

September 16, 2026

Beyond Awareness: The Next Phase of Responsible Gaming

What Healthy Play research tells us about changing behavior, player protection and the shared responsibilities of lotteries and vendors

Responsible gaming has long been central to lottery. What is changing is the environment around it.

Lottery, casinos, sports betting, online gaming and emerging options such as prediction markets are giving Americans more ways to play. Scientific Games' 2025 *Healthy Play* research found that among surveyed Americans who are not morally opposed to gambling, 83% participated in at least one gambling activity during the past year—the highest level recorded by the research since the pandemic.

This rapid expansion makes player protection a shared responsibility across the gaming industry. As the industry recognizes Responsible Gaming Education Month, this edition of Data in Motion examines what the research tells us about healthy participation, the limits of awareness alone and the roles lotteries and vendors play in advancing player protection.

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Understanding *Healthy Play*

Scientific Games launched *Healthy Play* research with Lotto Research in 2021. Since then, 16 states have participated, contributing to a national benchmark that examines player attitudes and behaviors within the broader gaming environment.

The research provides an encouraging starting point: the majority of lottery players participate responsibly. Players in the healthiest segments tend to report lower stress and greater happiness and are more likely to view lottery as entertainment rather than a financial strategy or primary activity.

Together, the findings help define the attitudes and behaviors associated with healthy participation—not only potential risk.

What Have We Learned from *Healthy Play* Research?



A More Complex View of Player Behavior

Healthy participation is only part of the picture. The research also demonstrates the value of understanding behavior across the broader gaming environment.

In the 2025 study, 31% of surveyed Americans were classified within higher-risk segments, consistent with the previous year’s research. People in these segments were more likely to participate in multiple forms of gaming. For many respondents reporting gambling-related issues, sports betting was the activity most frequently associated with those concerns. Two-thirds of participants in the highest-risk segment also expected to increase their sports-betting spending in 2026.

31% of surveyed Americans were classified within higher-risk segments.

2 in 3 participants in the highest-risk segment expected to increase their sports-betting spending in 2026.

The purpose of looking across gaming activities is not to attribute risk to one product or category. It is to recognize that people may participate in several activities and that their overall behavior can change even if their participation in any one category appears relatively stable.

This broader perspective gives lotteries additional context for evaluating their

responsible gaming programs and helps vendors consider how their products and platforms can support player protection.

Awareness Is Important—But It Is Not the Finish Line

One of the more revealing findings from the *Healthy Play* research is that familiarity with responsible gaming does not necessarily translate into healthy behavior.

Players at greater risk of gambling-related harm are often among the most well-versed in responsible gaming information. Younger Americans also report greater awareness of responsible gaming messaging than those age 45 and older.

The industry has made progress in creating awareness, but awareness alone does not demonstrate that a message is personally relevant or influences behavior.

The 2025 research provides additional insight into how messages resonate with different player segments.

Among players in the low risk segment, 84% rated “never put gambling ahead of family, friends or financial commitments” as effective. Among players in the highest-risk segment, 76% rated “take a break or stop if play stops being fun” as effective.

Responsible Gaming Message Effectiveness by Player Segment

	NATIONAL BENCHMARK	High Risk Segment	Moderate Risk Segment	Low Risk Segment
Never put gambling over your family and friends or your financial commitments.	73%	67% -6 pts	63% -10 pts	84% +11 pts
Not letting play interfere with work or family obligations.	71%	69% -2 pts	65% -6 pts	80% +9 pts
Setting a budget and playing only within your financial means.	70%	69% -1 pts	65% -5 pts	82% +12 pts
It's important to me that my lottery operates responsibly.	69%	76% +7 pts	66% -3 pts	79% +10 pts
Taking a break or stop playing entirely if playing stops being fun.	67%	76% +9 pts	61% -6 pts	77% +10 pts

Survey question: How effective is each responsible gaming message? Five-point scale: 1 = not effective; 5 = effective

How to Read: Point differences are calculated against the national benchmark. Top 2 Box = % rating 4 or 5.

Click to enlarge the chart.

The results show that perceptions of effectiveness differ across segments. While the ratings do not establish that a message changes behavior, they can help lotteries evaluate which language different audiences consider relevant and guide further research into what supports healthier decisions.

Turning Research Into Action

Research can identify patterns, test assumptions and show how attitudes differ across player segments. Lotteries and vendors then have distinct but connected roles in applying those insights.

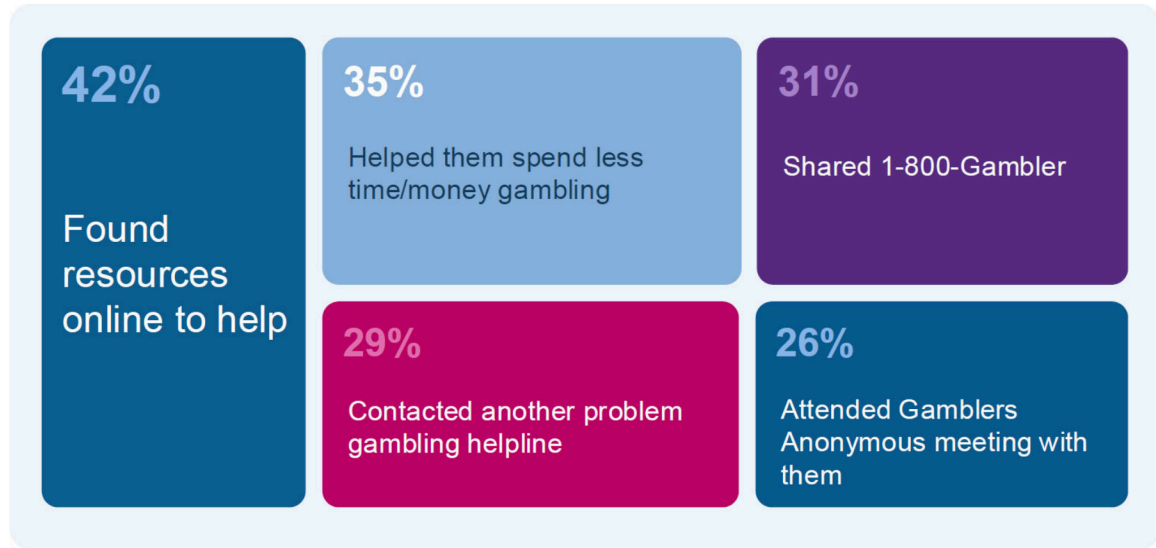
The Lottery's Role

Lotteries have the direct relationship with their players and responsibility for the policies and programs that govern play. Research can help inform decisions about:

- Emerging player behaviors and potential risks
- Responsible gaming education and messaging, including which messages resonate with different player segments
- The availability and configuration of player-protection tools
- Responsible gaming across retail and digital products
- Program evaluation over time

Accessible resources are an important part of that work. The *Healthy Play* research found that 29% of surveyed Americans knew someone experiencing a gambling problem and wanted to help. Among that group, 60% reported successfully providing assistance, with finding resources online the most frequently cited action.

How Americans Helped Someone Experiencing a Gambling Problem in 2025



Respondents could select more than one answer.

The finding reinforces the practical value of making credible information and support easy to find. Lotteries are best positioned to determine how those resources are communicated to their players and integrated into their broader responsible gaming programs.

The Vendor's Role

Vendors have a corresponding responsibility to give lotteries the capabilities and information needed to put their policies into practice. Regulatory and certification requirements are the baseline; player protection should be considered from the beginning of product and platform development.

For vendors, that can include:

- Applying responsible gaming considerations during game development and review
- Building configurable spending, session and other controls into player account management platforms
- Providing access to play history
- Supporting lottery-established limits, policies and responsible gaming protocols
- Researching changing player attitudes and behaviors

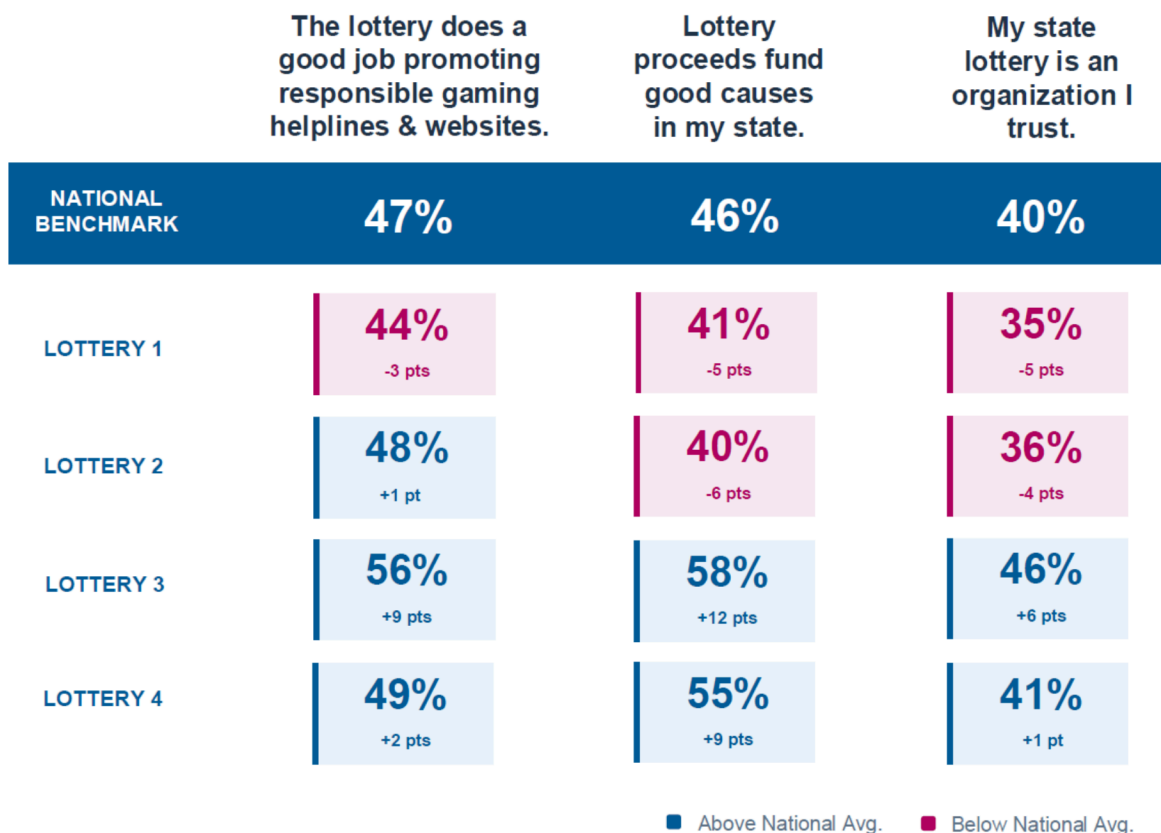
Data and AI may create additional opportunities to identify patterns that signal changes in play and give lotteries better information. Their use must reflect lottery policy, privacy protections, transparency and human oversight. Data should inform decisions, not replace professional judgment.

Protecting an Industry Strength

Responsible gaming is one of lottery's longstanding strengths. It is part of the trust lotteries have built through public oversight, accountability and their commitment to generating funding for beneficiary programs and good causes.

Healthy Play research measures that relationship through national benchmarking. The findings indicate that awareness of lottery beneficiaries and winners is associated with stronger trust, although perceptions vary by market.

Trust and Reputation vs. National Benchmarks



Survey Question: Please indicate on a scale how much you agree with the following statements, where 1 = strongly disagree and 5 = strongly agree

How to Read: Each lottery is compared with the national benchmark for the same measure. Top 2 box % agree | Difference shown in percentage points

Click to enlarge the chart.

Final Word

Lottery has earned trust through its commitment to responsible gaming, public accountability and public purpose. As gaming options expand, maintaining that trust will require moving beyond awareness to make player protection more relevant, practical and embedded in the experience.

Research provides the evidence. Lotteries translate that evidence into policy and program decisions. Vendors support those decisions through responsible product design, configurable tools and technology. Protecting players—and preserving what makes lottery different—depends on both.

CONTRIBUTORS



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Source: *Scientific Games Healthy Play Research*, 2025.

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