



FROM VISION TO FRUITION

SPORTS BETTING DOMINATES DISCUSSION AT ICE 2018

The Innovation Group's Survey Answers Key Sports Betting Questions

This year's ICE conference in London revealed an industry continuing to look for new and innovative opportunities to grow revenues and customer engagement:

- Hot global topics ranged from applications of blockchain technology in brick and mortar operations to fully monetizing the maturing e-sports market.
- Emerging markets - Japan and Brazil, in particular - remained a focus, but development discussions are tempered by slow and uncertain regulatory processes.
- Potential legalized sports wagering in the United States generated the most buzz. There is optimism, albeit cautious optimism, that these floodgates will open. Innovation Group clients are engaged in:
 - Building strategic plans and financial forecasts
 - Undertaking lobbying efforts and looking at the impact of a range of legislative outcomes
 - Contacting (largely overseas) third-party platform providers and becoming acquainted with new technologies and integration challenges

On the heels of releasing our [Sports Betting Playbook](#), The Innovation Group produced a targeted, consumer-focused survey on sports betting which we previewed at ICE. Data from this survey will inform operators, state governments, tribes, and lotteries on how consumers may respond to the myriad of sports betting options that could follow the resolution of Christie v. NCAA.

The Innovation Group has begun to use its survey results to develop detailed segment-level insights and market sizing for a number of U.S. markets. Here are some of the findings we discussed at ICE:

- **41% of adults responded that they would make at least one wager per year** ...in a legalized/regulated environment. State averages ranged from 36% - 45%, and we polled in 5 of the 40 states most likely to introduce sports wagering legislation.

- **Half of potential sports bettors are female.** Average incomes were around \$70k, and average age was 40-45. This is a younger and more male demographic than casinos at large, but it also suggests an upside in developing an experience that appeals to a female audience.

[Click here to read the full document.](#)

SAVE THE DATE FOR OUR NEXT WEBINAR:

Sports Betting Survey Results: A Detailed Discussion
Wednesday, March 14, 2018
1:00 p.m. ET

IOWA RACING AND GAMING COMMISSION SYMPOSIUM PARTICIPANTS

The Innovation Group will also be participating in the [Iowa Racing and Gaming Commission meeting](#) on March 6 at Prairie Meadows Racetrack and Casino in Altoona, as the state of Iowa nears the legalization of sports betting. Using the results of our Sports Betting Survey, Innovation Analytics Principal Anthony Mason will lead a discussion on market sizing, entry strategies for stakeholders, and expected player behavior. For more information, contact [Anthony Mason](#).

TRANSCRIPT FROM LAST YEAR'S SPORTS BETTING WEBINAR

In 2017, Emerging Leaders of Gaming hosted "Sports Betting: Opportunities Inside & Out of Nevada", a popular video webinar featuring panelists Will Green (Sr. Director of Research, American Gaming Association), Dan Kustelski (Co-Founder & CEO, Chalkline Sports), and Dan Shapiro (VP of Strategy & Business Development, William Hill US). These expert panelists discussed how casinos can use sports betting for customer acquisition and retention inside and out of Nevada, and how they can provide regulatory updates for gaming jurisdictions throughout the U.S. [Click here for the transcript in Gaming Law Review's January/February issue](#), or watch our video of it below.





ELG Sports Betting Webinar 2017

About The Innovation Group:

The Innovation Group has long been recognized as the world's most respected and sought-after research and advisory firm, specializing in the gaming, entertainment, hospitality and leisure industries. To date, our research and analyses have driven over \$100 billion in investment decisions across more than 80 countries and six continents. The Innovation Group's accuracy and reliability is unparalleled, with our forecasts historically tracking within 5% of actual revenues across the most complex of gaming jurisdictions throughout the globe.

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