



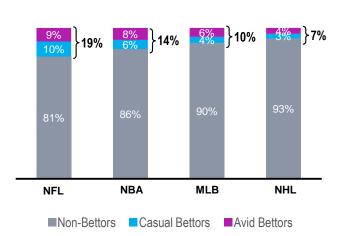
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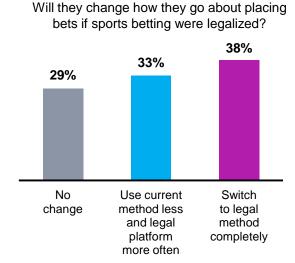
WHAT'S NEXT IN THE U.S. SPORTS BETTING MARKET?

Research by Nielsen Sports

TYPES OF BETTORS BY LEAGUE

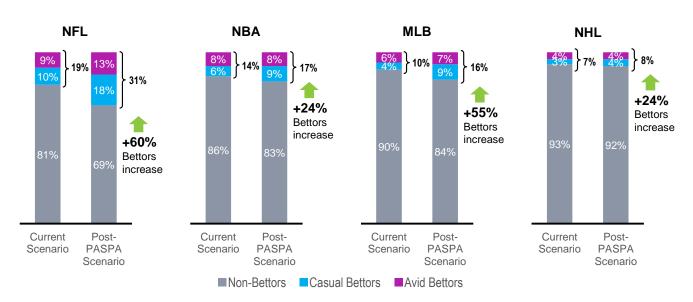
OF THOSE WHO PLACED A BET WITH A BOOKIE...





PROJECTED CHANGE IN BETTING HABITS AFTER LEGALIZATION OF GAMBLING

Based on reported behavior from survey conducted



 $Source: Custom\ Nielsen\ Research\ 2018.\ Survey\ Respondents: Panel\ Sample\ Total\ n=1032$

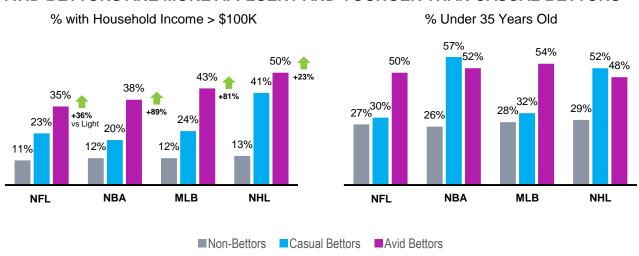




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AVID BETTORS ARE MORE AFFLUENT AND YOUNGER THAN CASUAL BETTORS



Source: Custom Nielsen Research 2018. Survey Respondents: Panel Sample Total n=1032

DEMOGRAPHICS OF FANS VS BETTORS

Bettors almost universally younger, more affluent, more diverse and better educated

	NFL			NBA					MLB		NHL				
	Fans	Bettors	1	/1	Fans	Bettors	1	/1	Fans	Bettors	1/1	Fans	Bettors	1	/
% Age 18-34	34%	40%	1	18%	40%	54%	1	35%	35%	46%	31%	41%	49%	1	20%
% Male	59%	69%	1	17%	60%	73%	1	22%	62%	75%	21%	64%	83%	1	30%
% College Grad	58%	62%	1	7%	63%	61%	Ţ	-3%	62%	61%	-2%	66%	69%	1	5%
% HHLD Income > \$100K	23%	31%	1	35%	26%	30%	1	15%	26%	36%	38%	29%	46%	1	59%
% of Hispanic, Latino Or Spanish Origin	13%	23%	1	77%	16%	32%	1	100%	14%	31%	121%	15%	27%	1	80%

Sources: Sponsorlink Nov 2017; Custom Nielsen Research 2018. Survey Respondents: Panel Sample Total n=1032