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Legalizing Sports Betting: A Winning Wager

To: American Gaming Association

From: Greenberg Quinlan Rosner Research

Support for expanded sports betting has gained traction in recent years in the legal system and among key stakeholders including league officials and elected officials. A national survey of American adults¹ confirms that this momentum extends to the public as well: by a 20-point margin, Americans support changing PASPA to allow individual states to decide whether or not to legalize sports betting in their own state.

Support for legalization extends across lines of party, race, gender, and geography, and includes both sports fans, who enthusiastically support legalization, and non-sports fans, a plurality of whom support changing the law.

The AGA and its allies can draw upon other positive takeaways from this survey as well:

- Sports betting is increasingly common; it is not a fringe activity
- Betting on sports increases bettors' enjoyment and engagement with games
- If it were legal, more Americans would bet on sports
- A majority of Americans see clear positive consequences of legalizing sports betting: increased revenue for communities and increased safety for bettors

Robust Support for Legalization

Few Americans are familiar with the legal environment for sports betting: only 38 percent recognize that it is not legal in most of the nation. And when given the option, a majority embrace changing the law so that each individual state could decide whether or not to allow sports betting in their own state (a proposal we shorthand as 'legalization' in this memo). This coalition of supporters is led by sports fans – and especially existing sports bettors – but contains Americans of all stripes. More specifically:

¹ Greenberg Quinlan Rosner Research conducted a mixed-mode survey from January 24-30, 2017. The sample consisted of 1200 adults over the phone and an oversample of 400 avid sports fans online. Thirty percent of telephone interviews were conducted on cell phones. The survey carries an overall margin of error of +/- 2.45 percent at a 95 percent confidence interval; margin of error is larger among subgroups.

- Overall, a **55 percent majority of Americans support legalization**. Only 35 percent oppose. Ten percent are undecided at first ask.
- **Avid sports fans² are the strongest**, but not the only supporters, at 72 percent in favor. Casual fans support legalization by a 54 percent to 36 margin. And even those who are not sports fans at all are more likely to favor (45 percent) than oppose (42 percent).
- Other **key groups are highly supportive of legalization**, including casino-goers (70-24 support-oppose), Super Bowl viewers (59-32), and millennials (61-30). People who play DFS or fantasy sports are almost universally in favor (88-7).
- There are **noteworthy demographic differences** in support for legalization. Appendix A shows a table of support by demographic.
 - Men (65 percent) are more supportive than women (46 percent), and male avid sports fans (77 percent) are more supportive than female (64 percent)
 - Younger people (62 percent of those under age 50) are more supportive than older people (47 percent of those age 50 or above, including 41 percent of seniors)
 - White adults (58 percent) are more supportive than non-white adults (51 percent among African Americans, 53 percent among Hispanics)
 - Higher-income adults (64 percent among those with household incomes above \$75,000) are more likely to support than lower-income adults (52 percent among those with household incomes below \$30,000)
 - Adults who do not attend religious services (60 percent) or attend irregularly (61 percent) are more supportive than those who attend services at least weekly (46 percent)
- Were it legal to bet on sports, **12 percent of American adults would be more likely to bet** on sports – which represents roughly 28 million people. That includes:
 - 41 percent of those who already report having bet on sports
 - 33 percent of avid sports fans
 - 47 percent of avid millennial fans
 - 39 percent of those who frequently attend sporting events
 - 26 percent of casino-goers

² In this survey, we define avidity with a combination of a self-reported scale and reported frequency of behaviors. Avid fans are those who classify themselves as “avid” and also report engaging in at least one activity like watching games, attending games, or wearing sports merchandise “frequently.”

- **Majority support holds – and even expands slightly** – in response to arguments both for and against legalization. Overall support rises from 55 to 58 percent; strong support rises from 23 percent to 28 percent. Demographic groups particularly open to positive messaging include seniors (+5 net movement), adults in the South (+7), non-college women (+7), liberals (+6), casino-goers (+5), and non-white adults (+4).

Table 1: Support for Legalization

	Initial Test	Re-Test
Strongly favor	23	28
Somewhat favor	32	30
Somewhat oppose	14	13
Strongly oppose	21	23
Don't know/refused	10	5
Total favor	55	58
Total oppose	35	37

- **Americans see a number of benefits of legal sports betting.** Nearly 2 in 3 believe that local communities will benefit from more tax revenue and job creation (including 59 percent of non-sports fans), while 57 percent agree that legalization would make betting on sports safer for regular people.

Leveraging Insights

We believe this data has the potential to appeal to numerous audiences. Below, we present some additional important takeaways from this survey.

- **Betting is not a fringe activity.** Nearly 1 in 5 Americans (19 percent) report having bet on sports in the past year, and the number that *actually* bet on sports is likely even higher³. Even so, nearly half (45 percent) of avid fans report having bet on sports in the past year, as do 25 percent of men, 26 percent of millennials, and 45 percent of those who frequently attend sporting events.
 - Religious opposition to sports betting is significant, but not overwhelming: 28 percent of non-bettors do not bet on sports because it's against their values. Another 32 percent do not bet on sports because they have no interest in sports, and substantial numbers do not bet because they lack disposable income (24 percent) or are concerned they would lose money (19 percent).

³ We suspect that some respondents who *did* bet on sports did not admit as much, whether due to social desirability bias or because they forgot or did not realize that they had.

- **A majority of Americans are uninformed**, or misinformed, about the legal landscape. Only 38 percent of adults – and 26 percent of millennials – realize that sports betting is not legal in most of the country.
- **Legalization receives broad, bipartisan support**. The coalition in favor of legalization includes 52 percent of Democrats, 57 percent of independents, and 58 percent of Republicans; 55 percent of liberals and 54 percent of conservatives; 50 percent of Clinton voters and 61 percent of Trump voters. Few other issues attract such clear support from Americans across party lines.
- **Legal sports betting would increase fan activity, enjoyment, and engagement**. Nearly all sports bettors report that when they bet on sports, they are more likely to watch a game (92 percent), talk with people about a game (82 percent), follow teams and players more closely (80 percent), and find a game more fun and enjoyable (79 percent).
- **Sports fans want to legalize sports betting**. A clear majority of fans of every major sport support legalization.

Table 2: Support for Legalization among Fans

Sport	% of Americans who are fans	% of support among fans	% of Americans who are avid fans	% support among avid fans
NFL	70	59	33	64
MLB	53	60	19	67
NCAA Football	52	59	20	67
NBA	47	58	15	60
NCAA Basketball	42	58	12	61
Soccer	32	64	9	71
Auto Racing	30	64	7	71
NHL	29	67	7	73
Golf	25	64	6	71

Appendix A.

Demographic Group	Strongly Favor	Total Favor	Total Oppose	Favor Minus Oppose
Total	23	55	35	+20
Men	30	65	26	+39
Women	17	46	43	+3
18-29	19	59	32	+27
30-39	33	65	25	+40
40-49	25	62	29	+33
50-64	27	52	39	+13
65+	12	41	45	-4
City	25	54	36	+18
Suburban	26	59	31	+28
Small town	26	56	33	+23
Rural area	17	52	37	+15
Northeast	22	55	34	+21
Central	21	54	36	+18
South	24	55	36	+19
West	26	57	32	+25
Non-college	24	54	36	+18
College grad	24	58	33	+25
White	25	58	33	+25
African American	19	51	34	+17
Hispanic	20	53	37	+16
Democrat	18	52	39	+13
Independent	27	57	29	+28
Republican	27	58	35	+23
Regular relig.	21	46	44	+2
Irregular relig.	25	61	29	+32
Never relig.	26	60	28	+32
HH <\$30k	16	52	39	+13
HH \$30k-\$50k	20	54	39	+15
HH \$50k-\$75k	30	59	31	+28
HH >\$75k	32	64	29	+35
2016 voter	25	55	36	+19
2016 non-voter	20	55	31	+24
Avid sports fan	37	72	21	+51
Casual sports fan	21	54	36	+18
Non-sports fan	16	45	42	+3