Data*in*Motion

Marketing & Insights

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

Over the years, Scientific Games has formed strategic partnerships with some of the most respected market research firms in the world. One of those partners, Leger, recently conducted a syndicated study that focused on the four generations (Gen Z, Millennials, Gen X, and Boomers) and explored what players value most across various gaming activities, including lottery. The full report will be available in the coming weeks, but Leger recently shared some highlights that we felt our Data in Motion readers would find interesting.

The study, conducted in 2022, focused on players across six key gaming categories: Lottery (split by Draw and Instant Scratch games), Sports Betting, Casino Gambling, Online Gambling, and Video/Social Gaming. The study provided insights on what each player generation valued and how those values drove play behaviors such as frequency, spend, and future intention to play.

The Nine Player Values
The study asked respondents to rank the importance of nine different values with respect to their engagement with various gaming activities. These nine values are listed below along with some interesting highlights:

1. Convenience
Convenience was cited as a primary value across the board. It was the #1 driver across the entire range of gaming, and in the Top 3 of five of the six gaming categories. Video/Social Gamers and Online Gamblers cited Convenience as their #1 driver of play.

2. Time Spent
Time Spent, or the time it generally took to participate in each activity, was the #2 driver for Casino Gamers, Sports Bettors, and Video/Social Gamers.

3. Entertainment
Instant Scratch Players and Sports Bettors both cited Entertainment as the #1 driver of their player value.

4. Regular Play
Both Draw Game Players and Casino Gamers were driven by the ability to play their games regularly and listed Regular Play as their #1 driver.

5. Luck
Although luck played a part in driving player value across all the gaming categories, Sports Bettors in particular felt that luck played a bigger role in their ability to bet and win.

6. Money Spent
Money Spent was not a factor at all for Social/Video Gamers but was an important driver (4th) for Instant Scratch Players (especially Heavy Spending Instant Scratch Players) and Casino Gamers.

7. Winning/Losing
The Winning proposition was a Top 3 motivator for Online Gamblers, driven primarily by the Low Spenders in this category.

8. Winning Odds
Although a tertiary driver for most player types, Winning Odds did have a stronger impact on future play among Heavy Spending players in both the Casino and Sports Betting categories.

9. Social (vs Individual)
Leger's study confirmed that Gaming is more of an individual activity than a social activity for most respondents. Heavy Spending Sports Bettors and Online Gamblers, however, are driven in part by the 'social connection' they associate with gaming.

Rank and File
The chart below shows how Instant Scratch Players, sorted by average annual spend, ranked each of the above nine values:

Importance of Various Play Values to Instant Scratch Game Players by Spend

Type of Player	Instant/Scratch Players	High Spenders $500+	Medium Spenders $100 - $499	Low Spenders $99 and Under
Entertainment	1	7	3	1
Convenience	2	3	1	4
Time Spent	3	2	4	2
Money Spent	4	1	5	6
Luck	5	4	2	5
Regular play	6	5	7	3
Winning Odds	7	9	8	7
Winning/Losing	8	6	6	9
Social	9	8	9	8

The chart below shows how Draw Game Players, sorted by average annual spend, ranked each of the above nine values:

Importance of Various Play Values to Draw Game Players by Spend

Type of Player	Draw Game Players	High Spenders $1000+	Medium Spenders $200 - $999	Low Spenders $199 and Under
Regular play	1	1	4	1
Convenience	2	3	1	4
Money Spent	3	5	2	5
Entertainment	4	4	7	2
Time Spent	5	7	3	3
Luck	6	2	6	6
Winning Odds	7	6	9	7
Social	8	9	8	8
Winning/Losing	9	8	5	9

Final Word
We are excited to dig into Leger's full report when it becomes available and will share highlights in future editions of Data in Motion. If you want more than just highlights, the link below will take you to Leger's site where you can request additional information.

Leger Player Value Report