

Scientific Games Responsible Gaming Research 2025

Presentation to NCPG Conference – July 2026



Simon Jaworski
Founder & CEO
Lotto Research

SG Responsible Gaming Research Timeline

- Started in 2021
- Four years of research so far (2021, 2023, 2024, 2025)
- Q4 field period to match sports betting primetime.
- States that have participated include:



SG RG Research – Key clients

“From our introduction to the RG research effort jointly focused on by Scientific Games and Lotto Research a little over two years ago, this research has helped us significantly to better understand the impact that Iowa is making with regards to responsible gaming.



We (Iowa Lottery) now understand more directly how our efforts have (or haven't) impacted key segments and has helped us to initially focus our efforts for WLA Level 2 Responsible Play certification and is now playing a more critical role as we work ahead to implement and adapt our efforts here. This has become a key research effort for the Iowa Lottery.”

Jonathan Roth, Sales & Marketing Bureau Chief, Iowa Lottery

SG RG Research – Key clients

“The responsible gambling research gives us (Pennsylvania Lottery) a clearer picture of how player behavior is changing and what it means for Lottery play.

Those valuable insights, especially the national benchmarking, continue to guide how we approach messaging and support responsible play.

The research also helps us identify opportunities for continual improvement, which is fundamental to our responsible gambling certifications.”

Stephanie Weyant, Deputy Executive Director, PA Lottery



“This research gives us a deeper understanding of how and why people engage with lottery games. It allows us to design responsible gambling initiatives that are not only effective but also empowering. This helps Ohioans keep play fun, informed, and within their control.”

Jimmie Hicks, Deputy Director, Office of Responsible Gambling, OH Lottery



SG RG Research Methodology - 2025

- **3,405 Americans participated in a 20-minute on-line survey.**
 - Must be a resident of the United States from a state that allows the lottery.
 - Must be age 18 or older.
- **In addition, an oversample of approximately n=1,000 was conducted in seven states. Oversamples were also conducted in two other states of approximately n=500.**
- **Sample was based on specific proportions for gender, age, ethnicity, income and region.**
- **The study ran from November 4 to January 5th, 2026, for the national study, with state level field extended through the end of January.**
- **The margin of error for this study is $\pm 2.4\%$ at 95% confidence, $\pm 2.0\%$ at 90% confidence**

  **Arrows indicate significantly lower (red) or higher compared to 2024**

BCD **Letters indicate significantly higher than another 2025 data point**

RG Questions...Scan QR code and get ready!



Which definition best describes the serious problem gambler?

Young, Stressed, Sports Bettor

Older, Female Lottery Player

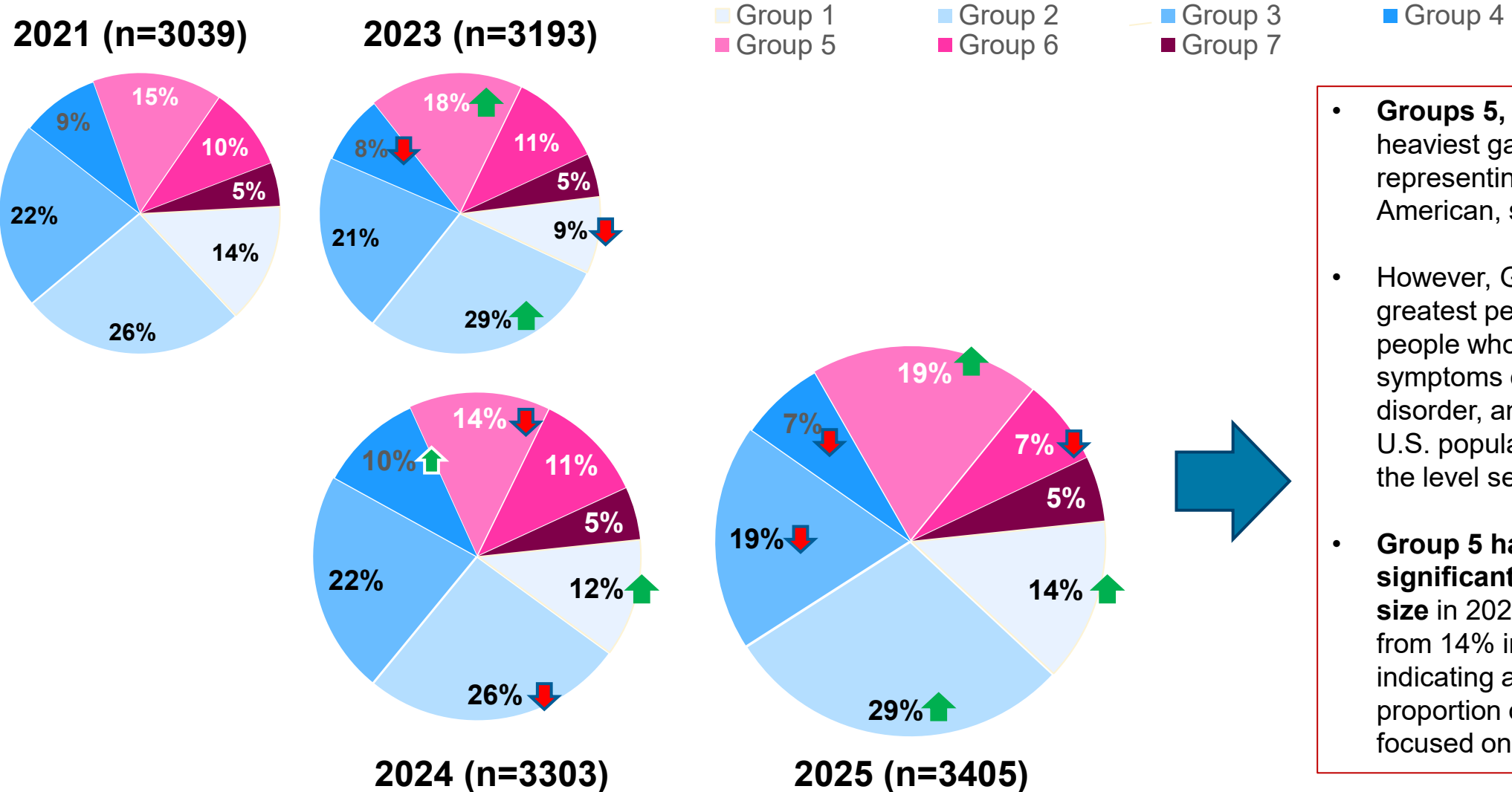
Poor, Uneducated Casino
Player

Responses are hidden X

0/1



7 U.S. Groups – Evolution past 5 years



- **Groups 5, 6 and 7** are the heaviest gambling groups, representing 31% of American, **similar to 2024..**
- However, Group 7 has the greatest percentage of people who show the most symptoms of a gambling disorder, and is 5% of the U.S. population, similar to the level seen in 2024.
- **Group 5 has seen a significant increase in size** in 2025 (up to 19%) from 14% in 2024, indicating a greater proportion of Americans focused on winning.

Group 7 - 2025

This group **over-indexes** on:



Male



Age 18-44

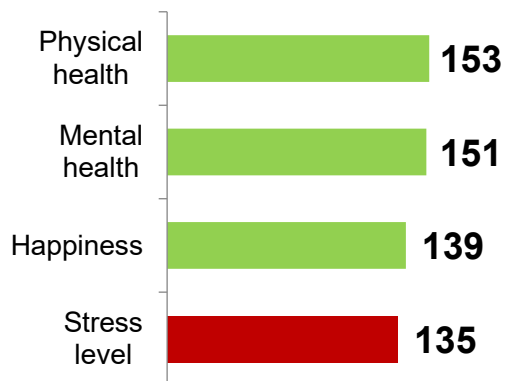


Have
children
living in HH

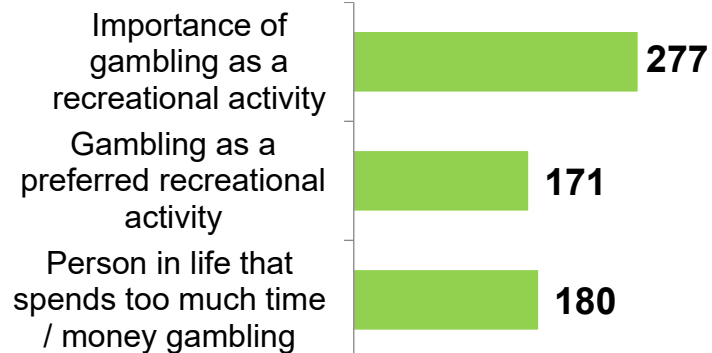


HH income
\$100k+

Health



Gambling



Key Facts

1. Most RG educated.
2. 4 /10 say gambling has caused health or financial issues.
3. Half have tried to cut down in past year.
4. Highest self-exclusion – Sports Betting #1
5. 2/3 will increase Sports Betting spend in 2026

Group 5 - 2025

This group **over-indexes** on:



Male



Age 25-44

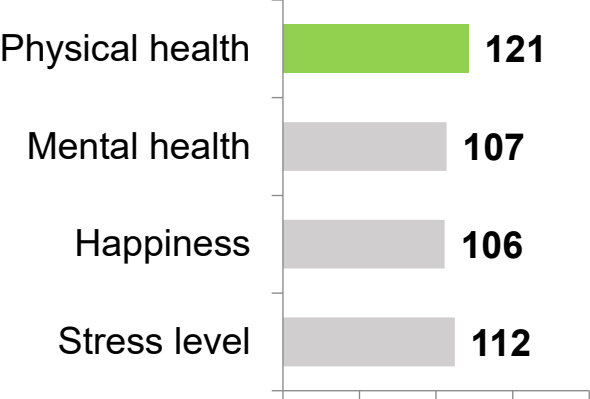


Have
children
living in HH

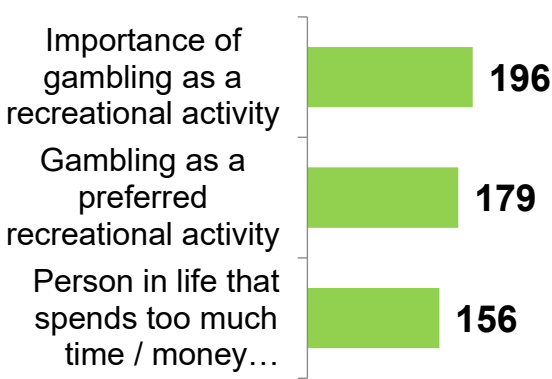


Employed
Full time

Health



Gambling



Key Facts

1. 37% Bet on Sports Past Year
2. 1/3 say a specific type of gambling has contributed to their problems. SB#1
3. Highest alcohol consumption % (75%)
4. >50% would buy lottery online if available.

Group 2- 2025

This group **over-indexes** on:

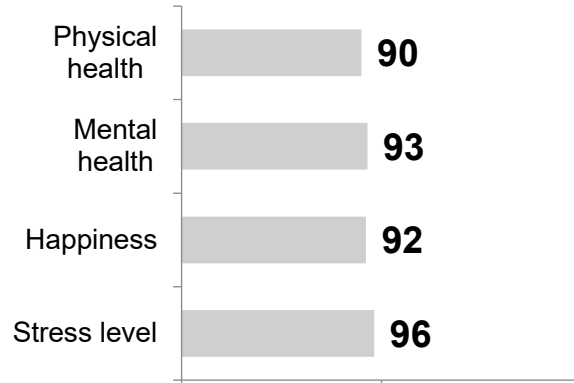


Age 55-64

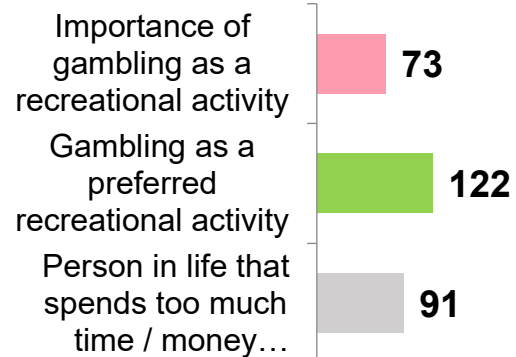


Divorced

Health



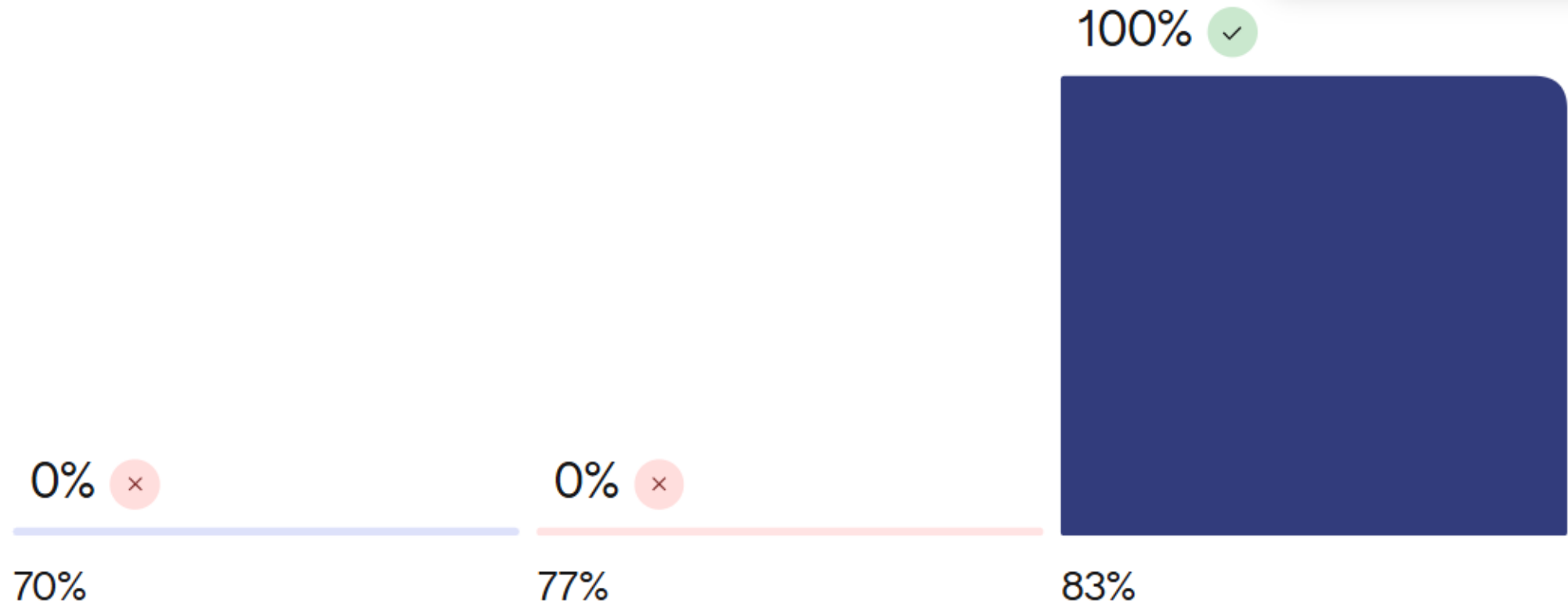
Gambling



Key Facts

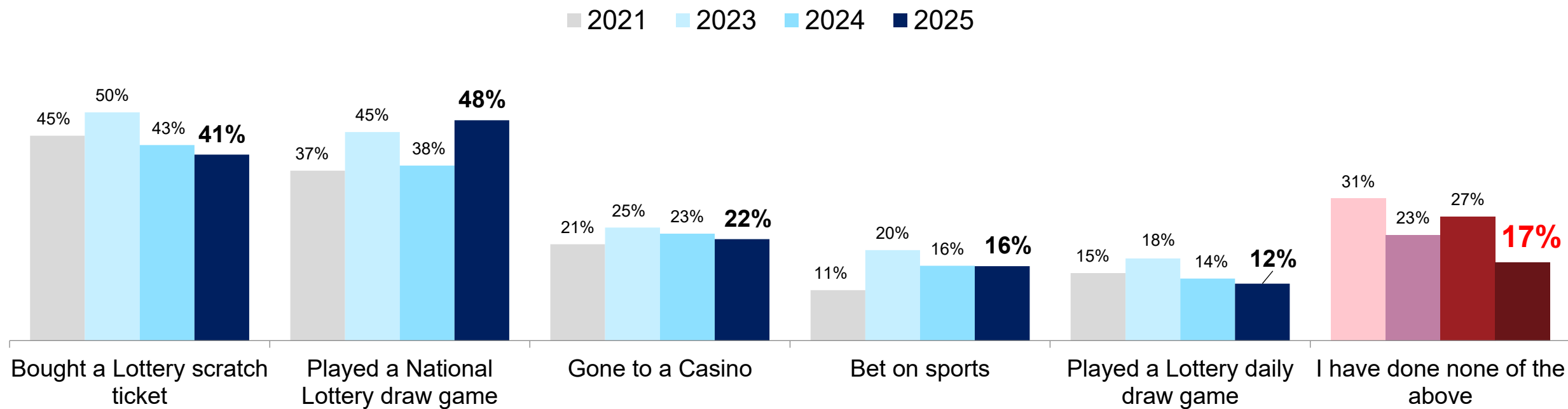
1. Largest U.S. group (29%)
2. They play Lottery to win money.
3. Only 40% are aware skill machines are illegal
4. Highest % group to say they are "in control" when they play Lottery
5. 2025 net decline in Lottery Draw, Scratch, Mega Millions spend...yet up in Sports Betting!

What % of Americans took part in some form of gamb

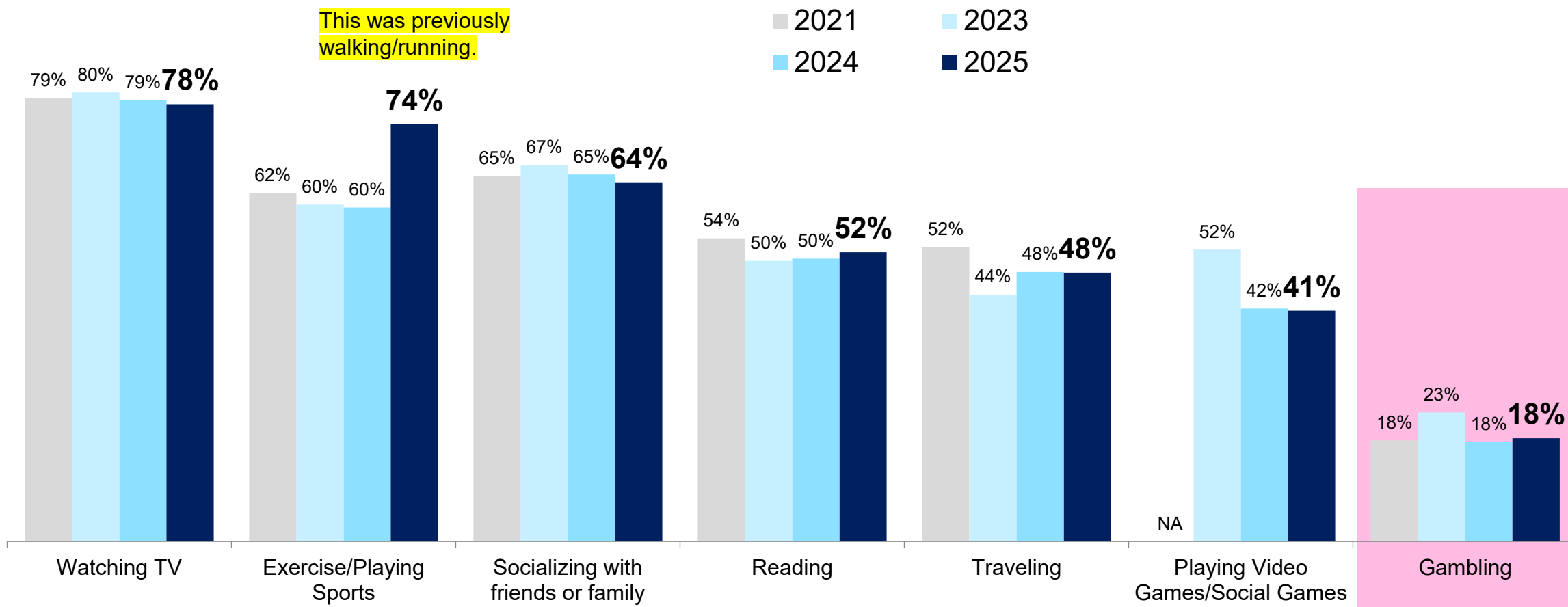
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Gambling Activities in the Past Year (U.S.)

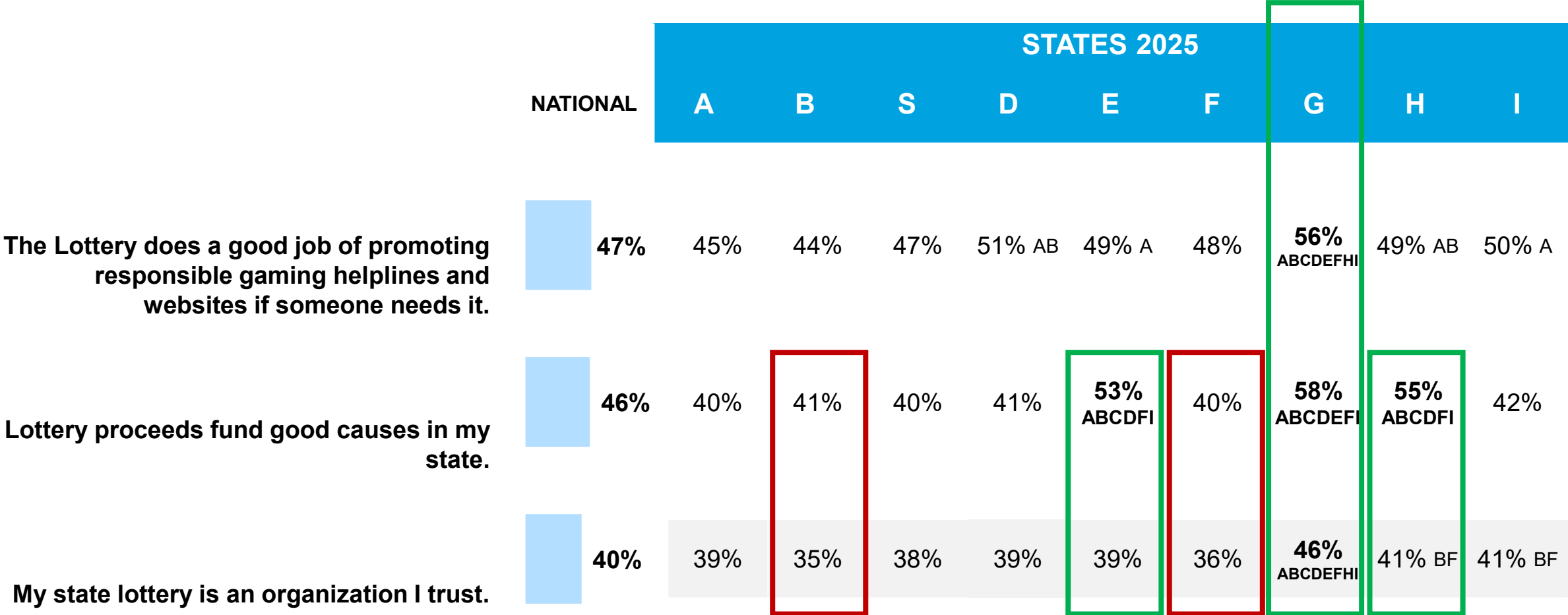
83% of Americans who are not morally opposed to gambling have gambled in the past year, a record level since COVID, and an indication of the ‘normalization’ of gambling in society.



Preferred Recreational Activities (U.S.)



Gambling Activities in the Past Year (U.S.)



Which state lottery has the highest trust level in the USA?



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PA Lottery – Consistent messaging / Fun with RG



Play Online ▾

Draw Games

Scratch-Offs

Fast Play

Keno

Derby Cash

More ▾

HOME > STAY CURIOUS

VERSIÓN EN ESPAÑOL >

Stay Curious

Your curiosity has led you to the right place. So get ready because your journey to learning everything about the PA Lottery starts right meow.

What Are The Chances?

Clarifying Chances Logic



Benefits Older Pennsylvanians.
Every Day.

What % of Americans agree "There is no minimum age to play the lottery, as long as parents are okay with it."?



→ Show correct answer

 **Mentimeter**

SJ ▾

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“There is no minimum age to play the lottery, as long as parents are okay with it.”

17% of Americans say this is true!

However, this is 35% among Group 6 players,
...and 49% among Group 7 players!

NCPG Statements Past 5 Years (U.S.) – Agree %

	2021	2023	2024	2025
Gambling is a good way to make money	21%	21%	20%	18%
If I gamble more often, it will help me to win more than I lose	15%	17%	16%	15%
My chances of winning get better after I have lost	14%	16%	15%	16%

NCPG Statements 2025 (U.S.) – Agree % by RG Groups

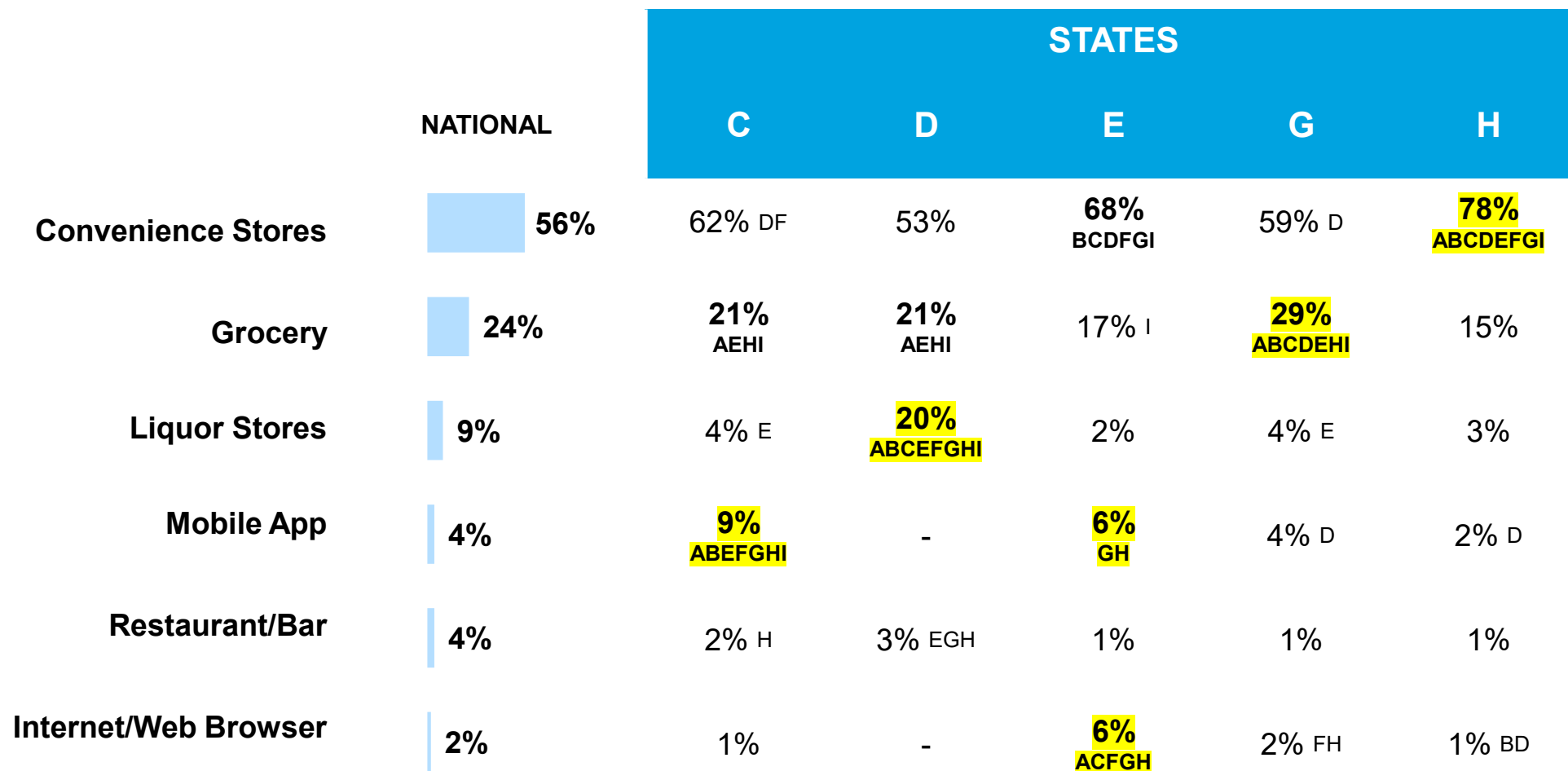
2025	TOTAL	G2	G5	G7
Gambling is a good way to make money	18%	11%	34%	65%
If I gamble more often, it will help me to win more than I lose	16%	7%	31%	64%
My chances of winning get better after I have lost	15%	5%	30%	64%

How effective are these RG messages? – Top 2 Box %

		G2	G5	G7
Never put gambling over your family and friends or your financial commitments .	73%	84%	63%	67%
Not letting play interfere with work or family obligations.	71%	80%	65%	69%
Setting a budget and playing only within your financial means .	70%	82%	65%	69%
It's important to me that my lottery operates responsibly	69%	79%	66%	76%
Taking a break or stop playing entirely if playing stops being fun	67%	77%	61%	76%

At which retailers can we talk to our players?

Outlet Spend \$ Most on Lottery in the Past Year (U.S.)



Through which lottery channels can we talk to our players?

Store clerks, vending or a combo



	NATIONAL	STATE			
		A	D	G	H
Store clerk	56%	76% BCDEFGI	36% G	30%	84% ABCDEFGI
Both	27%	15%	34% ABCEHI	32% ABEHI	13%
Vending machine	16%	8%	28% ABCEFHI	36% ABCDEFHI	3%
Vending Machine NET	43%	23%	62% ABCEFHI	68% ABCDEFHI	16%

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Which RG message tested best among Americans?



- ☒ A. Never put gambling over your friends or family or financial commitments ✓
- ☐ B. Setting a budget and play only within your financial means ✗
- ☐ C. Take a break or stop, if playing stops being fun ✗

→ Show correct answer

 Mentimeter

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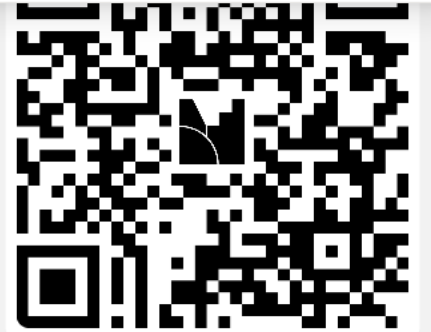
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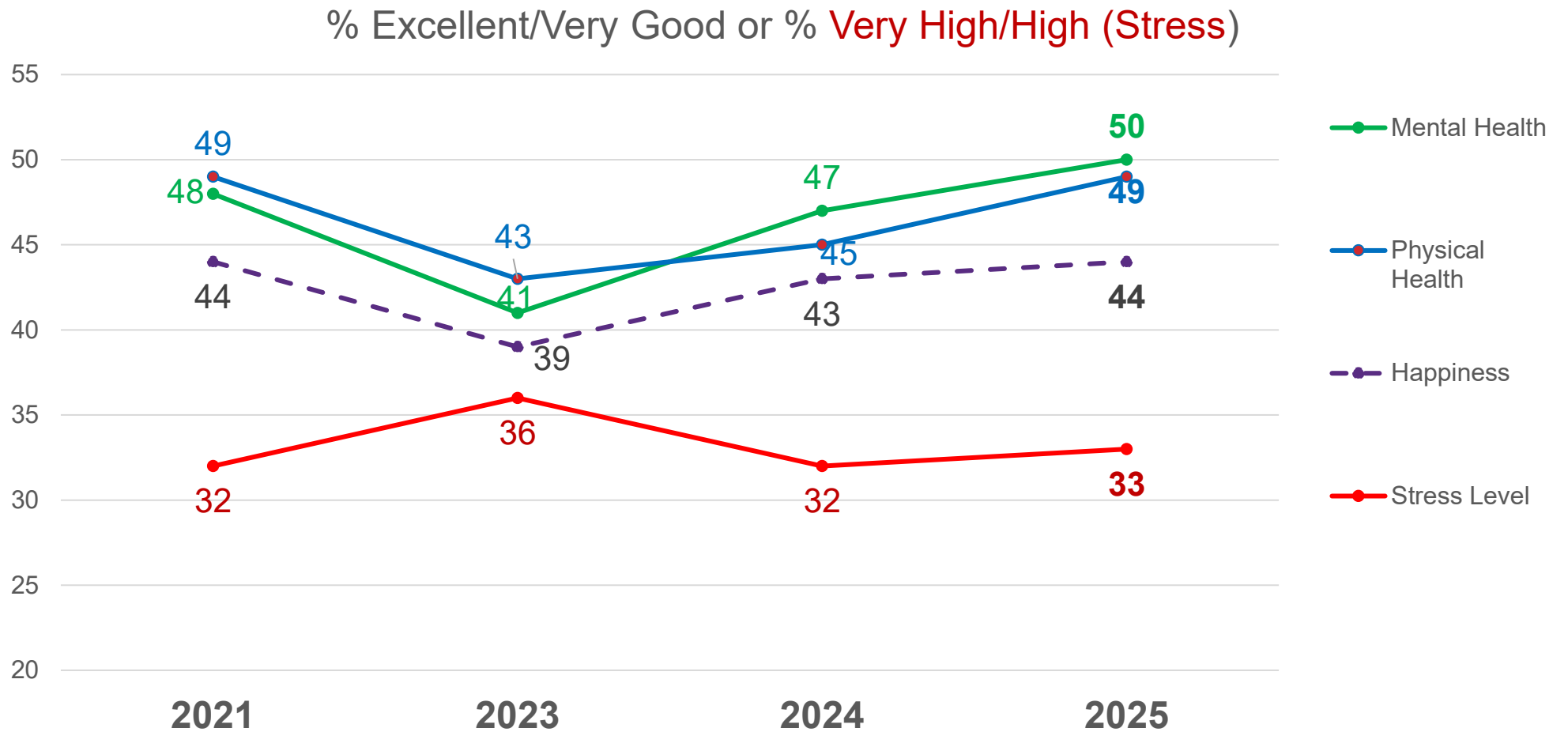
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Stress and Happiness (U.S.) – Gender & Age

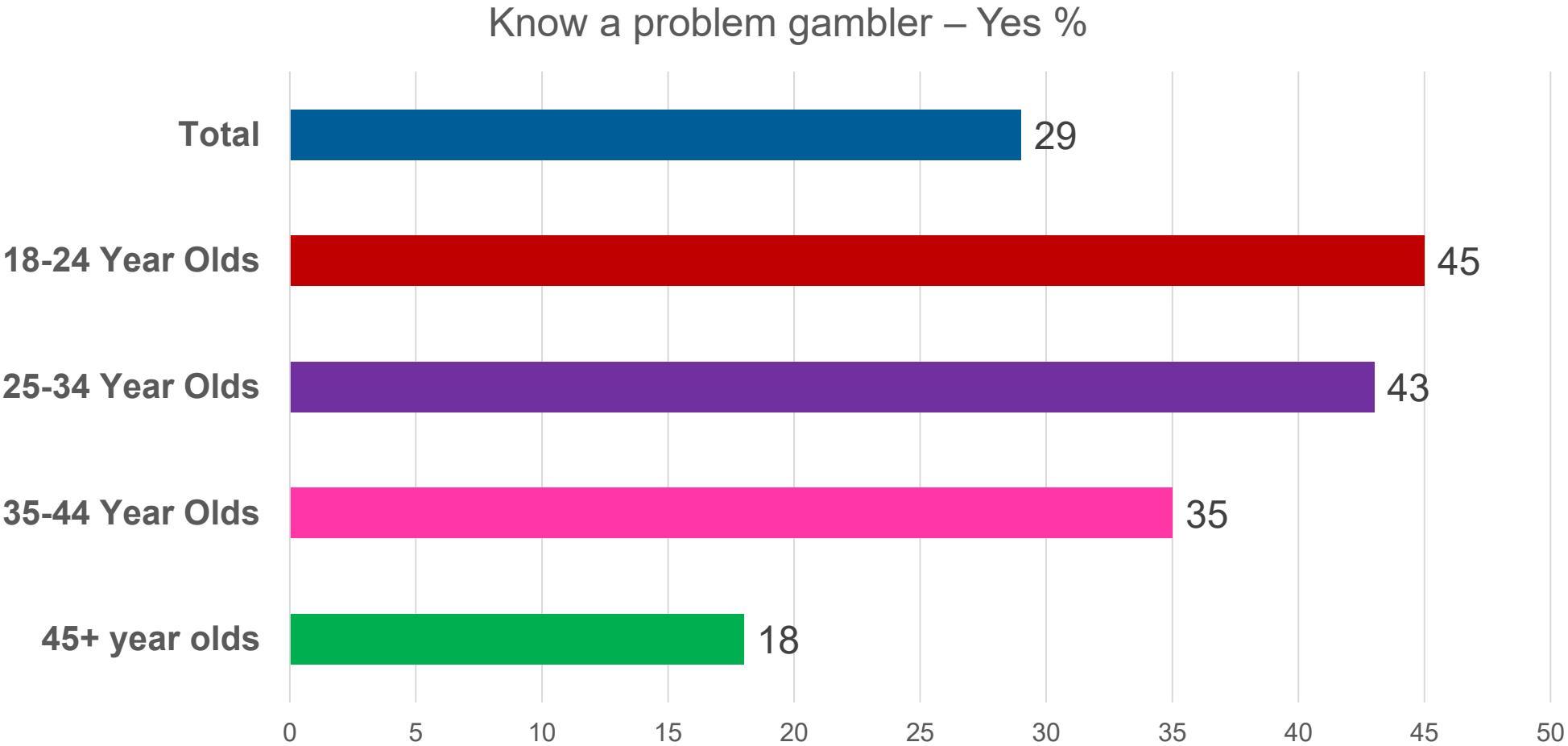
Very High/ High Stress %	Male	Female	18-24	25-34	35-44	45-54	55-64	65+
33%	29%	37%	48%	44%	42%	38%	25%	9%

Happiness (Excellent/ Very Good%)	Male	Female	18-24	25-34	35-44	45-54	55-64	65+
46%	50%	43%	44%	40%	46%	39%	43%	61%

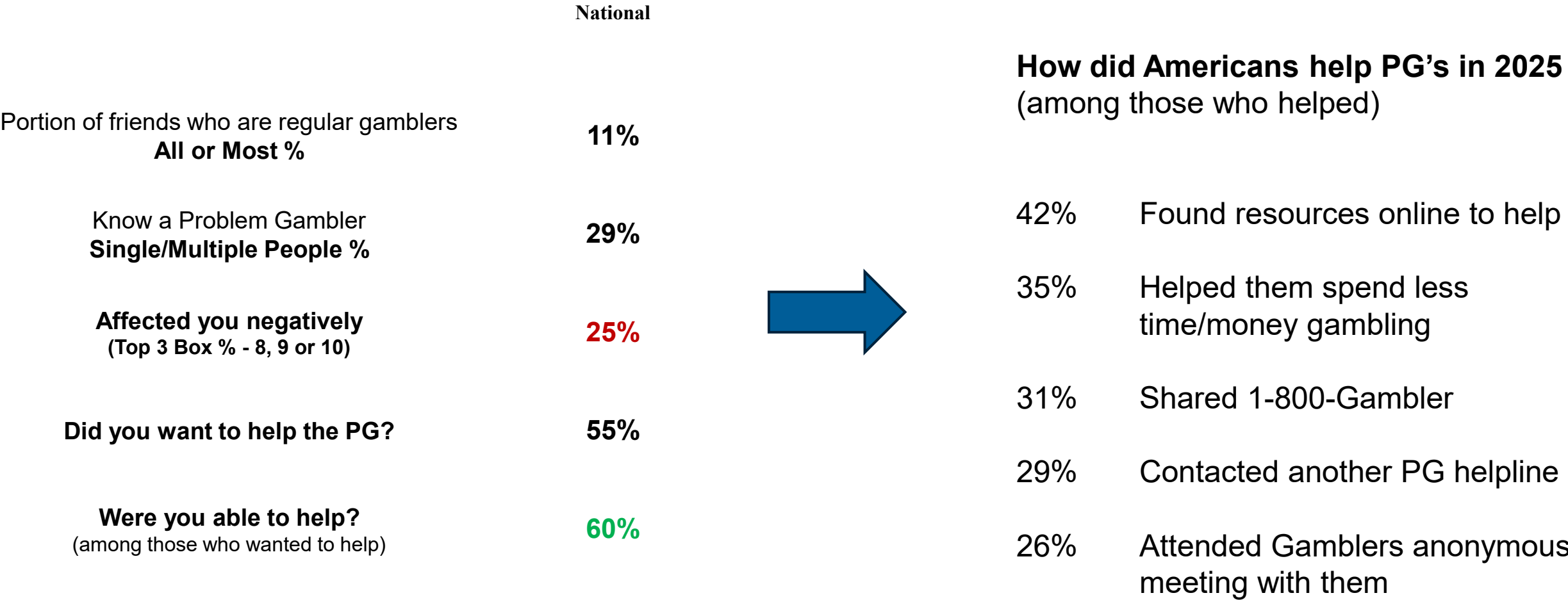
Physical/Mental Health, Happiness and Stress (U.S.)



Do you know a person with a gambling problem? (U.S.)

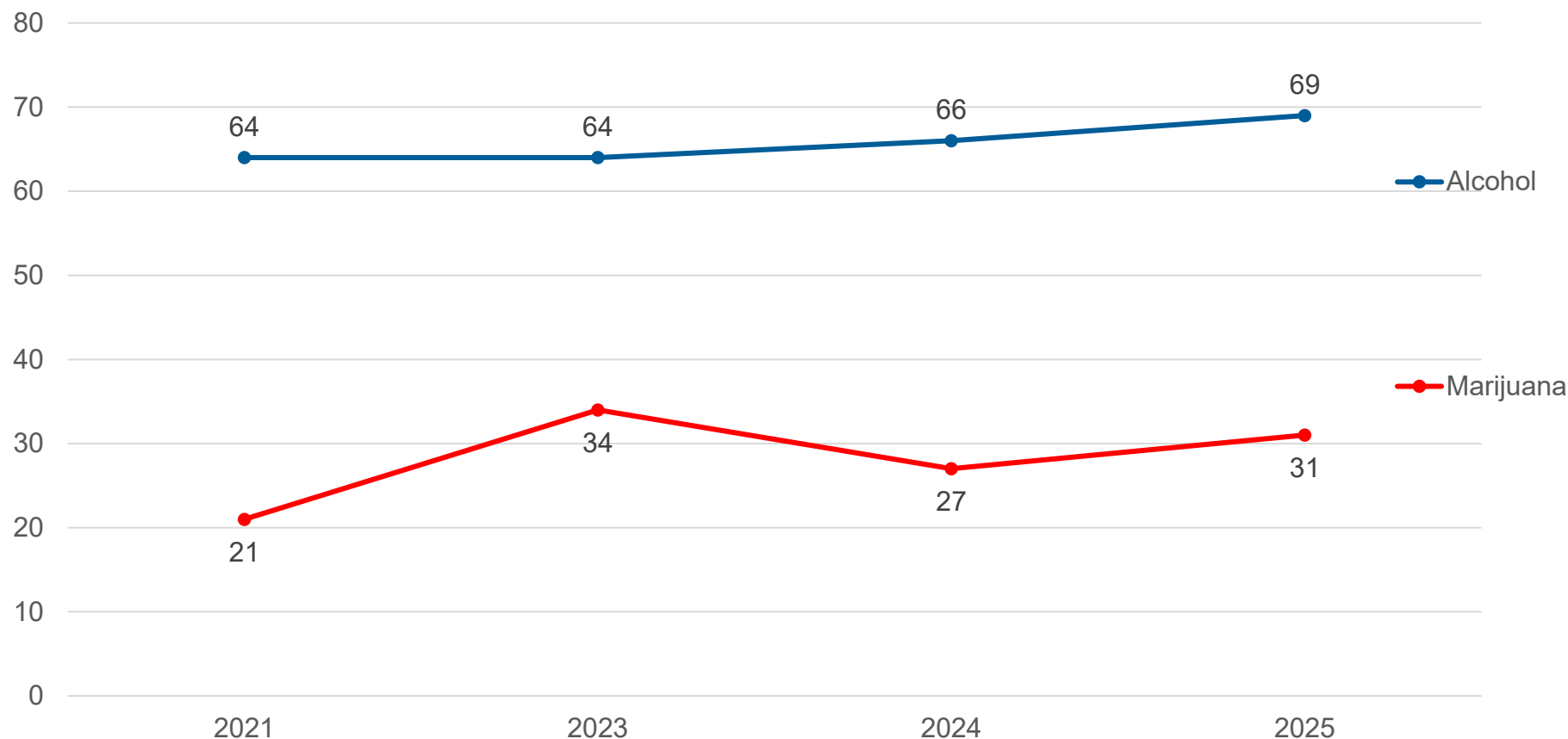


How problem gambling affects Americans (U.S.), and how they help problem gamblers.



Alcohol or Marijuana use – 5 Year trends (U.S.)

% of Americans Drinking Alcohol or Using Marijuana - Trend



Group 5 / Group 7

75% / 70%

39% / 46%

Marijuana use among
25-34 year olds is also
at 46%

GLP1's (U.S.) & Gambling



In 2025, 12% of Americans have used a weight loss drug such as Ozempic, Wegovy, Mounjaro, etc.

This is up from 8% in 2023.

However, it is as high as 28% in Group 7.

Which aligns with the decline in gambling being a preferred recreational activity...

What is the most important responsible gaming word from your perspective?

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SJ



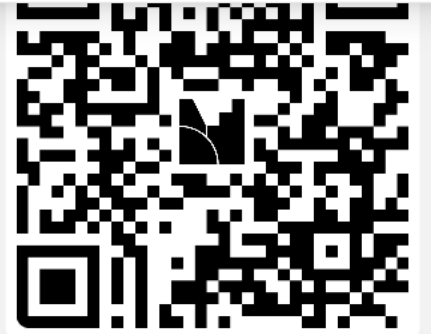
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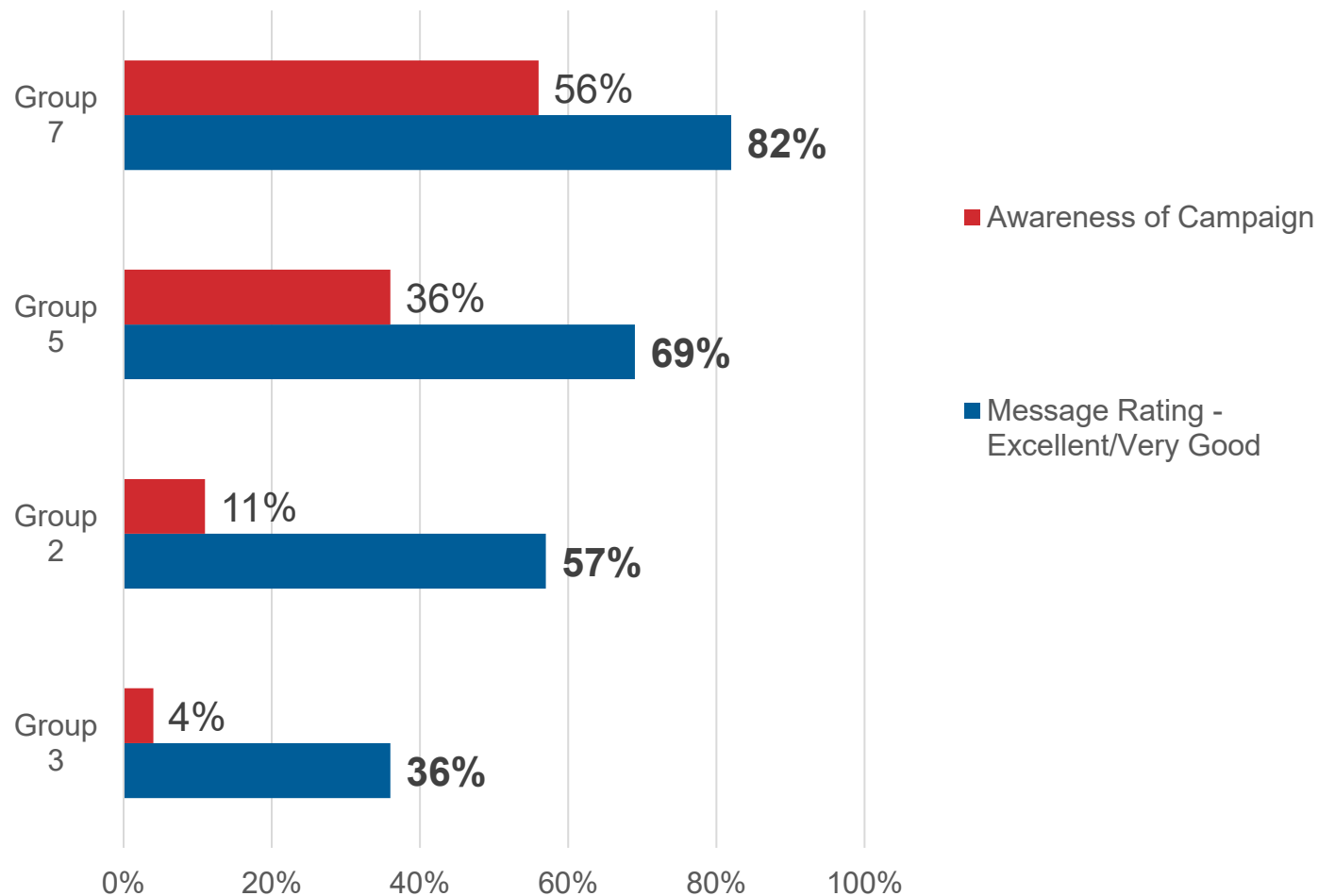
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RG Campaigns - Awareness (U.S.)

M2-M5

	National	State B	State C	State F	State G	State I		18-34	35-44	45+
Aware of Healthy Play Campaign	18%	13%	23%	17%	14%	23%		29%	29%	8%
Thinks Responsible Gaming Education Month is September	8%	11%	12%	10%	5%	12%		13%	13%	5%
Thinks Problem Gambling Awareness Month is March	6%	11%	15%	9%	4%	16%		9%	12%	3%
Aware of “Gift Responsibly” holiday campaign	13%	6%	16%	14%	10%	13%		22%	20%	6%

“Have Fun. Do Good. Play Healthy.” (U.S.)



Awareness also skews younger
18-24 = 27%, 25-44 = 30%

Where does the SG RG research go from here?

1. Continue to provide the largest and most accurate research on responsible play and problem gaming in the United States.
2. Focus State Lottery efforts on helping Group 7's, whilst providing the correct messaging and tools for Groups 5 and 6 to prevent them becoming Group 7's.
3. Encourage new states to get involved, and show them the benefits of this timely and accurate data for their internal teams and their WLA certification efforts.
4. Expand to other countries. New Zealand conducted this research in 2024 and looks set to repeat every two-three years.
5. It is critical that Scientific Games is seen as a leader in Responsible Gaming in the Lottery industry and beyond.
6. Present 2026 findings to the NCPG conference in July 2027.

ANY QUESTIONS?





Thank You

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