National Survey on Gambling Attitudes and Gambling Experience (NGAGE)

DETAILED REPORT SPORTS BETTING
MINNESOTA
May 2019
Sports betting
Type of sports betting

- Traditional sports: 30%
- Fantasy sports: 17%
- Both: 53%
Traditional Sports betting
Past year traditional sports betting by state

- Nevada
- New Jersey

U.S. overall = 22%

<table>
<thead>
<tr>
<th>Percent betting in past year</th>
<th>Number of states</th>
</tr>
</thead>
<tbody>
<tr>
<td>[13%, 18%]</td>
<td>17</td>
</tr>
<tr>
<td>(18%, 23%)</td>
<td>23</td>
</tr>
<tr>
<td>(23%, 28%)</td>
<td>9</td>
</tr>
<tr>
<td>(28%, 33%)</td>
<td>2</td>
</tr>
</tbody>
</table>
Number of sports bet on

Past year sports bettors only

<table>
<thead>
<tr>
<th>Category</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 2</td>
<td>55%</td>
<td>61%</td>
</tr>
<tr>
<td>3 to 5</td>
<td>36%</td>
<td>31%</td>
</tr>
<tr>
<td>6 or more</td>
<td>8%</td>
<td>7%</td>
</tr>
</tbody>
</table>

November 2018
Frequency of sports bets

<table>
<thead>
<tr>
<th>Frequency</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly or more</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>1-3 times a month</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Several times a year</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>Once or twice a year</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Less often than once</td>
<td>7%</td>
<td>13%</td>
</tr>
</tbody>
</table>
How do you make sports bets?

- Social bets with family or friends: 90% Minnesota, 91% U.S.
- Online sportsbook: 50% Minnesota, 62% U.S.
- "Brick and mortar" sportsbook: 51% Minnesota, 57% U.S.
- Bookie/Bookmaker: 28% Minnesota, 48% U.S.

Questions asked of sports bettors only

November 2018
How do you make sports bets?

Social bets with family or friends
- Occasionally: 5%
- Often: 43%
- Total: 47%

Online sportsbook
- Occasionally: 10%
- Often: 31%
- Total: 41%

"Brick and mortar" sportsbook
- Occasionally: 10%
- Often: 23%
- Total: 33%

Bookie/Bookmaker
- Occasionally: 5%
- Often: 23%
- Total: 28%

Questions asked of sports bettors only

November 2018
What sports have you bet on in past year for real money (Sports bettors only)

- Pro football: Minnesota 73%, U.S. 65%
- College football: Minnesota 0%, U.S. 10%
- Pro basketball: Minnesota 10%, U.S. 27%
- Baseball: Minnesota 14%, U.S. 30%
- College basketball: Minnesota 24%, U.S. 26%
- Soccer: Minnesota 10%, U.S. 17%
- Ice hockey: Minnesota 11%, U.S. 29%
- E-sports: Minnesota 9%, U.S. 11%
- Combat sports: Minnesota 12%, U.S. 11%
- Motor racing: Minnesota 10%, U.S. 14%
- Tennis: Minnesota 6%, U.S. 9%
- Golf: Minnesota 7%, U.S. 7%

November 2018
What type of sports bet have you made in the past year?

- Single bets on the outcome of a game: 88% (Minnesota), 85% (U.S.)
- Bet on events within a game ("prop bets"): 42% (Minnesota), 40% (U.S.)
- Parley bets: 16% (Minnesota), 23% (U.S.)

November 2018
Past year sports betting by gender

Percent betting on sports in past year

Male: 27%
Female: 11%

November 2018
Past year sports betting by age

November 2018
How have you played sports contests in the past year?

- With people I know outside of office: 67% (Minnesota), 60% (U.S.)
- Office pool: 47% (Minnesota), 38% (U.S.)
- Online with people I did not know: 33% (Minnesota), 37% (U.S.)
Fantasy sports
Fantasy sports participation

U.S.
- Daily only, 34%
- Traditional season-long only, 44%
- Both DFS and traditional, 22%

Minnesota
- Daily only, 19%
- Both DFS and traditional, 36%
- Traditional season-long only, 45%
Fantasy sports participation by state

National rate = 17%

DC, IL, MD, NJ, NY, NC, OH, VA,
Method of playing traditional fantasy sports leagues

U.S.

- Both online and offline, 21%
- Offline only, 50%
- Online only, 29%

Minnesota

- Both online and offline, 19%
- Offline only, 12%
- Online only, 69%

November 2018
Fantasy sports played in past year

- Pro football: 85%
- Baseball: 33%
- Pro basketball: 30%
- College football: 25%
- College basketball: 14%
- Soccer: 15%
- Motor racing: 14%
- E-sports: 11%
- Golf: 13%
- Combat sports: 11%
- Ice hockey: 9%
- Other: 2%

Other sports include: Ice hockey, Combat sports, Golf, Motor racing, E-sports, Soccer, College basketball, College football, Baseball, Pro football.

Minnesota vs U.S.

November 2018
Number of fantasy sports bet on

- 1 - 2: 63%, 62%
- 3 - 5: 32%, 35%
- 6 or more: 5%, 3%

Past year fantasy sports bettors only

November 2018
Number of traditional fantasy sports leagues

- 60% for 1 - 2 leagues
- 64% for 3 - 5 leagues
- 25% for 1 - 2 U.S. leagues
- 26% for 3 - 5 U.S. leagues
- 7% for 6 or more U.S. leagues
- 3% for 6 or more Minnesota leagues

Past year traditional fantasy sports bettors only
Past year fantasy sports betting by gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percent Betting on Fantasy Sports in Past Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>22%</td>
</tr>
<tr>
<td>Female</td>
<td>7%</td>
</tr>
</tbody>
</table>

November 2018
Past year fantasy sports betting by age

28% 32% 24% 15% 6% 2% 0%

18-24 25-34 35-44 45-54 55-64 65-74 75+
Frequency of daily fantasy sports bets

<table>
<thead>
<tr>
<th>Frequency</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly or more</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>1-3 times a month</td>
<td>31%</td>
<td>38%</td>
</tr>
<tr>
<td>Several times a year</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Once or twice a year</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Less often than once a year</td>
<td>4%</td>
<td>2%</td>
</tr>
</tbody>
</table>

November 2018
“On average, how much do you spend to enter a daily fantasy sports contest?”

- 54% spent $15 or less
- 30% spent $16 to $50
- 27% spent $51 to $100
- 10% spent $101 to $300
- 7% spent more than $300
- 2% in the U.S.
- 2% in Minnesota
How much does your traditional, season-long fantasy sports league(s) cost to play?

<table>
<thead>
<tr>
<th>Category</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>$15 or less</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>$16 to $50</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td>$51 to $100</td>
<td>22%</td>
<td>29%</td>
</tr>
<tr>
<td>$101 to $300</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>$300 to $500</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>More than $500</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

November 2018