

Online Casino & Sports Betting Research

Survey Findings

January 2025



Methodology

1 Stage One

Global Strategy Group conducted **an online journal** among **50 Political Elites** between **October 29 and October 31, 2024**.

The discussion was conducted among an **even number of Democrats and Republicans**, split across a **mix of key states** (New York, Maryland, Virginia, Illinois, Georgia, and Texas).

2 Stage Two

Global Strategy Group conducted a survey of **1,200 Nationwide Registered Voters** and **500 Nationwide Political Elites** between **January 14 and January 20, 2025**.

Margin of error

The margin of error of the Nationwide Voter sample at the 95% confidence level is +/- 2.8%.

The margin of error of the Political Elite sample at the 95% confidence level is +/- 4.4%.

The margin of error on sub-samples is greater.

Key Findings from Survey

Landscape

Voters know the industry is growing, and their opinions about it are mixed



Two in three voters say their state has seen a recent increase in online gaming, but not everyone is convinced this is a good thing. While many voters – especially political elites – view the industry as accessible, successful, and entertaining, there are still many who associate the industry with some negative traits.

Voters are worried about illegal and problem gaming



Nearly half of voters are concerned about illegal gaming, and the potential it has to target vulnerable populations, bolster criminal activity, and compromise personal data and information. Voters are also worried about problem gaming, such as cycles of debt, addiction, and underage gaming.

Voters need more visibility into the industry's efforts to combat problem gaming



While a majority of voters believe the gaming industry prioritizes problem gaming, they aren't seeing those efforts. They would like to know the industry is prioritizing 24/7 hotlines, age restrictions, and addiction treatment resources.

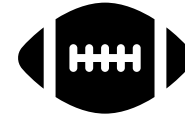
The industry's advertising is not harming its reputation



About half of voters recall seeing an online gaming ad recently, and of those who did, most say the industry's advertising is of a good quality. Voters recall memorable elements featured in the industry's ads, like operator names, offers, and public figures.

Further Improving Perceptions

Online sports betting is already widely supported, and improving perceptions further would be difficult



Prior to any information or messaging, most voters already support the legalization of online sports betting. Tax revenue, personal freedom, and secure platforms are the biggest selling points of legalized online sports betting. However, even information and messaging on these does not increase support of online sports betting.

There is some room to grow support for online casinos



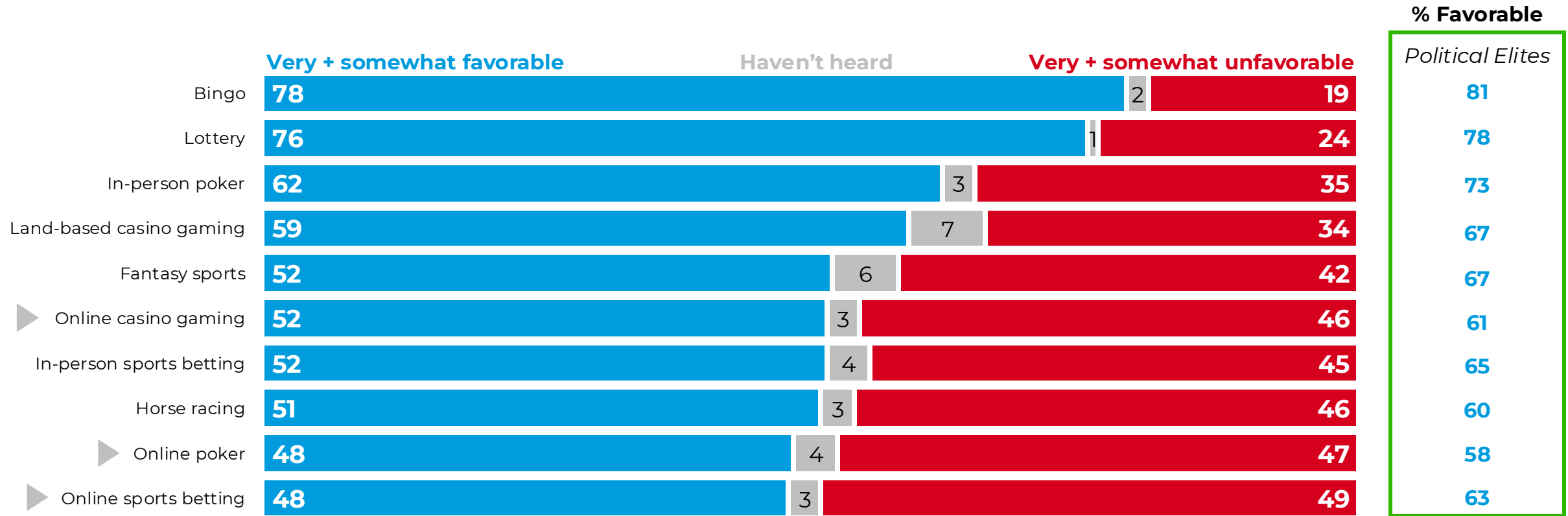
Voters are largely split over online casinos, with only a slight majority favoring them. SBA can increase support for online casinos by educating voters about the benefits, namely that legalization will create tax revenue, give adults the freedom to choose whether or not to gamble, and offer safe/secure platforms.



General Industry Perceptions

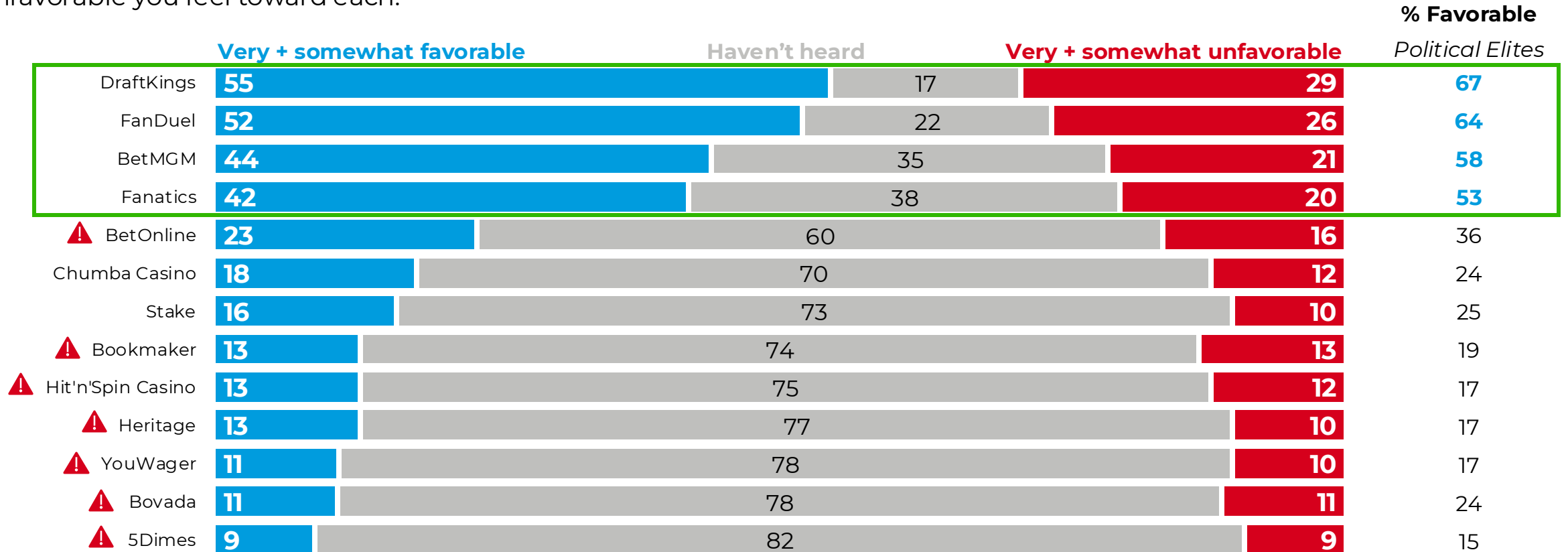
While voters are more likely to be favorable of in person vs. online gaming (e.g., bingo, the lottery, in-person poker, land-based casino gaming), about half of voters are favorable of various types of online gaming

The following is a list of various types of gaming. Please indicate whether you have a favorable or unfavorable opinion of each.



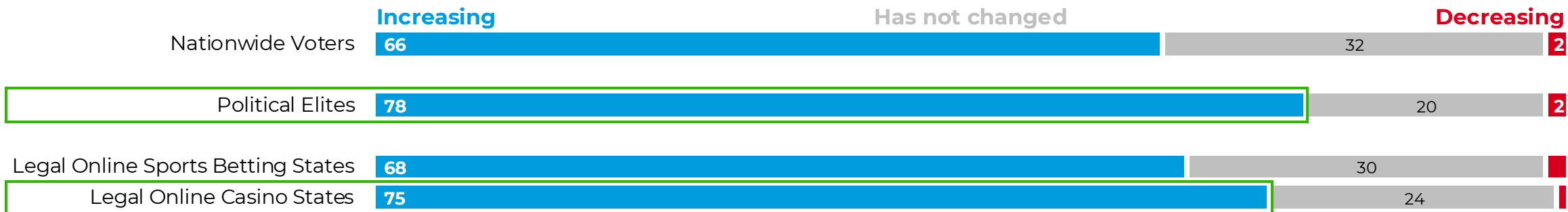
Voters – especially political elites – are more likely to be favorable of and familiar with SBA’s members than other online gaming operators

The following is a list of specific companies and platforms within the online gaming industry. Please indicate how favorable or unfavorable you feel toward each.

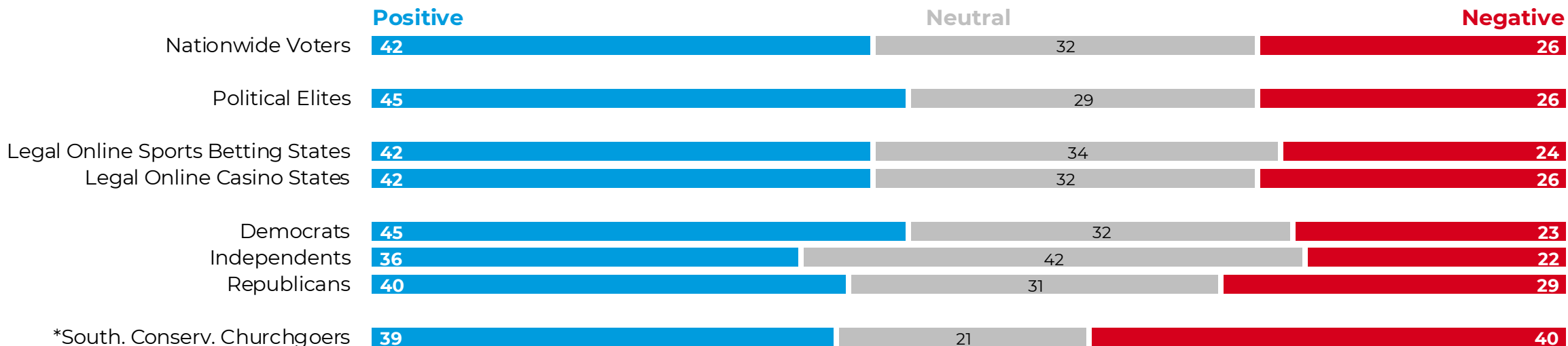


Nationwide, there is a perception that gaming is increasing, but voters are split over whether this is a good thing

Thinking about the past couple of years, would you say the amount of online gaming that's been happening in your state has been increasing, decreasing, or staying the same?



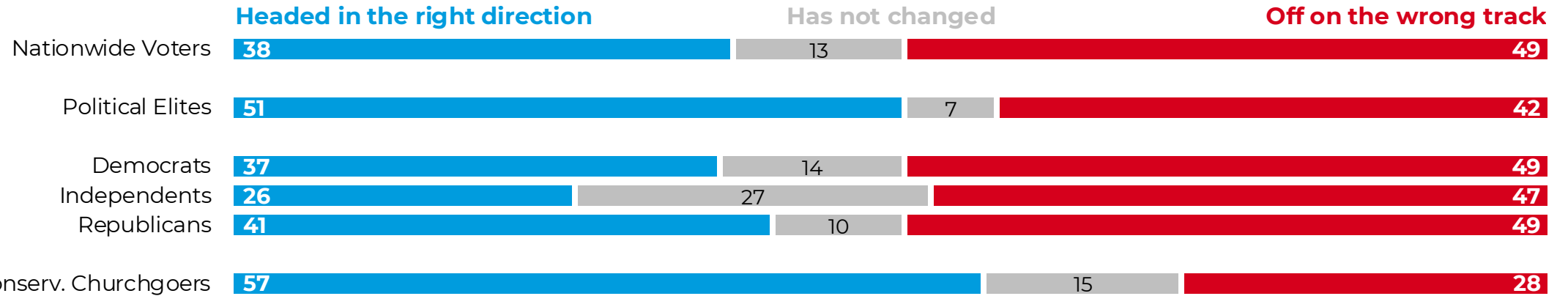
[IF INCREASING] Is this positive for your state, negative, or neutral?



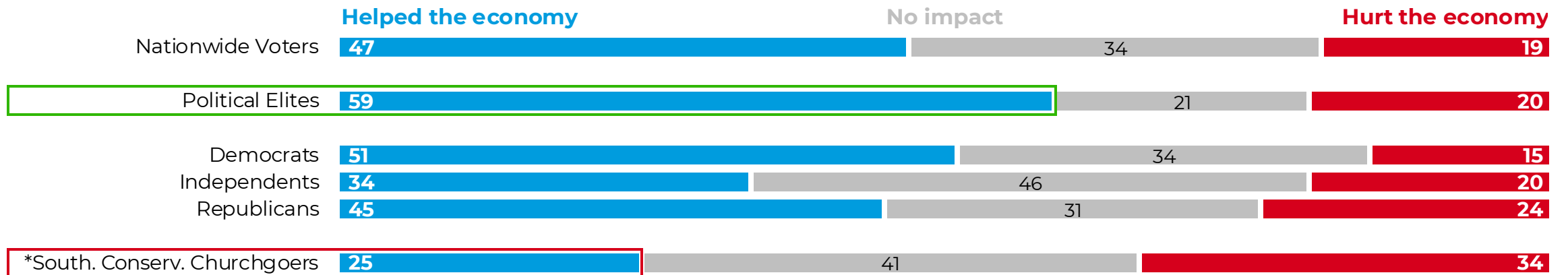
NOTE: * Denotes small sample size (<100). Results of small sample sizes are directional. Here and throughout this deck, **"Southern Conservative Churchgoers"** are conservative voters from the South who attend church regularly.

Many voters – especially political elites – think the gaming industry helps their state’s economy

In general, would you say the economy in your state is...

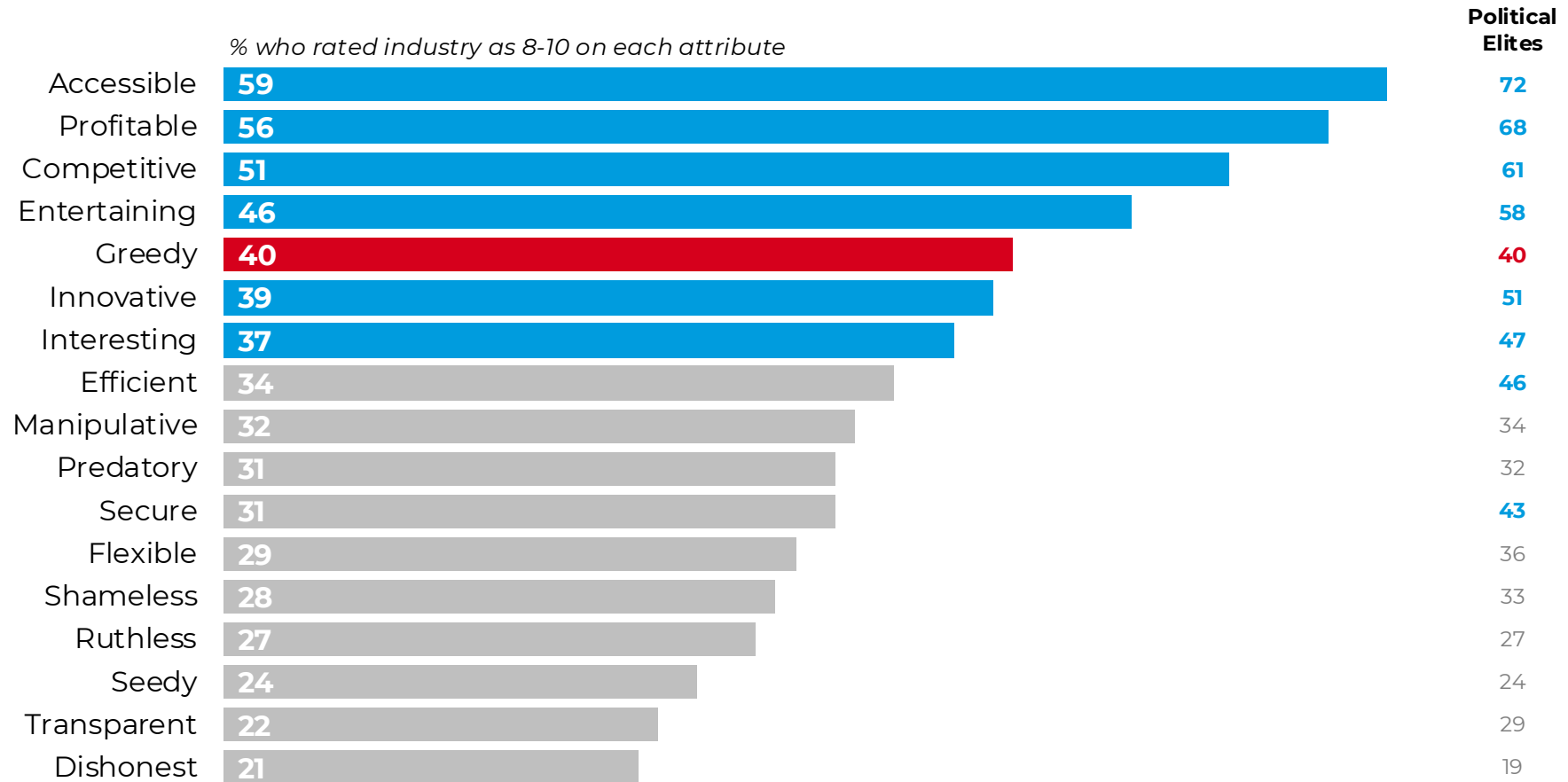


[IF IN A LEGAL GAMING STATE] Overall, do you think gaming has helped or hurt your state’s economy?



Voters are more likely to attribute positive vs. negative traits to the industry (they see it as accessible, successful, and entertaining); that said, there are still many who do associate the industry with some negative traits

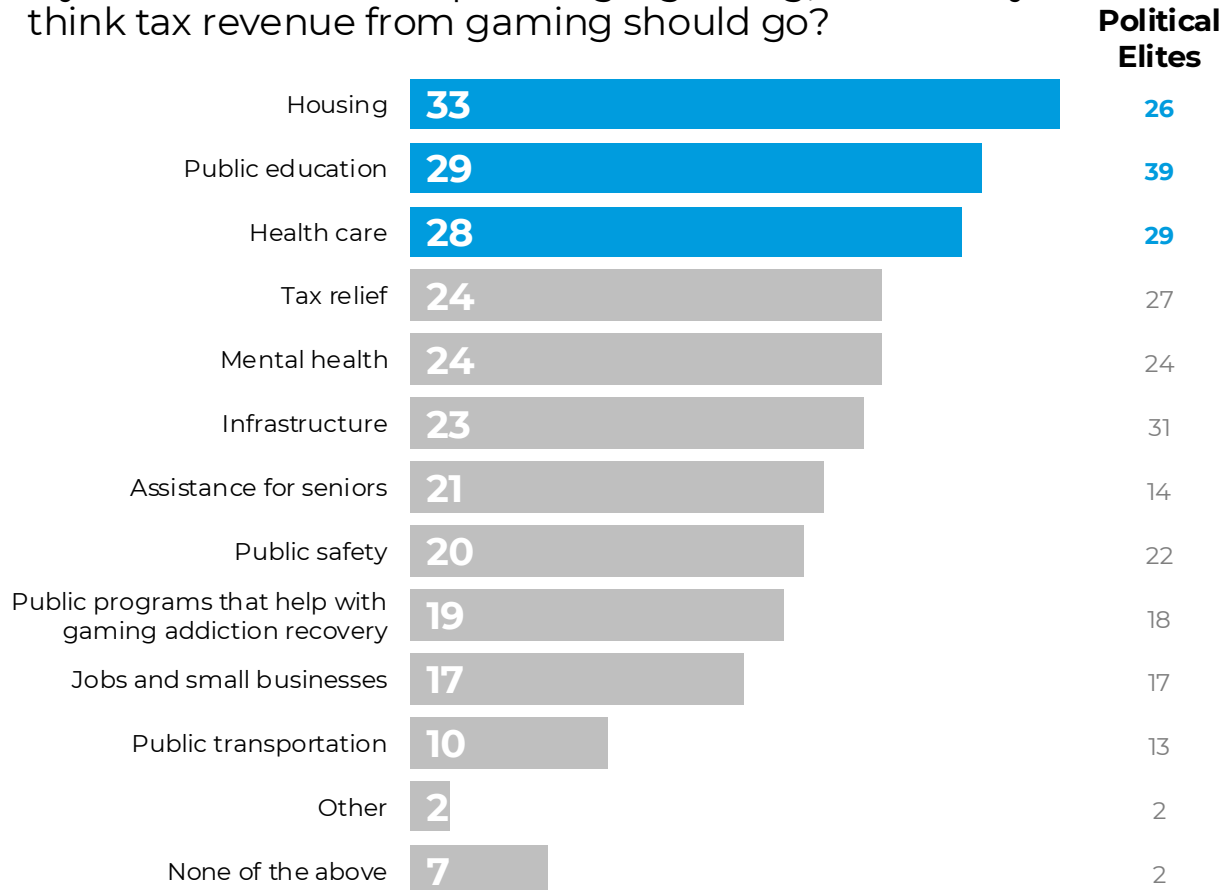
Here is a list of attributes. For each, please indicate how well you feel it applies to the legal online gaming industry.



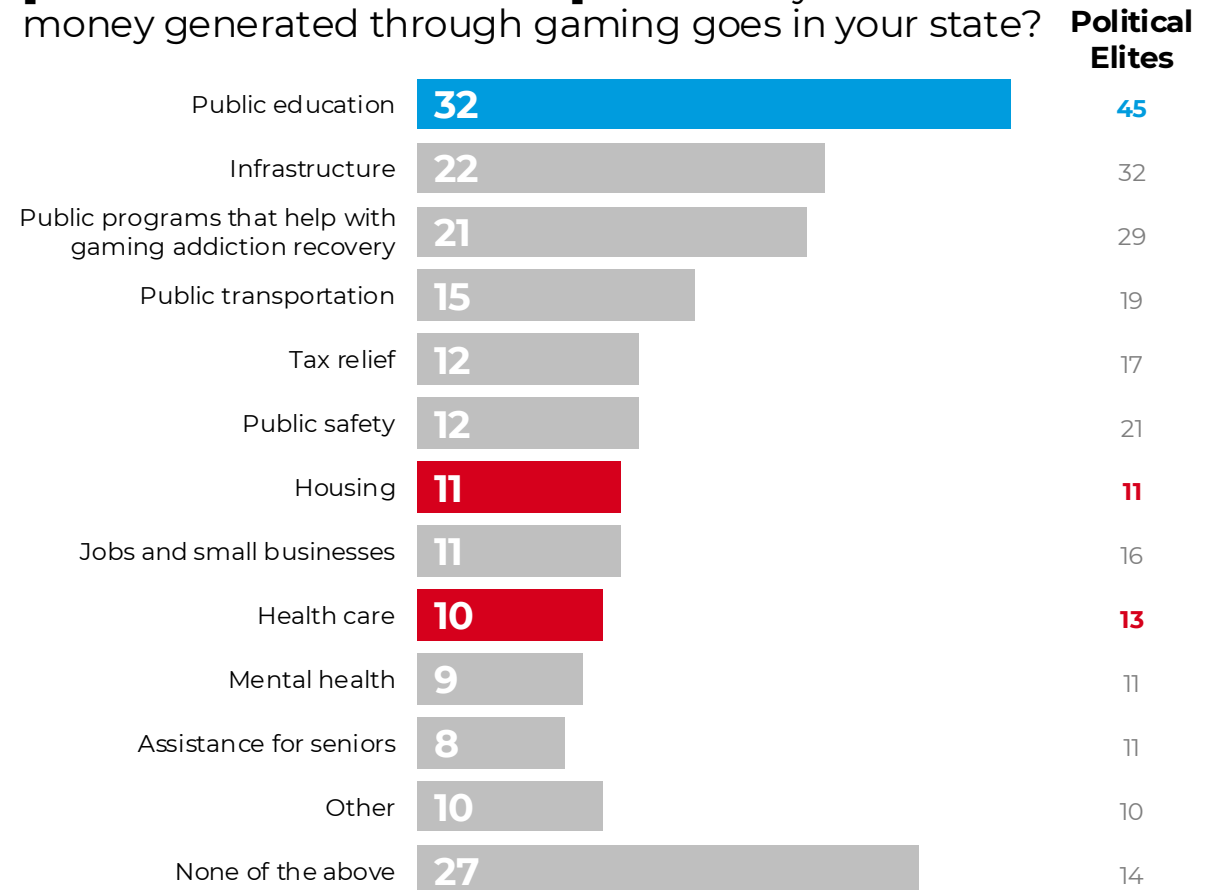
ADDITIONAL INSIGHT: Overall, 83% of voters attribute one or more positive attribute with the gaming industry; 56% of voters attribute one or more negative attribute with the gaming industry.

Voters want tax revenue from gaming to start supporting housing, education, and health care, which is a shift from where they see it currently going

If your state were to expand legal gaming, where do you think tax revenue from gaming should go?



[IF IN LEGAL GAMING STATE] Where do you think tax money generated through gaming goes in your state?



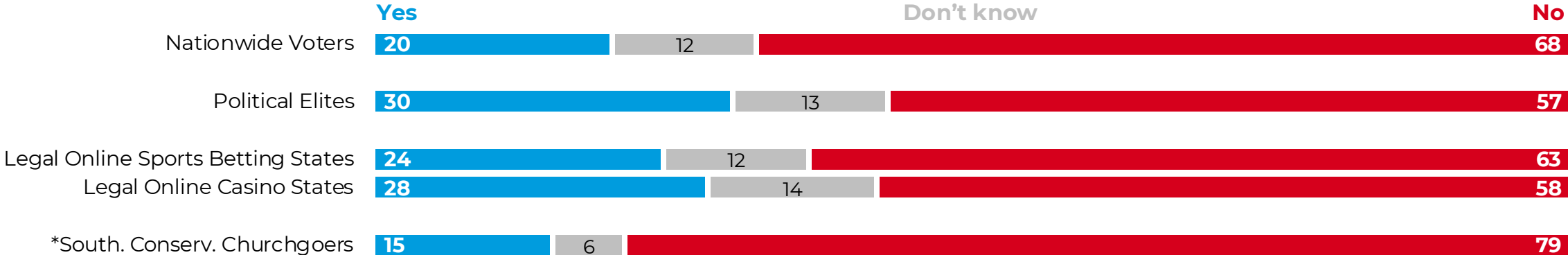
ADDITIONAL DEMOGRAPHIC INSIGHT: More so than voters overall, **Republicans want the industry revenue to provide tax relief** (30%). However, only 15% of Republicans say tax revenue from the industry is currently providing tax relief.



Responsible Gaming

While many voters are unfamiliar with existing responsible gaming programs, most believe the industry prioritizes them

As you may or may not know, responsible gaming programs help ensure gamblers can responsibly enjoy gaming as a form of entertainment. They promote awareness of and help prevent gaming addiction. Prior to taking this survey, had you seen, read, or heard anything about responsible gaming programs in your state?



Do you agree or disagree with the following statement? The gaming industry prioritizes responsible gaming.

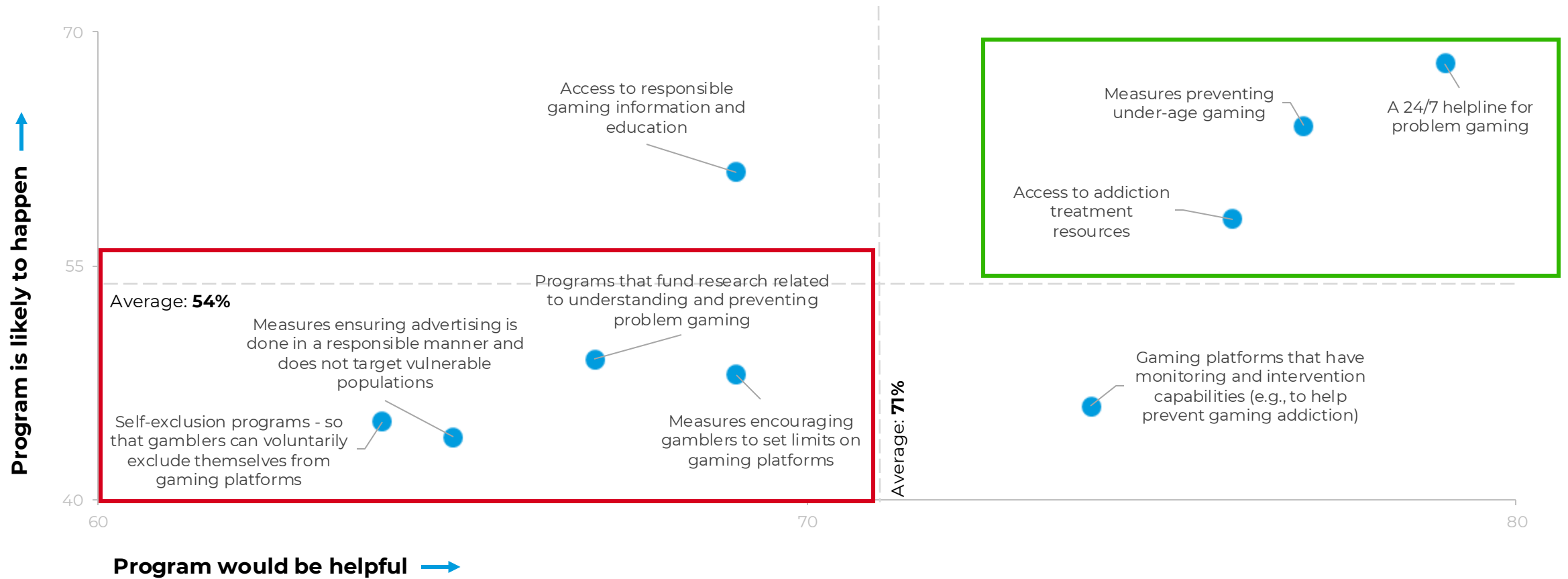


12 NOTE: * Denotes small sample size (<100). Results of small sample sizes are directional.



To combat concerns about problem gaming, the industry needs to promote its responsible gaming efforts, specifically helplines, addiction treatment resources, and measures to prevent underage gaming

Responsible Gaming Programs: Helpful **vs.** Likely to Happen (*Nationwide Voters*)

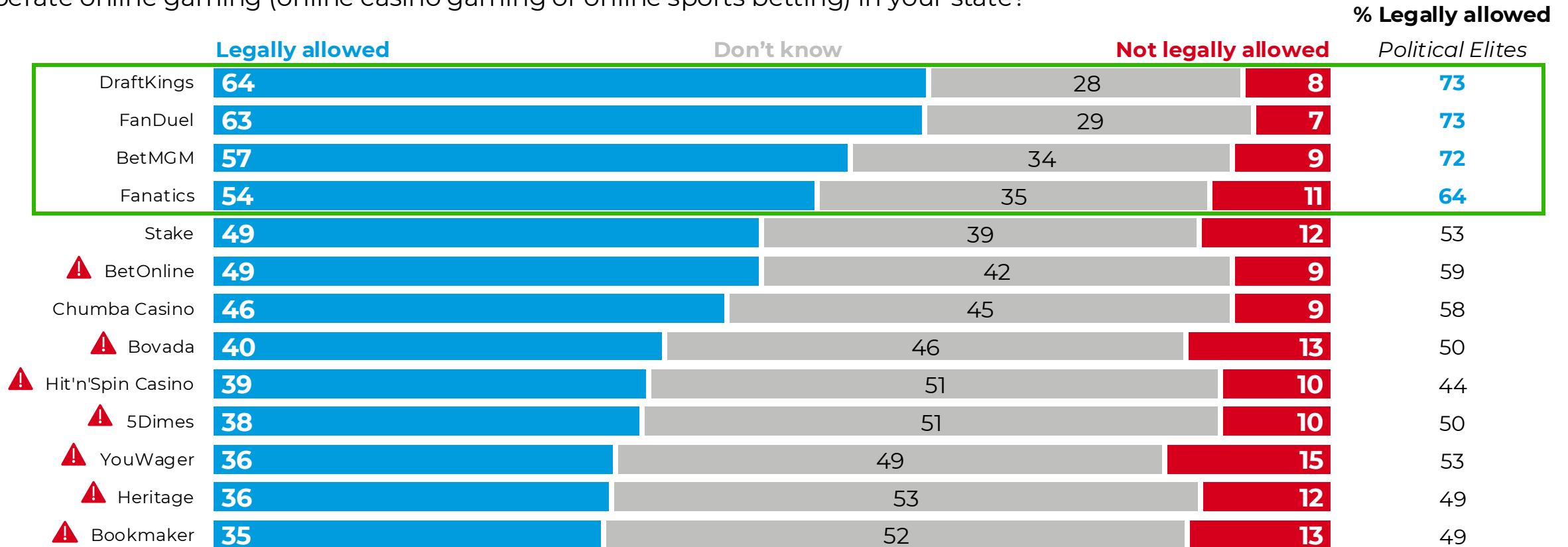




Illegal and Unregulated Online Gaming

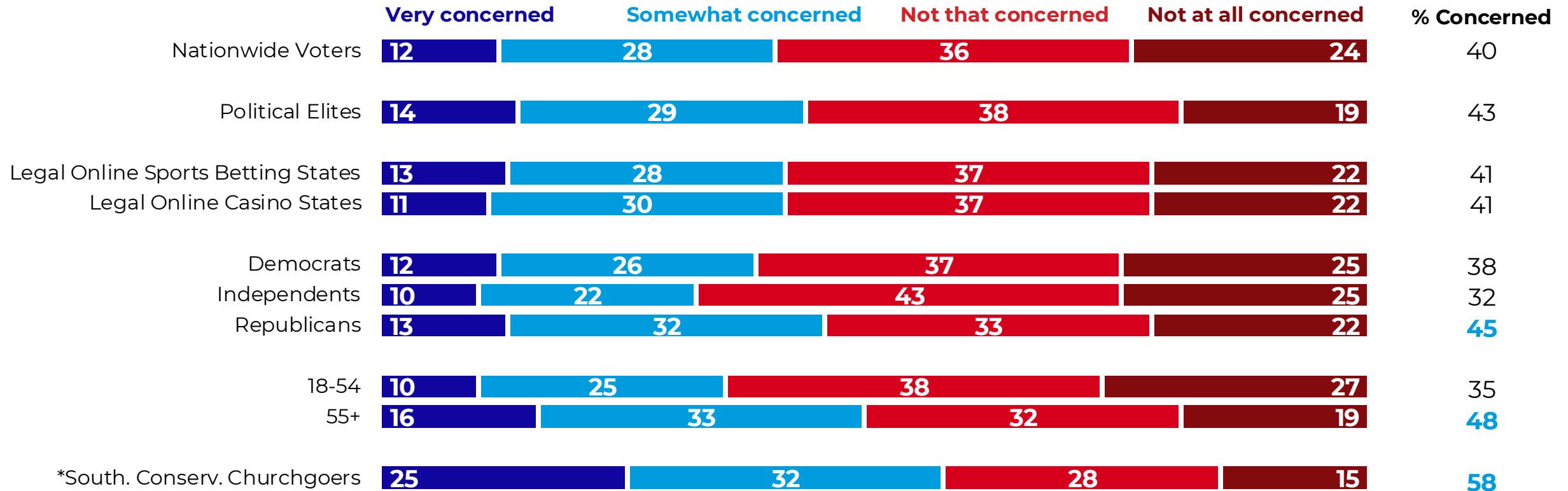
While over half of voters know SBA's members are legal online gaming operators, there is confusion over whether other platforms are legal or not

[IF FAMILIAR WITH COMPANY] Without looking it up and based on what you already know, is [COMPANY] allowed to legally operate online gaming (online casino gaming or online sports betting) in your state?



A plurality of voters – especially Republicans, older voters, and southern conservative churchgoers – are concerned about illegal online gaming

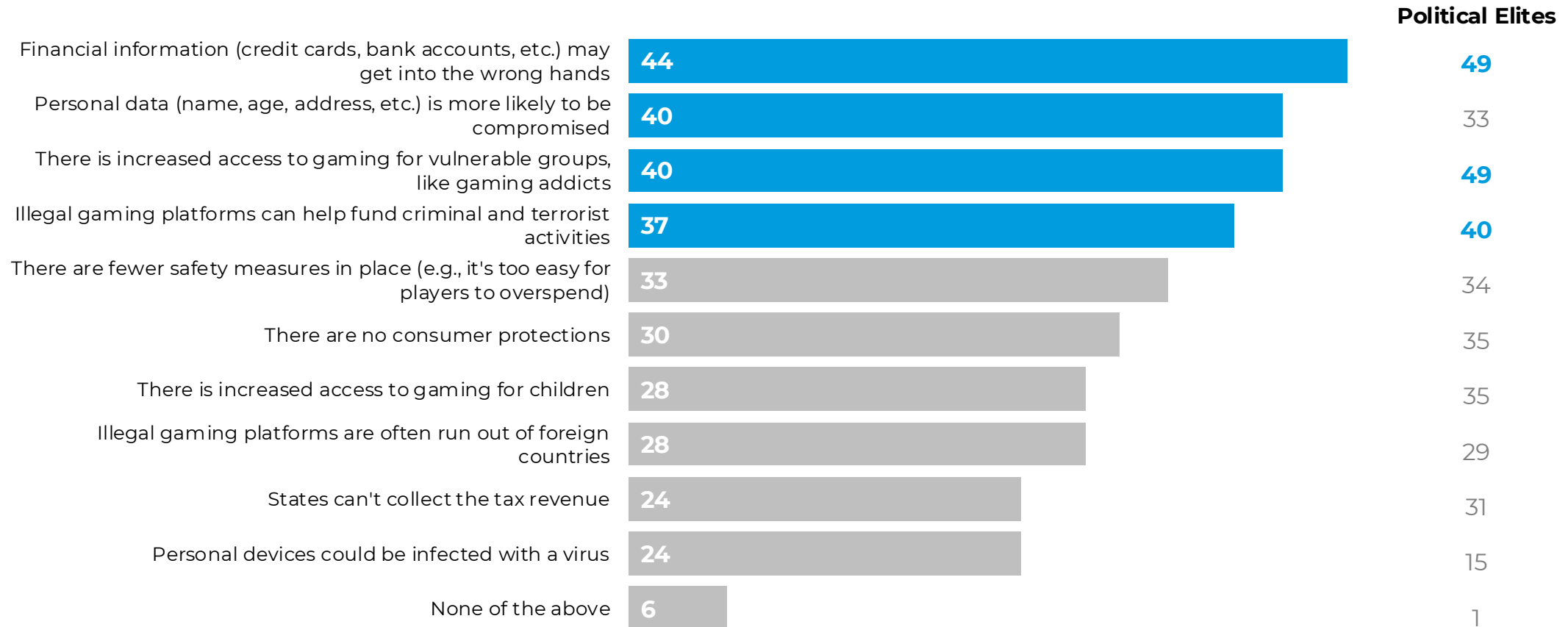
How concerned are you about illegal online gaming happening in your state?



ADDITIONAL INSIGHT: While almost half of voters are worried about illegal online gaming, in practice, few actually see it happening. Only 9% of voters are aware of ways to gamble online illegally.

Illegal gaming concerns are driven by fears that financial and personal information will be compromised, vulnerable people will be taken advantage of, and criminal activity will flourish

[IF CONCERNED W/ ILLEGAL ONLINE GAMING] Below is a list of reasons why some individuals have said they are concerned about illegal online gaming happening in their states. Please select up to four reasons that concern you the most.





Perceptions of Online Sports Betting

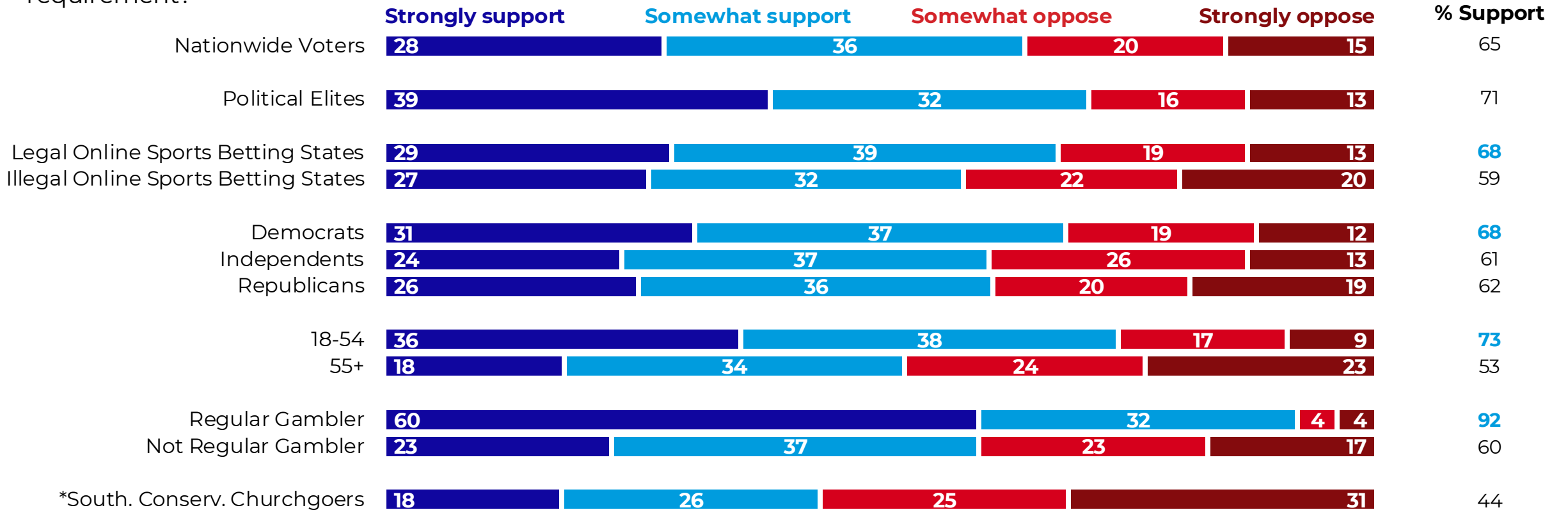
Regardless of where they live, most voters believe online sports betting is legal in their state

Without looking it up, do you think online sports betting is legal or illegal in your state?



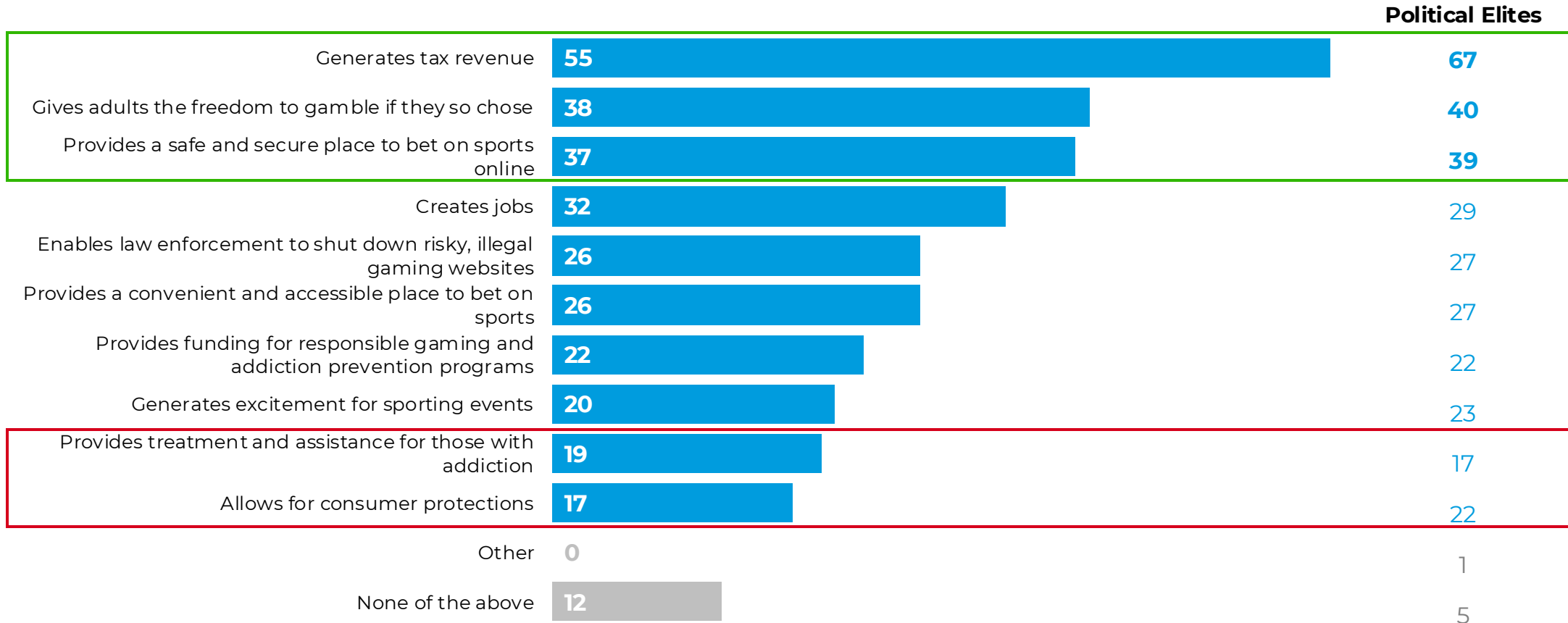
The majority of voters – especially those who gamble regularly – support legalizing online sports betting

Do you support or oppose the legalization of online sports betting for adults who meet your state’s minimum age requirement?



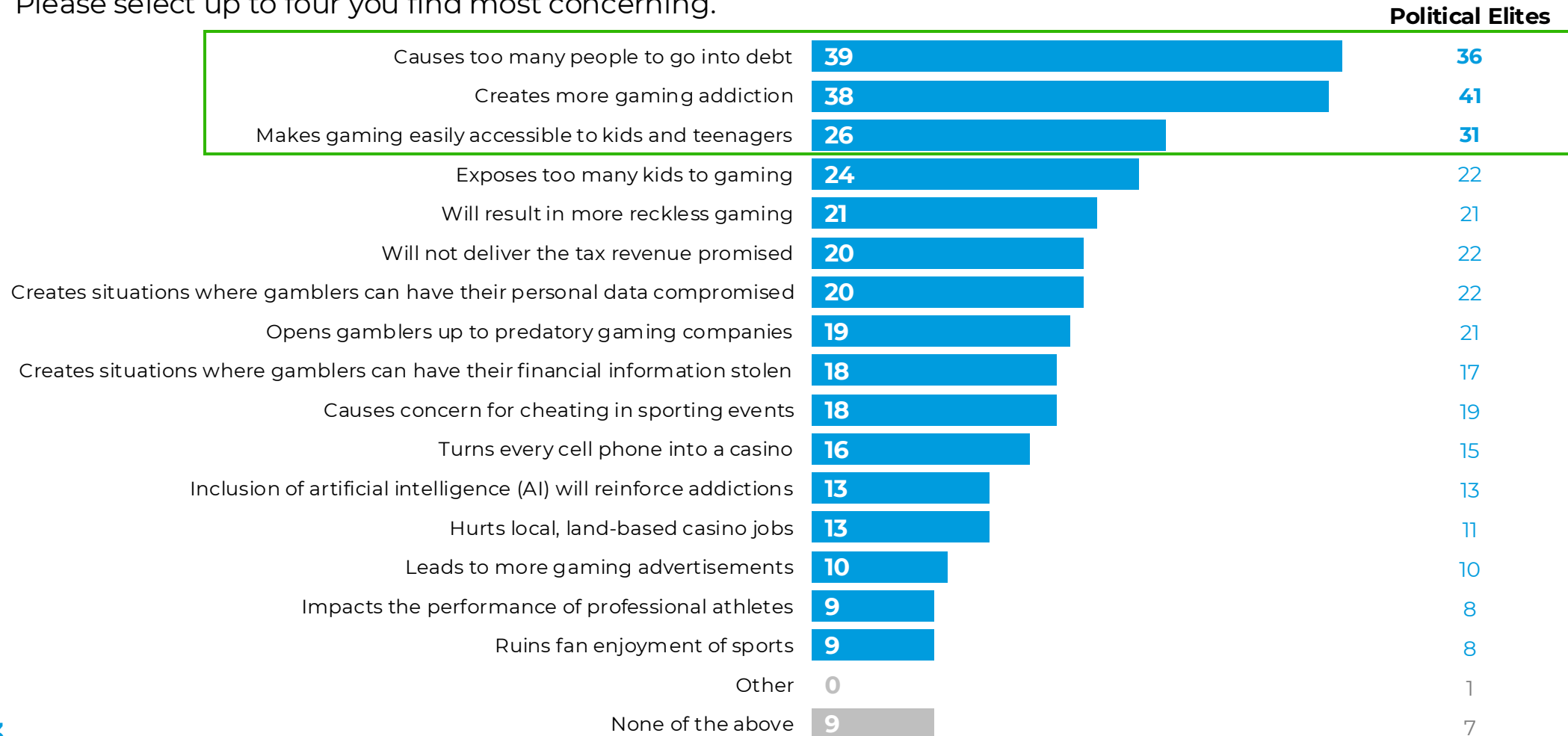
Tax revenue, personal freedom, and secure platforms are the biggest selling points of legalized online sports betting

Below is a list of benefits some people have said they associate with the legalization of online sports betting in their state. Please select up to four that you think have the potential to have the most positive impact in your state and community.



Voters are worried legalizing online sports betting will lead to debt, addiction, and underage gaming

Below is a list of concerns some people have said they associate with the legalization of online sports betting in their state. Please select up to four you find most concerning.



Voters want online sports betting platforms to verify the age of “gamblers” to “prevent children” from gambling

Below is a list of requirements that state governments could place on legal online sports betting companies and their platforms. Which do you think would have the greatest impact? Please select up to four.



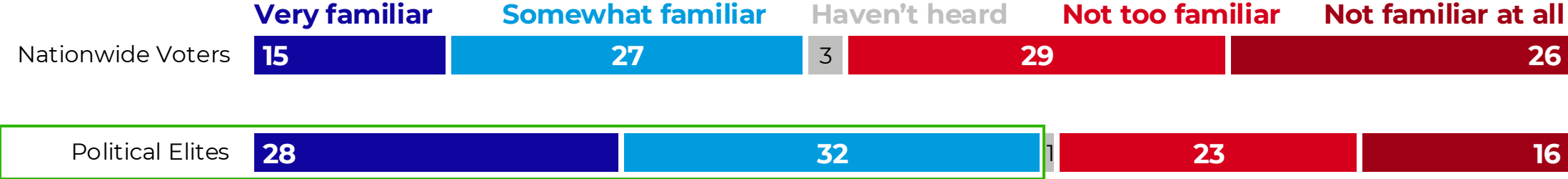
NOTE: Here, the words “age of the gamblers” and “prevent children” are the most impactful language permutations.



Perceptions of Online Casinos

Among Voters, especially political elites, advertising is generally driving familiarity with online casinos

How familiar are you with online casinos?



[IF HEARD] What have you seen, read, or heard recently about online casinos in your state?

NATIONWIDE VOTERS

"Ads for **DraftKings** and **FanDuel** for deposit bonuses and sign-up bonuses."

"I've heard that **BetMGM** has a promotion."

"Online casinos are being discussed for **legalization**, which could bring **new opportunities & benefits** to the state."



124

POLITICAL ELITES



95

"I've heard an **ad** about **Chumba Casino**."

"I've heard **more states are legalizing it** and setting regulations, like in **Pennsylvania**."

"I see **ads** and read a **news** article about casinos **trying to be legal in Texas**."

Regardless of where they live, most voters believe online casinos are legal in their state

Without looking it up, do you think online casinos are legal or illegal in your state?

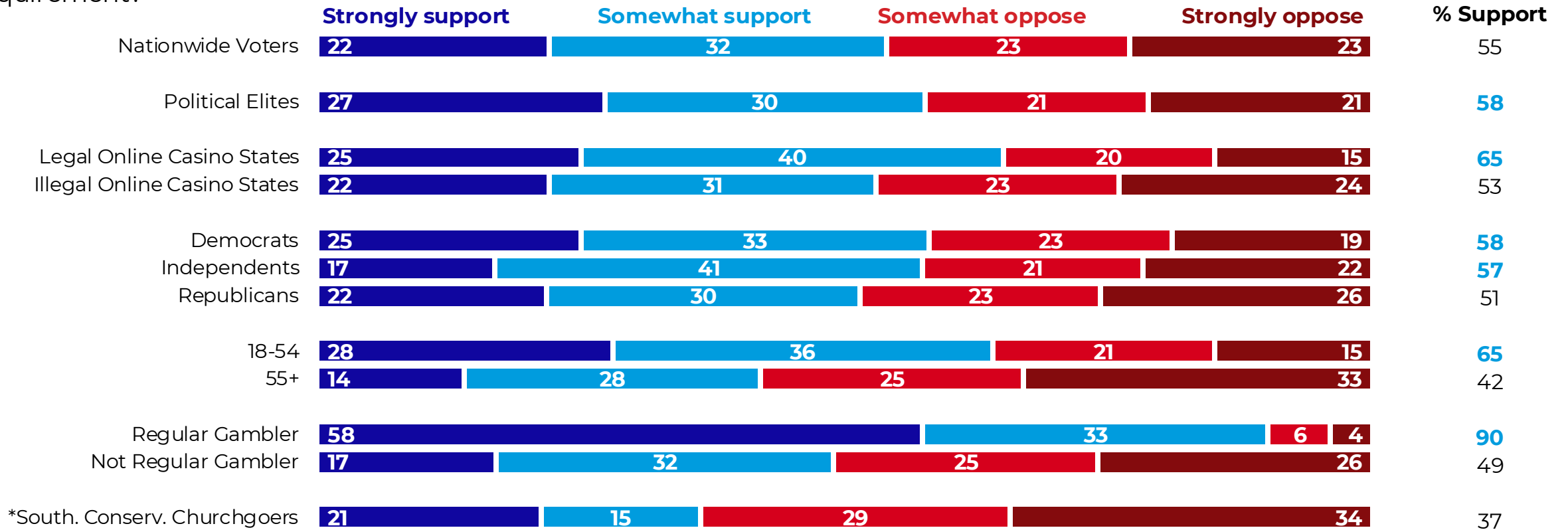
Legal

Not Yet Legal



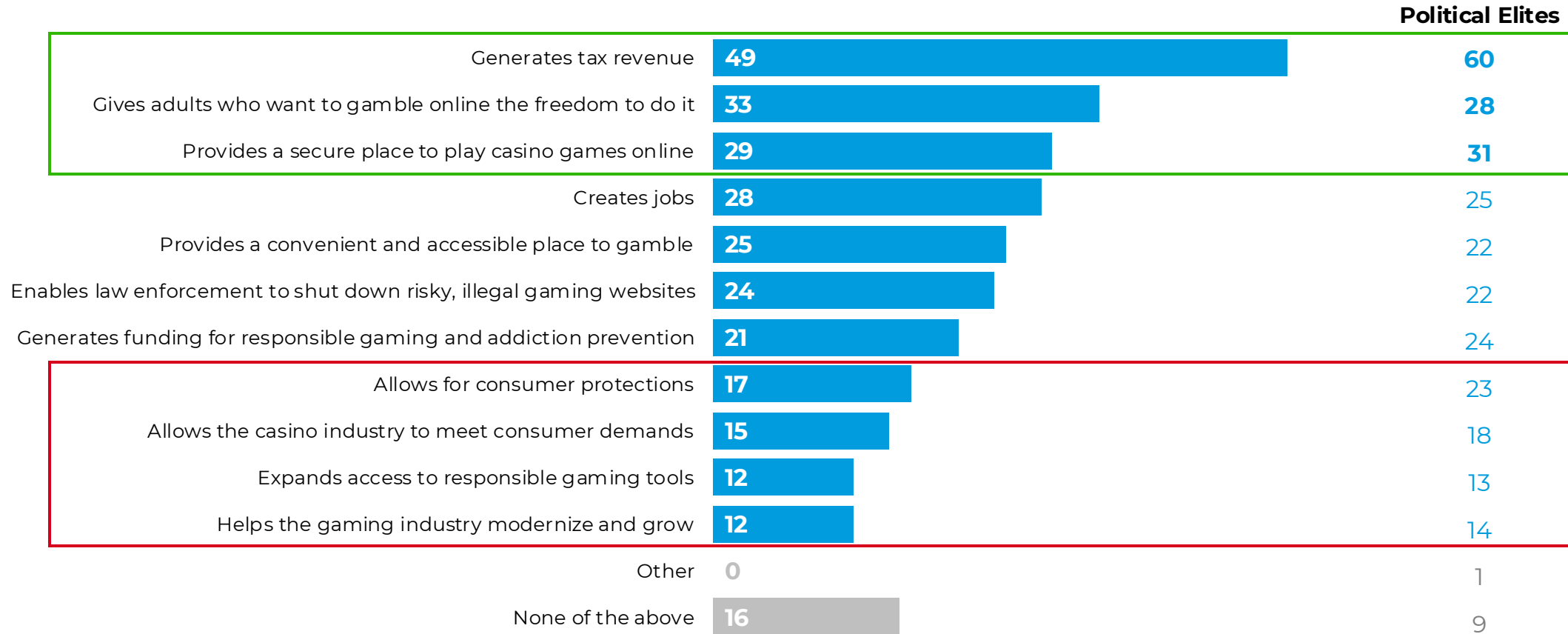
Just over half of voters support legalizing online casinos, indicating there's room to build on the industry's positive momentum

Do you support or oppose the legalization of online casinos for adults who meet your state's minimum age requirement?



Tax revenue, personal freedom, and secure platforms are the biggest selling points of legalized online casinos

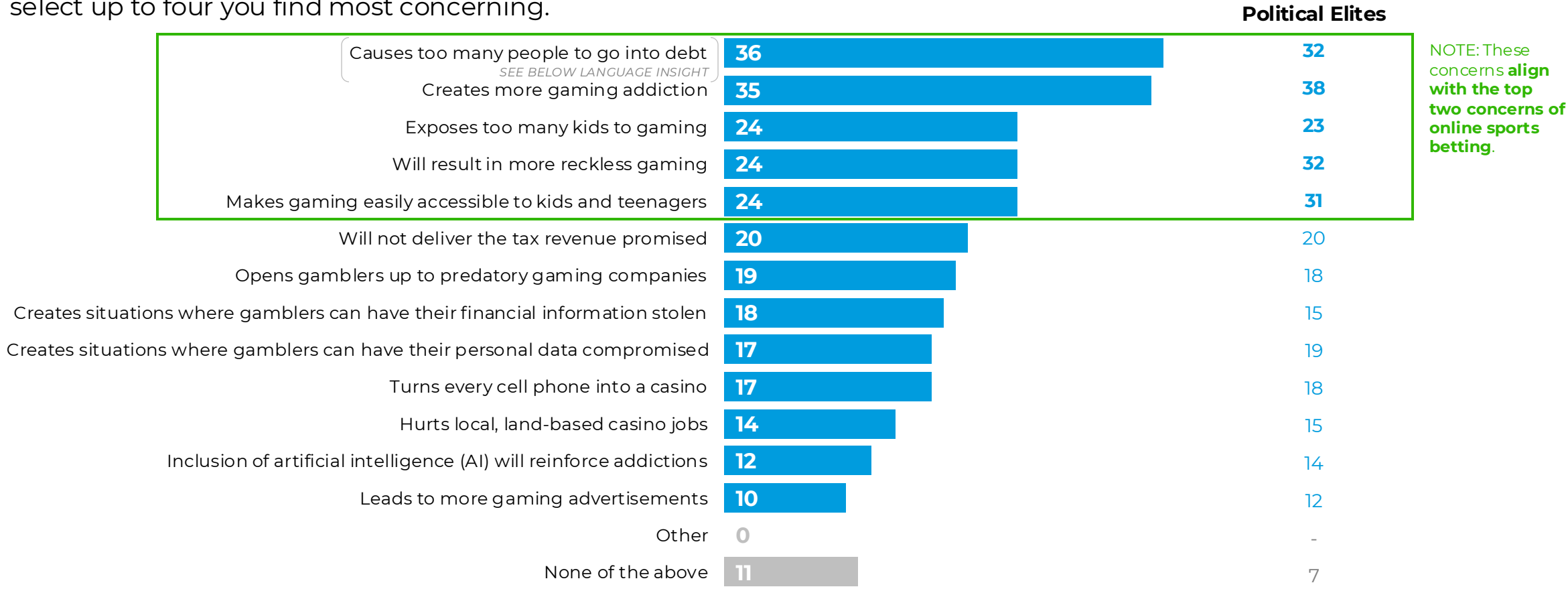
Below is a list of benefits other people have said they associate with the legalization of online casinos in their state. Please select up to four that you think have the potential to have the most positive impact on your state and community.



NOTE: While these benefits align with the top three benefits on online sports betting, support for tax revenue is stronger here and slightly less strong for freedom and a secure place.

Voters are worried online casinos will lead to debt, addiction, and underage gaming

Below is a list of concerns other people have said they associate with the legalization of online casinos in their state. Please select up to four you find most concerning.



ADDITIONAL LANGUAGE INSIGHT: When communicating to voters at large about the industry’s efforts to combat gaming debt, consider whether or not it’s the right place to focus on “low-income” people. **Voters at large are more likely to be concerned that online casinos will cause “too many people to go into debt” (36%) vs. cause “too many low-income people to go into debt” (31%).**

Voters want online casinos to verify the age of “gamblers” to “prevent children” from gambling

Below is a list of requirements that state governments could place on legal online casino companies and their platforms. Which do you think would have the greatest impact? Please select up to four.



NOTE: These requirements align with the top two requirements of online sports betting. As with online sports betting, here, the words “age of gamblers” and “prevent children” are the most impactful language permutations.



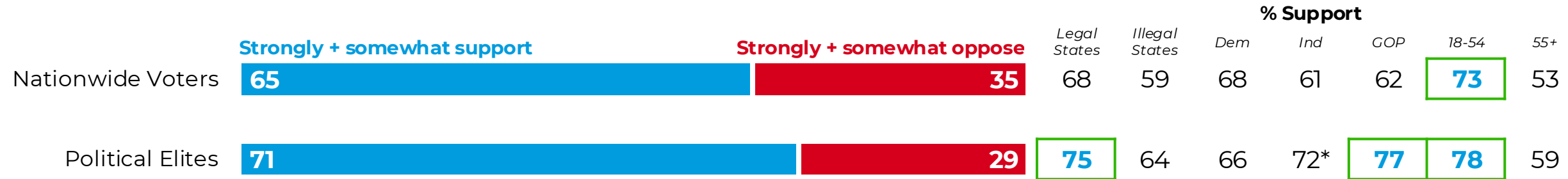
Vote Movement

Survey Structure

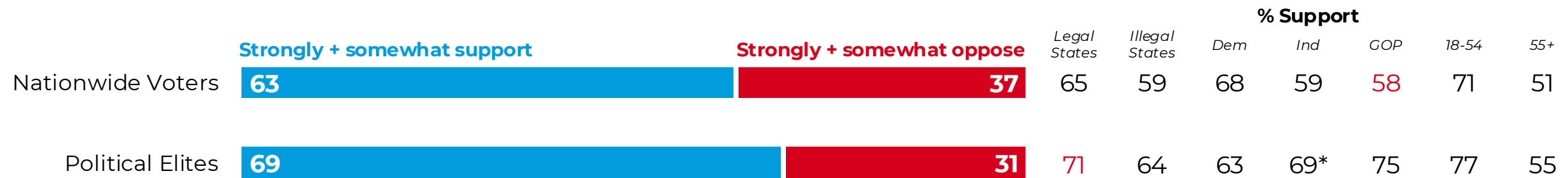


Support for online sports betting is already strong; additional information and messaging does little (if anything) to shift perceptions in our direction

Initial Vote: Support or oppose legalization of online sports betting.



Post-Messaging Vote: Support or oppose legalization of online sports betting.

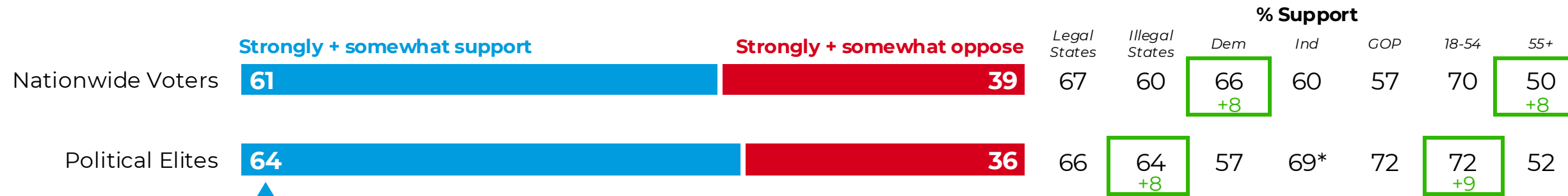


SBA can build support for the legalization of online casinos by educating voters about the potential benefits of it (e.g., increased tax revenue)

Initial Vote: Support or oppose legalization of online casinos.



Post-Messaging Vote: Support or oppose legalization of online casinos.



▲ After exposure to additional information and messaging, the percentage of both voters and political elites who support the legalization of online casinos **increases by 6-points**.

Targeting persuadable voters can help build support for online casinos; these voters naturally have less exposure to online casinos (they are infrequent gamblers from states where online casinos are not yet legal)

Initial Vote: Do you support or oppose the legalization of online casinos for adults who meet your state's minimum age requirement? (*Nationwide Voters*)



18%



Persuasion Target

After messaging, **18% of voters move in our direction:**

*From somewhat or strongly opposing to somewhat or strongly supporting
From somewhat supporting to strongly supporting
From strongly opposing to somewhat opposing*

Persuadable voters are:

- **From states where online casinos are not yet legal** (90% of the Persuasion Target are from illegal states)
- **Infrequent gamblers** (89%)
- **White** (75%)
- **Ages 55+** (49%)

Note: Southern conservative churchgoers make up only 3% of the persuasion target.



Communications & Advertising

The strongest messages in support of legalizing online gaming focus on tax revenue, allowing adults the freedom to make their own choices, and the illegal market

Please indicate how convincing each statement is as a reason to support legalized online gaming.

% Extremely Convincing (5 on a 5-point scale)

NW Voters	Dem Voters	GOP Voters	*S. Con. Church.	Persuade. Voters	Elites	Message
23	26	21	18	19	27	[TAX REVENUE] Online gaming is a good source of additional tax revenue for states and localities . Revenue from these types of gaming allows states to fund critical public programs and services - like education - without raising taxes on citizens or businesses. If a state does not legalize online gaming, they lose out on this potential revenue source.
22	23	23	18	27	22	[CHOICE] Whether it's betting on a professional sports game or playing a casino game like poker online, many people enjoy gaming and should be allowed to do so in a secure, regulated space . If Americans want to safely and responsibly gamble online, they should have the freedom to do so .
22	26	18	19	25	26	[ILLEGAL MARKET – DUPING AMERICANS] Many Americans who participate in online gaming are unknowingly gaming on the illegal market. These Americans are often duped by foreign websites , where they are taken advantage of, and their data and financial information is compromised. Legalizing online gaming in all states will allow for consumer protections that will ensure people have access to safe and secure online gaming options that provide tools for responsible gambling, making them less likely to be taken advantage of by illegal foreign operators .
19	18	20	11	20	24	[ILLEGAL MARKET – ALREADY HAPPENING] Many Americans are already participating in online gaming and will continue to do so whether it is legal or not . Without safe and legal options, Americans will turn to predatory illegal websites, often headquartered in foreign countries. Legalizing online gaming in all states will allow for consumer protections that will ensure people have access to safe and secure online gaming options that provide tools for responsible gambling, making them less likely to be taken advantage of by illegal foreign operators .
18	20	16	15	17	19	[RESPONSIBLE GAMING] The technology behind online gaming helps address concerns like underage gaming and problem gaming in new and effective ways. For example, gamblers are required to verify they are of legal age. They are also given the ability to set limits on deposits, wagers and time spent gaming, as well as educational tools on how to gamble responsibly.
14	14	15	16	11	16	[COMPETITION] Legalization of online gaming allows for an increase in healthy competition between online gaming companies . This increased competition would be good for consumers, as it would encourage new innovations in the industry and allow consumers to choose a platform that meets their needs and provides a safe place to gamble responsibly.
14	17	12	11	10	15	[JOBS] Legal online gaming will protect land-based casinos and create new jobs by helping the industry to modernize and grow , giving them new ways to engage with their consumers, and ensuring the creation of well-paying jobs associated with new innovations.

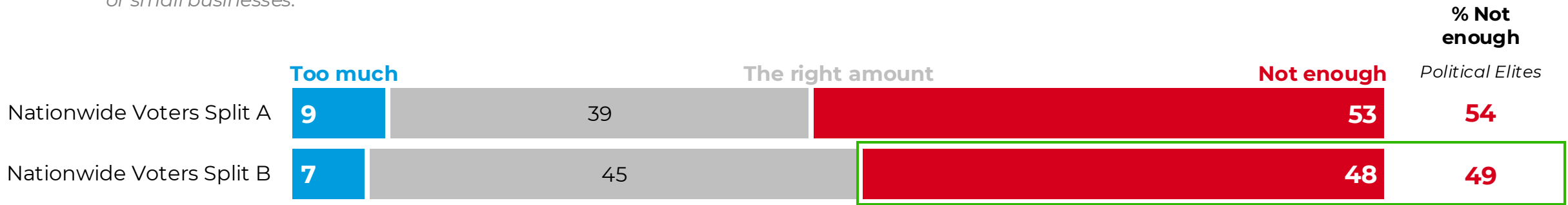
Focusing on the tax revenue message also strengthens the industry's position in the tax fight

INITIAL QUESTION: Do you think sports betting companies are taxed too much, not enough, or the right amount?



FOLLOWING INITIAL QUESTION: Half of respondents received a message from SPLIT A and half received SPLIT B. They were then re-asked the previous question.

- [SPLIT A – ILLEGAL OPERATORS ARE UNTAXED] Legal sports betting **operators are taxed a federal excise tax** of 0.25% on every legal sports wager, as well as a state gaming tax. **Illegal operators don't pay taxes**, unnecessarily disadvantaging legal sports betting operators.
- [SPLIT B – TAX REVENUE FOR COMMUNITIES] Since 2018, states and local **communities have taken in \$6.5 billion in tax revenue** from legal sports betting. This revenue allows states and communities to **fund critical public programs and services** - like education - without raising taxes on citizens or small businesses.

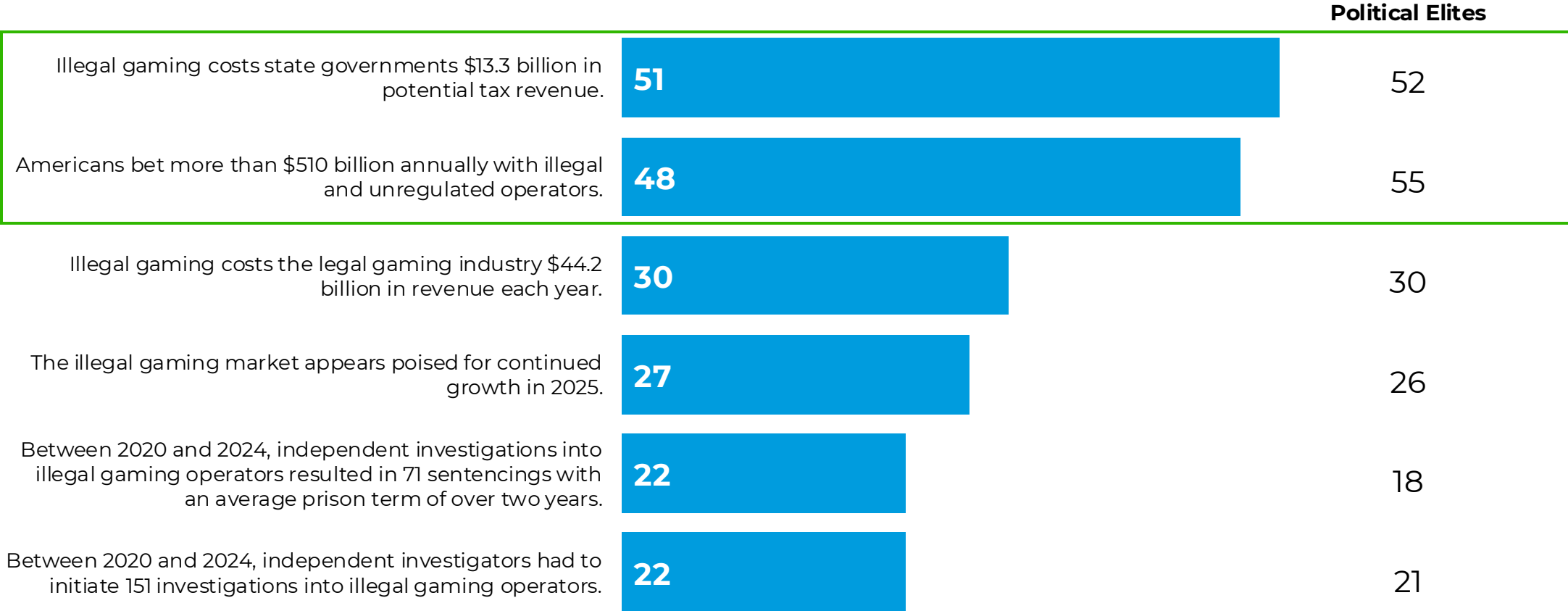


▲ Exposure to the **tax revenue message** (SPLIT B) **moves voters in our direction** on the tax fight (“not enough” drops 7-points among voters and 6-points among political elites).



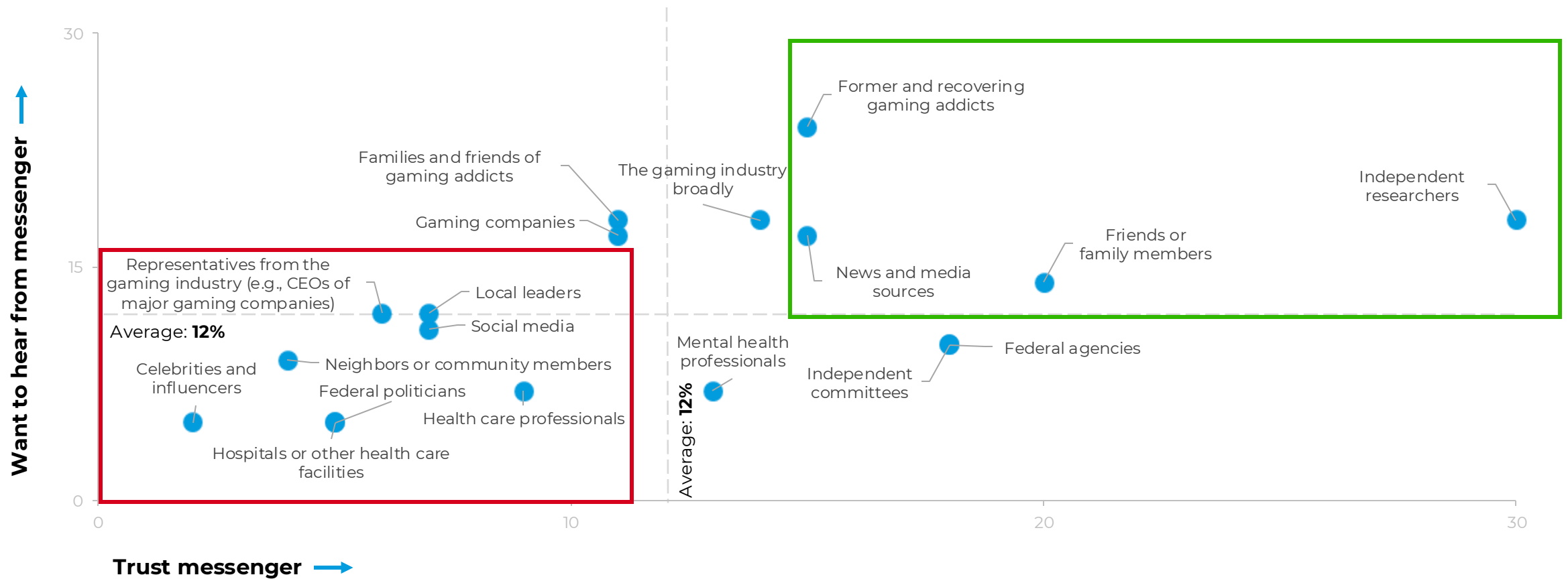
When communicating about illegal online gaming, the strongest statistics demonstrate how widespread the problem is and how much states are losing in revenue

Below is a list of statistics related to illegal online gaming. Please select the two statistics that concern you the most.



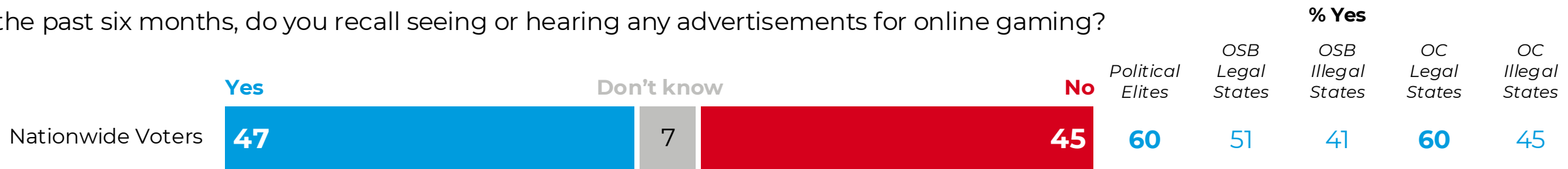
The industry's best messengers can help alleviate concerns with online gaming; they are independent researchers, former addicts, and community members

Messengers for Online Gaming: Trust **vs.** Want to Hear From (*Nationwide Voters*)



About half of voters are being exposed to ads for online gaming; the rate at which they're seeing these ads is mostly (1) holding steady and (2) similar to ads for other products

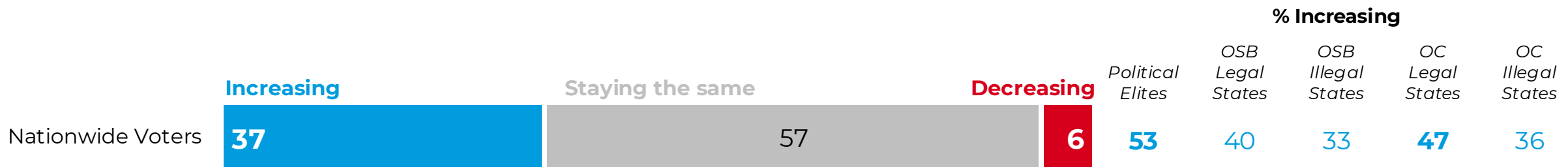
In the past six months, do you recall seeing or hearing any advertisements for online gaming?



Do you think the amount of online gaming advertisements you are seeing are more than, less than, or the same amount as other products and ads?

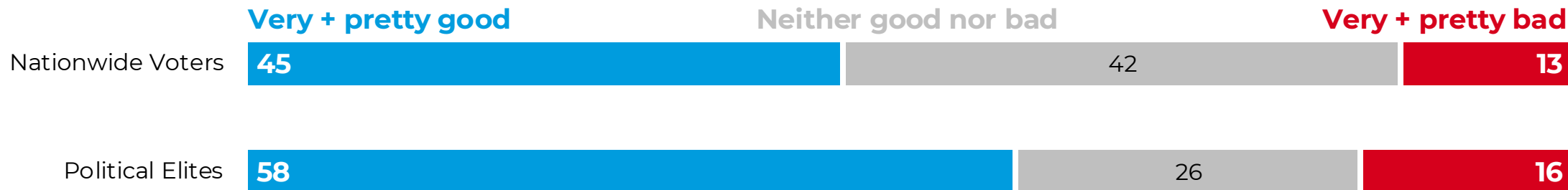


Do you think the number of gaming advertisements in your area are increasing, decreasing, or staying about the same?



The industry's advertising includes memorable moments, brand names, and figures; few voters think the ads are of a bad quality

[IF SEEN/HEARD ADS FOR ONLINE GAMING] You indicated that you have recently seen or heard one or more gaming advertisements. Thinking about these advertisements collectively, how would you rate the quality of them?



In a sentence or two, describe what you recall from the most recent gaming advertisement you saw/heard?

"The ad was for **DraftKings**. It promoted free bets."

"I recall the ad featured a promotion for a sports betting platform emphasizing **bonus offers** for new users, highlighting the **excitement of betting on live games**."

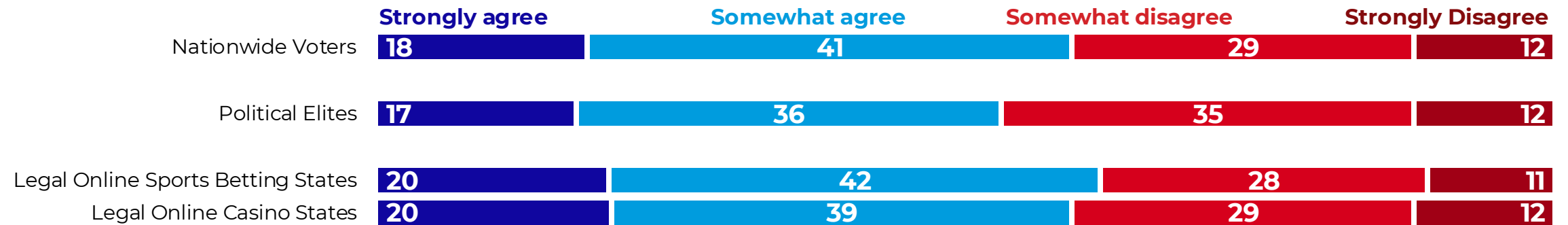


"The ad was for **DraftKings** and it featured **LeBron and Kevin Hart** in LeBron's living room cracking jokes."

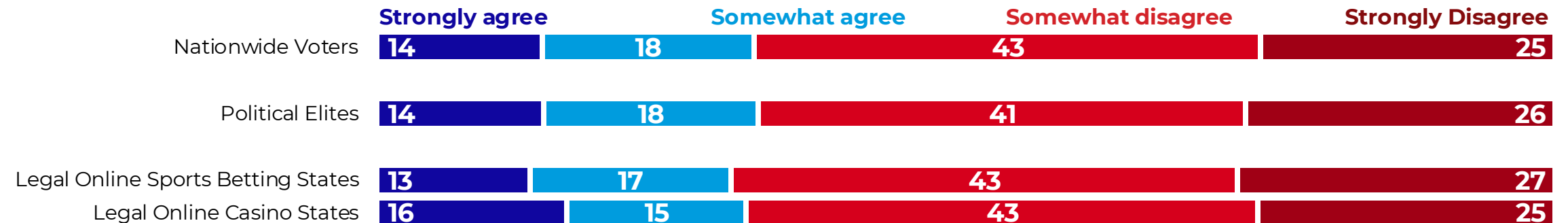
"Peyton and Eli manning were talking about betting on **FanDuel**. I think it was for the Superbowl."

While there is some disagreement over when online sports betting ads should be shown, voters are more likely to believe advertising should be limited to sporting events

Do you agree or disagree with the following statement? *“Online sports betting advertisements should only be shown during sporting events.”*



Do you agree or disagree with the following statement? *“Online sports betting advertisements should never be shown during sporting events.”*





Conclusions

Recommendations

To boost the industry's reputation, SBA should **lean into existing positive perceptions of the industry** – that sports betting is easily accessible entertainment and is helping bolster state and local economies in states where it is legal.

- Similarly, while many voters are **concerned about debt, addiction, and access for kids**, most voters think the industry is working to solve those issues. SBA should lean into this positive perception by **emphasizing the critical work the industry is already doing in this space** – for example, 24/7 helplines, addiction treatment resources, and measures to prevent underage gaming.

There's already broad support for online sports betting. However, **there is an opportunity to grow positive perceptions of online casinos**. SBA should educate voters – especially those who have less exposure to online casinos and are more persuadable – about the benefits of legalizing online casinos. The most effective messaging focuses on:

- **Tax revenue.** Voters – especially political elites – are enthusiastic about the gaming industry's potential to create more support for housing, education, and health care. And SBA's most compelling message speaks to this – “Online gaming is a good source of additional tax revenue for states and localities. [It funds] critical public programs and services.”
- **The illegal market.** Voters are worried about the illegal market, especially how it has the potential to leak sensitive information and target vulnerable Americans. Legalizing online gaming helps ensure there are safe, secure places for Americans to gamble, where they are not being “taken advantage of by illegal foreign operators.” Messages like this are also particularly compelling among political elites.
- **Individual freedoms.** Legal online casinos give adults the freedom to choose how they want to spend their time. One of SBA's most effective messages – and the most effective message among Republicans and persuadable voters – focuses on choice. “If Americans want to safely and responsibly gamble online, they should have the freedom to do so.”

Less effective messaging lanes for SBA include those that are focused on how **the expansion of online gaming will benefit the gaming industry**. For example, by increasing “healthy competition,” protecting “land-based casinos,” and “helping the industry to modernize and grow.” Instead of focusing on how expanding online gaming will help the industry flourish, SBA should focus on how expansion will benefit the public.

Message in 60-Seconds

The online gaming **industry is growing**, and that's **a good thing** for states and local communities. Online gaming is a major source of **tax revenue** that is funding **housing, education, and health care**. If a state does not legalize online gaming, they lose out on funding for their communities.

Whether it's betting on a professional sports game or playing a casino game like poker online, online gaming is an **entertaining, accessible** way Americans can choose to **spend some of their time**.

Today, many Americans who participate in online gaming are **unknowingly gaming on the illegal market**. These **Americans are often duped by foreign websites**, where they are taken advantage of, and their information is compromised. Legalizing online gaming in all states will ensure there are **safe and secure platforms**, where Americans can have fun **without worrying that their personal data, credit cards, or bank accounts will get into the wrong hands**.

The online gaming industry **prioritizes responsible gaming**. To combat problem gaming, the industry offers **24/7 helplines, addiction treatment resources**, and **age verification to prevent children** from accessing gaming platforms.

Lean into existing perceptions that the industry is growing and immediately focus on why this is a good thing. Tax revenue is the key benefit, and it can fund housing, education, and health care.

Remind voters that when done responsibly, online gaming is a positive experience. And it's one Americans should have the freedom to choose whether or not to engage in.

Share insight into why the illegal market is such a big threat. Americans are already using illegal unregulated platforms, and as a result, their personal and financial information is being put at risk.

Finish by recognizing that the industry prioritizes responsible gaming. Highlight its programs that combat common concerns, like those that fight addiction and preventing kids from engaging in online gaming.

Specific Language Guidance

Avoid

Messaging that (1) focuses on **helping the industry** or (2) tries to justify legalization by insinuating that **expansion is essential in order to fight problem gaming**.

Legalization will encourage “healthy competition,” protect “land-based casinos,” and “help the industry modernize.”

Benefits of legalization include addiction “treatment and assistance” and “consumer protections”

Focusing on **less impactful responsible gaming programs**.

*“Self-exclusion programs”
“Measures ensuring [responsible] advertising”
Funding “research related to [...] problem gaming”*

Talking too generally about age verification.

Online gaming platforms “verify a customer’s age [...] before allowing them to participate.”

Do This Instead

Concentrate on how **legalization will benefit people**.

Legalization will increase “local tax revenue” for things like “housing,” “education,” & “healthcare”; help ensure “Americans aren’t being taken advantage of by illegal foreign operators”; “ensure Americans have the freedom to safely and responsibly gamble online”

Focus on **responsible gaming programs** that voters **believe** are happening and are **helpful**.

*“A 24/7 helpline for problem gaming”
“Measures to prevent underage gaming”
“Access to addiction treatment resources”*

Specify that platforms will **verify ages to prevent underage gambling**.

Online gaming platforms “verify the age of gamblers [...] to prevent children from accessing gaming platforms.”

Thank you

New York

Washington, DC

Hartford

Chicago

Denver

Seattle