



Promoting Responsible Gaming through Healthy Play: A Detailed Perspective for Lotteries

Published December 17, 2024



The \$371 billion global lottery industry offers exciting entertainment for players and provides steady funding for vital good cause programs in communities worldwide. However, today's ever-connected world and the growing accessibility of online gaming have amplified the spread of misinformation about lotteries, increasing the focus on

responsible gaming. This has led lotteries to seek additional guidance and support so they can continue to raise funding in responsible, sustainable ways.

Scientific Games grounded its award-winning *Healthy Play* program in research and science-based methods to ensure it positively impacts all lottery stakeholders. A core element of the program's success is its commitment to educating everyone in a jurisdiction about how to practice healthy lottery play.

One of *the Healthy Play* program's main goals is to improve "lottery literacy." This involves helping lotteries educate the public on the key tenets of how lotteries work, from understanding the odds to recognizing that winning is not guaranteed to knowing the minimum age to play. This kind of education helps manage expectations, which is especially important in preventing gambling disorders. There are multiple facets of lottery literacy, such as the public's perception and understanding of lotteries, how games work, what it means to practice healthy play, and most importantly, prevention and awareness of a gambling disorder and resources to get help.

Each lottery that participates in the program has access to the *Healthy Play* toolkit, which covers multi-faceted practical applications of how to address the gaps in lottery literacy identified in the *Healthy Play* research. The toolkit fulfills the responsible gaming framework requirements of the World Lottery Association and the North American Association of State and Provincial Lotteries.

Healthy Play Guided by Research

Scientific Games partnered with independent research firm Lotto Research to conduct industry-leading responsible gaming research known as *Scientific Games' Healthy Play* study.

The study goes beyond typical player samples and represents all socio-demographic attributes to reflect a full cross-section of the adult population, ensuring comprehensive findings. This approach not only strengthens lottery literacy but also helps them understand gaps and misperceptions among their stakeholders, which, if unaddressed, could erode public trust in the lottery.

The *Healthy Play* study is comprised of questions from internationally accepted responsible gaming research and specifically tailored lottery-centric questions. As the first of its kind in the lottery industry, *the Healthy Play* research program includes data from approximately 15,000 respondents across the U.S., spanning multiple years and 15 lotteries. Findings from the study are not limited to lottery players, as is typical in other

responsible gaming research, but instead include a sampling of every lottery stakeholder, in other words, every person who lives in a lottery jurisdiction.

This ongoing research, conducted in 2021 and 2023 and expanded to include global findings in 2024, offers historical and real-time insights delivered in a *Healthy Play* research report. In the report, a lottery is benchmarked against national and anonymized data from other participating lotteries. This enables a lottery to measure the efficacy of its responsible gaming efforts over time.

Even in the benchmark study, a lottery can see how they compare to the national or total population and other jurisdictions or regions. Strengths and areas of improvement are identified right from the start, then help them with solutions to change the trajectory of the responsible gaming conversation.

Putting Research into Action

A survey conducted as part of the *Healthy Play* research highlights public misperceptions, or myths, such as the belief that buying five tickets in a game with odds of 1:4 guarantees a win. When 22% of participants indicated this misconception, it became clear that educational gaps exist. *Healthy Play* addresses these gaps through targeted messaging and continuous education campaigns, emphasizing that lotteries are games of chance and that losses are an expected outcome.

Some Gaps in Lottery Literacy May Seem Benign But Are Vitally Important

SURVEY STATEMENT
More people seem to win in the larger cities/states because more people live there.

49% AGREED | **51% DISAGREED**

- If 51% of the population disagrees with this, they don't trust that lottery draws are random...and are they fixed?
- Public trust is eroding.

SURVEY STATEMENT
If the odds of winning are 1:4, and I buy five tickets, I'm sure to win.

22% AGREED

- If someone buys five tickets from a game with odds of 1:4, and believe they are sure to win, then **don't** win...
- Trust in the Lottery erodes.

Healthy Play emphasizes the importance of measuring lottery literacy. Consistently, it was revealed there is a correlation between lottery literacy and healthy play. The greater a person's lottery literacy, the more responsibly they play.

This rule extends to components of lottery literacy that includes how games are played, and winners are determined. These may seem less important, but one of the most revealing insights from the study was that the group that exhibited the highest percentage of behaviors related to a gambling disorder was consistently more likely to agree with common myths in these areas, as illustrated in the following figure.



This is further evidenced in the following chart, which shows how the results vary from jurisdiction to jurisdiction and how that impacts the percentage of people exhibiting symptoms of a gambling disorder.

Healthy Play Research

STATEMENT PEOPLE AGREE WITH	NATIONAL	STATE A	STATE B
If the odds of winning are 1:4, and I buy five tickets, I'm sure to win.	21%	22%	12%
If I don't follow my good luck ritual/strategy, I'm sure to lose.	22%	21%	16%
My chances of winning get better after I've lost.	16%	15%	8%

The percentage of people exhibiting symptoms of a gambling disorder in **STATE B** is less than half of **STATE A** and **NATIONALLY**.

Scientific Games analyzes *Healthy Play* Research to identify these gaps, and the company works with lotteries to employ the *Healthy Play* toolkit—the best practices, messaging and mechanisms to address the gaps.

Another key finding in the *Healthy Play* research revealed the group of people that exhibited the highest percentage of behaviors related to a gambling disorder also over-indexed in their stress levels. So messaging that shames a person or exacerbates stress can negatively affect responsible gaming behavior.



Real World Examples

And it's working. The Pennsylvania Lottery participated in the 2021 *Healthy Play* study, established benchmarks for lottery literacy, and identified areas for improvement. To address its gaps in lottery literacy, the Lottery created and launched its Stay Curious campaign leveraging social media and website marketing. At the same time, the state of Pennsylvania was experiencing a rapidly expanding gaming market.

The Pennsylvania Lottery joined the 2023 *Healthy Play* study, which revealed significant improvement in the Lottery's literacy KPIs as a result of the Lottery's actions. The Pennsylvania Lottery saw progress across the board, including increasing its level of public trust by 20%.

The Stay Curious ads also garnered impressive numbers, achieving above-average completion rates for the ads, an 87% awareness rate of the state's problem gambling helpline, and a 49% ad recall for our responsible gaming messaging.

Most impressively, despite Pennsylvania having more gambling options than any other state, it boasts a smaller percentage of people with symptoms of a gambling disorder compared to the national average. This demonstrates that *Healthy Play* can have a tangible and positive impact when integrated into comprehensive campaigns.

Ongoing *Healthy Play* research identifies emerging gaps and works to adjust strategies to improve lottery literacy and responsible gaming initiatives even more.

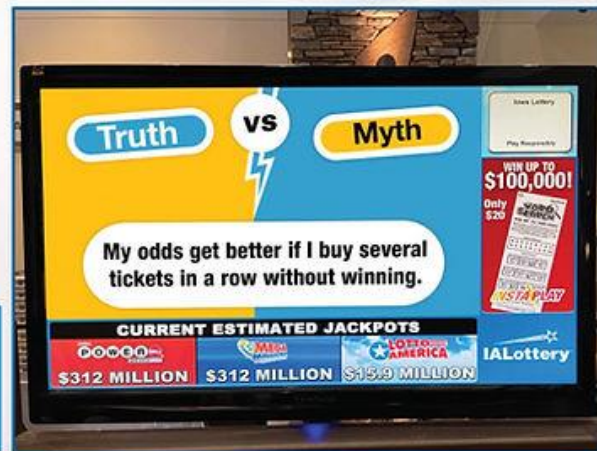
Lotteries like the Iowa Lottery, which participated in Scientific Games' *Healthy Play* study for the first time in 2023, are also finding success.

The Iowa Lottery's benchmark study provided insights into stakeholders that could immediately be acted upon. These insights are already paying off through the creation of social media and retail campaigns to educate all stakeholders, improve lottery literacy, and achieve the most positive impact, especially for those needing it the most.

How Iowa Is Putting Insights into Action

SERIES FOR LOTTERY SCREENS AT RETAIL

- Iowa Lottery owned and branded
- Helps players, retailers and the public
- Messaging from the Lottery in 2,500 retail locations



These real-world applications of the *Healthy Play* philosophy reflect the commitment of lottery organizations to foster safe, healthy and enjoyable gaming environments. By continuously adapting to research findings and implementing science-based communication strategies, the lottery industry can protect players, reduce gambling disorders and build long-term trust with the public.

The positive, science-based best practices, messaging and mechanisms included in the *Healthy Play* toolkit focus on what healthy lottery play behavior looks like and awareness about gambling disorders in a non-judgmental way to ultimately help individuals who may be struggling without stigmatizing the disorder.

Looking ahead, the *Healthy Play* program continues to evolve and strives to develop consumer insights from ongoing studies. It will also provide lotteries with the tools needed to help all potential stakeholders practice healthy play and continue responsible and sustainable growth of funding for good cause programs.



HEALTHY PLAYTM

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