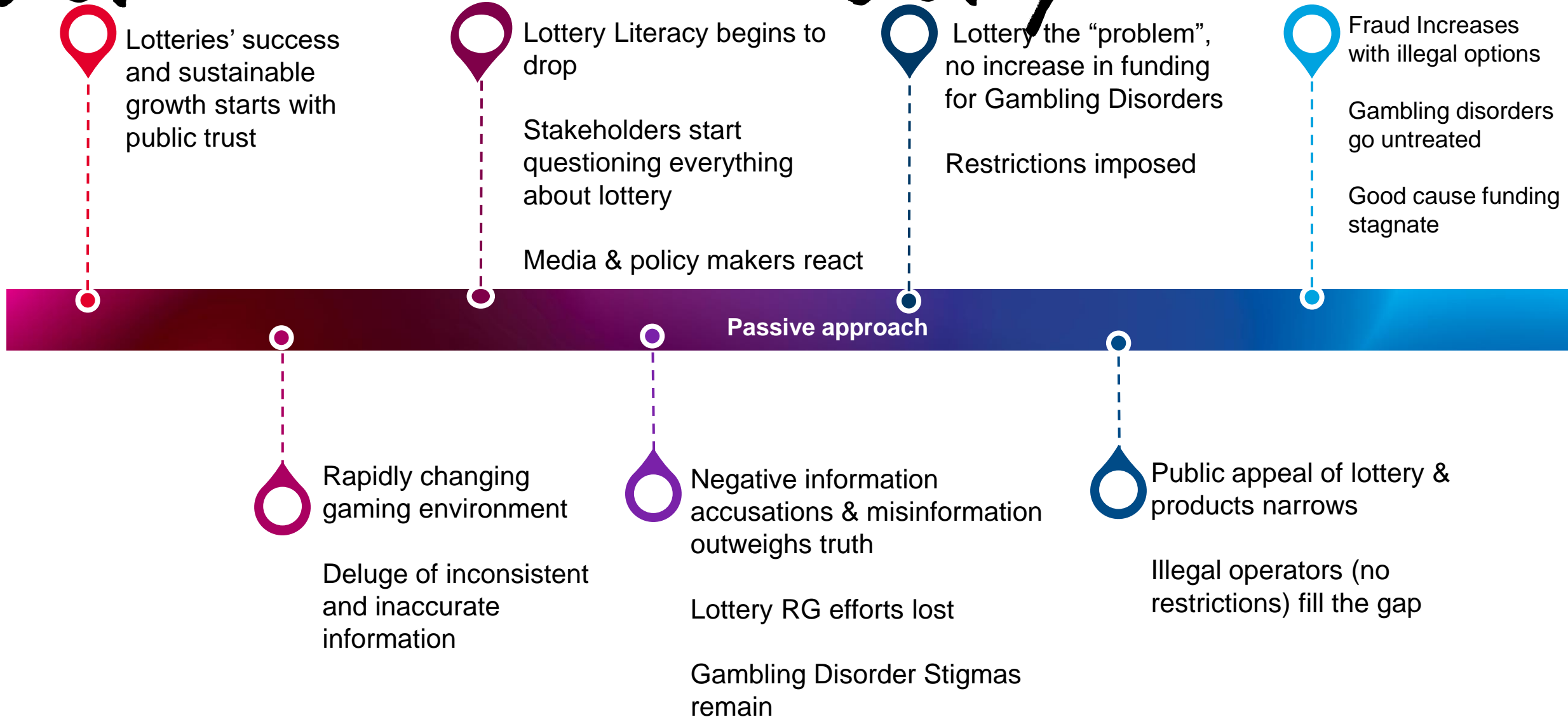# Healthy Play™
Our Common Goal

Carla Schaefer

VP, Responsible Gaming
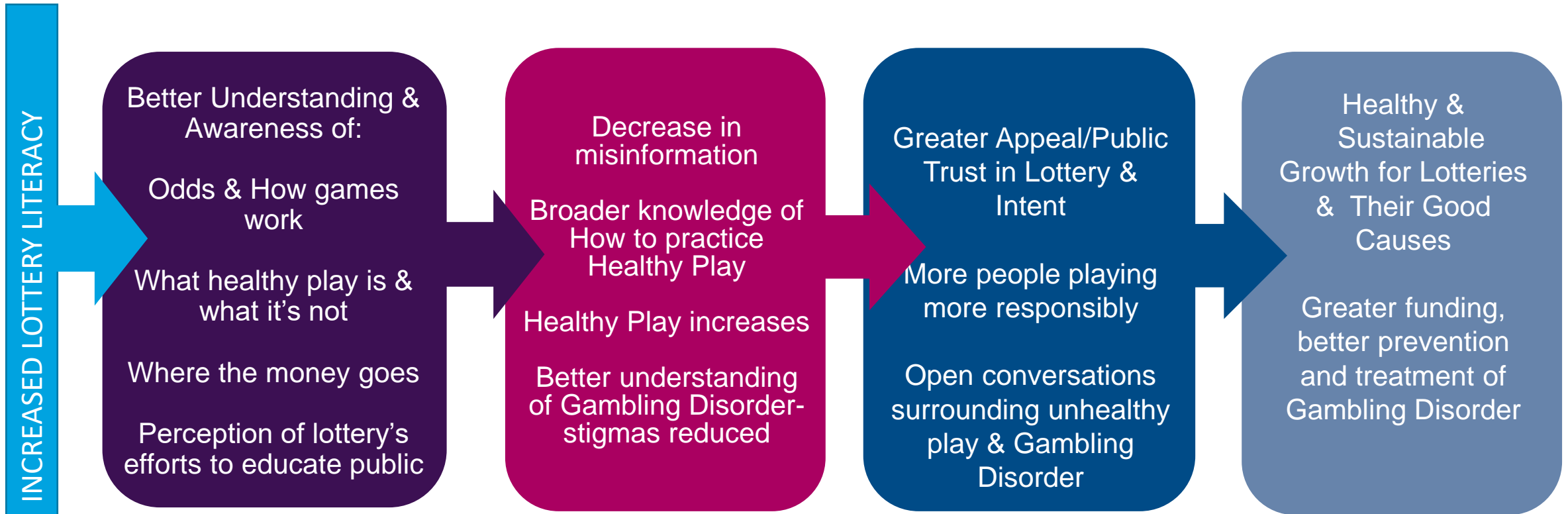
What Is Lottery Literacy? Why Is it important?

Lotteries' success and sustainable growth starts with public trust

Lottery Literacy begins to drop

Stakeholders start questioning everything about lottery

Media & policy makers react

Lottery the "problem", no increase in funding for Gambling Disorders

Restrictions imposed

Fraud Increases with illegal options

Gambling disorders go untreated

Good cause funding stagnate

Passive approach

Rapidly changing gaming environment

Deluge of inconsistent and inaccurate information

Negative information accusations & misinformation outweighs truth

Lottery RG efforts lost

Gambling Disorder Stigmas remain

Public appeal of lottery & products narrows

Illegal operators (no restrictions) fill the gap

Why Is it important?

INCREASED LOTTERY LITERACY

Better Understanding & Awareness of:

Odds & How games work

What healthy play is & what it's not

Where the money goes

Perception of lottery's efforts to educate public

→

Decrease in misinformation

Broader knowledge of How to practice Healthy Play

Healthy Play increases

Better understanding of Gambling Disorder- stigmas reduced

→

Greater Appeal/Public Trust in Lottery & Intent

More people playing more responsibly

Open conversations surrounding unhealthy play & Gambling Disorder

→

Healthy & Sustainable Growth for Lotteries & Their Good Causes

Greater funding, better prevention and treatment of Gambling Disorder

Lotteries Looking for Solutions

Beyond Certifications

- Lotteries recognize importance of an RG Program
- Lotteries need to know that solutions and recommendations will be acceptable to **all** stakeholders and must be:
  - Science-Based
    - Research
    - Academia
  - Vetted by industry and advocacy professionals
  - Measurable – is it working?

How Is Scientific Games Helping?
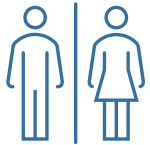
National
Responsible Gaming Research

2022

Research Overview

- Nationally representative survey of over 3,000 people across the United States

- Conducted by Leger; an expert in gaming research.

- Each of the respondents had to be 18 or older and live in a lottery state

- Sample based on specific proportions for

Gender	Age	Ethnicity	Income	Education	Region

- Research included comprehensive content
  - Multiple responsible gaming entities
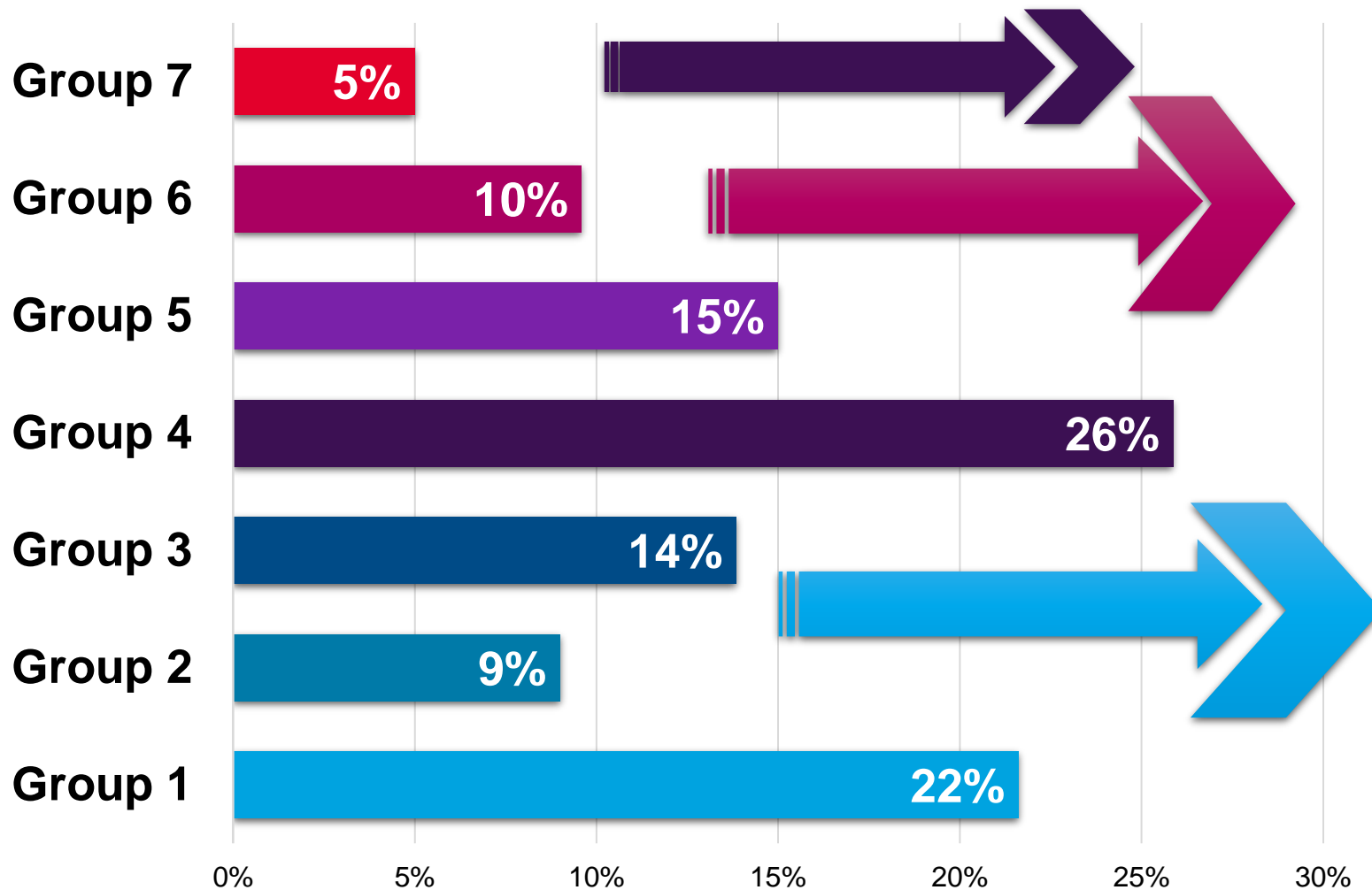 - Scientific Games Lottery Literacy survey

Research Objectives

- The survey had multiple goals, but these primary objectives
  - Establish a benchmark for Lottery Literacy
  - Identify Areas of Lottery Literacy on which to Focus Efforts (nationally & by jurisdiction)
  - Develop the best messaging, mechanisms, and practices to increase lottery literacy and public trust
  - Break the population into more manageable groups (similar to segmentation) so that lotteries can measure the impact of these science-based efforts over time

7 Consumer Groups Identified

Group 7 — 5%
Group 6 — 10%
Group 5 — 15%
Group 4 — 26%
Group 3 — 14%
Group 2 — 9%
Group 1 — 22%

0% 5% 10% 15% 20% 25% 30%

Groups 5, 6 and 7 are the heaviest gambling groups representing nearly a third of America **(29-30%)**

Group 7, making up **5%** of the U.S. population, has within it the strongest subset of those with symptoms of a Gambling Disorder
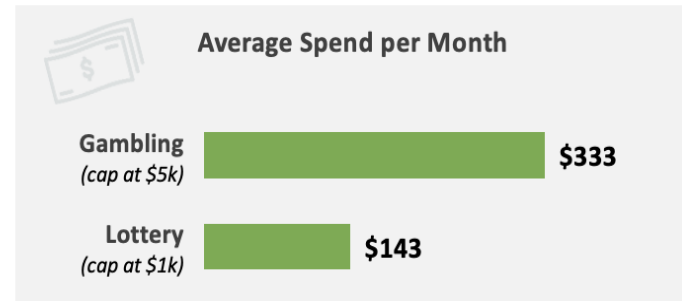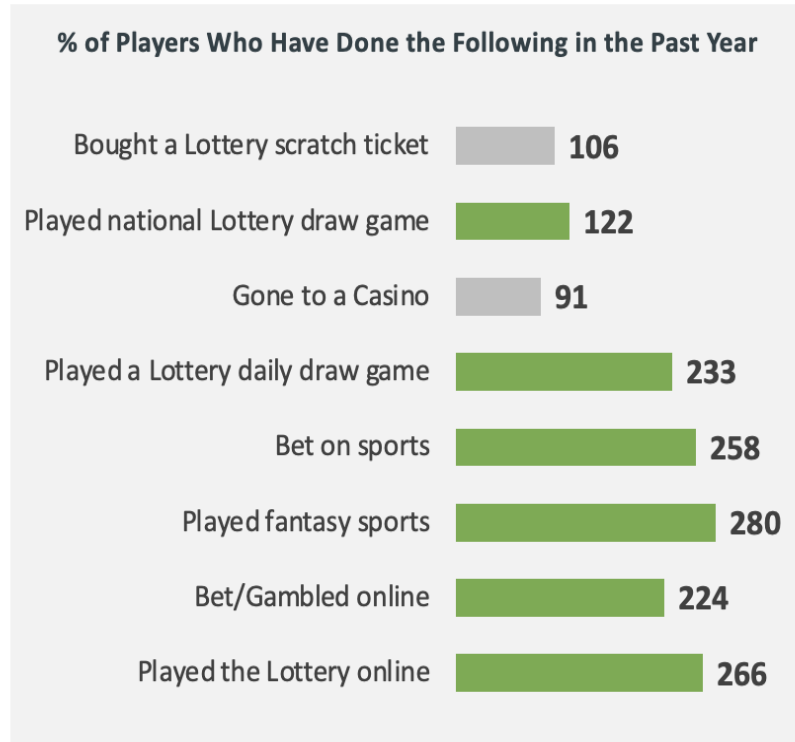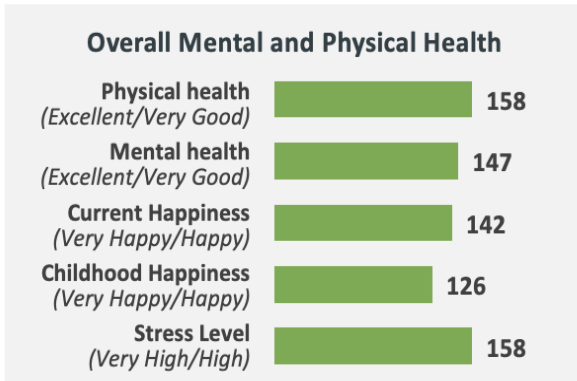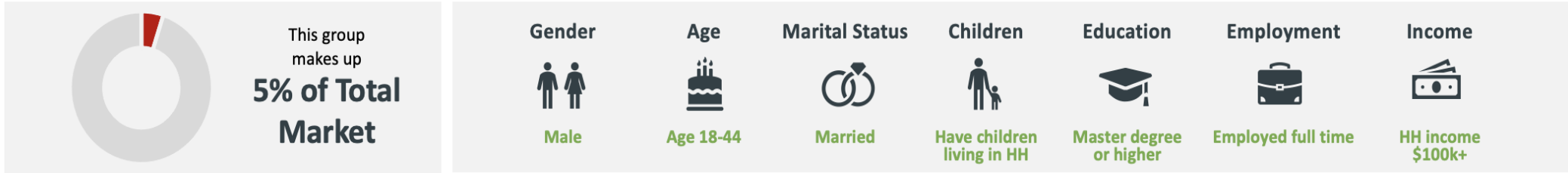
Groups 1 – 4, comprising **71%** of the population, have no problem whatsoever

Examples of Key Findings

Group 7

This group makes up
5% of Total Market

This group over-indexes on:

Gender	Age	Marital Status	Children	Education	Employment	Income
Male	Age 18-44	Married	Have children living in HH	Master degree or higher	Employed full time	HH income $100k+

Overall Mental and Physical Health

Physical health (Excellent/Very Good)	158
Mental health (Excellent/Very Good)	147
Current Happiness (Very Happy/Happy)	142
Childhood Happiness (Very Happy/Happy)	126
Stress Level (Very High/High)	158

■ High Index (>120) | ■ Low Index (<80)

% of Players Who Have Done the Following in the Past Year

Bought a Lottery scratch ticket	106
Played national Lottery draw game	122
Gone to a Casino	91
Played a Lottery daily draw game	233
Bet on sports	258
Played fantasy sports	280
Bet/Gambled online	224
Played the Lottery online	266

Average Spend per Month

Gambling (cap at $5k)	$333
Lottery (cap at $1k)	$143

SNAPSHOT Leger

Example of Key Findings

Overall mental and physical health
(Groups)

	NATIONWIDE % THAT SELECTED THIS OPTION	GRP 1	GRP 2	GRP 3	GRP 4	GRP 5	GRP 6	GRP 7
Physical health *(Excellent/Very Good)*	49%	89	84	110	84	106	128	158
Mental health *(Excellent/Very Good)*	48%	106	85	109	84	98	110	147
Current Happiness *(Very Happy/Happy)*	44%	102	84	111	87	99	110	142
Childhood Happiness *(Very Happy/Happy)*	65%	99	75	104	98	106	103	126
Stress Level *(Very High/High)*	32%	70	78	99	109	117	111	158

C3: Over the past 12 months, would you say that in general your physical health has been...
C3b: Over the past 12 months, would you say that in general your mental/emotional health has been...
C4: In the past 12 months, how would you rate your overall level of stress?
C5: In the past 12 months, how would you rate your overall level of happiness?
C13: How would you describe your childhood?

☐ High Index (>120) | ▪ Low Index (<80)
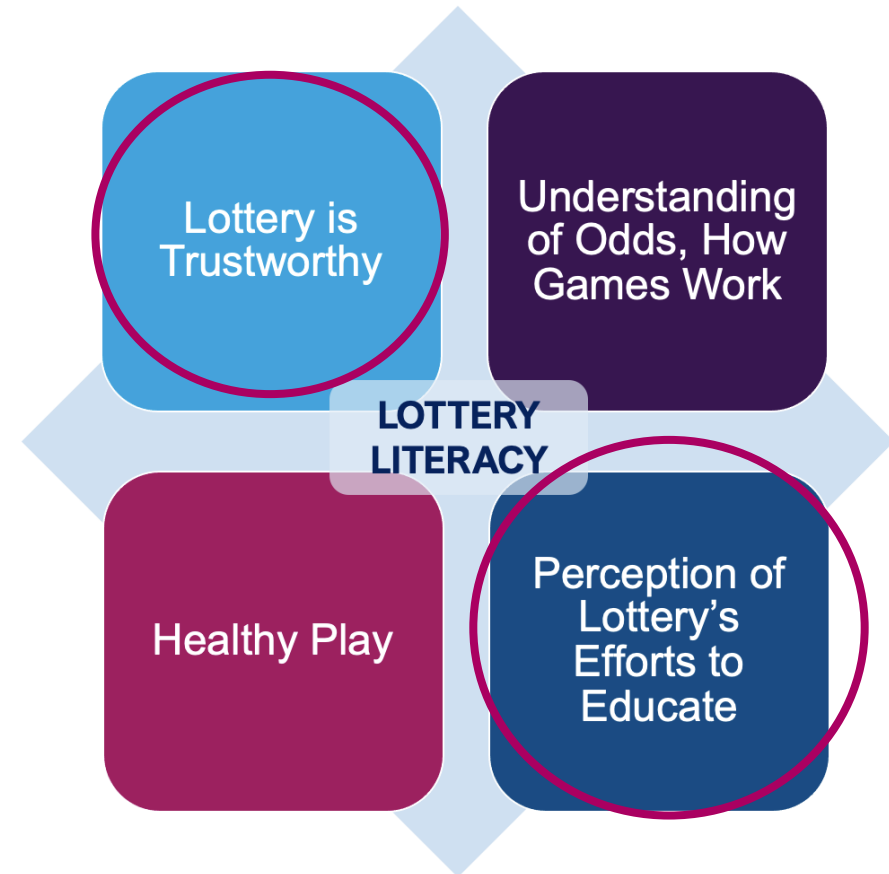
SNAPSHOT   **Leger**

Example of Key Findings

	Total	Male	Female
I am in control when I play Lottery games	67%	67%	67%
I am in control when I gamble at casinos or online	61%	63%	60%
I am in control when I bet on sports.	52%	56% ⬆	48%
I gamble at casinos in "binges," episodes of concentrated, intense gambling with a clear beginning and end.	15%	19% ⬆	12%
I play Lottery in "binges," episodes of concentrated, intense gambling with a clear beginning and end.	15%	18% ⬆	12%
I bet on sports in "binges," episodes of concentrated, intense gambling with a clear beginning and end	14%	19% ⬆	9%

Using Data to Create Actionable Insights

GOAL: Develop most impactful <u>Messaging</u>, <u>Mechanisms</u> & <u>Best Practices</u> to increase Lottery Literacy among **100%** of Stakeholders

- Step #1: Categorized survey statements into 4 Levers

- Step #2: Analyzed survey statements to identify
  - Gaps
  - Messaging to address those gaps

Lottery is Trustworthy

Understanding of Odds, How Games Work

LOTTERY LITERACY

Healthy Play

Perception of Lottery's Efforts to Educate

Perceptions:
100% of Stakeholders

Public Perception – Total Population

	% Who Agree	% Who Disagree
The Lottery makes it easy to find the odds for different Lottery games.		
The Lottery does a good job of promoting responsible gaming hotlines and websites if someone needs it.		
The lottery makes it easy to understand how different lottery games are played		
The lottery does a good job communicating the minimum age to buy and play the lottery.		
Lottery proceeds fund good causes in my state.		

Perceptions Vary by State Benchmark Established

Public Perception by Jurisdiction

% Nationally Who Said 'Yes'	Lottery A	Lottery B	Lottery C	Lottery D	Lottery E
The Lottery makes it easy to find the odds for different Lottery games.					
The Lottery does a good job of promoting responsible gaming hotlines and websites if someone needs it.					
The Lottery makes it easy to understand how different Lottery games are played.					
The Lottery does a good job communicating the minimum age to buy and play the Lottery.					
Lottery proceeds fund good causes in my state.					

Lottery Literacy Link to Public Trust Benchmark Established

	National	State A	State B	State C	State D	State E
If the odds of winning are 1:4, and I buy 5 tickets, I'm sure to win	21%	17%	21%	17%	17%	19%
There is no minimum age to play the lottery, as long as parents are ok with it	18%	15%	19%	17%	13%	15%

Lottery Literacy
Why Educate All Stakeholders?

Group Index against Total Population

	% Nationally who said "Yes"	Grp 1	Grp 2	Grp 3	Grp 4	Grp 5	Grp 6	Grp 7
Problem gaming is only an issue for poor people	17%							
There is no minimum age to play the lottery, as long as parents are okay with it	18%							
My chances of winning get better after I have lost	14%							
If the odds of winning are 1:4, and I buy 5 tickets, I'm sure to win	21%							

🟩 High Index (>120) | 🟥 Low Index (<80)

Putting Insights Into *Action*
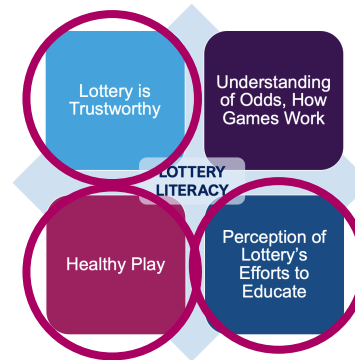
FAQ

Isn't a Gambling Disorder just a financial problem?

FAQ

Why is there a minimum age to buy lottery tickets?

Putting Insights Into *Action*

Current	New
Gambling Problem/ Problem Gambling/ Problem Gambler	Gambling Disorder / Someone with a Gambling Disorder
Self-Exclude	Opt Out Time Out Taking a Break
Lottery dictates iLottery limits	Registration process requires player set personal limits for time and money

LOTTERY LITERACY

- Lottery is Trustworthy
- Understanding of Odds, How Games Work
- Healthy Play
- Perception of Lottery's Efforts to Educate

Putting Insights Into *Action*

Current	New
Reality checks flash time or money spent	Reality check is a myth/truth quiz
Problem Gambling message printed on Draw ticket by Retailer(@ terminal) & Player (@PCHD)	Truths/Myths, How to Play Healthy tips, Lottery Literacy Questions,FAQ'S

Example: Rotate Healthy Play Tips on vending machines, point of purchase monitors:

lottery; then stick to them! …………What Does Healthy Play Look Like?

Myth or Truth?

The odds in a game get better after I have lost

Myth or Truth?

If the odds of winning are 1:4 and I buy 5 tickets, I am guaranteed to win

though live chat, text email or phone. Visit XX.org or call 1-800-GAMBLER

Play Responsibly

Supports Lotteries in Certifications
Research, Messaging, Mechanisms and Best Practices

- **Aligns with Lottery's Purpose**

- **Increases Lottery Literacy**

- **Fulfill NASPL & WLA RG Requirements**
  - Research-SG has Created Benchmark
  - Employee Training
  - Products, Services, Retailers
  - Online, iLottery, Sports Betting
  - Marketing & Advertising, PR Efforts
  - Players Education / Awareness
  - Stakeholders: Media, Policy Makers, Public
  - Measurement: Lotteries can learn impact of RG efforts

How Does the Process Work?

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┌─────────────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐
│   Present Healthy Play  │      │                     │      │  Research Results   │
│   Research, Messaging,  │ ───▶ │  Create Customer    │ ───▶ │  and HP Toolset     │
│   Best Practices to     │      │  toolkit            │      │  Reviewed with      │
│   Internal Stakeholders │      │                     │      │  Lottery            │
└─────────────────────────┘      └─────────────────────┘      └─────────────────────┘
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┌─────────────────┐      ┌─────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐
│  Benchmark      │      │  Each Lottery   │      │  Launch HP          │      │  Measure Results via│
│  Against Total  │ ───▶ │  Identifies     │ ───▶ │  Solutions          │ ───▶ │  Annual Survey to   │
│  Market Data    │      │  Areas for Focus│      │  Recommended for    │      │  Determine Most     │
│                 │      │                 │      │  Improvement        │      │  Impactful Solutions│
│                 │      │                 │      │                     │      │  Adjust             │
└─────────────────┘      └─────────────────┘      └─────────────────────┘      └─────────────────────┘
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Thank You

Questions?