

Data in Motion

Marketing & Insights

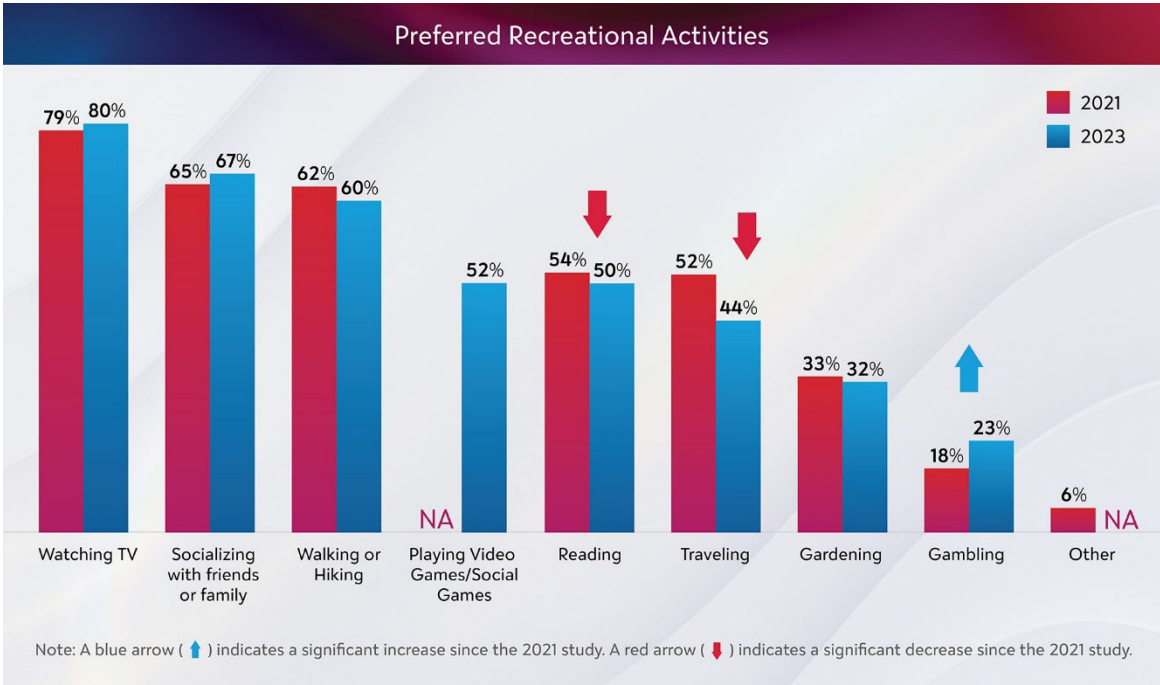


January 31, 2024

Recreation Trends

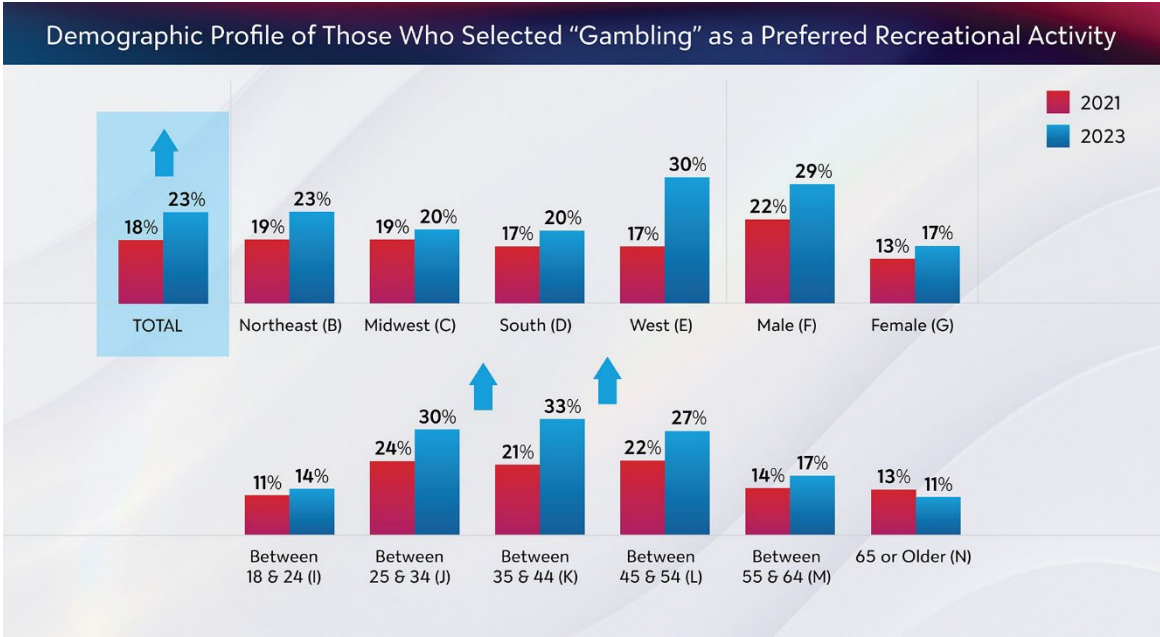
Scientific Games conducts research on a regular basis to stay informed of consumer and industry trends. As part of that effort, we conduct a national survey every other year that tracks recreational preferences and covers a wide range of activities, from watching television to hiking to gambling. The most recent survey was conducted in Q4 of 2023 and we were able to compare the results of that survey with the survey we fielded in Q4 of 2021.

When 3,193 consumers were given a list of recreational activities to choose from and asked which they preferred, the only activity that experienced notable growth since 2021 was Gambling, which was up five percentage points. Traveling and Reading saw the largest declines, dropping eight percentage points and four percentage points respectively.



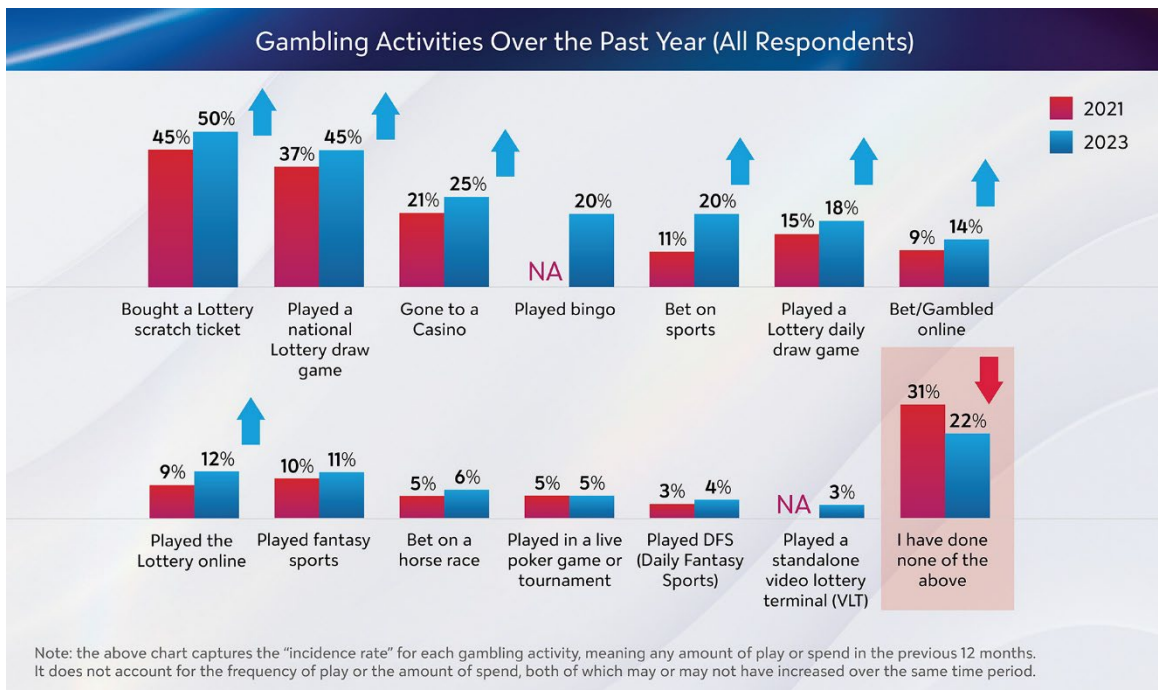
Those who chose Gambling as a preferred recreational activity were more likely to be:

- Males
- Between 25 and 54 years of age
- Reside in the Western region of the U.S.



What Are They Gambling On?

“Gambling” is a broad category with lots of options so the survey also asked what gambling activities the respondents participated in over the past twelve months. As the chart below shows, lottery products did well overall versus 2021, with a five-point increase in the percentage purchasing a scratch ticket and an eight-point increase in the percentage purchasing a national draw game (e.g., Powerball, Mega Millions). But the big winner was sports betting which saw a nine-point increase with 20% of the total respondents indicating that they had participated in this activity.



Final Word

Based on the results of this latest survey, it’s fair to say that gambling as a recreational activity is alive and well. Many of the gambling options that were negatively impacted by COVID-19 are thriving again, with sports betting making an especially strong comeback. What does this mean for our industry? On the plus side, it’s comforting to know that the space we are in is strong and growing. But it also means that there is more competition than ever for the same share of the consumer’s wallet. In such a competitive environment, it’s more important than ever that we take a holistic approach to managing our product portfolios,

building strategic product plans with well-researched games that offer clear value propositions and differentiate our products from other options in market.

Source: Scientific Games' Bi-Annual National Survey
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