

Insights and Data to Help Manage Today's Changing Consumer Environment

Over the years, lotteries have been consistent and reliable contributors to a wide range of good causes and diligent in their efforts to earn and keep the public's trust. But with rapid changes to the gaming environment along with a steady stream of inaccurate and false information floating around, even the most supportive stakeholders could find themselves questioning a lottery's intent in today's environment. With March being Problem Gambling Awareness Month, we wanted to use this issue of Data in Motion to share with our readers some of the research-based efforts our company has taken to help our lottery partners navigate these uncertain times.

In a previous issue of Data in Motion (July 2021), we shared how industry insights and Scientific Games' own research revealed that the greater a jurisdiction's "lottery literacy," the greater the public trust. Lottery literacy is defined as:

Lottery Literacy (n.) when all stakeholders are educated about the lottery, including its games and offerings, how to play, the odds, minimum age, where the money goes, what healthy play looks like, and how to get help if play becomes unhealthy.

The research also makes clear that a passive approach to building and maintaining lottery literacy (e.g., posting information on the Lottery's responsible gaming page) was not enough – lotteries need to proactively and consistently communicate the tenets of lottery literacy to all of a jurisdiction's constituents, not just lottery players. In surveying the lottery landscape, we see lotteries attempting to communicate lottery literacy to varying degrees using a variety of methods, but is it working? Perhaps the greatest challenge for any lottery's responsible gaming program is how to measure the impact of those efforts and identify where there may be gaps.

Industry Leading Healthy Play Study

With an increase in requests for assistance on this front from our lottery partners, Scientific Games embarked on an extensive, first-of-its-kind responsible gambling study: The Healthy Play Study and Toolkit. For the first time ever, the study incorporated multiple surveys developed by trusted responsible and problem gambling organizations. The Healthy Play Study, finalized in 2022, was conducted in the U.S. by the highly respected research firm Leger and had multiple goals, but three primary objectives:

1. Help lotteries identify gaps in lottery literacy within their own jurisdiction and benchmark their metrics against a national sample
2. Identify and develop messaging, mechanisms, and best practices to increase lottery literacy and public trust
3. Break the population into more manageable groups (similar to segmentation) so that lotteries can measure the impact of these data-driven efforts to improve lottery literacy over time

Breaking the total population in to smaller sub-groups based on their behaviors and beliefs allowed us to provide our lottery partners with actionable insights on how and what they communicate to these groups. For example, the research showed that the group that exhibited the highest percentage of behaviors related to a gambling disorder (Group 7) also over-indexed in terms of their stress levels:

Stress Level by Group

Stress Level Index (High/Very High)

National	Group 1	Group 2	Group 3	Group 4	Group 5	Group 6	Group 7
32%	70	78	99	109	117	111	158

In addition to establishing a national benchmark, the study also provided jurisdiction-specific insights into those areas where a lottery had excelled at promoting lottery literacy, and those areas where improvements could be made. The chart below, which has been anonymized, is a sampling of these results.

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.	40%	38%	45%	42%	41%	36%
The Lottery does a good job of promoting responsible gaming hotlines and websites if someone needs it.	42%	40%	46%	52%	50%	40%
The Lottery makes it easy to understand how different Lottery games are played.	43%	40%	49%	50%	47%	37%
The Lottery does a good job communicating the minimum age to buy and play the Lottery.	49%	49%	53%	50%	54%	44%
Lottery proceeds fund good causes in my state.	47%	56%	46%	45%	57%	40%

Final Thoughts

As an industry leader with 100% focus on lottery, Scientific Games is passionate about helping our lottery partners continue to grow funding for the good causes they support in a responsible, sustainable manner. Our partners have access to the Healthy Play Study and Toolkit, which includes guidance and research-backed messaging, mechanisms, and practices to increase lottery literacy, along with ways to measure the impact of these efforts. If your lottery is interested in learning more, please contact your Scientific Games representative.



Source: Leger's 2022 Healthy Play Study
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Scientific Games is a Platinum Member of the National Council on Problem Gambling (NCPG), an internationally recognized responsible gaming advocacy organization. We are proud to annually support the NCPG's Problem Gambling Awareness Month with multiple initiatives, including this issue of Data in Motion.