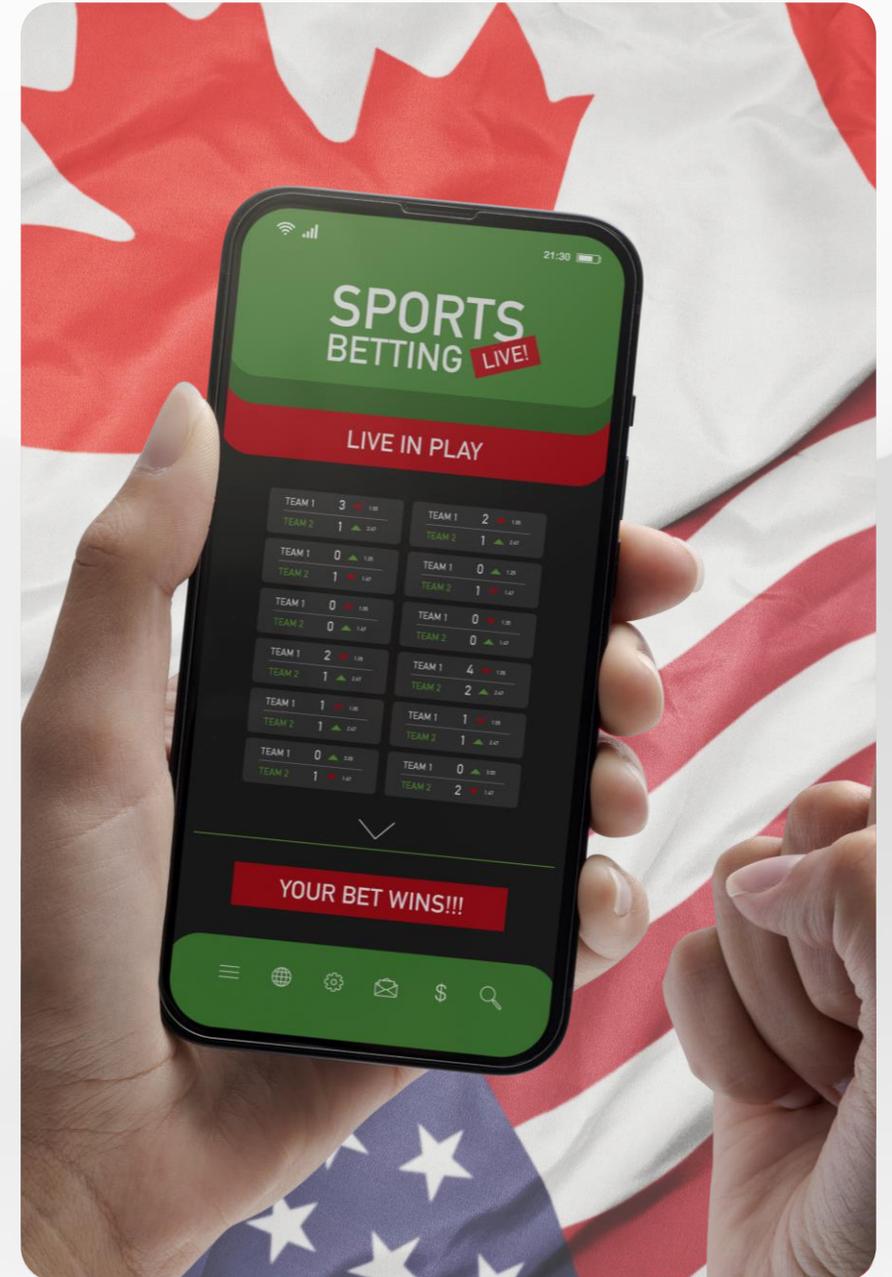


Sports Betting and Fantasy Sports in Canada and the U.S.



Methodology & Objectives



Methodology



Where

- Canada 
- Unites States 



Target

- General Population (18+ years)



Sample Size

- n=1,521 
- n=1,004 



How

- Online Survey



Field Dates

- September 6-8, 2024

➔ Notes:
Data weighted to census data to ensure samples are representative of the respective general populations:
Canada: Age-Gender-Region, CMAs, Language x Region, Education and Kids in HH
US: Age-Gender, Gender-Region, Race, Hispanic, HH size and Education

Objectives

The **Key Objectives** for this North American Study:



→ Attain and compare the current market size of sports betting and fantasy sports in Canada and the U.S.

→ Find out the likelihood of Canadians and Americans regarding sports betting and fantasy sports participation this Fall 2024 and analyze potential market growth.

→ Determine impacts of sports betting on spend, sports viewership and media consumption, and how perceptions of sports betting ads vary between the two countries.

Key Findings



Key Findings

1

Americans are more likely to sports bet and play fantasy than Canadians.



2

There are an estimated 77M sport bettors in America, and 6M sports bettors in Canada, and 61M and 5M fantasy players, respectively.

3

Betting on sports is anticipated to grow in North America across all major leagues in the Fall season.

4



NHL is the top sport to bet on or play fantasy sports with among Canadians



NFL is the main sport among Americans for both activities.

5

Canadians' sports betting spend is decreasing, while Americans' betting spend is increasing.

6

A majority of Canadian and American sports bettors watch the game live if they placed a bet on that game.

7

Sports viewership and media consumption increases among Canadians after starting to bet, and even more so among American bettors.



8

More Canadians who have seen sports betting ads feel there are too many advertisements compared to Americans.

9

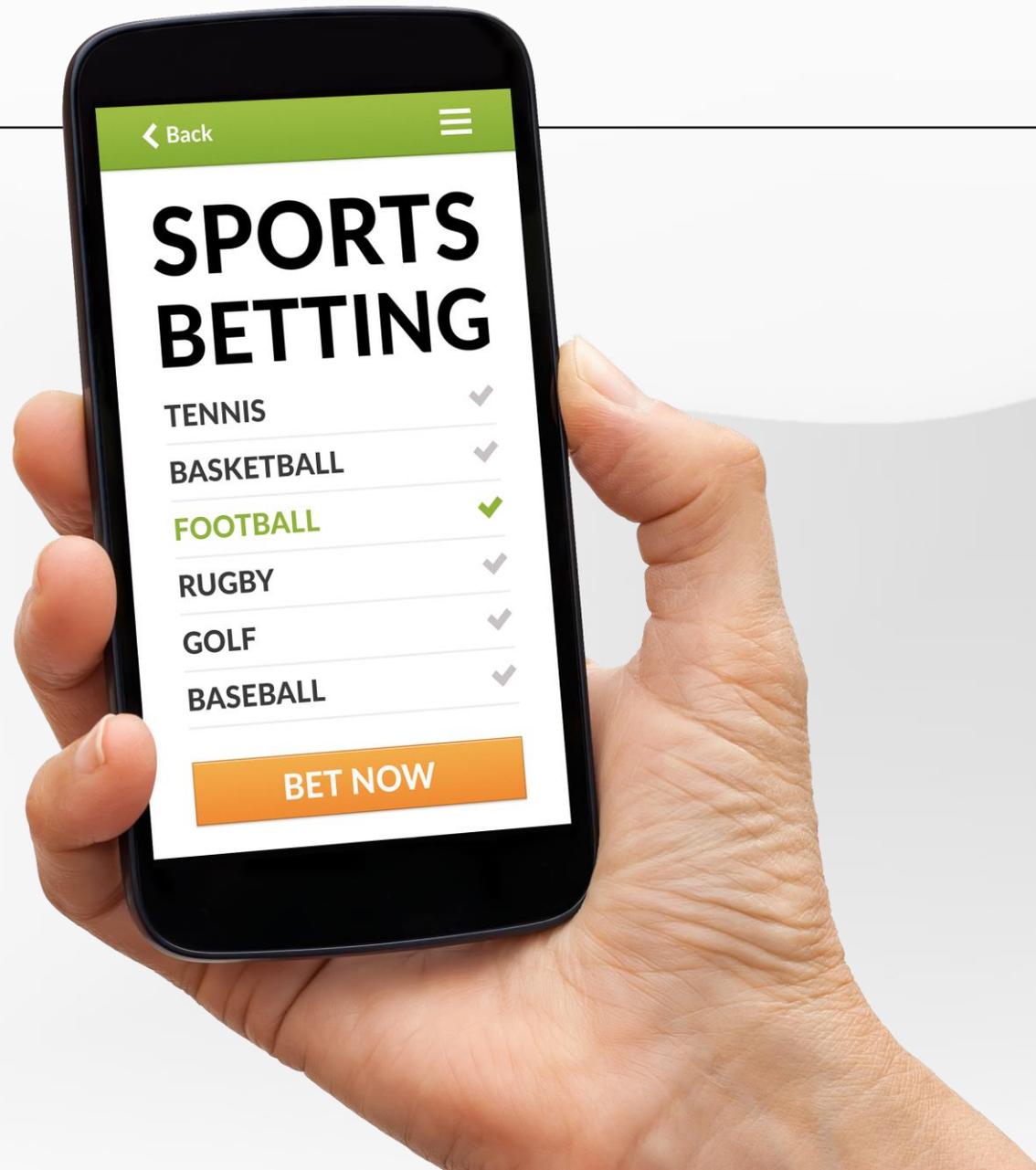
A higher portion of Canadians who have seen sports betting ads agree it is *not* appropriate to have celebrities in the ads compared to Americans who recall ads.

10

Seeing celebrities in sports betting ads does not make most Canadians or Americans visit that website more.



Detailed Results

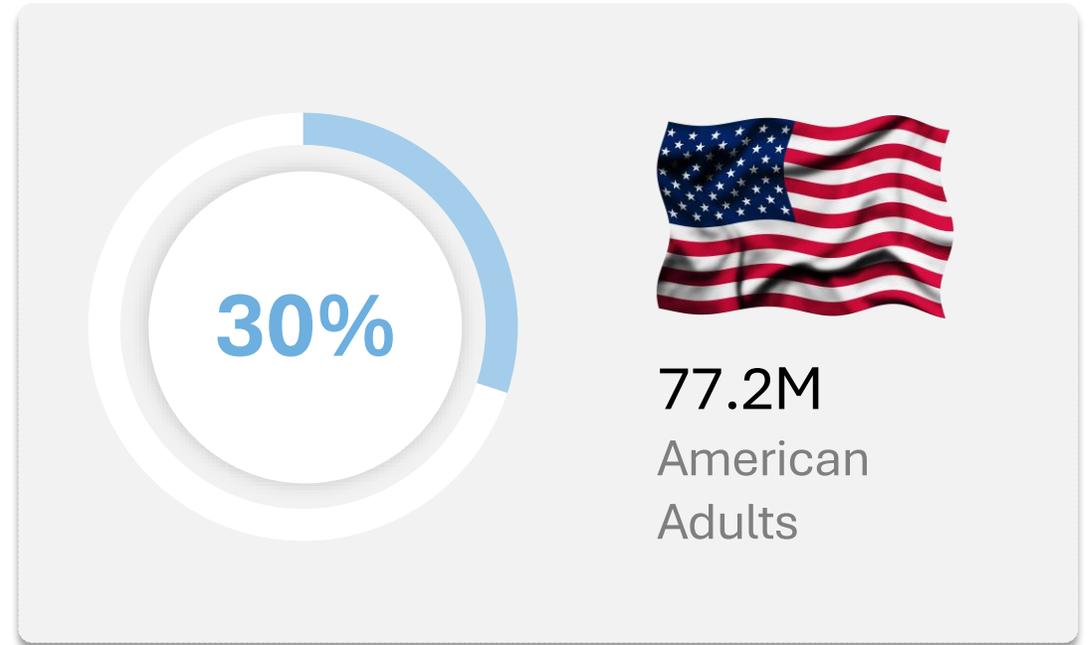


Americans are more likely to bet on sports than Canadians

30% of Americans have bet on sports in the past year, compared to 21% of Canadians.



% of General Population who bet on sports in past 12 months



Base: Canadian (n=1,521) and American (n=1,004) General Population

Have you bet on any of the following sports in the past year? Note this question refers to placing wagers on sporting events/outcomes and does not include Fantasy Sports?

Note: Adult population estimates based on 31,395,380 Canadians and 258,418,467 Americans.

NHL is the most popular sport to bet on among Canadians, while NFL is the most common among Americans.

% of Sports Bettors who bet on...



AMONG CANADIAN BETTORS



Other Sports/
Leagues (NET) 65%

AMONG AMERICAN BETTORS

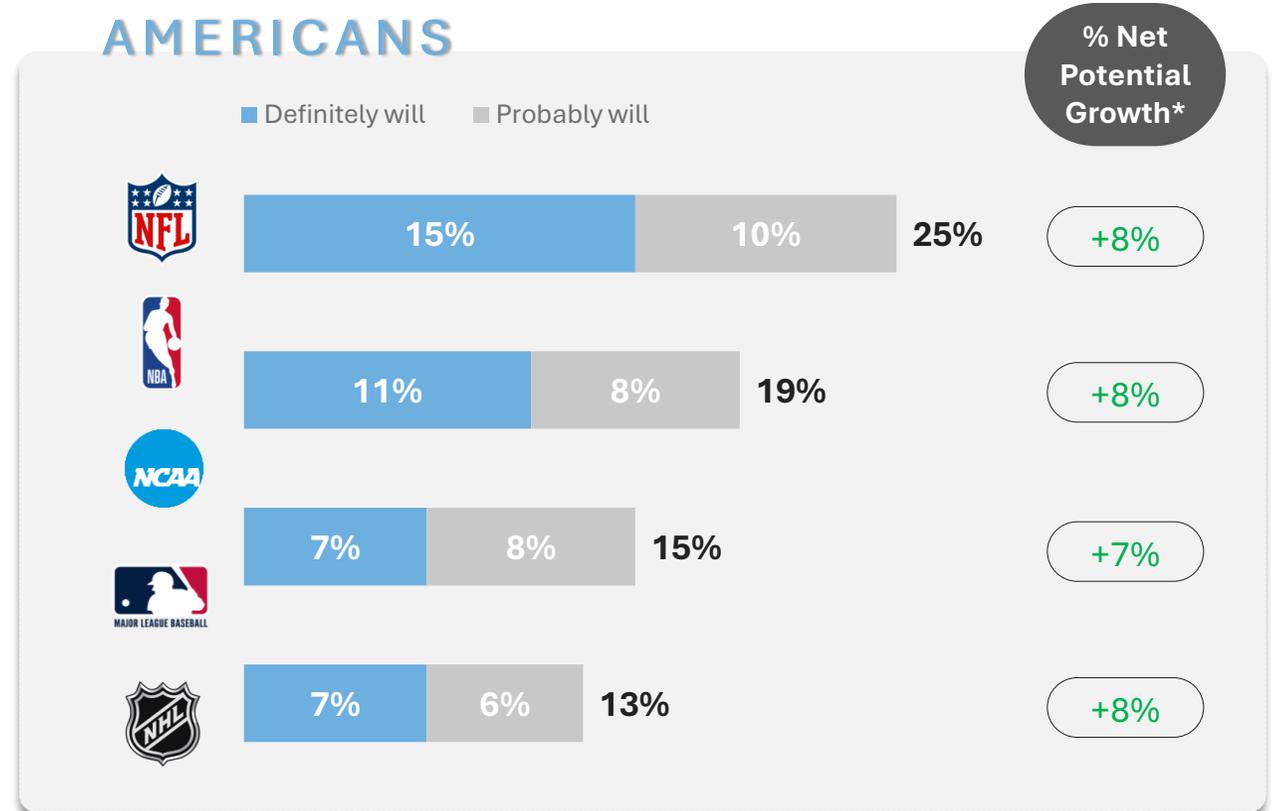
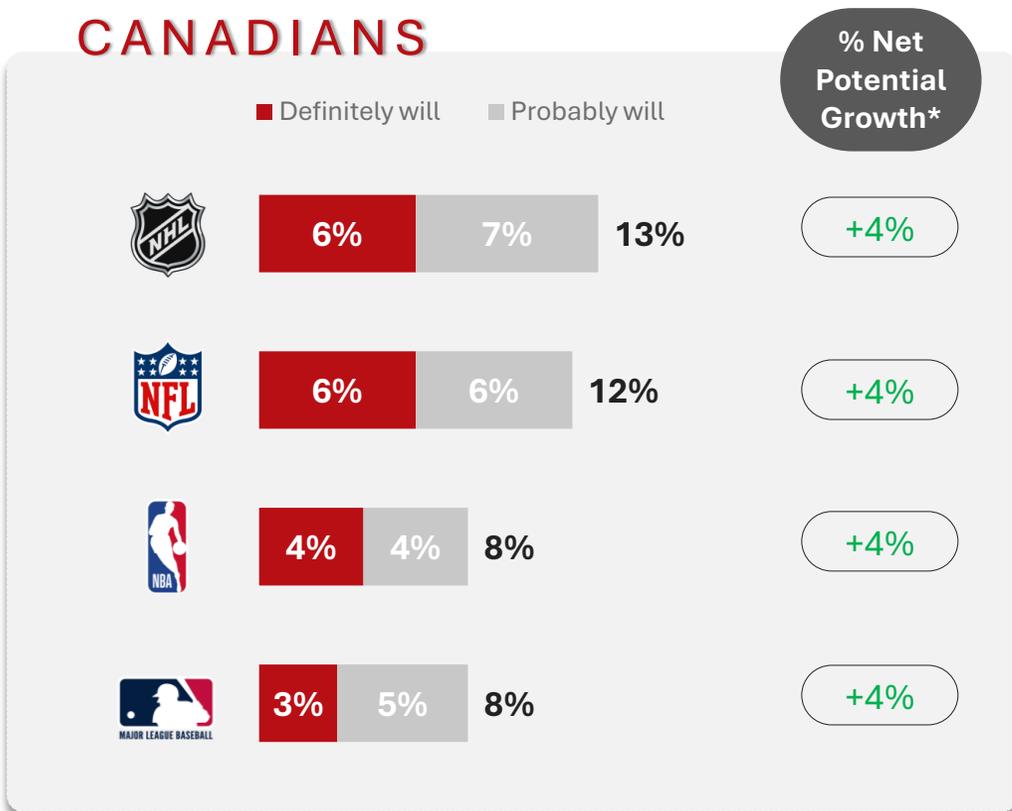


Other Sports/
Leagues (NET) 77%

NHL and NFL top the list among what Canadians are most likely going to bet on this Fall 2024, while NFL will remain the main sport to bet on in America. Each major sports league is set for potential growth this Fall season.



% of General Population who plan to bet real money on the following sports in Fall 2024



Base: Canadian (n=1,521) and American (n=1,004) Gen Population
 What is the likelihood you will bet real money on the following sports in Fall 2024? [Top 2 Box on a 5-point scaler reported].
 Note: CFL and MLB were noted as playoffs
 *% NET Potential Growth = % who bet on each sport in P12M minus % who will likely bet this Fall

Americans are also more likely to play fantasy sports than Canadians.



% of General Population who participate in fantasy sports



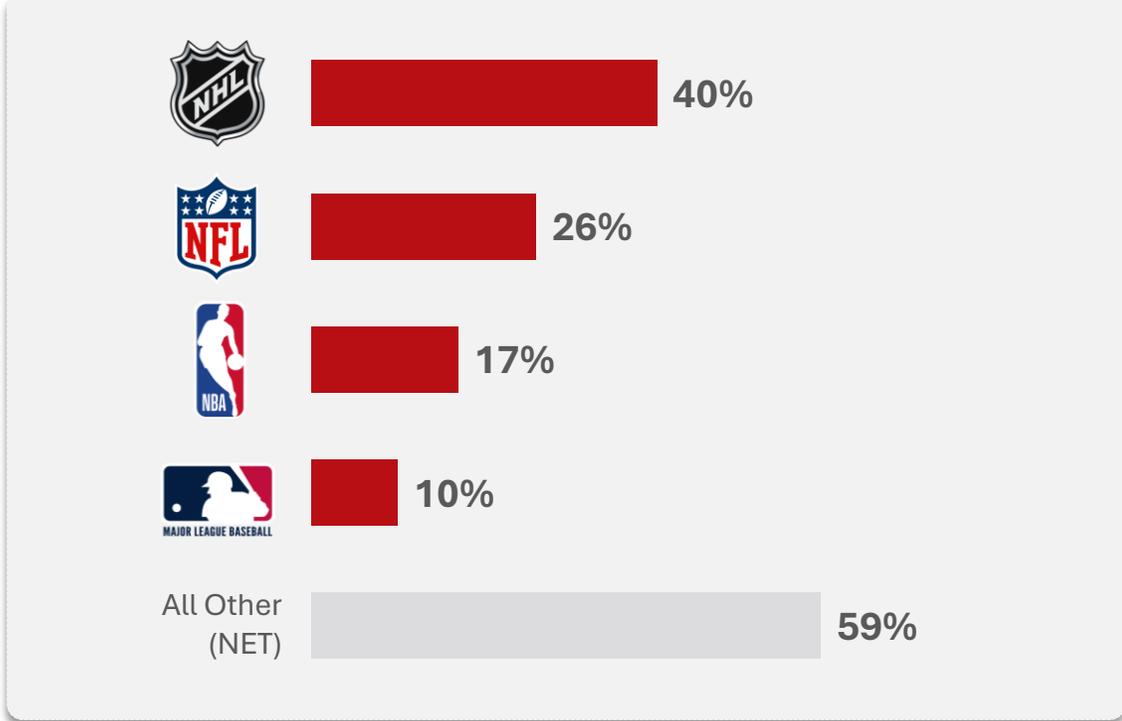
Base: Canadian (n=1,521) and American (n=1,004) Gen Population
 Have you participated in fantasy sports leagues (season-long or daily) for any of the following sports in the past year?
 Note: Adult population estimates based on 31,395,380 Canadians and 258,418,467 Americans.



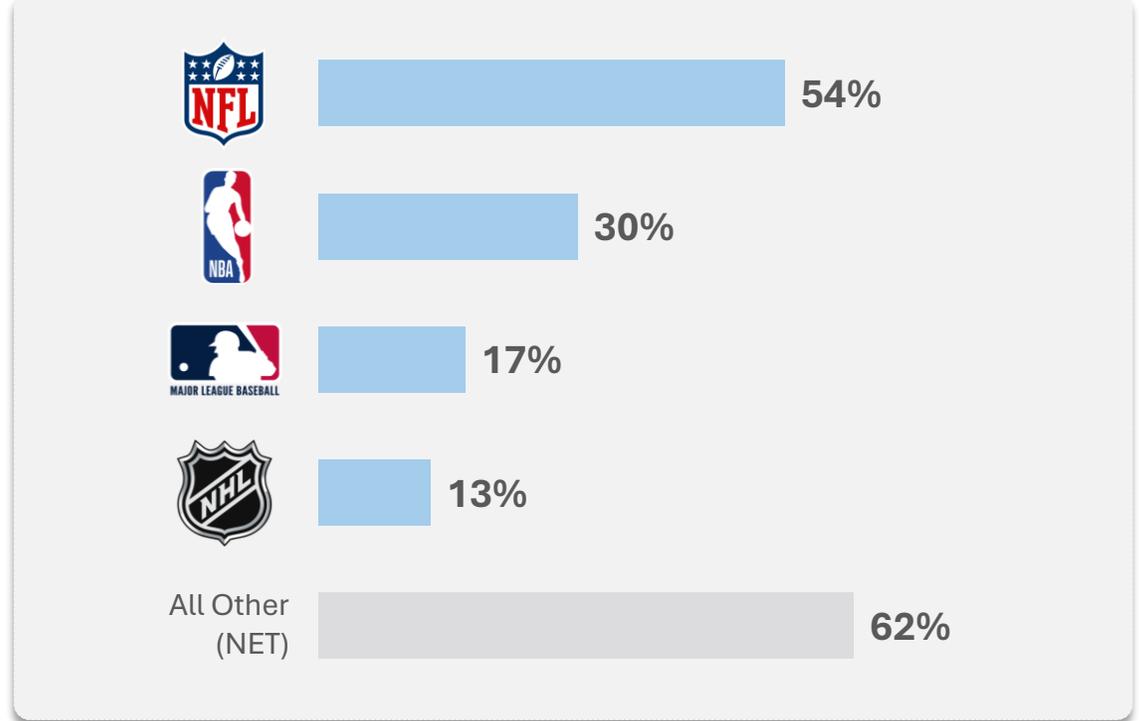
NHL is also the most popular sport for fantasy among Canadians, while NFL is the most common among Americans.

% of Fantasy Sports Players who participate with...

AMONG CANADIAN FANTASY PLAYERS



AMONG AMERICAN FANTASY PLAYERS



Base: Canadian (n=244) and American (n=212) fantasy sports participants
 Have you participated in fantasy sports leagues (season-long or daily) for any of the following sports in the past year?

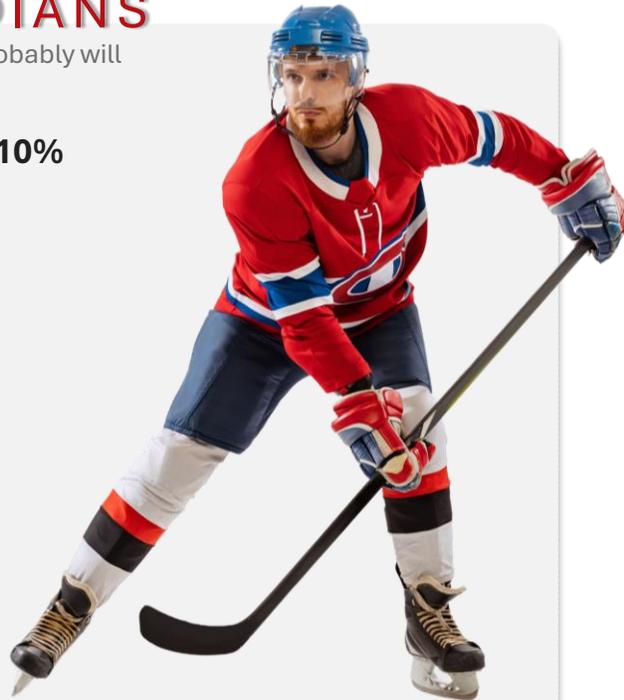
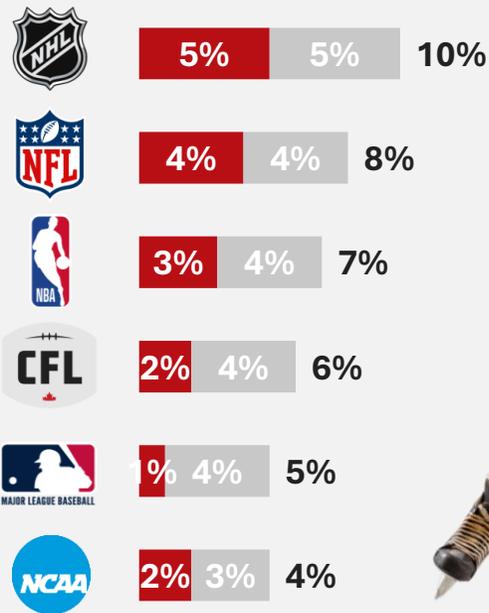
NHL and NFL are set to continue as the most common leagues for Fantasy players in Canada and the U.S., respectively.



% of General Population who plan to play fantasy sports with the following sports in Fall 2024

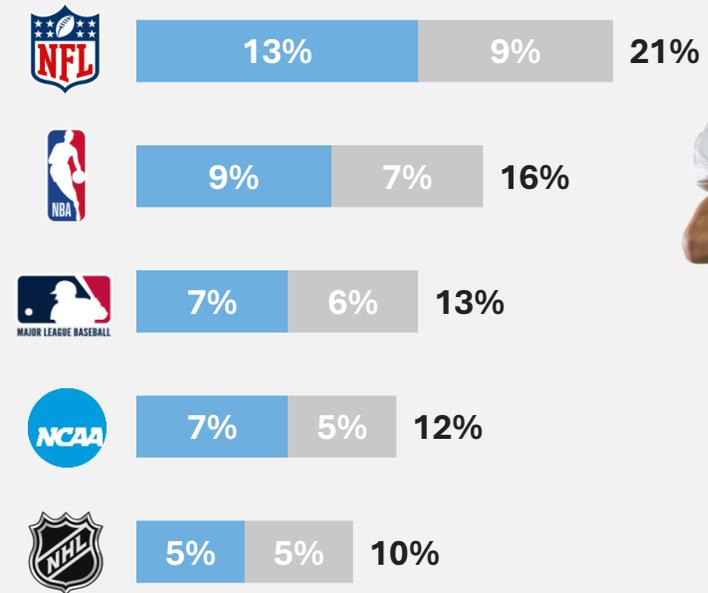
AMONG CANADIANS

■ Definitely will ■ Probably will



AMONG AMERICANS

■ Definitely will ■ Probably will

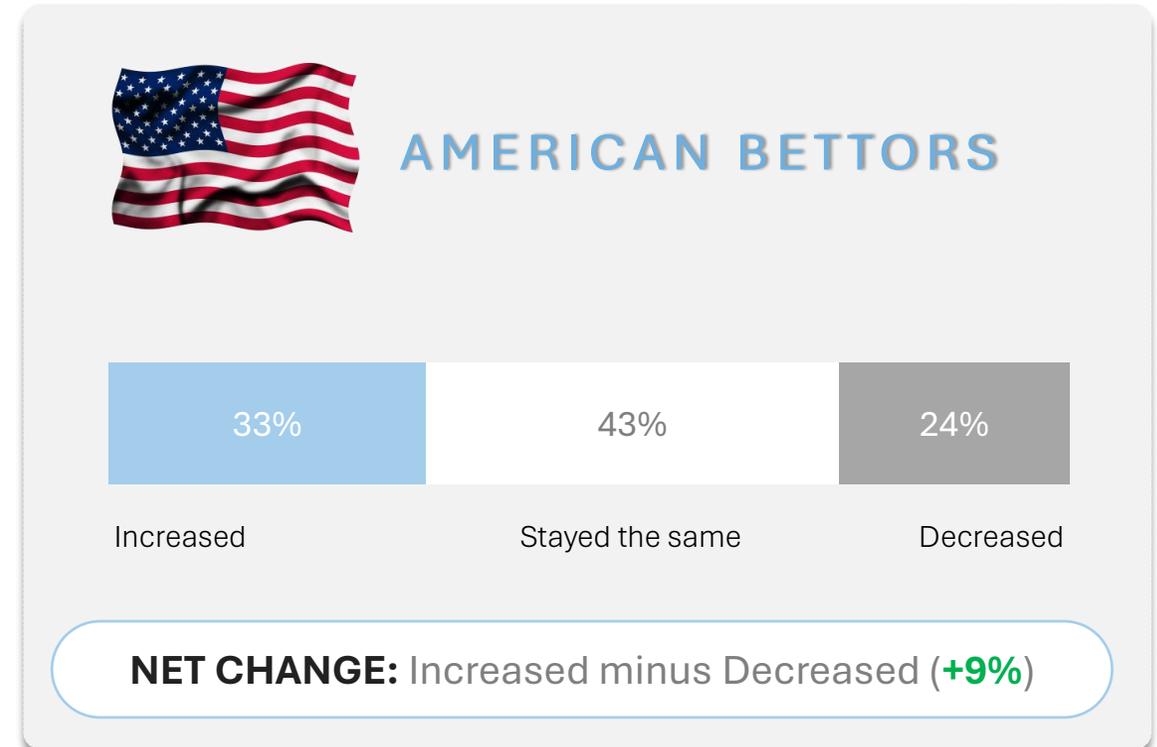
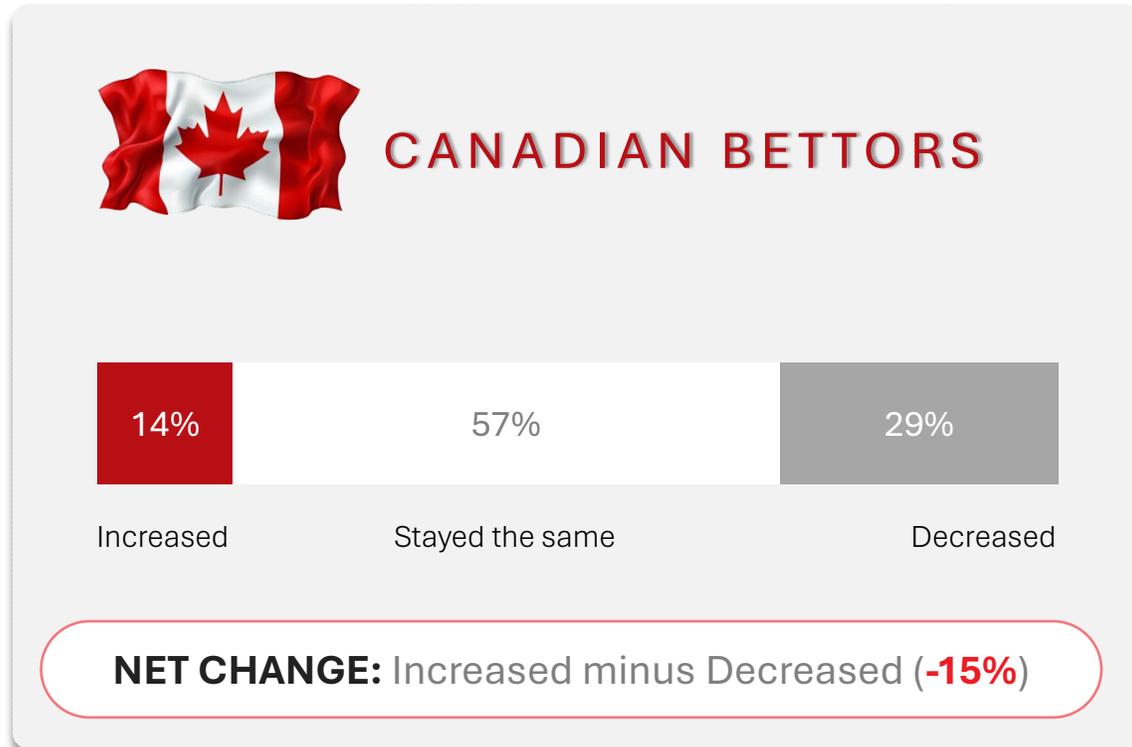


Base: Canadian (n=1,521) and American (n=1,004) Gen Population
 What is the likelihood you will participate in fantasy sports leagues (season-long or daily) with each of the following sports in Fall 2024?
 Note: CFL and MLB were noted as playoffs

Sports Betting spend is declining among Canadian bettors but growing among American bettors.



% of Sports Bettors who have changed their sports betting spend in the past year



A majority of Canadian
and American sports
bettors watch the game
live if they place a bet on
the game.



Base: Canadian (n=303) and American (n=281) sports bettors
If you bet on a sports game, do you watch the game live?

% of Sports Bettors who watch the game live since they've started betting on sports

CANADIANS

57%

Always/Most
of the time

- Always
- Most of the time
- Some of the time
- Very rarely
- Never

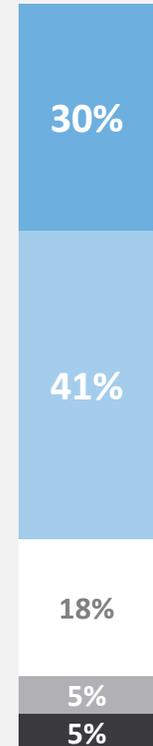


AMERICANS

71%

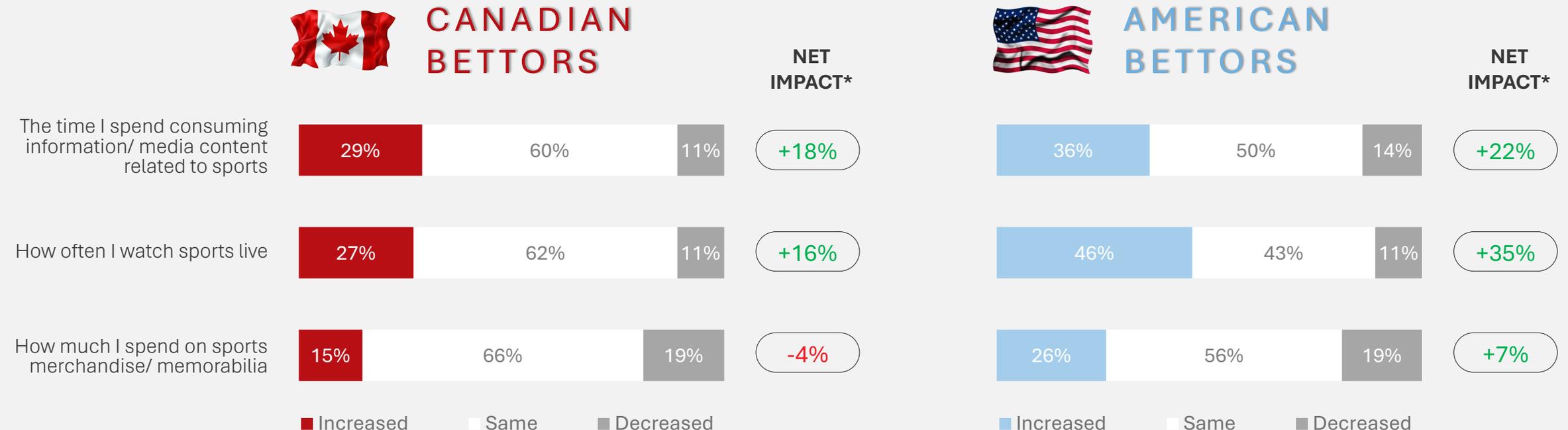
Always/Most
of the time

- Always
- Most of the time
- Some of the time
- Very rarely
- Never



Sports media/information consumption and viewership frequency increases among Canadian bettors and even more so among American bettors. Americans on average also tend to spend more on memorabilia after starting to bet on sports.

% of Sports Bettors who have changed the following due to sports betting

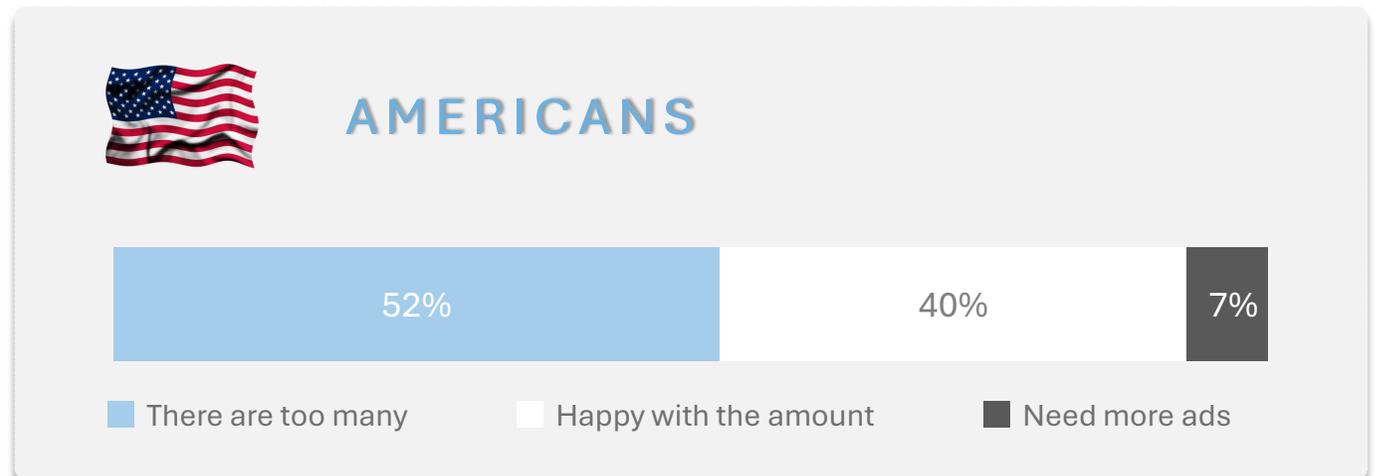


Base: Canadian (n=303) and American (n=281) sports bettors
 Since you started sports betting, how have these changed...?
 *Net impact = Increased minus decreased



More Canadians
feel there are **too many**
sports betting
advertisements
compared to
Americans.

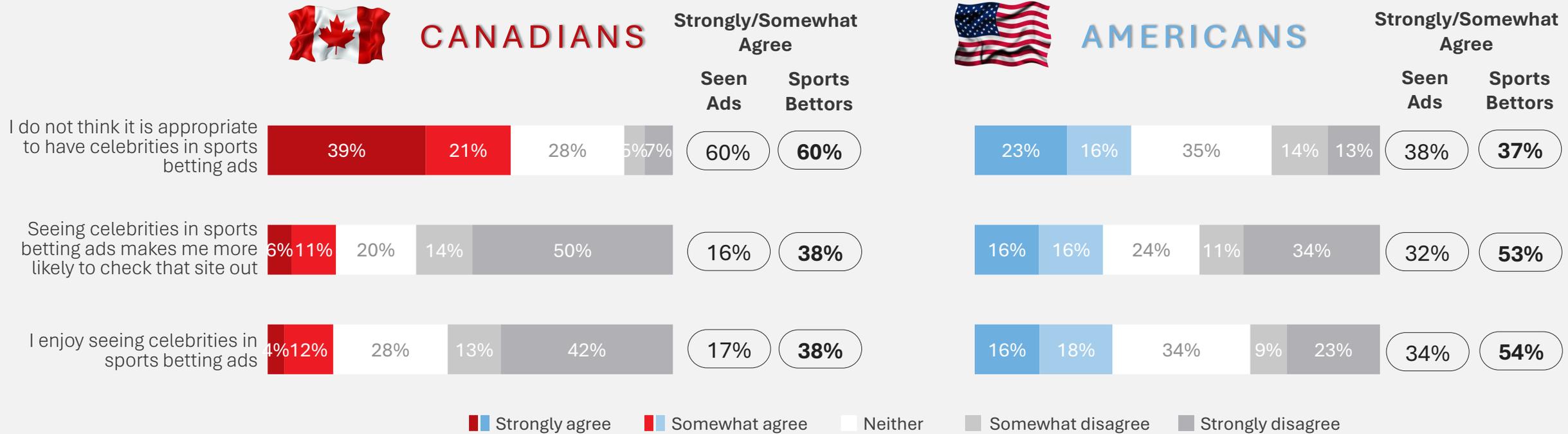
% of General Population who thinks sports betting ads...



Base: Canadian (n=870) and American (n=566) Gen Population
Thinking of sports betting advertisements you have seen or heard recently, which of the following best describes how you feel?

Canadians are generally less receptive to celebrities in sports betting ads compared to Americans. Sports bettors in both countries who have seen ads are more likely to check out the website if a celebrity is in the ads and enjoy seeing celebrities in ads.

% of those who have seen sports betting ads and agree with following statements



Base: Canadians (n=870) and Americans (n=566) who have seen sports betting ads
Thinking of sports betting advertising, how much do you agree with the following statements?

Demographics



Demographics



CANADIAN

	General Population	Sports Bettors	Fantasy Players
Male	49%	71%	71%
Female	51%	29%	29%
<i>Average age</i>	49.3	39.5	37.8
HS or less	29%	25%	20%
College +	71%	75%	80%
<\$40K	18%	14%	13%
\$40K to <\$100K	43%	51%	50%
\$100K+	30%	33%	35%
Employed NET	51%	72%	75%



AMERICAN

	General Population	Sports Bettors	Fantasy Players
Male	49%	65%	66%
Female	51%	35%	34%
<i>Average age</i>	48.1	38.9	37.3
HS or less	37%	33%	34%
College +	62%	65%	65%
<\$50K	49%	46%	42%
\$50K to <\$100K	28%	27%	28%
\$100K+	18%	26%	29%
Employed NET	50%	68%	75%

Le^ger

Data-driven intelligence for a changing world.