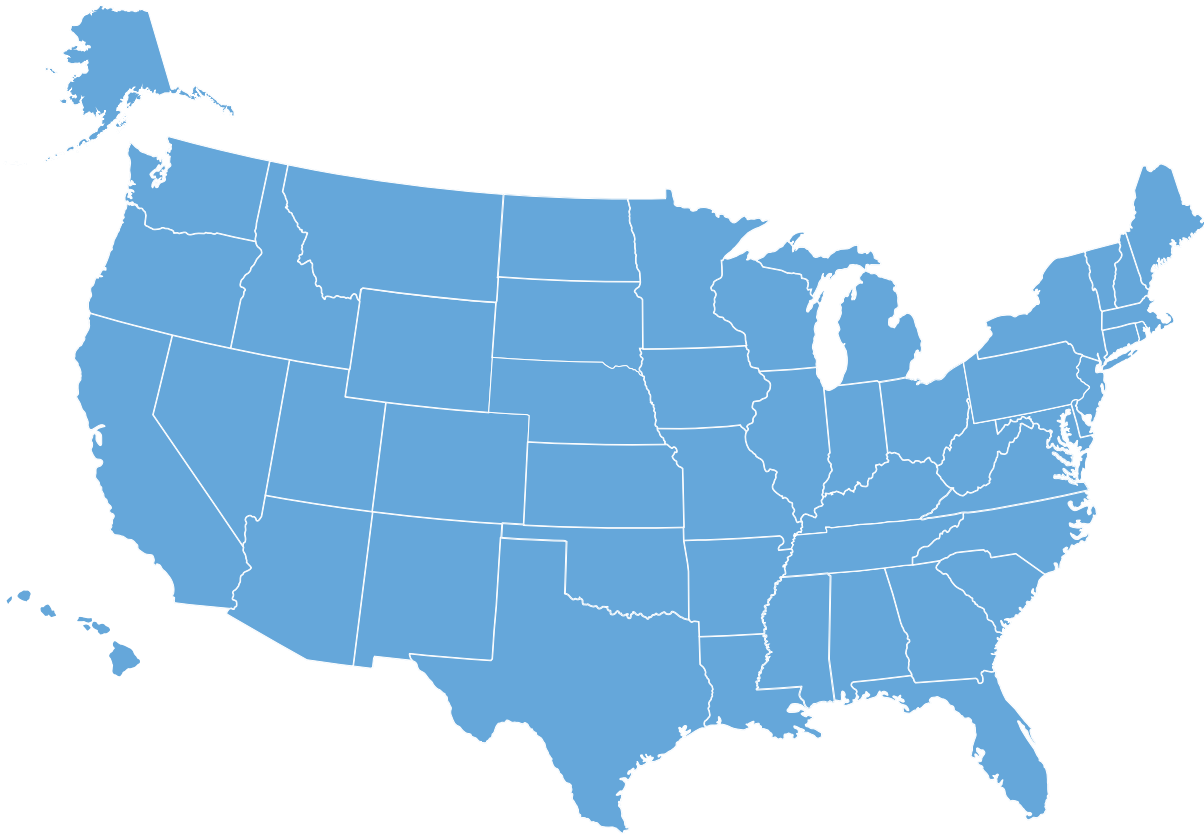




## National Detail Report

# National Survey on Gambling Attitudes and Gambling Experiences 1.0



[www.ncpgsurvey.org](http://www.ncpgsurvey.org)



**NCPG**

National Council on Problem Gambling

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# **NATIONAL SURVEY on GAMBLING ATTITUDES and GAMBLING EXPERIENCES**

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## From the Executive Director

The National Council on Problem Gambling is proud to release its National Detailed Report from the National Survey of Gambling Attitudes and Gambling Experiences 1.0 (NGAGE). This study is the first major national research on gambling issues and public attitudes about gambling since the 1999 National Gambling Impact Study Commission. It will meet a critical need for new data about these issues, especially in the wake of the growth of casinos and other gambling operations in the US in recent years, and with the rapid growth of legalized sports gambling.

The National Detailed Report is being publicly released as nearly half of the states across the nation have legalized sports betting following a Supreme Court decision in 2018. There are also State Detailed Reports for each state in the nation available for purchase. These detailed reports follow companion overview reports on national trends and state trends, released earlier. You may access all of them via [www.ncpgsurvey.org](http://www.ncpgsurvey.org).

With the support of GVC Group/Entain Group, in late 2018 NCPG commissioned Ipsos, an international market research and consulting firm, to conduct a national survey of more than 28,000 US consumers to understand their experiences and attitudes about various forms of gambling. The findings provide an overview of both national and state-by-state gambling participation trends as well as problem gambling issues. The survey questions address a broad range of issues including gambling participation, rates of problematic behavior and positive play, and public beliefs and opinions about problem gambling. This research also includes an in-depth look at trends in and attitudes about sports betting and fantasy sports betting, providing the most detailed information to date about these emerging fields.

Now that NCPG has created this baseline, there is an urgent need for ongoing national survey research to measure and monitor these trends. Without this information it is impossible to accurately assess the costs, benefits and impacts of gambling in America.

The NGAGE survey was conducted at the outset of what is likely to be the largest and fastest expansion of gambling in our nation's history. NCPG will continue to use this information to advocate for programs and services to assist people and families affected by problem gambling and gambling addiction.

Keith Whyte  
Executive Director, NCPG

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## I. INTRODUCTION AND EXECUTIVE SUMMARY

### Gambling opportunities abound in the U.S.

As of November, 2019, government-sponsored lotteries existed in 45 states and the District of Columbia<sup>1</sup> (North American Association of State and Provincial Lotteries, 2019) while casinos operated by corporations or Native American tribes existed in 43 (American Casino Guide, 2019). Many states allow various forms of gambling to benefit charities, and wagering on horse races takes place in 30 states.

Sports betting, long restricted to Nevada, is expanding rapidly following the Supreme Court's decision in *Murphy v National Collegiate Athletic Association* to overturn federal prohibitions on the activity. As of February 2021, sports betting was operational in 20 states and the District of Columbia and had been legalized but not yet implemented in four others. Legal sports wagers in the U.S. reached \$1.4 billion in September 2019 (Barrabi, 2019). Fantasy sports is widely available despite its murky legal status (National Conference of State Legislatures, 2015) and online gambling of various types, while only legal in a few states, is nonetheless available to anyone with access to a computer.

In response to the Supreme Court ruling in the *Murphy* case, the National Council on Problem Gambling (NCPG) commissioned a national survey to measure the extent of gambling in the United States prior to the rapid expansion of sports betting. This National Survey on Gambling Attitudes and Gambling Experiences (NGAGE) also included questions on gambling-related problems, positive play, and public opinion and beliefs about problem gambling. The survey was designed not only to provide extensive national data (with a national sample size of 3,000 respondents), but to provide reliable data on a state-by-state basis as well.

The survey was taken in November 2018, a time when legal sports betting was only available in Nevada and New Jersey. We hope to replicate this survey in coming years to measure the effect of readily available sports betting on the public's gambling behavior and attitudes.

### Key Findings

- 1) **Gambling is a very popular American pastime.** Three in four American adults report some type of gambling in the year preceding the survey. Only 12 percent claim to never have gambled.
- 2) **Most gamblers bet on more than one activity**, with the average American gambler betting on three different activities.
- 3) **Legal prohibitions or restrictions on gambling have minimal effect on gambling participation.** Even in the two states that allow no legal gambling (Hawaii and Utah), more than half the adults report some gambling activity in the past year. One in five Americans placed a sports bet despite it being legalized in only two states at the time of the survey, many of them online or through bookmakers. And 15 percent reported making an online wager.
- 4) **The lottery is the most popular form of gambling**, with two out of three survey respondents reporting a past year lottery purchase. More than one-third of the sample reported spending money at a casino.

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<sup>1</sup> The Mississippi Lottery began sales on November 25, 2019, following completion of this survey..

- 5) **Most who gamble appear to do so without negative consequences.** While for methodological reasons the survey was not designed to assess the rate of gambling disorder, 70 percent of gamblers reported never experiencing any of the four risky gambling behaviors covered by the survey. However, 7 percent reported experiencing at least one of these behaviors “many times,” with most of these reporting only one frequent problematic behavior.
- 6) **Young adults appear to be at higher risk for gambling problems.** Half of those under 35 responded “yes” to at least one indicator of risky behavior. By contrast only 10 percent of gamblers over the age of 65 responded “yes” to at least one indicator.
- 7) **Sports bettors appear to be at particularly high risk.** They are three or more times as likely than those gamblers who did not bet on sports to report frequent risky behavior. Those betting weekly on sports are five or more times more likely to report frequent risky behavior. These disparities are even greater for those playing fantasy sports. We do not know, however, if sports betting results in risky behavior, or if those who are more prone to risky behavior are drawn to sports betting.
- 8) **A considerable number of gamblers do not understand the way gambling works,** with 16 percent believing that gambling is a good way to make money. Similar numbers believe that gambling more often will help them win more than they lose, or that their chances of winning get better after they’ve lost. These misconceptions are more common among those playing games with a skill component, such as sports betting or cards.
- 9) **A large share of the population misunderstands or stigmatizes problem gambling.** More than half of those surveyed attribute gambling problems at least in part to moral weakness or lack of willpower, while fewer than one half believe it can result from genetics or a medical condition.

This report summarizes the findings of the NGAGE survey on the national level. Reports covering individual states are available through NCPG.

## 2. METHODOLOGY

NCPG designed the NGAGE survey in consultation with its research committee and the survey vendor Ipsos, the third-largest global market and opinion research group. Ipsos then conducted an online survey of people throughout the continental United States, Alaska, and Hawaii. Survey respondents were drawn from panels recruited by Ipsos and supplemented with panels obtained from other members of the market research industry. Ipsos conducted all fieldwork, including sample sourcing, data collection and hosted the survey online.

Through these panels, Ipsos collected a national sample of 3,000 adults between November 8 and November 29, 2018. Respondents could choose to take the survey in either English or Spanish. Ipsos designed the survey to allow for easy completion on any device type, including computers, smartphones, and tablets. Quotas were established during fielding to ensure that the sample was representative of key demographics such as gender, age, and Hispanic/non-Hispanic proportions. The data were further weighted post-fieldwork to ensure proper representation of differing levels of educational attainment. In some charts, categories may not add up to 100 percent because not everyone answered the question—this often happens, especially with household income questions. All demographic survey data were matched to data from the U.S. Census Bureau.<sup>2</sup>

In addition to the 3,000 surveys conducted nationally, Ipsos obtained additional responses to allow for state-by-state comparisons. We attempted to “boost” each state’s sample to 500 adults per state, though Ipsos could not reach this level for a few states with smaller populations.<sup>3</sup> Due to the difficulty that inclusion of the booster samples would cause in appropriately weighting the national data set, these additional samples were used for within-state analysis only. Unless specific state data are cited, all analysis in this report is derived from the base survey of 3,000.

Further surveys were collected in order to allow reliable estimates of the characteristics of sports bettors in each state, with a goal of completing interviews with 200 sports bettors per state. Again, this level could not be achieved in every state; however, samples of 150 or greater were obtained in all but 10 states.<sup>4</sup>

Questions within each section of the survey were presented to each respondent in random order in order to eliminate any bias resulting from the order of the questions. For example, within the section on gambling participation, one participant might be asked about bingo first and sports betting second, while the next might be asked about roulette first, lottery second, with bingo being sixth and sports betting tenth.

Ipsos measures the precision of their online surveys using Bayesian credibility intervals, an approach similar to classical confidence intervals or margin of error that attempts to account for the uncertain probability of an individual being included in an online panel.<sup>5</sup> For this survey, the national sample (n=3,000) has a credibility interval of plus or minus 2.0 percentage points for all respondents. The credibility interval will be wider among subsets of the sample population, as follows:

Sample of 1,000; credibility interval is +/- 3.5 percent

Sample of 500; credibility interval is +/- 5.0 percent

Sample of 200; credibility interval is +/- 7.9 percent.

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2 The need to match the data to U.S. Census data precluded offering respondents the option of a non-binary or gender designation other than male or female.

3 The states for which 500 responses could not be obtained and their final sample sizes were: Vermont (401), North Dakota (494), South Dakota (490), District of Columbia (405), Wyoming (402), and Alaska (379).

4 Alaska, the District of Columbia, Hawaii, Idaho, Maine, Montana, North Dakota, South Dakota, Vermont, and Wyoming.

5 For a detailed discussion of credibility intervals, see Gelman, (2003).



## 2. METHODOLOGY

Given the size of the national sample, most comparisons will show differences that are statistically significant. However, in many cases, these differences will be so small as to have little, if any practical significance. For this reason, levels of statistical significance will not be routinely cited in this report, allowing a focus on differences large enough to be meaningful for public policy, public health, or program development. NCPG conducted data analysis and reporting using SPSS statistical software.

As with all sample surveys and polls regardless of sample methodology, this study is subject to other sources of error, including, but not limited to, coverage error and measurement error.

### 3. GAMBLING IN THE U.S.

Not surprisingly, gambling is a common pastime in the United States. Almost three out of every four Americans (73%) report having bet on at least one of the fourteen gambling activities covered on the survey in the twelve months preceding the survey. In twelve states (Arizona, Connecticut, Illinois, Massachusetts, Michigan, New Hampshire, New Jersey, New York, Ohio, Pennsylvania, Rhode Island, and Texas) more than four in five adult residents reported a past year bet (Figure 3-1). At the other end of the spectrum are the two states without any legally sanctioned gambling: Utah and Hawaii. But even in those states at least half the population had wagered in the past year (50 percent in Utah and 57 percent in Hawaii).

Of the 27 percent of survey participants who did not report gambling in the past year, more than half (15 percent of the adult population) said they had gambled, but not in the past year, leaving only 12 percent of the population saying they had never gambled.

The lottery is the most popular form of gambling in the U.S., having been played by 66 percent of adults in the year prior to the survey (Figure 3-2). Raffles were a distant second at 41 percent. More than one American in three (37%) reported spending money at a casino while 32 percent had played a slot machine or other gaming terminal. Almost one in four (23%) had wagered money on a card game, while 20 percent reported playing bingo, pull-tabs, or traditional sports betting. Slightly smaller numbers reported wagers on fantasy sports (17%), a horse or dog race (14%), spinning wheel games (14%), roulette (13%) or craps or other dice games (13%). Fifteen percent reported wagering money online on these or other activities.

Most of those who gamble bet on more than one activity (Figure 3-3). Only 22 percent of gamblers (16% of survey respondents) reported wagering on only one activity. The average gambler placed a bet on three different activities in the past year, with 27 percent of gamblers betting on seven or more activities. Of those who play only one activity, lottery is the game of choice of seven out of ten (71%). However, big jackpot games such as Powerball and Mega Millions do not seem to engage many people who otherwise would not bet, as only 4 percent of all gamblers played only these games.

#### 3A. The Demographics of Gambling

While various demographic factors have statistically significant relationships with a person's gambling activities, the magnitude of these relationships with overall gambling is relatively minor. Males are somewhat more likely to gamble than females (78% to 69%). Likewise, gambling by racial or ethnic origin ranges from a low of 64 percent past year participation for Native Americans to a high of 80 percent for people of Asian ancestry<sup>6</sup> (Figure 3-4). Those who have less than a high school diploma appear less likely to gamble than those with higher educational attainment, but that difference is only marginally statistically significant (Figure 3-5). A similar pattern is seen in gambling by household income. The lowest annual household income group (less than \$25,000) is less likely to gamble than those with higher incomes, but differences between groups with incomes over \$25,000 are slight. (Figure 3-6).

Gambling increases by age up through those between 45 and 54 years old, and then decreases steadily through those 75 and older (Figure 3-7). The gap between the age group most likely to gamble (45 to 54, 81%) and the group least likely to gamble (75 and older, 64%), while not trivial, is not sufficiently large to be of use when designing programs. In general, those designing programs for problem gambling treatment, prevention, and awareness must consider all demographic segments of the population.

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<sup>6</sup> Survey respondents could select multiple or racial/ethnic origin, which makes calculation of statistical significance impossible.

### 3. GAMBLING IN THE U.S.

Demographics, however, do vary significantly when it comes to what type of gambling people participate in. Not surprisingly, many of the greatest disparities occur with gender. In craps or dice games, horse or dog racing, sports betting (both traditional and fantasy), roulette, and online gambling, male gamblers outnumber female gamblers by at least two to one (Figure 3-8). The only activities in which female participation comes close to that of males are raffles, bingo, and the lottery. These disparities are also reflected in the fact that 61 percent of nongamblers are female.

Age is also a significant determinant of both gambling participation and the choice of activities. Nongamblers are older, on average, than the participants in any form of gambling with a median age of 49 (Figure 3-9). Among gamblers, the oldest median age is found in lottery players (47) with the youngest median age (34) found among craps or dice, roulette, and fantasy sports players and those who play online.

Nongamblers also have the lowest household income, with a median annual income of approximately \$42,000 (Figure 3-10). At the other extreme, those playing craps or other dice games, roulette, card games, fantasy sports, raffles, or horse or dog racing had average incomes \$15,000/year higher than the nongamblers.

Educational attainment, on the other hand, bore no meaningful relationship with gambling participation, though it does play some role in the choice of gambling activities. The average level of education for nongamblers and all forms of gamblers alike was having some college or an associate degree.

## 4. PROBLEMATIC GAMBLING BEHAVIOR

The NGAGE survey included four specific measures of gambling-related problems. These items are all included in the criteria for gambling disorder established in the fifth edition of the Diagnostic and Statistical Manual (DSM-5) (American Psychiatric Association, 2013). All items were also included in either the Brief Biosocial Gambling Screen (Gebauer et al, 2010) or the Lie/Bet questionnaire for screening pathological gamblers (Johnson et al, 1997). The resulting survey questions were:

1. How often have you needed to gamble with larger amounts of money or with larger bets in order to get the same feeling of excitement?
2. How often have you felt restless or irritable when you tried to cut down or stop gambling?
3. How often have you relied on others to pay your gambling debts or to pay your bills when you had financial problems caused by your gambling?
4. How often have you lied to hide your gambling?

Respondents were instructed to only consider their behavior in the past 12 months. All questions could be answered “No, not in the past 12 months,” “once,” “a few times,” or “many times.” Only those reporting participation in at least one of the gambling activities listed in section 3 were asked these questions.

We did not calculate a prevalence rate for gambling disorder. A review of the literature did not find studies that had validated the use of online panels for prevalence studies based on the DSM. In addition, Mishra and Carleton (2017) reported finding unusually high prevalence rates in four studies using online crowdsourcing platforms. While our sample was not crowdsourced, the similarities were sufficient to give us pause.

A large majority of past year gamblers reported none of these problematic behaviors. However, 31 percent reported experiencing at least one of these items in the past 12 months, with 12 percent experiencing one item, 7 percent two, 5 percent three, and 8 percent all four of the items asked. In other words, some level of potentially problematic gambling behavior is fairly common.<sup>7</sup>

Frequent problematic behavior, on the other hand, is much less common. A total of 7 percent of past year gamblers reported experiencing at least one of the four behaviors “many times.” However, 5 percent experienced only one item “many times,” while 1 percent reported two items “many times,” and less than 1 percent reported three or more.

The most commonly endorsed item was the need to gamble more for the same feeling of excitement. **(Figure 4-1)** One in four (26%) past year gamblers reported this experience at least once. However, only 3 percent of past year gamblers reported this experience many times. The second most common was feeling restless or irritable when trying to cut down or quit, with 19 percent reporting this at least once, lying to hide gambling at 17 percent, and relying on others to pay debts or bills at 12 percent. However, no more than 3 percent reported experiencing any of these items many times.

There is a strong relationship between problematic behavior and age, with younger players far more likely to report potentially problematic play. At one extreme, only half of those under the age of 35 answered “not in the past year” to each of the four indicators compared to 90 percent of those 65 or older **(Figure 4-2)**. And one out of four respondents under 35 reported experiencing at least three of the four indicators in the past year compared to fewer than one percent of those 65 or older **(Figure 4-3)**.

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<sup>7</sup> It is important to recognize that those with risky behaviors do not necessarily experience negative consequences as a result. In particular, experiencing a behavior once or “a few times” is not likely to cause problems for that individual.

## 4. PROBLEMATIC GAMBLING BEHAVIOR

Most notably, 19 percent of those between 18 and 24 answered “many times” to at least one of the four indicators compared to 2 percent or less for each age group over the age of 54 (Figure 4-4).

Gender differences exist in problematic behavior, but they are not as pronounced as differences related to age. Women are more likely than men to report no problematic past year behavior by a 74 percent to 64 percent margin. They are also less likely to answer “once or more” to three or four of the indicators by a margin of 10 percent to 16 percent. There was, however, no statistically significant difference in the likelihood of reporting “many times” to at least one indicator, with 8 percent of males and 6 percent of females providing this answer at least once.

The percentage reporting no problematic play does vary with income (Figure 4-5). Those with annual household incomes under \$25,000 were the least likely to answer “not in the past year” to all four questions. However, the most likely to report no problematic play were those with incomes of \$25,000 to \$49,999, with this percentage decreasing as incomes rise. It should be pointed out, though, that the lowest income bracket disproportionately includes those under the age of 35, so some of what seems to be an income effect may actually be an artifact of age. In addition, those with the lowest incomes may also be the most likely to borrow money to meet living expenses or to lie about their gambling because of their economic circumstances rather than their actual gambling behavior.

Educational attainment shows some relationship with the likelihood of answering “not in the past year” to all four risky gambling behaviors, with a slight tendency for those with higher levels of education to report lower levels of potentially problematic play. Overall, these differences are likely too small to be of practical significance.

## 5. POSITIVE PLAY

The Positive Play Scale was an index developed, in the words of its authors, to assess “the extent to which a consumer base has positive beliefs about gambling and gambles in a positive manner” (Wood et al, 2017). The full scale consists of four subscales: Honesty and Control, Pre-commitment, Personal Responsibility, and Gambling Literacy. However, due to survey length limitations, only the Personal Responsibility and Gambling Literacy subscales were included in this study.

The Personal Responsibility subscale measured agreement with the following four items:

1. “I should be able to walk away from gambling at any time.”
2. “I should be aware of how much money I spend when I gamble.”
3. “When I gamble, it’s my responsibility to spend only money that I can afford to lose.”
4. “I should only gamble when I have money to cover my bills and living expenses first.”

The Gambling Literacy subscale included the following three items:

1. “Gambling is not a good way to make money.”
2. “My chances of winning get better after I have lost.”
3. “If I gamble more often, it will help me to win more than I lost.”

The vast majority (85 percent or more) of gamblers agree with the four items relating to personal responsibility (Figure 5-1), with almost three out of four agreeing with each item strongly.

There is less agreement, however, on the three items relating to gambling literacy. While almost three in four endorse positive play on these items, only half endorse positive beliefs strongly (Figure 5-2). For example, only 47 percent of gamblers in the sample strongly disagree with the statement: “My chances of winning get better after I’ve lost,” meaning that the other half give at least some credence to this basic misunderstanding of probability. Similarly, almost half seem to be willing to at least entertain the possibility that gambling is a good way to make money.

For every indicator on both the personal responsibility and gambling literacy scales, the likelihood of a “positive” response increases with age. For example, while 87 percent of those 75 or older strongly agree that “I should be able to walk away from gambling at any time,” only 64 percent of those between the ages of 18 and 24 strongly agree (Figure 5-3). Similarly, strong agreement that “I should only gamble when I have money to cover my bills and living expenses” decreases from 78 percent among those 75 or older to 57 percent for those between 18 and 24 (Figure 5-4).

This trend is more pronounced for the three items on the gambling literacy scale. While 70 percent of those between 65 and 74 strongly disagree with the statement that “If I gamble more often, it will help me to win more than I lose,” only 30 percent of 18 to 24-year-olds strongly disagree (Figure 5-5). Particularly striking are differences in the strong endorsement of the statement “Gambling is not a good way to make money.” Those 75 or older were three times more likely to strongly endorse the statement than those between the ages of 18 and 24 (Figure 5-6).

Women are more likely to endorse positive play statements than men, but the differences, while statistically significant, are small. The greatest difference is found in the number believing that “gambling is not a good way to make money.” That statement was endorsed by 59 percent of women but only 49 percent of men. Differences on other items ranged from 1 percent (“My chances of winning get better after I’ve lost”) to 7 percent (“I should only gamble when I have money to cover my bills and living expenses first” and “If I gamble more often, it will help me to win more than I lose”) (see Table 1).

**Table 1: Personal Responsibility and Gambling Literacy Subscales- Gender Differences**

% strongly agreeing	Male	Female
<b>Personal Responsibility Subscale</b>		
I should be able to walk away from gambling at any time	72%	77%
I should be aware of how much money I spend when I gamble	71%	75%
It’s my responsibility to spend only money I can afford to lose	71%	76%
I should only gamble when I have money to cover my bills and living expenses first	67%	74%
<b>Gambling Literacy Subscale</b>		
Gambling is not a good way to make money	49%	59%
If I gamble more often, it will help me to win more than I lose	46%	53%
My chances of winning get better after I’ve lost	47%	48%

Positive play shows little relation with educational attainment, with every statement either not displaying a statistically significant relationship or one that is statistically significant but quantitatively small. [Figure 5-7](#) displays a typical example. Similarly, there does not appear to be any meaningful relationship between positive play and household income (see [Figure 5-8](#) for an example).

Racial or ethnic origin, however, does appear to have a relationship with positive play. Those identifying as White were consistently more likely to endorse positive play measures than those identifying with other racial or ethnic groups, usually by a margin of 10 percent or more (Table 2).

5.  
POSITIVE PLAY

**Table 2: Personal Responsibility and Gambling Literacy Subscales–  
Racial or Ethnic Origin Differences**

% strongly agreeing	Latinx	White	Black	Native American	Asian American	Other
<b>Personal Responsibility Subscale</b>						
I should be able to walk away from gambling at any time	59%	77%	65%	64%	66%	63%
I should be aware of how much money I spend when I gamble	57%	75%	66%	56%	59%	60%
When I gamble, it’s my responsibility to spend only money that I can afford to lose	59%	76%	66%	58%	51%	60%
I should only gamble when I have money to cover my bills and living expenses first	54%	74%	60%	48%	56%	54%
<b>Gambling Literacy Subscale</b>						
Gambling is not a good way to make money	41%	57%	32%	38%	48%	42%
My chances of winning get better after I’ve lost	35%	50%	34%	37%	47%	36%
If I gamble more often, it will help me to win more than I lose	39%	52%	33%	43%	42%	42%

The lack of a relationship (as mentioned above) between positive play and both income and education make it unlikely that, in this regard, race or ethnicity is serving simply as an indicator for socio-economic status. However, the sample size is not sufficient to reliably examine the relationship between positive play, ethnic identity, and socio-economic status.

Let us be clear: there are many members of every racial or ethnic group who practice positive play, just as there are many in every group who do not. The data suggest, however, that there is a need for public awareness messaging that takes cultural differences into account, and that the beliefs and values underlying these differences would be a fruitful area for future research.



## 6. GAMBLING ACTIVITIES

The large sample included in the NGAGE survey allows a more detailed analysis of the participants in some, but not all, forms of gambling. In this section, emphasis is placed on those forms that are both the subject of policy debate and represented by a sufficient sample size.

### 6A. Lottery

In terms of participation, lotteries are the most common form of gambling in the U.S. Two out of every three (66 percent) of American adults reported purchasing a lottery ticket in the year preceding the survey. Stated in another way, nine out of 10 of those who reported at least one gambling activity played the lottery. An additional 15 percent reported playing the lottery but not in the past year, meaning that four out of every five Americans (81 percent) have purchased a lottery ticket at some point.

At the time of the survey, lottery tickets were sold in 44 states and the District of Columbia.<sup>8</sup> In each of these jurisdictions, the lottery was the most popular form of gambling. What may be more surprising is that it was also the most popular form of gambling in three of the six states without a lottery: Alabama, Mississippi, and Utah, illustrating perhaps the frequency and willingness to cross state borders to purchase lottery products. Only in Alaska, Hawaii, and Nevada did lotteries fall to second place, behind raffles (Alaska and Hawaii) and casinos (Nevada). Lottery participation ranges from 30 percent in Hawaii to 78 percent in New Hampshire with participation exceeding 60 percent in all but seven states.

Lotteries are also overwhelmingly the game of choice of the 22 percent of American gamblers who bet on only one activity—71 percent of those playing one game just play the lottery. In other words, 11 percent of the American public's involvement with gambling goes no further than a state lottery.

Of those reporting past year lottery play, one in four (26 percent) said they play weekly or more, another one in four (24 percent) played at least once a month but not weekly, 30 percent played several times a year, while 23 percent reported playing just once or twice a year.

Big jackpot draw games such as Powerball or Mega Millions garner much of the attention, and 56 percent of the American public (85 percent of lottery players) reported playing those games in the past year. One in five draw game players reported playing weekly or more, while an additional one in four played at least once a month (**Figure 6A-1**). Instant or scratch games, however, match draw games in the number of participants, also being purchased by 85 percent of lottery players. Frequency of play was comparable to that of draw games (**Figure 6A-2**). Finally, daily numbers (such as Pick 3) or keno-style games were played by 56 percent of lottery players.

Given the very high number of gamblers who play the lottery, it should come as no surprise that the demographics of lottery players closely resemble the demographics of all gamblers as discussed in section 3A. Lottery play currently peaks in middle age (**Figure 6A-3**), with the highest participation found among those between the ages of 45 and 54 (75 percent) and the lowest participation found among those between 18 and 24 (60 percent) and over the age of 75 (52 percent). It is worth noting, however, that lottery players have the highest median age of participants in any form of gambling. Half of all lottery players are aged 47 or older (**Figure 3-9**).

Racial or ethnic origin has very little impact on lottery play, with participation for every racial or ethnic group measured between 65 percent and 68 percent (**Figure 6A-4**). Similarly, household income and

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<sup>8</sup> At the time of the survey, states without lotteries included Alabama, Alaska, Hawaii, Mississippi, Nevada and Utah. The State of Mississippi began lottery sales in November, 2019, a year after completion of this survey.

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educational attainment are at best a minor determinant of lottery play. Play by educational attainment ranges from a low of 59 percent for those with less than a high school diploma<sup>9</sup> to 69 percent for those with an associate degree as their final level of education (Figure 6A-5). Play among different levels of household income also display a narrow range, from 61 percent of those with annual incomes less than \$25,000 to 74 percent of those with incomes between \$75,000 and \$100,000 (Figure 6A-6).

As the overwhelming majority (90 percent) of all gamblers play the lottery, the positive play and problematic play practices of lottery players are virtually identical to those described for all gamblers in sections 4 and 5. Accordingly, they are not further analyzed here. It is worth noting, however, that frequent (weekly or more) lottery players are more likely to show problematic play (Figure 6A-7) and less likely to exhibit positive play behaviors on the gambling literacy scale (Figure 6A-8) than more casual lottery players. However, these differences were not seen on the personal responsibility scale (Figure 6A-9). For example, while 72 percent of all other gamblers (correctly) disagree with the statement that “my chances of winning get better after I’ve lost,” only 60 percent of weekly lottery players disagree with that statement. While these differences are not as extreme as are seen with frequent players of other forms of gambling (as will be seen later), they do suggest a special need for player education and prevention messaging aimed at the most frequent lottery players.

### 6B. Casinos

Casinos of some form existed in 43 states at the time of the survey (American Casino Guide, 2019). These casinos may be commercial or state-owned land-based or riverboat casinos, casinos owned by tribal governments on tribal land, casinos located at pari-mutuel racetracks, or boats that leave U.S. ports and travel to international waters before gambling is allowed to begin. Only in Alaska, the District of Columbia, Hawaii, New Hampshire, Tennessee, Vermont, Virginia and Utah did one have to leave the state to access casino gambling.

Two out of three survey participants have visited a casino. Slightly over one-third (37 percent) reported spending money at a casino in the past year, while another 30 percent reported visiting a casino in prior years.<sup>10</sup> Of those who visited a casino in the past year, two-thirds (65 percent) visited a casino in their home state while 35 percent visited a casino in a neighboring state and 30 percent reported a visit to a casino in Las Vegas or elsewhere in Nevada. (Figure 6B-1). As opposed to years past when casino visits usually meant a fair amount of travel, many casino goers do not have to travel far at all: one-third report travelling less than 25 miles to their destination.

Not surprisingly, Nevada easily leads the nation in casino visitation—72 percent of its residents made at least one trip to a casino in the past year. Arizona is a distant second at 53 percent (Figure 6B-2). At the other end of the scale, fewer than one resident in four of Alaska, South Carolina, and Vermont reported a casino visit.

When asked why they had visited a casino, 51 percent replied that they had gone mostly to gamble, but also to socialize, while 27 percent went just to gamble (Figure 6B-3). Another 20 percent reported going mostly to socialize, but sometimes to gamble, and 3 percent said they went to socialize and enjoy casino amenities only.

Slots or gaming machines dominate the casino gambling landscape, with almost three out of four

<sup>9</sup> The relatively low level of play for those with less than a high school diploma may well be an artifact of age. Many of those without a diploma are either the youngest adults who might not yet have finished high school or the oldest, the two age groups least likely to play the lottery.

<sup>10</sup> Respondents were asked if they had “spent money at a casino for any reason,” meaning that is possible for someone to answer “yes” having gone only for food, drink, or a show. However, only 3 percent of past year casino visitors said that they never went to gamble, only to socialize and enjoy the amenities.

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casino visitors reporting machine play (**Figure 6B-4**). Blackjack was the second most popular game at 43 percent, followed in order by roulette, craps or other dice games, sports betting, poker, pai gow (a card game played in casinos based on a Chinese domino game of the same name), and baccarat.

The demographics of casino goers show differences between various groups that are somewhat different from those seen with gamblers overall. First, casino goers are 1.5 times more likely to be male (43 percent to 30 percent). Second, racial or ethnic differences are more pronounced, ranging from 45 percent participation among Blacks to 35 percent among Whites and 32 percent among Native Americans (**Figure 6B-5**). Other than notably lower play (28 percent) among those whose educational attainment is less than a high school diploma,<sup>11</sup> the variations between those with differing levels of education are relatively slight, ranging from 34 percent of those completing high school to 40 percent of those with an associate degree or higher (**Figure 6B-6**). When examined by household income, the highest participation (49 percent) was found in the highest income group—those with annual incomes of \$150,000 or more—with casino visitation dropping off until reaching a low of 28 percent of those with incomes less than \$25,000 (**Figure 6B-7**).

Casino visitors are, on the average, slightly younger than lottery players (median age of 44 compared to 47 for lottery play) but older than most other forms of gambling (**Figure 3-9**). For example, the average casino goer is 10 years older than the average fantasy sports player. However, the stereotype of the elderly casino customer is put to rest by the data in **Figure 6B-8**. Annual casino attendance peaks at 46 percent in the 25- to 34-year-old age group and slowly but consistently declines to a low of 26 percent of those 75 or older.<sup>12</sup> The same pattern holds true for those going to the casino monthly or more often, peaking at 17 percent of those between 25 and 34 years old and declining to 5 percent of those 75 or older (**Figure 6B-9**).

Casino visitors appear to be more likely than other gamblers to show high levels of problematic play, being more likely to answer “many times” to each of the four measures of problematic play, though the total numbers are not large (**Figure 6B-10**).

There are no meaningful differences between casino visitors and gamblers who did not visit a casino for the four personal responsibility positive play measures (**Figure 6B-11**). Differences are far greater for the three measures of gambling literacy (**Figure 6B-12**). Those not gambling at casinos were more likely to disagree with the statement “my chances of winning get better after I’ve lost” than those who do gamble at casinos by a margin of 77 percent to 61 percent, for example (**Figure 6B-13**).

When we look at those who visit casinos weekly or more, a more extreme picture emerges. Frequent problematic play is much more common (**Figure 6B-14**). For example, 14 percent of weekly casino visitors reported relying on others to pay their debts or bills “many times” compared to only 1 percent of all other gamblers. Positive play measures show a similar pattern. While differences in three of the four personal responsibility measures are small, the percentage agreeing that “it’s my responsibility to spend only money that I can afford to lose” drops from 90 percent of all other gamblers to 72 percent of weekly casino visitors (**Figure 6B-15**). Differences are much more pronounced, however, on measures of gambling literacy (**Figure 6B-16**). In the most extreme case, only 34 percent of weekly casino visitors disagree that “my chances of winning get better after I’ve lost” compared to 71 percent of all other gamblers.

11 As previously mentioned, the lack of a high school diploma is heavily correlated with age, as those in that group are disproportionately young adults who have not yet completed their education or the very old who attended school in an era when educational expectations differed from those of recent years.

12 The low attendance for those between 18 and 24 in large part results from an age limit of 21 in most jurisdictions.

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### 6C. Gaming Machines

Gaming machines (usually referred to as “slots” or “slot machines”) were played by 32 percent of Americans in the year preceding the survey. Gaming machines are often associated with casinos and, in fact, 86 percent of gaming machine customers did play them there (Figure 6C-1). However, in some states, machines can also be played in bars or restaurants, convenience stores, or pari-mutuel racetracks (“racinos”). Most customers play casually with only 10 percent reporting playing weekly or more often and 39 percent saying they only play once or twice a year (Figure 6C-2).

Not surprisingly, Nevada leads the nation in gaming machine participation, with 60 percent of Nevadans reporting past year play. Arizona and New York rank a distant second and third, at 47 percent and 44 percent respectively. While it has been suggested that adoption of “convenience gambling” (gaming machines in non-casino locations such as convenience stores or bars) leads to greater participation, a look at state data suggests that this is not necessarily the case. While some states with convenience gambling have participation rates higher than the national average (such as Louisiana and South Dakota, both at 39 percent), others, such as Oregon (33 percent) and West Virginia (25 percent) are either close to or below the national rate.

As with casinos, gaming machine players are older, on average, than most forms of gambling, with a median player age of 44 years old (Figure 3-9). But again as with casinos, it would be a mistake to think of machine players as elderly. Those between the ages of 25 and 34 are the most likely to report past year play (Figure 6C-3) and monthly or more play (Figure 6C-4) while those 75 or older are the least likely.

Men are more likely to play gaming machines than women (37 percent vs. 27 percent). There are only small, if any, differences in participation by race or ethnicity, with play ranging from 37 percent for the Latinx population to 31 percent for Blacks (Figure 6C-5). Differences by education and income closely mirror those seen for casinos. Participation increases with increasing household income (Figure 6C-6) and, with the exception of lower participation among those who have not finished high school, shows little difference by educational attainment (Figure 6C-7).

Differences in both problematic play and positive play measures are virtually identical to those observed in casino gamblers and so are not further discussed here. More information can be found in Figures 6C-8 through 6C-10.

### 6D. Sports Betting

Sports betting in the United States occurs in three forms. The first, which we will call “traditional” sports betting, involves a wager on the outcome of a sports event or an occurrence within an event. These are frequently social bets with another individual. When done with a casino, bookmaker, or other gambling establishment, they are bets against the house (as opposed to bets against other players) involving odds set by professional oddsmakers. The second is fantasy sports. In its original form, fantasy sports is a social event where players get together in a league where each contestant “drafts” a team of active players in a professional sport. Winners and losers in a fantasy sports league are determined by the actual performance of the players drafted into each fantasy team over the course of a season. In recent years fantasy sports evolved to include leagues run over the Internet where players never actually meet, and finally to daily fantasy sports (DFS) where the contests are played over a shorter period of time such as a week or even a day and are organized by for-profit businesses. DFS contests can involve thousands of players who compete for large cash prizes. The third form of sports betting is sports contests, where players compete against each other (rather than against the house) by picking winners for a series of games, with prizes going to those who pick the most winners. One prominent form of sports contests are the pools surrounding the NCAA men’s basketball tournament (“March Madness”).

Americans participate in these three forms in relatively equal numbers. Twenty-two percent of Americans reported participating in a sports contest in the past year, 20 percent in traditional sports betting, and 17 percent in fantasy sports. Many (63 percent of sports bettors) participate in more than one form, with 40 percent of sports bettors participating in all three (**Figure 6D-1**). Overall, 29 percent of Americans participated in at least one type of sports betting in the past year. It is worth noting that there are very few who bet on fantasy sports only. This group constituted only 7 percent of the sports betting population.

The NGAGE survey focused heavily on traditional sports betting and fantasy sports in response to current policy debates. Sports contests were not as intensively studied. The remaining portions of the sports betting section will focus exclusively on traditional and fantasy sports.

### 6E. Traditional Sports Betting

As previously mentioned, 22 percent of survey respondents reported making a traditional sports bet in the previous year. Traditional sports bets can be further divided into three forms. The most common form is single bets on the outcome of a game—85 percent of sports bettors made this type of a bet (**Figure 6E-1**). The second most popular type of bet is the “prop” bet, where bets are made on events within a game, such as which baseball team will hit the first home run, or which quarterback will throw the first interception. Forty percent of sports bettors made this type of bet. The third form is parlay betting, where instead of picking the outcome of a single game players attempt to pick the outcome of a series of games, such as all NFL games on a given weekend. Parlay bets are the sports betting equivalent of lottery games like Powerball, where players face very long odds of winning a very large prize.<sup>13</sup> Only 22 percent of sports bettors reported a past year parlay bet.<sup>14</sup>

At the time of the NGAGE survey, sports bets could be legally made in only two states: Nevada and New Jersey. It will surprise few that these two states lead the nation in traditional sports betting participation. What may be more of a surprise is that the differences between these states (30 percent participation in New Jersey and 29 percent in Nevada) and the rest of the country (22 percent overall) is not that great. This suggests that the dramatic expansion of legalized sports betting since the survey may not lead to dramatic increases in sports gambling participation. (We caution that the survey provides no guidance on the amount of money being wagered or the form that wagers might take.)

The most popular sport for gamblers is easily professional football (**Figure 6E-2**). Almost twice as many (65 percent) bet on pro football as the 36 percent who bet on the second most popular activity (college football). Professional basketball, baseball, and college basketball also each attract more than one quarter of the sports betting population. There is substantial local variation in betting preference, however. In some states with prominent college football programs and no professional team, betting on college football outpaces betting on the pro game. In Alabama, for example, 74 percent of the sports betting population made a wager on college football compared to 61 percent on the NFL. Local popularity of certain sports is also apparent in the betting patterns, with, for example, 29 percent of sports bettors in Minnesota betting on hockey compared to 11 percent nationwide.

Of the less popular sports betting activities, it is worth noting the emergence of e-sports, or betting on the outcome of video game contests. Despite being a relatively new activity, it is now a big business with over \$1 billion in revenues worldwide<sup>15</sup>, and an increase of more than 500 percent since 2014 (Willingham, 2018). It is particularly noteworthy that 70 percent of the NGAGE survey participants who reported betting on e-sports are under the age of 35.

13 Parlay bets differ from sports contests in that they are bets made against the house, while sports contests are competitions between players.

14 In Nevada, however, parlay bets are considerably more common with 50 percent of sports gamblers making these bets.

15 Note that this is revenue from all facets of the e-sports business, not gambling revenues.

## 6. GAMBLING ACTIVITIES

Two out of three (66 percent) of sports bettors bet on more than one sport, with one in four (27 percent) betting on four or more (**Figure 6E-3**). Most report betting infrequently, with 31 percent reporting betting only once or twice a year, while an additional 28 percent bet more than that but less than once a month. The most frequent bettors—those wagering weekly or more—account for 18 percent of the total while those betting a few times a month make up the remaining 23 percent. As with overall sports betting, the share of Nevada sports bettors who bet on a weekly basis (20 percent) is virtually identical to the national rate.

The most common type of sports betting was social bets with family or friends (**Figure 6E-4**). Nine in ten sports bettors (91 percent) reported making this type of bet, with 43 percent making such a bet “often.” Perhaps more surprising is the 62 percent who reported at least an occasional bet on an online sportsbook, with 57 percent reporting bets at a brick and mortar sportsbook (which for most would have involved travel to Nevada, New Jersey, or another country). And almost half (48 percent) reported at least an occasional bet with a bookmaker.

It is very possible that more widespread legalization of sports betting will affect not only the number of sports bettors but the ways in which they gamble. It is possible that social bets, for example, will be increasingly supplanted by legal sportsbooks (either brick and mortar or online). It is also possible that growth in legal establishments will reduce participation in illegal bookmaking. While a definitive answer will have to await future surveys, it is possible that the experience of Nevada will serve as a guidepost for the rest of the nation. In Nevada, the share of sports bettors using a brick and mortar sportsbook was 85 percent compared to 57 percent in the nation. The share making social bets declines only slightly in Nevada, however, from 91 percent nationally to 80 percent in the Silver State. Most notable, however, is the lower use of bookmakers in that state. American sports bettors are 54 percent more likely to use bookmakers than sports bettors in Nevada.

Survey participants reported that the median wager on the outcome of a game was \$30 (**Figure 6E-5**). Nine percent, however, reported an average wager of \$100 or more. Notably, the amount of the average bet appears to be no higher in Nevada than in the rest of the country. The median bet on the outcome of a game was \$28 in Nevada, almost identical to the \$30 reported throughout the country.

Men are much more likely to bet on sports than women by a margin of 28 percent to 12 percent. There is also a dramatic generational divide, with past year sports betting peaking at 32 percent of those between 25 and 34 and declining to 8 percent of those between 65 and 74 and 3 percent of those 75 and older (**Figure 6E-6**). Put another way, almost half (46 percent) of sports bettors are under the age of 35, even though that group makes up only 29 percent of the adult population. An age disparity of this extent invites speculation about what will happen as this segment of the population ages. Will young adults bring their attraction to sports betting with them into middle age (which would likely suggest a gradual growth in sports betting over time), or will it remain an activity that appeals primarily to the young?

Analysis of sports betting by income and educational attainment suggests that that the activity has a disproportionate appeal to those at the higher end of the socio-economic scale. Past year sports betting is highest for those with a bachelor’s degree (27 percent) or a graduate degree (24 percent) and lowest for those with less than a high school diploma (19 percent) followed by those with some college but no degree (16 percent) (**Figure 6E-7**). Likewise, while participation peaks at the highest income levels (28 percent for those with incomes of \$100,000 or more) it steadily declines to 24 percent or less for those with incomes under \$50,000 (**Figure 6E-8**). What makes these data more striking is that, as we have seen, sports betting is by far more appealing to young adults who have likely not yet entered their peak earning years and who may not have completed their formal education.

Participation by Asian-Americans (33 percent) and Blacks (32 percent) is more than 50 percent higher than the participation rates for Whites (19 percent) and Native Americans (also 19 percent) (Figure 6E-9).

Sports bettors show significantly<sup>16</sup> higher levels of problematic play than those who gamble but not on traditional sports. Compared to the non-sports gamblers, those wagering on sports were three times more likely to say they needed to gamble more for the same feeling of excitement “many times,” more than five times more likely to say they’ve needed to rely on others to pay their debts or bills many times, seven times more likely to have lied to hide their gambling many times and more than three times more likely to have frequently felt restless or irritable when trying to quit or cut down on their gambling. (Figure 6E-10). More striking are the even more elevated levels for those betting on sports weekly or more (Figure 6E-11). In this group 11 percent reported needing to gamble more for the same feeling of excitement and feeling restless or irritable when trying to quit or cut down. Ten percent frequently lied to hide their gambling and 8 percent frequently relied on others to pay their debts or bills. It is also noteworthy that even those gambling on sports less frequently show higher levels of problematic gambling behavior than those who do not bet on sports.

Some of these disparities can be explained by sports bettors being younger than other gamblers, and young gamblers in general are more prone to risky behavior. However, the levels of problematic play are considerably higher even when the comparison is limited to those under the age of 35 (Figure 6E-12). It is apparent, then, that sports bettors are at higher risk than those betting only on other activities. What we do not know is if this is because sports betting is inherently more risky, if those prone to risky behavior are more likely to be drawn to sports betting, or if the limited legal options in most states (at the time of the survey) lead to more risky behavior. The data make it clear, however, that sports betting requires greater attention to problem gambling education and prevention than most, if not all, other forms of gambling.

It is not surprising that the same pattern is seen in positive play. Differences in personal responsibility beliefs are small but consistent (Figure 6E-13). As with casino gambling, however, the disparities are greater for items relating to gambling literacy (Figure 6E-14). While 80 percent of non-sports gamblers agree that “gambling is not a good way to make money,” that number drops to 59 percent for sports gamblers.<sup>17</sup> Similar differences are seen in the responses to “my chances of winning get better after I’ve lost” and “If I gamble more often it will help me to win more than I lose.”<sup>18</sup>

### 6F. Fantasy Sports

As previously mentioned, 17 percent of the gambling public bet on fantasy sports in the past year. Of these, almost half (44 percent) played in traditional season-long leagues only (Figure 6F-1), while another third (34 percent) played only daily fantasy sports. The remaining 22 percent played both traditional and daily fantasy sports.

Of those playing traditional fantasy sports, half (50 percent) played only online (Figure 6F-2) which could mean play in leagues through a website such as ESPN or Yahoo. Another 29 percent played offline only, playing with friends or colleagues with scores tallied up by hand. The remaining 21 percent played both ways.

<sup>16</sup> “Significantly” in this instance refers to both statistical significance and meaningful significance. Each comparison referenced in this paragraph has a statistical significance of  $p < .001$ .

<sup>17</sup> It must be acknowledged that a very small number of sports bettors do consistently make money wagering on sports. However, for the overwhelming majority of sports bettors, it is quite true that gambling is not a good way to make money, and educating people about this reality is an important component of responsible play efforts.

<sup>18</sup> It is possible that the answers to these two questions reflect a belief that experience will make one a better gambler rather than a misunderstanding of probabilities. To the extent this is the case, however, it may also reflect overestimation of the benefits of experience for the average gambler.

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As with traditional sports betting, professional football dominates, attracting 69 percent of all fantasy sports players (**Figure 6F-3**). Baseball (30 percent) and professional basketball (29 percent) are a distant second and third, respectively. Almost two-thirds of players (62 percent) bet on only one or two sports (**Figure 6F-4**), while 10 percent bet on five or more. Sports preferences are similar whether one plays daily fantasy or traditional fantasy sports (**Figure 6F-5**). Both those playing only traditional fantasy and those playing only daily fantasy have a strong preference for professional football. The greatest differences are found in college football (played by 35 percent of daily only players versus 24 percent of traditional only players), baseball (more preferred by traditional players by a 28 percent to 20 percent margin), and college basketball, where daily-only players outplay traditional-only players by 20 percent to 12 percent.

Traditional fantasy sports players participate in an average of 2 leagues (**Figure 6F-6**), though 23 percent play in five or more. (Note that these can be in different sports or multiple leagues in the same sport.) Half report that their leagues cost \$50 or less to play, with 26 percent reporting a cost of over \$100.

Daily fantasy sports players bet relatively frequently compared to other forms of gambling. Four in ten (41 percent) reported making bets on this activity weekly or more often (**Figure 6F-7**). For perspective, remember that only 18 percent of traditional sports gamblers (as opposed to traditional fantasy sports) reported betting this often. Half (49 percent) report spending \$25 or less on average to enter a daily fantasy sports contest with 12 percent reporting average spending of \$100 or more.

Given the significant overlap between fantasy sports participants and traditional sports bettors, it is not surprising that the demographic characteristics of these two groups are quite similar. Fantasy sports players on average are among the youngest players of any gambling activity, with a median age of 34 (**Figure 6F-8**). As these data suggest, more than half (53 percent) of fantasy sports players are under the age of 35 while only 9 percent are 55 or older (**Figure 6F-9**). As with traditional sports betting, fantasy sports players are overwhelmingly male, with women making up only 32 percent of players.

As do traditional sports gamblers, fantasy sports participants skew towards higher household income (**Figure 6F-10**) and higher levels of education (**Figure 6F-11**). Participation among those with graduate degrees (24 percent) is almost twice that of those with only a high school diploma or less (14 percent), while those with annual household incomes in excess of \$150,000 are almost twice as likely (28 percent) to participate as those with incomes under \$50,000. The racial and ethnic discrepancies noted in traditional sports betting are slightly magnified with fantasy sports (**Figure 6F-12**), with Whites (15 percent) participating at about half the rate of Asian-Americans (29 percent) and Blacks (28 percent).<sup>19</sup>

Fantasy sports players, particularly those playing daily fantasy sports, are more likely to acknowledge risky gambling behavior than those gamblers who do not bet on fantasy sports (**Figure 6F-13**). One in ten daily fantasy sports players (11 percent), for example, said that they had lied to hide their gambling many times, compared to 7 percent of traditional fantasy players and 2 percent of gamblers who did not play fantasy sports. And 8 percent of daily fantasy sports players said they needed to gamble more for the same feeling of excitement many times, a statement only endorsed by 2 percent of both traditional fantasy sports players and those not betting on fantasy sports.

The same pattern holds true for positive play. Gamblers not playing fantasy sports are much more likely to strongly agree with personal responsibility statements such as “I should be aware of how much money I spend when I gamble” (78 percent) than those playing traditional fantasy sports (56 percent)

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<sup>19</sup> Again, some of these differences may simply be a reflection of age, as the Asian-American and Black populations in the U.S. are younger than the White population.



and those playing daily fantasy sports (47 percent) (Figure 6F-14). The discrepancies are even greater for items relating to gambling literacy, with only 20 percent of daily fantasy players strongly agreeing that “gambling is not a good way to make money” compared to 30 percent of traditional fantasy players and 62 percent of all other gamblers (Figure 6F-15). Similarly, only 14 percent of daily fantasy players strongly disagreed that “my chances of winning get better after I’ve lost,” compared to 27 percent of traditional fantasy players and 54 percent of those not playing fantasy sports.

### 6G. Card Playing

One in four American gamblers (23 percent) reported betting on cards in the year preceding the survey. Of these card players, 77 percent had played blackjack while 60 percent reported playing poker. Smaller numbers had played pai gow (8 percent), baccarat (7 percent), cribbage (6 percent) or some other game for money (13 percent) (Figure 6G-1). Overall, 86 percent of card players had played either blackjack or poker, with 40 percent playing both, 27 percent blackjack only, and 19 percent poker only (Figure 6G-2).

Twelve percent of card players report playing weekly or more often, with another 20 percent playing “once or more” a month but not weekly. Thirty-six percent played several times a year, with the remaining 32 percent playing once or twice a year.

Casinos are the most popular venue for both poker and blackjack players, with 79 percent of blackjack players (Figure 6G-3) and 65 percent of poker players (Figure 6G-4) reporting casino play.<sup>20</sup> Poker was also commonly played at someone’s home (60 percent of poker players) while blackjack was less likely to be found in a home setting (38 percent). Smaller numbers played at card clubs, racetracks, or bars and restaurants.

Card players in many ways resemble sports gamblers.<sup>21</sup> Males are twice as likely as females to play (32 percent to 16 percent), Blacks and Asian Americans are more likely to play than other ethnic or racial groups (Figure 6G-5), and they tend to have high socio-economic status, with participation increasing with both income (Figure 6G-6) and education (Figure 6G-7). Like sports gamblers, they are disproportionately young, with a median age of 38 (Figure 3-8)<sup>22</sup>, though more older adults bet on cards than wager on sports. Forty-one percent of card players are under the age of 35, compared to 46 percent of those betting on traditional sports and 53 percent of fantasy sports players.

Card players also resemble sports gamblers in their greater propensity for risky behavior than the rest of the gambling population (Figure 6G-9). For example, 7 percent of card players reported frequently feeling restless or irritable when trying to cut down on their gambling compared to 2 percent of the non-card-playing gambling population, and 6 percent reported lying to hide their gambling “many times” as opposed to 1 percent of non-card players.

Positive play indicators also exhibit the same patterns as sports betting. Card players show a small but consistent trend of being less likely to agree with personal responsibility indicators (Figure 6G-10), but are much less likely to show positive play on the three gambling literacy items (Figure 6G-11). For example, 80 percent of non-card players agreed that “gambling is not a good way to make money.” Only 63 percent of card players agreed with the statement.

20 No attempt was made to separate casino card players playing with live dealers from those playing either with automated dealers or at gaming machines with poker or blackjack themes. In addition, we do not know the degree to which those playing card-themed machines consider that to be card playing.

21 There is a great deal of overlap in the card playing and sports betting populations. Of those who have played either one in the past year, half reported playing both.

22 Poker players and blackjack players have an identical median age of 37.

## 6. GAMBLING ACTIVITIES

### 6H. Online Gambling

Though online gambling is illegal (with the possible exception of fantasy sports) in most jurisdictions, 15 percent of the sample reports past year wagering on a website or an app on a mobile device. Participants reported a number of diverse activities, with online simulations of traditional gambling being far more popular than forms unique to online platforms (**Figure 6H-1**). Sports, fantasy sports, and poker head up the list, though wagering on mobile slots is not very far behind.

While not necessarily a gambling activity, 79 percent of online gamblers also reported spending real money to buy credits, tokens or virtual currency on a social casino or casual games site to play traditional gambling games such as slots, poker or blackjack.

One in four (25 percent) online gamblers report weekly bets, with another one in four (26 percent) betting at least monthly (**Figure 6H-2**). These numbers are comparable to lottery play (48 percent betting monthly or more) and traditional sports betting (41 percent) but much less frequent than fantasy sports (73 percent) (**Figure 6H-3**). Online gamblers of any kind are, however, more likely to bet frequently than card players (31 percent) betting monthly or more, casino visitors (27 percent), or gaming machine players (28 percent).

Online gamblers are, on average, the youngest group of gamblers with a median age of 34. Those under the age of 35 make up 53 percent of the online gambling population. This certainly relates in part to the popularity of the most common forms of online gambling (sports, poker) among young adults, though we cannot tell from the data whether people play online because of the availability of these activities or if these activities are popular among young adults because they can be played online. Past year participation ranges from 40 percent of those between 25 and 34 to 3 percent or less of those 65 or older (**Figure 6H-4**).

The propensity to gamble online does not appear to be affected by socio-economic status. With the exception of those with graduate degrees (where 29 percent played online), participation by education level falls within a narrow range (**Figure 6H-5**). Similarly, participation by income only ranges from 19 percent of those with annual household incomes between \$25,000 and \$50,000 to 26 percent of those with incomes in excess of \$100,000 (**Figure 6H-6**). Race or ethnicity does, however, appear to be related to online gambling participation, with Whites and Latinx approximately 50 percent more likely to participate than Blacks, Native Americans, or Asian Americans (**Figure 6H-7**). Two-thirds of online gamblers (67 percent) are male, which may be a consequence (or a cause) of the availability of sports betting and poker.

Online gamblers have significantly higher frequency of risky behavior than those who only gamble offline (**Figure 6H-8**). Nine percent of online gamblers reported lying to hide their gambling “many times,” for example, compared to 1 percent of those gambling only offline. Similar disparities are found for the other three measures of risky behavior. We must caution, however, against attributing the differences solely to use of online gambling. Various studies, notably Gainsbury (2014), Wardle (2011) and LaPlante (2014), have shown that problematic behavior in online gamblers may often be a consequence of their offline gambling activities and that the rates of problematic behavior in those who gamble purely online is quite low. Our sample of online gamblers was not sufficient to make this comparison. Similar patterns are found in positive play measures (**Figures 6H-9** and **6H-10**); however, the same caveat likely applies. These findings, however, do suggest the need for education and prevention efforts targeted at the online gambler.

## 6I. Other Forms of Gambling

Other forms of gambling mentioned in this study will not be subject to the detailed analysis given to the types of gambling discussed above. In some cases, such as raffles, it is because they are not particularly relevant for policy discussions. In others, such as pari-mutuel racing or casino table games such as roulette or craps, the number of participants in the sample was not adequate for detailed analysis. For some of these, however, a few relevant facts do emerge.

**Racing:** As of November 2019, horse racing tracks operate in 30 states (Wikipedia, 2019), though betting through simulcasts or over the Internet may take place in others. Fourteen percent of survey participants reported wagering on a horse race in the past year, with another 14 percent saying they had done so prior to the previous year. Of past year gamblers, 41 percent reported betting only once or twice a year, while 31 percent bet once a month or more. Participants were overwhelmingly male (69 percent), and had a median age of 37.

Participation by state ranges from a high of 25 percent in New York; followed closely by Kentucky, 23 percent; New Jersey and Florida, 21 percent; and California (20 percent) to a low of 4 percent in South Dakota. Ten states have participation rates of 8 percent or less.

**Bingo:** Bingo was played by one in five (20 percent) of survey respondents in the past year. Despite its reputation as a game for senior citizens, it is surprisingly popular among young adults (**Figure 6I-1**). Participation is highest in the 25-to-34-year-old age group, where 30 percent played in the past year, and is actually lowest among seniors. Only 10 percent of those between 65 and 74 and 11 percent of those 75 or older reported past year bingo play. Put another way, there are more than three times the number of bingo players under the age of 35 as there are who are 65 or older.<sup>23</sup> In some parts of the country, promoters have capitalized on this trend by offering variations of bingo designed for younger audiences such as “purse bingo,” where prizes include products such as designer handbags (see, for example Burger, 2016).

Bingo participation is particularly high in a small number of states, led by Texas (32 percent), New York (29 percent), Minnesota (28 percent) and Nevada (27 percent). At the other end of the scale are Utah (9 percent), Hawaii (11 percent) and Idaho and Nebraska (13 percent).

**Table Games:** The casino table games of craps and roulette were each played in the past year by 13 percent of our sample. Players, on average, were among the youngest gamblers, with a median age of 34, and are heavily male (67 percent for roulette and 69 percent for craps or other dice games). Approximately half of those playing either game also played the other.

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<sup>23</sup> Bingo is also one of the more gender-balanced forms of gambling, with 52 percent of bingo-playing survey respondents being male and 48 percent female.

## 7. PUBLIC OPINION

The NGAGE survey included several questions about knowledge and beliefs about problem gambling and opinions on matters relating to public policy. These questions were asked of all respondents, gamblers and nongamblers alike. Taken as a whole, the answers to these questions reveal considerable differences of opinion among the American public, substantial confusion over the nature of problem gambling, and the continuing existence of stigma associated with gambling disorders.

### 7A. Beliefs about Problem Gambling

Survey respondents generally agreed that “addiction to gambling is a lot like addiction to drugs or alcohol” (Figure 7A-1). Only 11 percent of the public disagreed with the statement, either strongly or somewhat, while 37 percent strongly agreed and 38 percent agreed somewhat. This belief is held by gamblers and nongamblers alike (Figure 7A-2). Agreement, however, does increase with age (Figure 7A-3). Only 63 percent of respondents between the ages of 18 and 24 agree with the statement compared to 85 percent of those 65 or older.

Respondents were presented with nine conditions that might be believed to “cause” a gambling problem. Some of these items would likely be considered credible by most of those knowledgeable in the field (such as “a traumatic event in someone’s life”) while others would likely be rejected (such as “a moral weakness”). For each of the nine, respondents could say the condition was “very likely,” “somewhat likely,” “somewhat unlikely,” or “very unlikely” to cause a gambling problem. Respondents could answer “likely” or “unlikely” to as many of the nine conditions as they wished.

The conditions believed to “cause” a gambling problem, in the survey’s phrasing, are:

1. Moral weakness
2. Having an addictive personality
3. Not having enough willpower
4. Being around people who gamble a lot
5. Having a parent or other family member who gambles
6. A traumatic event in someone’s life
7. A person’s genetics or other medical condition
8. Seeing a lot of ads promoting gambling
9. Winning a lot of money

As discussed in the methodology section, the order of these statements was randomized for each respondent, so that some would, for example, see “moral weakness” first, others would see it second, and so on.

The results of this exercise are summarized in Figure 7A-4. All but one of the conditions were endorsed (i.e. answered “very likely” or “somewhat likely”) by half or more of the survey participants, the exception being “a person’s genetics or other medical condition.”

The most widely endorsed item was “having an addictive personality,” strongly endorsed by 44 percent and somewhat endorsed by 41 percent. Many, if not most mental health professionals disavow the existence of an addictive personality (see, for example Kerr, 1996 or Szalavitz, 2015), yet this conclusion clearly has not reached the general public.

This belief may well be problematic. As Szalavitz (op. cit.) writes, “The ‘addictive personality’ is seen as a bad one: weak, unreliable, selfish, and out of control. The temperament from which it springs is

seen as defective, unable to resist temptation.” It may also contribute to a view of the person with an addiction as “different from me” and the belief that “I don’t have an addictive personality; therefore, it can’t happen to me.”

Agreement that an addictive personality can cause a gambling problem is fairly evenly spread across all age groups, though it is slightly lower for those between 18 and 24 (76 percent compared to 83 percent to 88 percent for all others) (Figure 7A-5). The belief is held equally by gamblers and nongamblers (85 percent of each group), and by men (86 percent) and women (85 percent). Perhaps ironically, agreement with the statement increases with educational attainment, ranging from 74 percent of those with less than a high school education to 91 percent of those with advanced degrees (Figure 7A-6).

“Being around people who gamble a lot” was cited as a likely cause by 80 percent of survey respondents, with 33 percent believing it was “very likely” to cause a problem. Again, belief in this factor is strong regardless of age (Figure 7A-7), gender, or gambling/nongambling status. There is much less of a correlation with educational attainment than for the addictive personality statement, however. While it is possible that frequent gambling or maladaptive gambling could lead to association with other frequent gamblers (and certainly regular attendance at a gambling venue means one would be around people who gamble a lot), there is no evidence that it is a cause of gambling problems. One does not develop a gambling problem because they adopt problem gamblers as role models or because the condition is contagious. It is not a healthy belief, as it may lead some to believe that all one has to do to “treat” a gambling problem is to stop associating with other gamblers.

Lack of willpower is cited as a cause by 79 percent of respondents. There is scientific evidence that gambling disorders are accompanied by a lack of willpower (Brevers, 2013), though it is unlikely that the general public has the same understanding of willpower as researchers and practitioners. It is also not clear that the loss of control as understood by professionals is a cause of a gambling disorder, a symptom, or a consequence. Once again, age (Figure 7A-8), gender, gambling participation, and educational attainment (Figure 7A-9) do not appear to influence this belief.

A “big win” has long been cited as contributing to gambling disorders, and 78 percent of survey participants agreed that “winning a lot of money” was at least somewhat likely to cause a problem. The scientific literature is to some degree divided on the subject. Certainly it is not uncommon to note the frequency with which a winning experience is mentioned in treatment situations (see Rosenthal, 1992). More recent empirical studies, however, have called this into question (Weatherly, 2004). Yet again, age (Figure 7A-10), gender, gambling participation, and educational attainment (Figure 7A-11) have no apparent effect on this belief.

A large majority of the public (76 percent) agrees that “having a parent or family member who gambles” is likely to cause a gambling problem. It is not clear, though, whether respondents believe that this is due to shared genetic makeup, living in a family where gambling is to some degree accepted, or having gambling role models. It is also possible that some responded to the question in the context of excessive gambling while others thought of it as a family member who gambles at all.

This belief increases slightly with higher levels of education, ranging from 70 percent among those not completing high school to 83 percent among those with graduate degrees (Figure 7A-12), but age (Figure 7A-13), gender, and gambling experience show no meaningful differences.

There is a large drop-off from this item to the 56 percent who agree that “seeing a lot of ads promoting gambling” can cause a gambling problem. Griffiths (2005), in a review of literature on the effects of advertising on excessive use of both gambling and alcohol, concludes that “there is no evidence that this (a ban on advertising) would work.” In a more recent review of the literature, Binde (2014) concludes

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that “[t]he impact of advertising on the prevalence of problem gambling is in general likely to be neither negligible nor considerable, but rather relatively small. ... Only in particular conditions, such as extensive advertising for especially risky forms of gambling that are offered on an immature market with few if any player protection features (such as stake limits and possibilities for self-exclusion), may one assume that advertising in itself substantially contributes to problem gambling.”

While differences of up to 10 percent exist between groups in both age (Figure 7A-14) and educational attainment (Figure 7A-15), these differences do not indicate a consistent trend. There are no apparent differences regarding gender or gambling experience.

Clinicians have long noted that many presenting for gambling disorder treatment have a history of a traumatic event or events, and this appears to be confirmed in the research literature; see, for example, Kausch (2003) or Scherrer (2007). This view is supported by a small majority (55 percent) of survey respondents. Young adults are approximately 50 percent more likely to endorse trauma as a possible cause, with 64 percent of 18 to 24 year olds and 63 percent of 25 to 34 year olds agreeing with this belief compared to 47 percent of 65 to 74 year olds and 41 percent of those 75 or older (Figure 7A-16). Women are slightly more likely than men to agree (58 percent to 52 percent), but there are, at most, small differences between gamblers (56 percent) and nongamblers (53 percent) and between those with differing levels of education (Figure 7A-17).

“Moral weakness” is also cited by just over half (52 percent) of those participating in the survey.<sup>24</sup> There is very little difference between gamblers and nongamblers, men and women, and young and old (Figure 7A-18) in support for this item but there is some tendency for it to lose support with increasing education (Figure 7A-19).

The endorsement of moral weakness is problematic on at least three counts. First, is a condition caused by moral weakness one that would cause someone to see a trained professional or recommend that someone else do so? One does not generally go to a medical professional to get morally stronger. Second, it is certainly stigmatizing, likely contributing to reluctance to disclose a problem or to seek help. Third, it is likely that very few people think of themselves as morally weak, which could in turn lead many to believe that they are not susceptible to a problem that moral weakness “causes.”

The final item on the list of possible causes was “a person’s genetics or other medical condition.” In 1984 Henry Lesieur and Robert Custer wrote that “(t)he medical model of pathological gambling is coming to dominate the public image of the problem gambler. The new image is replacing the previous one of sinner or criminal” (Lesieur 1984). It is unlikely that this statement was true in 1984, and it was certainly not true in 2018, when it was endorsed by only 43 percent of survey respondents. The scientific literature, however, supports this concept nearly if not entirely universally (Gyollai, 2014).

There is a tendency for more young adults to endorse this item than senior citizens, though for any age group, agreement was far from universal. Agreement peaks at 51 percent for those between 35 and 44, though those under 35 are not far behind (Figure 7A-20). It declines, though, to 37 percent for those between 65 and 74 and 31 percent for those 75 or older. Gamblers are slightly more likely than nongamblers to endorse the statement by a margin of 45 percent to 39 percent, while there is little difference between men and women. There is, however, a tendency for greater agreement with increasing levels of education, with agreement ranging from 39 percent in high school graduates to 52 percent for those with a graduate degree (Figure 7A-21).

<sup>24</sup> As “moral weakness” is not a concept that lends itself to a precise definition or to scientific measurement, there is very little in the scientific literature about the validity of it as a cause of gambling problems.

In addition to these questions about the causation of problem gambling, respondents were asked two questions designed to indicate the level of stigma associated with gambling disorder. First, they were asked for their agreement with the statement: “People with a gambling problem are to blame for their problems.” A slight majority (51 percent) agreed with the statement with another 27 percent replying they were neutral, leaving only 22 percent who disagreed (Figure 7A-22). Interestingly, gamblers were slightly more likely to agree with the statement by a margin of 52 percent to 45 percent for nongamblers. There is a more notable disparity by age, with agreement ranging from 39 percent among those between 18 and 24 years old, to 57 percent for those between 55 and 64 years old (Figure 7A-23). Men are more likely to agree than women by a margin of 56 percent to 47 percent. Those with higher levels of education are more likely to disagree with the statement, with 18 percent of those with a high school degree disagreeing compared to 24 percent of those with a bachelor’s degree and 27 percent of those with a graduate degree.

For the second question, survey participants were asked for their level of agreement with “People with a gambling problem are below average in intelligence.” Agreement with this extremely stigmatizing statement was, fortunately, low, with only 10 percent agreeing overall and only 4 percent strongly agreeing (Figure 7A-24). While the numbers remain low, younger adults were more likely to agree with the statement than older ones, with agreement ranging from 17 percent of those between 25 and 34 to 4 percent of those 65 or older (Figure 7A-25).

## 7B. Perceptions and Knowledge of Treatment

The survey included four questions pertaining to awareness and perception of problem gambling-related services.

Respondents were asked if they agreed that “services to treat compulsive gambling are available in my community.” Four in 10 (38 percent) agreed, with only 13 percent agreeing strongly. A smaller number—15 percent—disagreed, with the remaining 47 percent selecting “neutral” (Figure 7B-1).

It is important to recognize that we have no way to evaluate the accuracy of these responses. Not every community has dedicated problem gambling services, and therefore some answering “no” may well be correct. At the same time, some answering “yes” may be incorrect, might be referring to more general social services, or might be thinking of a statewide helpline even though treatment is not available in their part of the state. However, the large number providing a neutral response speaks to an overall lack of awareness, and it is certainly true that one is unlikely to go to treatment if they are not aware it exists.

Given the uneven distribution of services, it should not be surprising that there is substantial state-to-state variation in response to this question. At the high end is Nevada, where 71 percent of those taking part in the survey expressed agreement. No other state comes close, with the next closest being Louisiana (53 percent), Delaware (51 percent), Oregon (51 percent), and Iowa, North Dakota and South Dakota, each with 49 percent agreeing. At the other end of the scale are the two states with no legal gambling: Hawaii (21 percent) and Utah (26 percent). Six other states had agreement rates of under 30 percent: Alabama (24 percent), Alaska (27 percent), Georgia (29 percent), New Hampshire (26 percent), Vermont (26 percent) and Wyoming (27 percent).

It is well worth noting that gamblers were twice as likely to claim awareness of services than nongamblers by a margin of 43 percent to 22 percent (Figure 7B-2). It is entirely possible that this is due to awareness promotions done in conjunction with gambling venues, such as inclusion of helpline numbers on lottery tickets or the placement of information at casinos or racetracks. Certainly this information is much more likely to be seen by gamblers. It is also possible that gamblers are simply more likely to

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pay attention to this type of information. It is also worth noting that gamblers who reported risky behavior were more likely to agree with this question than gamblers reporting no problems. Slightly more than half (53 percent) of gamblers who reported experiencing at least one of the four potentially problematic behaviors “many times” agreed that services were available in their community, as did 50 percent of those reporting one of the four at least once in the past year. By contrast 40 percent of gamblers reporting no problematic play agreed with the statement.

Other demographic characteristics showed little relation to answers to this question.

A related question asked for agreement that “if someone close to me had a gambling problem, I would know where to get them help.” While at first glance this may seem identical to the previous question, one could agree with this statement by citing resources that were not specifically designed for problem gambling, such as speaking with a religious leader or a family doctor. Alternatively, someone could be aware that services exist but not know how to access them. However, the percentage agreeing with this statement was identical to the percentage agreeing with the previous one (38 percent). Overall, 65 percent of those agreeing that services were available in their community also agreed that they would know where to get help, suggesting that the questions are related but by no means identical (Figure 7B-3).

Awareness of services in itself, however, is not sufficient to ensure that someone would take advantage of the services or encourage someone else to do so. They must also feel that accessing services is an appropriate thing to do and is likely to be effective. Two questions addressed this issue.

The first was “if someone in my family had a gambling problem, I would advise them to not discuss it with anyone outside the family.” This question speaks both to cultural norms surrounding help-seeking and to the stigma associated with gambling disorders. One in five (19 percent) of our respondents agreed with this statement, with 7 percent of them strongly agreeing (Figure 7B-4).

Gamblers are more likely to agree with the statement than nongamblers by a margin of 21 percent to 13 percent, however. And the numbers are even more striking for those reporting problematic behavior. Almost half (45 percent) of those experiencing at least one problematic behavior “many times” agreed that the problem should not be discussed outside the family, while 37 percent of those reporting a problematic behavior at least once agreed. Only 14 percent of gamblers reporting no problems agreed. Clearly knowledge of services by itself is not sufficient to guarantee use of those services.

It might come as a surprise to some that agreement with this statement is highest among young adults (Figure 7B-5). One in four (26 percent) of those under the age of 35 agreed compared to 17 percent of those between 55 and 64 and 10 percent of those between 65 and 74. More significant are differences in agreement by race or ethnicity (Figure 7B-6). At the high end 34 percent of LatinX respondents agreed that a gambling problem should not be discussed outside the family, with 29 percent of Asian Americans agreeing. At the other extreme, 17 percent of Whites agreed with the statement. Awareness and prevention efforts must consider cultural differences in receptivity to treatment.

The second question asked for agreement with the statement: “People with a gambling problem are unlikely to recover or get better.” Overall, 19 percent agreed with the statement, with half disagreeing (Figure 7B-7). However, another 29 percent responded that they were neutral, meaning that roughly half the population has some doubt about the prospects for recovery. In addition, most of those who disagreed with the statement (34 percent) only disagreed somewhat. The message that treatment works needs to be reinforced, as people who doubt its efficacy are unlikely to enter treatment or to refer someone else.

Older Americans, are more likely to believe in the prospect of recovery, with disagreement ranging from 40 percent of those between 18 and 24 to 57 percent of those between 65 and 74 (Figure 7B-8).



Racial and ethnic differences about the prospects for recovery are relatively minor (Figure 7B-9). Again, culturally specific messaging is important.

Gamblers are slightly more likely than nongamblers to disagree with the statement, but the difference is not large (54 percent to 47 percent). A much greater difference exists, however, between those not exhibiting risky gambling behaviors and those who do. Of those who reported at least one of the four problematic behaviors “many times” only 39 percent disagreed that those with a gambling problem are unlikely to recover or get better compared to 55 percent of those reporting no frequent problematic behavior. Those at the greatest risk are the most likely to doubt the possibility of recovery.

### 7C. Morality of Gambling

Respondents were asked if gambling was immoral and if it was against their religion.

Overall only 14 percent of survey respondents agreed that gambling is immoral, while 17 percent agreed that it was against their religion (Figures 7C-1 and 7C-2). There was not as much concordance between responses to these questions as one might expect, with 65 percent of those saying gambling is immoral also saying it was against their religion and only 49 percent of those saying it was against their religion agreeing that it was immoral.

What may come as more of a surprise was that 11 percent of gamblers agreed that gambling is immoral compared to 22 percent of nongamblers (Figure 7C-3). Put another way, as there are many more gamblers in the population than nongamblers, the majority of those believing gambling to be immoral had, in fact, gambled in the past year—59 percent of those saying that gambling is immoral also reported gambling in the past year. Similarly, 61 percent of those saying gambling is against their religion reported past year gambling.

Differences in age among those saying gambling is immoral are relatively slight, ranging from 17 percent of those between 18 and 24 to 11 percent of those between 65 and 74 (Figure 7C-4). Age differences among those agreeing that gambling is against their religion are somewhat more pronounced, ranging from 21 percent of those between 35 and 44 and 55 and 64 to 11 percent of those between 18 and 24. It is interesting to note that the age group most likely to say that gambling is immoral is also the least likely to say it is against their religion.

### 7D. Public Policy

Respondents were asked whether the gambling industry and the government should do more to help people with a gambling addiction. They were also asked similar questions specific to sports betting.

The public is much more favorable about increased gambling industry assistance than they are about additional help from the government by a 63 percent to 43 percent margin (Figure 7D-1). Gamblers and nongamblers alike have virtually identical opinions on both questions (Figures 7D-2, 7D-3). There is slightly more support for gambling industry assistance with increasing age (Figure 7D-4), with agreement ranging from a low of 56 percent of those between 35 and 44 to 70 percent for those 75 or older. The opposite trend holds true for opinions on government assistance, however (Figure 7D-5). The highest support is found among those between the ages of 18 and 24 (52 percent) and the lowest among those 75 and older (37 percent). And while there is little state-to-state variance in support for additional industry help (ranging from 70 percent in Iowa, Nebraska, Oregon and West Virginia to 58 percent in Utah) there is a greater disparity in support for government assistance, which ranges from 57 percent in New York to 34 percent in Utah. Interestingly, increased government support is more

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likely to be endorsed by those believing that gambling is immoral (57 percent) than those who do not agree that gambling is immoral (39 percent).

Three questions were specifically about sports betting. The first asked “if your state was to legalize or has legalized sports betting, how important is it to require operators to implement responsible gambling measures?” Almost two out of three respondents (63 percent) believed it to be at least somewhat important, with 19 percent calling it either somewhat or very unimportant. The remaining 19 percent had no opinion (Figure 7D-6).

Responses to this question appear related to the respondent’s gambling experience, as responsible gambling measures were endorsed by 51 percent of nongamblers, 67 percent of all gamblers, and 76 percent of sports gamblers. It is also related to views on the morality of gambling, as responsible gambling measures were endorsed by 56 percent of those gamblers agreeing that gambling is immoral, but 68 percent of those disagreeing with the immorality of gambling.

There was somewhat less support for the second question: “If your state was to legalize or has legalized sports betting, how important is it to set aside some of the revenues to treat individuals who develop gambling problems?” A smaller number (53 percent) believed revenue set-aside was somewhat or very important, while 26 percent called it somewhat or very unimportant, with 22 percent neutral (Figure 7D-7). As with the previous question, support was strongest with sports gamblers, 66 percent of whom endorsed the statement, followed by all gamblers (56 percent) and nongamblers (42 percent).

The third question was “If your state was to legalize or has legalized sports betting, how important is it to set aside some of the revenues to pay for public awareness campaigns designed to educate the public about the risks of gambling and the help that is available?” Of those surveyed (Figure 7D-8), 56 percent believed it important. It was rated as unimportant by 23 percent, with the remaining 21 percent having no opinion. And as with the previous two questions, sports gamblers were the most likely to believe funding for this purpose is important (67 percent), followed by all gamblers (60 percent) and nongamblers (44 percent). Those morally opposed to gambling were less likely to think a revenue set-aside for this purpose was important by a margin of 54 percent to 59 percent for those not morally opposed.

## 7E. Segments Analysis

Segmentation is a method of multivariate statistical analysis that places individuals in discrete groups based on their responses to a battery of questions. While initially limited to grouping by demographic characteristics, the technique has evolved to include a variety of traits such as values, tastes, and preferences (Yankelovich, 2006).<sup>25</sup>

We performed a segmentation analysis using the attitudinal questions described in sections 7A through 7D. Demographic and behavioral variables were not used to determine segment composition, though they were analyzed once the segments had been constructed.

The analysis broke our sample into four segments, each composing about one quarter of the population. The segments were named by the researchers and directors of the NGAGE project. A graphical summary of segment characteristics can be found in **Figures 7E-1** through **7E-17**. The segments and their key characteristics are:

### 1. “Responsible Gamblers” (25 percent of sample)

Members of this segment have a stronger belief than the rest of the population that genetics or medical issues are a cause of gambling problems, are the most likely to believe that gambling problems can be caused by traumatic experience, and are the least likely to endorse moral weakness as a cause. They believe that gambling problems are similar to substance addiction and have less of a tendency than other segments to assign blame to the gambler for gambling problems. “Responsible Gamblers” members are unlikely to believe that gambling is immoral (with only 5 percent endorsing this belief) or against their religion (9 percent). They have the strongest belief in effective recovery and, compared to the other segments, are more likely to know that services are available in their community and where to go to get help. They are also the most likely to believe that both the government and the gambling industry should do more to help.

They are the second most likely segment to gamble—81 percent reported gambling in the past year and 49 percent in the past month. Their gambling tends towards games of chance, with 73 percent having bet on the lottery and 79 percent on gaming machines. However, they trail all but the “Moralists” segment in participation in traditional sports, fantasy sports, and table games. Those who gamble commonly endorse positive play practices and report a low rate of risky gambling behavior—19 percent reported experiencing one of the four measured risky behaviors “once or more.” Only 4 percent of this segment reported experiencing one or more of the risky behaviors “many times.”

Demographically they have the highest educational attainment of the four segments (though not by a large margin), have an age structure that closely resembles the overall population with a median age of 50, and are disproportionately female (58 percent).

### 2. “It’s Your Fault” (22 percent of sample)

Members of this segment are far less likely than others to believe that gambling problems stem from genetic or medical conditions or from traumatic experience. They are the most likely (tied with the “Moralists”) to believe gambling problems stem from lack of willpower and are the second most likely segment (after the “Moralists”) to believe that those with

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25 A detailed description of market segmentation methodology can be found in Wedel (2000).

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gambling problems are to blame for their condition. They have average awareness of the availability of services and where to get help. Only a small portion of this segment believes gambling to be immoral or against their religion.

They are the most likely segment to have gambled in the past year (87 percent) and to report monthly gambling (49 percent) and are the most likely to bet on the lottery (79 percent) or gaming machines (42 percent). They are also the second most likely to have participated in games of skill, including traditional sports betting (25 percent), fantasy sports (20 percent), and table games (32 percent). Their rates of positive play are on a par with the overall population, though they are slightly less likely than average to agree that “gambling is not a good way to make money.” Risky play is on a par with the overall population, with 22 percent reporting one or more of the four measured behaviors once or more. Problematic play is uncommon, with 3 percent of this segment reporting a problem “many times.”

“It’s Your Fault” members have a median age of 52, close to average for the adult population. Men outnumber women by a 54 percent-46 percent margin.

### 3. “Moralists” (26 percent of sample)

Members of this segment, by a considerable margin, are the most likely to believe that people with gambling problems are to blame for their problems, with 71 percent endorsing the statement. They are also the most likely to say that gambling is against their religion (30 percent) and second most likely to agree that gambling is immoral (20 percent). They are by far the least aware about services in their community (16 percent) and the least likely to say they would know where to get help (11 percent). They, along with “It’s Your Fault” members, are the most likely to attribute gambling problems to lack of willpower and the second most likely to attribute it to moral weakness.

They are the least likely segment to report past year gambling, with 58 percent reporting a past year wager. Those who do so gamble casually, with only 25 percent reporting monthly gambling. (The next closest segment is the responsible gamblers at 47 percent.) The most popular game for those who do gamble is the lottery. Half of the segment reported buying a lottery ticket in the past year, but all other gambling activities are far less common, with 8 percent placing a sports bet, 7 percent playing fantasy sports, 18 percent playing a gaming machine, and 13 percent a table game. For those who do gamble, rates of positive play are comparable to the overall population. They are unlikely to report problematic play, with only 2 percent reporting any of the four indicators “many times.”

Members of this segment have an average age of 51, close to average for the adult population. Women outnumber men by 58 percent to 42 percent.

### 4. “Invulnerables” (27 percent of sample)

This segment is the most likely to stigmatize those with gambling problems, as they are the most likely to agree with the statement that people with a gambling problem are below average in intelligence. They are also the most likely to believe that gambling is immoral, the most likely to believe that people with a gambling problem are unlikely to get better, and the most likely to attribute gambling problems to moral weakness. By a large margin, they are the least likely to agree that “addiction to gambling is a lot like addiction to drugs or alcohol” or that the gambling industry should do more to help people with a gambling addiction.

## 7. PUBLIC OPINION

Seven out of ten members of this segment gamble. While this is a somewhat lower yearly rate than either the “Responsible Gamblers” or “It’s Your Fault,” their rates of monthly or weekly gambling exceed those of “Responsible Gamblers” and approach those of “It’s Your Fault” members. They are the most likely to bet on traditional sports, fantasy sports, and table games (including cards), the forms of gambling associated with the most frequent risky behavior. Accordingly, this is the segment with by far the highest level of risky gambling behavior and by far the lowest levels of positive play. They are, for example, six times more likely to have reported relying on others to pay debts than any of the other segments, and four times more likely to say they have lied to hide their gambling. Regarding positive play, each of the other segments is almost twice as likely to agree that “I should only spend money that I can afford to lose” or that “I should be aware of how much money I spend when I gamble,” among other indicators. Overall, this segment accounts for 46 percent of those reporting any of the four risk indicators once or more, and 61 percent of those reporting one or more of the risky behaviors many times despite being only 27 percent of the population.

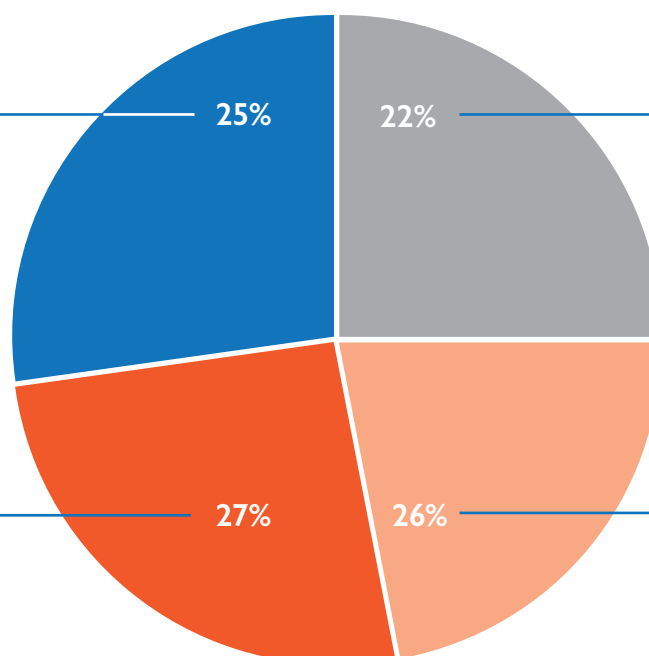
Members of this segment are, overall, considerably younger than the other segments, with a median age of 37, and 47 percent are under the age of 35 compared to no higher than 26 percent for the other segments. They are slightly more likely to be male (53 percent) than female.

### Segment 1: Responsible Gamblers

- 2<sup>nd</sup> most likely to gamble
- Strongest belief in genetics/medical model
- Least likely to blame gamblers
- Strongest belief in effective recovery
- Most likely to believe that government and industry should do more to help

### Segment 4: Invulnerables

- Youngest
- Most problematic play
- Least positive play
- Least likely to think the government & industry should do more to help



### Segment 2: It's Your Fault

- Most likely to gamble
- Most likely to know where to get help
- Least likely to say gambling is against religion/morals
- Weakest belief in genetics/medical model

### Segment 3: Moralists

- Least likely to gamble
- More likely to blame weak willpower
- Most likely to blame gamblers
- Most likely to have religious opposition to gambling
- More than half still gamble

## 8. IMPLICATIONS FOR PUBLIC POLICY AND DIRECTIONS FOR FUTURE RESEARCH

- The prevalence of gambling in jurisdictions where it is prohibited (notably sports betting) suggests the limitations of policies based on prohibition. When creating public policy, governments need to take into account the possibility that prohibition may result in driving gamblers to illegal or offshore operators with little regulation and little incentive to encourage responsible play. At the same time, they must also recognize both the risks of easy access to unregulated play and the cost of effective regulation.
- Sports betting appears to come with a higher risk of problematic play than most other forms of gambling, though we do not know the extent to which this is driven by the widespread availability of illegal, unregulated play. We also do not know to what extent the activity is inherently risky and to what extent individuals at risk (notably young males) are drawn to sports betting. It is apparent, however, that legal, regulated sports betting must include extensive and effective responsible play and addiction prevention measures.
- The rapid expansion of sports betting combined with the risks associated with this activity require that its impact be carefully monitored. Efforts such as this report should be repeated on a regular basis so that any public health effects can be identified, and early and effective interventions be implemented.
- The level of risky behavior among fantasy sports players is at least as high as, if not higher than, as that associated with traditional sports betting, suggesting a need for measures to ensure responsible play and reduce problematic play that are much greater than currently exist.
- Young adults are at greater risk of problematic play than any other demographic segment. Prevention and awareness efforts need to place a greater emphasis on this population. At the same time, despite a perception of seniors as an at-risk population, the data suggest that they are at the lowest risk of any population segment.
- There is no evidence that the risks of problematic gambling are affected by socio-economic status or by racial or ethnic background.
- State lotteries have a critical role to play in problem gambling awareness and prevention. This is not because lottery players are at particular risk, but because almost all who gamble will, at some point, play the lottery. As such, the lottery provides greater access to a wider audience than all other gambling forms.
- For virtually every gambling activity, those reporting frequent play are considerably less likely to practice positive play than those playing less frequently. This finding suggests that positive play messaging might best be focused on media and activities targeted at frequent players such as players clubs or VIP programs.
- While the data from this survey point to factors that are associated with problematic play (notably age, type of betting, and, to a lesser extent, gender), we are far from understanding causal relationships. We also are unable to predict the degree to which young problematic gamblers will “age out” of their problems.

## 8. IMPLICATIONS FOR PUBLIC POLICY AND DIRECTIONS FOR FUTURE RESEARCH

- Gambling disorders continue to be highly misunderstood and stigmatized. Both factors likely contribute heavily to a reluctance to seek or recommend treatment. In addition, awareness of treatment resources is low. Greater efforts need to be made to convey the realities of problematic gambling, the effectiveness of treatment, and its availability.
- The segmentation analysis presented in section 7E makes it clear that different messages need to be presented to different audiences. The concentration of problematic behavior in one of the four segments (even though the segmentation analysis was not designed for this purpose) raises the intriguing possibility that some level of screening for at-risk gambling could be conducted using attitudinal questions instead of, or in addition to, direct questions about gambling behavior and consequences. Attitudinal questions are far less intrusive and threatening than stigmatizing questions such as “have you lied to hide your gambling?” Future research should explore the development of a screening instrument based, at least in part, on attitudinal questions.

This study, the first national survey of gambling in twenty years, points the way towards protecting public health and devising effective strategies to prevent gambling problems and improve the lives of those affected by it. As the United States undergoes the most massive expansion of legalized gambling in its history, it is critically important that governments, the gambling and gaming industry, and non-governmental service providers come together to enact policies that maximize the benefits to society of legalized gambling while mitigating its potential harms. Future surveys will show the degree to which these goals have been accomplished.

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## QUESTIONNAIRE

### SECTION S: SCREENERS

#### 1. WHAT IS YOUR DATE OF BIRTH?

**YEAR** (response options included every year from 1910 to 2015)

#### **MONTH**

- |                                    |                                   |                                   |                                   |
|------------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|
| <input type="checkbox"/> January   | <input type="checkbox"/> February | <input type="checkbox"/> March    | <input type="checkbox"/> April    |
| <input type="checkbox"/> May       | <input type="checkbox"/> June     | <input type="checkbox"/> July     | <input type="checkbox"/> August   |
| <input type="checkbox"/> September | <input type="checkbox"/> October  | <input type="checkbox"/> November | <input type="checkbox"/> December |

**\*\*\*\*\* TERMINATE IF UNDER 18 YEARS OLD**

#### 2. WHAT IS YOUR GENDER?

- Male       Female

#### 3. PLEASE INSERT YOUR ZIPCODE: *Used to determine state of residence*

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#### 4. ARE YOU OF HISPANIC, LATINX OR SPANISH ORIGIN?

- Yes       No  
 Prefer not to answer

#### 5. WHAT IS YOUR RACE? *Select all that apply*

- White       Black or African American  
 American Indian or Alaska Native  
 Asian       Pacific Islander       Other race  
 Prefer not to answer [EXCLUSIVE]

## APPENDIX

The next question is about different types of gambling/wagering activities.

To be clear, we are asking you about gambling with **real money**. Gambling with **real money** refers to gambling/paying for your bets **with your own cash, money you borrowed, or credit/debit cards**.

In the United States, people can gamble on many different things. Even if you think you do not gamble, please read closely through each of the following questions to tell us which activities might or might not apply to you.

### 6. HOW OFTEN, IF AT ALL, DO YOU PERSONALLY BET ON OR PLAY THESE GAMBLING/WAGERING ACTIVITIES USING REAL MONEY?

	Weekly, or more often	1-3 times a month, but not weekly	Several times a year, but not monthly	1-2 times a year	Less often than once a year	Never done/ Have not done this
1. Buying any lottery draw game tickets <i>(i.e. Powerball, Mega Millions, or other state lotto draw games)</i>						
2. Buying any daily numbers or Keno-style lottery games <i>(Pick 3, Pick 4, Keno, Quick Draw, Fast Play Games)</i>						
3. Buying any instant <i>(scratch-off)</i> tickets						
4. Playing Bingo at a Bingo hall or Bingo gaming center						
5. Wagering money on horse or dog races <i>(either live races or through off-track betting)</i>						
6. Buying any pull-tabs or break-open tickets						
7. Buying any raffle tickets <i>(e.g. charity raffles, fundraising tickets, but NOT including any state lottery operated raffles)</i>						
8. Betting on sporting events/sports outcomes <i>(e.g. point spreads, futures bets, prop bets, or bets on the result of a sporting event like an NFL or NBA game, etc. Note: This does NOT include Fantasy Sports)</i>						
9. Playing Fantasy Sports (either Daily Fantasy Sports <i>(DFS)</i> or traditional, season-long leagues. <i>Note: this does not include playing in free fantasy leagues/contests</i> )						
10. Entering sports contests like March Madness Brackets, NFL Survivor Pools, MLB Beat the Streak, “Pick’em” contests, etc. <i>(Note: This does NOT include sports betting (i.e. making single outcome or parlay bets) or fantasy sports.)</i>						
11. Wagering money gambling online/on a website, or app on a mobile device						
12. Wagering money on card games of any type <i>(i.e. card games found at casinos or any other card games)</i>						
13. Wagering money on Roulette						
14. Wagering money on Craps, or any other dice games						
15. Wagering money on Big Six/Wheel of Fortune, paddlewheel, or other spinning wheel type games						

APPENDIX

16. Spending money on slots, VLTs, or any other type of gaming machine

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**7. HOW OFTEN, IF AT ALL, DO YOU SPEND MONEY AT A CASINO (FOR ANY REASON, GAMBLING OR OTHERWISE)?**

- Weekly, or more often
- 1 to 3 times a month, but not weekly
- Several times a year, but not monthly
- 1 to 2 times a year
- Less often than once a year
- Never done/Have not done this

**ASK THIS BLOCK IF RESPONDENT ANSWERED  
1 to 2 times a year or more often for “Bet on Sporting Events”**

**SPORTS BETTING**

**8. YOU SAID THAT YOU HAVE BET ON SPORTS BEFORE. WHICH OF THESE SPORTS HAVE YOU BET ON IN THE PAST YEAR FOR REAL MONEY? *Check all that apply***

- |   |   |
|---|---|
| <input type="checkbox"/> Professional Football                                | <input type="checkbox"/> College Football   |
| <input type="checkbox"/> Professional Basketball                              | <input type="checkbox"/> College Basketball   |
| <input type="checkbox"/> Baseball   | <input type="checkbox"/> Ice Hockey   |
| <input type="checkbox"/> Golf   | <input type="checkbox"/> Soccer   |
| <input type="checkbox"/> Tennis   | <input type="checkbox"/> eSports ( <i>bets on video game leagues or tournaments</i> ) |
| <input type="checkbox"/> Motor Racing ( <i>i.e. NASCAR, Formula 1, etc.</i> ) | <input type="checkbox"/> Combat Sports ( <i>i.e. UFC, MMA, etc.</i> )                 |
| <input type="checkbox"/> Some other sport                                     |   |

**8A. HOW OFTEN DO YOU MAKE SPORTS BETS THROUGH THE FOLLOWING WAYS?**

	I often bet this way	I bet this way occasionally	I never bet this way
At a “brick and mortar” sportsbook <i>(i.e. not online, but in a casino or an actual building)</i>			
Through an online sportsbook <i>(i.e. on a website and/or mobile app)</i>			
With a state lottery			
Betting against friends, family, and/or colleagues			
Through a bookie/bookmaker <i>(Note: this does not include online websites or casino/physical sportsbooks)</i>			

## APPENDIX

### 8B. THERE ARE DIFFERENT BET TYPES FOR SPORTS WAGERING;

**Single bets on the outcome of a game:** a bet with only one outcome in which a particular team must win for you to win the bet. (e.g. *Team A to beat Team B in a game, Team A to win the Championship etc.*)

**Single bets on events within a game:** also known as a “prop” bet, this is a bet with only one outcome in which some event must take place during a game for you to win the bet (e.g. *a touchdown must be scored in the first 5 minutes or a particular player must score 20 or more points*).

**Parlay:** a bet with two or more outcomes in which all outcomes must occur for you to win (e.g. *Team A to beat Team B in a game AND Team C to beat Team D in another game – both need to happen for you to win*)

### WHICH OF THE FOLLOWING BET TYPES HAVE YOU MADE IN THE PAST YEAR?

*Select all that apply.*

- Single bet on the outcome of a game
- Single bets on events within a game (i.e. “prop” bets)
- Parlay bets

### 8C. THINKING ABOUT A TYPICAL BET THAT YOU WOULD MAKE, WHAT IS THE AVERAGE SIZE OF THE WAGER (OR VALUE OF THE WAGER IN DOLLARS) YOU WOULD MAKE FOR EACH OF THE FOLLOWING BET TYPES?

When you think about this, please only consider the amount you have actually bet, not any winnings.

For example, if I bet \$20 on a game and the bet was successful, I have still bet only \$20 in total.

- \_\_\_\_\_ Single bet on the outcome of a game
- \_\_\_\_\_ Single bet on an event within a game
- \_\_\_\_\_ Parlay bet

### [ASK 8D TO ALL]

#### 8D. A RECENT SUPREME COURT DECISION OPENED THE DOOR FOR STATES TO LEGALIZE SPORTS BETTING. IF YOUR STATE WAS TO LEGALIZE SPORTS BETTING, OR ALREADY HAS LEGALIZED SPORTS BETTING, HOW IMPORTANT DO YOU FEEL IT IS TO...

	Very important	Somewhat important	Somewhat unimportant	Very unimportant	No opinion
Require sport betting operators to implement responsible gambling measures					
Set aside some of the sports betting revenues to treat individuals who develop gambling problems					
Set aside some of the sports betting revenues to pay for public awareness campaigns designed to educate the public about the risks of gambling and the help that is available					

## APPENDIX

**ASK THIS BLOCK IF RESPONDENT ANSWERED  
1 to 2 times a year or more often for “Play Fantasy Sports”**

### FANTASY SPORTS

The next few questions are about Fantasy Sports.

**9A. YOU SAID THAT YOU HAVE PLAYED FANTASY SPORTS BEFORE. WHICH OF THESE TYPES OF FANTASY SPORTS HAVE YOU PLAYED IN THE PAST YEAR?**

- Played only Daily Fantasy Sports (DFS), through a site like Draft Kings, FanDuel, etc.
- Played only in traditional, season-long Fantasy Sports leagues
- Played both traditional, season-long leagues and Daily Fantasy Sports (DFS)

**9B. WHICH OF THE FOLLOWING SPORTS HAVE YOU PARTICIPATED IN FOR FANTASY SPORTS IN THE PAST YEAR? (Check all that apply)**

- Professional Football
- Professional Basketball
- Baseball
- Golf
- eSports (bets on video game leagues or tournaments)
- Combat Sports (i.e. UFC, MMA, etc.)
- Some other sport
- College Football
- College Basketball
- Ice Hockey
- Soccer
- Motor Racing (i.e. NASCAR, Formula 1, etc.)

**ASK 9C AND 9D IF RESPONDENT SELECTED  
“Played in DFS” or “Played in both” at 9A**

**9C. ON AVERAGE, WHEN THE SPORTS LEAGUES YOU PLAY DAILY FANTASY SPORTS (DFS) CONTESTS ON ARE IN SEASON, HOW OFTEN WOULD YOU SAY YOU PARTICIPATE IN DFS GAMES?**

- Weekly, or more often
- 1 to 3 times a month, but not weekly
- Several times a year, but not monthly
- 1 to 2 times a year
- Less often than once a year

**9D. ON AVERAGE, HOW MUCH DO YOU SPEND TO ENTER A DAILY FANTASY SPORTS (DFS) CONTEST WHEN YOU PLAY?**

\_\_\_\_\_

## APPENDIX

**ASK 9E, 9F, 9G IF RESPONDENT SELECTED  
“Played in traditional” or “Played in both” AT 9A**

**9E. ON AVERAGE, WHAT IS THE TOTAL AMOUNT EACH OF YOUR TRADITIONAL, SEASON-LONG FANTASY SPORTS LEAGUE(S) TYPICALLY COST TO PLAY? THIS WOULD INCLUDE LEAGUE BUY-IN/ENTRY FEES, WEBSITE HOSTING FEES, AND ANY ADDITIONAL FEES THAT GO TOWARDS THE LEAGUE PRIZE(S).**

\_\_\_\_\_

**9F. HOW MANY TRADITIONAL, SEASON-LONG FANTASY SPORTS LEAGUES DID YOU PARTICIPATE IN FOR **REAL MONEY** OVER THE PAST 12 MONTHS?**

\_\_\_\_\_

**9G. AND OF THE TRADITIONAL, SEASON-LONG FANTASY SPORTS LEAGUES YOU PARTICIPATE IN, HOW DO YOU PLAY?**

- All leagues are online through a website like Yahoo, ESPN, etc.
- All leagues are played offline, with friends/colleagues, with scores tallied up by hand
- Some leagues are online and some are offline

**ASK THIS BLOCK IF RESPONDENT ANSWERED  
1 to 2 times a year or more often for “Wager Money on Card Games”**

### **CARD GAMES**

The next few questions are about playing Card Games.

**10A. YOU SAID THAT YOU HAVE WAGERED MONEY ON CARD GAMES. WHAT TYPE OF CARD GAMES HAVE YOU WAGERED MONEY ON IN THE PAST YEAR? *(Check all that apply)***

- Poker (traditional, 5-card, Hold'em, etc.)
- Blackjack
- Baccarat
- Pai Gow
- Cribbage
- Some other card game

APPENDIX

**10B. WHERE HAVE YOU PLAYED THESE CARD GAMES IN THE PAST YEAR?**

*Select all that apply, and then click "Next".*

	Casino	Card club or a racetrack	Someone's home	Bar or restaurant	Somewhere else
Poker (traditional, 5-card, Hold'em, etc.)					
Blackjack					
Baccarat					
Pai Gow					
Cribbage					
Some other card game					

**ASK THIS BLOCK IF RESPONDENT ANSWERED 1 to 2 times a year or more often for "Spend money on slots, VLTs or any other type of gaming machine"**

**SLOTS – VLTs**

The next question is about playing Slots, VLTs, or other Gaming Machines.

**11A. YOU SAID THAT YOU HAVE SPENT MONEY ON SLOTS, VLTs, OR OTHER TYPES OF GAMING MACHINES. WHERE HAVE YOU PLAYED SLOTS, VLTs, OR GAMING MACHINES IN THE PAST YEAR? (Check all that apply)**

- Casino
- Racetrack
- Bar or restaurant
- Convenience store
- Some other location



## APPENDIX

ASK THIS BLOCK IF RESPONDENT ANSWERED 1 to 2 times a year or more often for  
“Wagered money gambling online/on a website, or app on a mobile device

### ONLINE GAMBLING

The next questions are about gambling online/on a website, or app on a mobile device.

**I2A. YOU SAID THAT YOU HAVE WAGERED MONEY GAMBLING ONLINE, ON A WEBSITE, OR USING AN APP ON A MOBILE DEVICE. WHAT TYPES OF GAMBLING/WAGERING HAVE YOU DONE ONLINE, ON A WEBSITE, OR MOBILE APP IN THE PAST YEAR? (Check all that apply) [RANDOMIZE]**

- Slots
- Table games (e.g. Blackjack, Roulette, etc.)
- Sports bets
- Bets on non-sporting events (e.g. The Bachelor, Oscars, elections, etc.)
- Bets on horse races
- Bets on virtual sports
- Other
- Poker
- Bingo
- Fantasy sports
- eSports (bets on video game leagues or tournaments)
- Raffle tickets

**I2B. HOW OFTEN DO YOU SPEND REAL MONEY TO BUY CREDITS, TOKENS OR VIRTUAL CURRENCY ON A SOCIAL CASINO OR CASUAL GAMES SITE/APP (E.G. SLOTTOMANIA, ZYNGA SLOTS, DOUBLEDOWN, BIG FISH, ETC.) TO PLAY SLOTS, POKER, BLACKJACK OR OTHER GAMBLING GAMES?**

- Weekly, or more often
- 1 to 3 times a month, but not weekly
- Several times a year, but not monthly
- 1 to 2 times a year
- Less often than once a year
- I have never done this

## APPENDIX

**ASK THIS BLOCK IF RESPONDENT ANSWERED  
1 to 2 times a year or more often to I2B**

### CASINOS

The next couple of questions are about Casinos.

#### 13A. YOU SAID THAT YOU HAVE SPENT MONEY AT A CASINO. WHICH OF THESE BEST DESCRIBES THE REASONS YOU'VE BEEN TO A CASINO IN THE PAST YEAR?

- Just to gamble
- Mostly to gamble, but also to socialize with friends or enjoy other amenities like restaurants, bars, shows, etc.
- Mostly to socialize with friends and enjoy the amenities, but sometimes also to gamble
- Never to gamble, only to socialize with friends and enjoy the amenities

#### 13B. WHAT TYPES OF CASINOS HAVE YOU BEEN TO IN THE PAST YEAR?

*(Check all that apply)* [RANDOMIZE]

- A casino in my home state
- A casino in a neighboring state
- A casino in Las Vegas or elsewhere in Nevada
- A casino in Atlantic City
- A casino somewhere else in the U.S. (not mentioned above)
- A casino outside the U.S.
- A casino on a riverboat or at a dockside (in the U.S. or any other location)
- A casino on a cruise ship (in the U.S. or any other location)

**ASK 13c IF RESPONDENT SELECTED “A casino in my home state”  
OR “A casino in a neighboring state” AT 13B. ELSE SKIP**

#### 13C. YOU INDICATED THAT YOU HAVE BEEN TO A CASINO IN YOUR HOME STATE AND/OR A NEIGHBORING STATE IN THE PAST YEAR. APPROXIMATELY HOW FAR AWAY WERE THE CASINO(S) YOU HAVE VISITED FROM WHERE YOU LIVE(D)? *Select all that apply, then click “Next”.*

- A casino in my home state **ASK IF IN 13b RESPONDENT SELECTED “A casino in my home state”**
- A casino in a neighboring state **ASK IF IN 13b RESPONDENT SELECTED “casino in a neighboring state”**
- Within 25 miles of my home
- Between 25 and 100 miles of my home
- More than 100 miles from my home

APPENDIX

ASK THIS BLOCK IF RESPONDENT ANSWERED  
1 to 2 times a year or more often to “Enter sports contests”

**SPORTS CONTESTS**

The next couple of questions are about Sports Contests (e.g. like March Madness Brackets, NFL Survivor Pools, MLB Beat the Streak, “Pick’em” contests, etc.)

**I4A. YOU SAID THAT YOU HAVE ENTERED SPORTS CONTESTS. HOW HAVE YOU PLAYED THESE TYPES OF SPORTS CONTESTS IN THE PAST YEAR? SELECT ALL THAT APPLY. [RANDOMIZE]**

- In an office pool
- Online with people I did not previously know
- In pools with other people I know (i.e. not as part of an office pool)

**I4B. WHAT IS THE LARGEST AMOUNT YOU HAVE EVER SPENT TO ENTER A SPORTS CONTEST?**

\_\_\_\_\_

ASK I5 and I6 TO “PAST YEAR GAMBLERS” ONLY

**PROBLEM GAMBLING**

For the next few questions, we’d like to ask about your personal gambling experience in the past 12 months. These questions do not have right or wrong answers, so please give us the answer that comes closest to your own experience.

**I5. QUESTION I5**

	No, not in the past 12 months	Once	A few times	Many times
How often have you needed to gamble with larger amounts of money or with larger bets in order to get the same feeling of excitement?				
How often have you felt restless or irritable when you tried to cut down or stop gambling?				
How often have you lied to hide your gambling?				
How often have you relied on others to pay your gambling debts or to pay your bills when you had financial problems caused by your gambling?				

## APPENDIX

### POSITIVE PLAY

For the next few questions, we'll show you some statements people have made about their gambling. For each one, please say how much you agree or disagree with the statement. These questions do not have right or wrong answers, so please give us the answer that comes closest to your own experience.

#### 16. QUESTION 16

	Strongly Agree	Agree Somewhat	Neutral	Disagree Somewhat	Strongly Disagree
Gambling is not a good way to make money					
If I gamble more often, it will help me to win more than I lose					
My chances of winning get better after I have lost					
I should be able to walk away from gambling at any time					
I should be aware of how much money I spend when I gamble					
When I gamble, it's my responsibility to spend only money that I can afford to lose					
I should only gamble when I have money to cover my bills and living expenses first					
I gamble for entertainment, not to win money					
Gambling is a good way to make money					

APPENDIX

**GENERAL PERCEPTIONS OF GAMBLING [ASK EVERYONE]**

Now we'd like your opinion about some statements relating to gambling in the United States. Regardless whether you gamble or not, we are looking for everyone's opinion.

For each statement, please tell us how much you agree or disagree with the statement. These questions do not have right or wrong answers, so please give us the answer that comes closest to your personal opinion.

**17. HOW MUCH DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT GAMBLING? [RANDOMIZE ROWS]**

	Strongly Agree	Agree Somewhat	Neutral	Disagree Somewhat	Strongly Disagree
Addiction to gambling is a lot like addiction to drugs or alcohol					
Gambling is immoral					
Gambling is against my religion					
Services to treat compulsive gambling are available in my community					
The gambling industry should do more to help people with a gambling addiction					
The government should do more to help people with a gambling addiction					
If someone close to me had a gambling problem, I would know where to get them help					
If someone in my family had a gambling problem, I would advise them to not discuss it with anyone outside the family					
Gambling is a good way to make money					
People with a gambling problem are to blame for their problems					
People with a gambling problem are unlikely to recover or get better					
People with a gambling problem are below average in intelligence					

## APPENDIX

**18. HOW LIKELY DO YOU BELIEVE EACH OF THESE CONDITIONS ARE TO CAUSE A GAMBLING PROBLEM?  
[RANDOMIZE ROWS]**

	Very Likely	Somewhat Likely	Somewhat Unlikely	Very Unlikely
Moral weakness				
Having an addictive personality				
Not having enough willpower				
Being around people who gamble a lot				
Having a parent or other family member who gambles				
A traumatic event in someone's life				
A person's genetics or other medical conditions				
Seeing a lot of ads promoting gambling				
Winning a lot of money				

## DEMOGRAPHICS

The remaining questions are for classification purposes only. Your individual responses will never be shared, and will remain anonymous at all times.

**19. ARE THERE ANY CHILDREN UNDER THE AGE OF 18 LIVING IN YOUR HOUSEHOLD?**

- Yes
- No

## APPENDIX

### 20. WHAT IS THE HIGHEST DEGREE OR LEVEL OF SCHOOL YOU HAVE COMPLETED? *Select only one*

#### Education through Grade 12 [Expandable Header] (?)

- Grade 4 or less
- Grade 5 to 8
- Grade 9 to 11
- Grade 12 (no diploma)

#### High School Graduate

- Regular High School Diploma
- GED or alternative credential

#### College or Some College

- Some college credit, but less than 1 year
- 1 or more years of college credit, no degree
- Associate degree (AA, AS, etc.)
- Bachelor's degree (BA, BS, etc.)

#### After Bachelor's Degree [Expandable Header]

- Master's degree (MA, MS, MBA, etc.)
- Professional degree (MD, DDS, JD, etc.)
- Doctorate degree (PhD, EdD, etc.)

### 21. PLEASE INDICATE YOUR ANNUAL HOUSEHOLD INCOME BEFORE TAXES.

\_\_\_\_\_

Figure 3-1

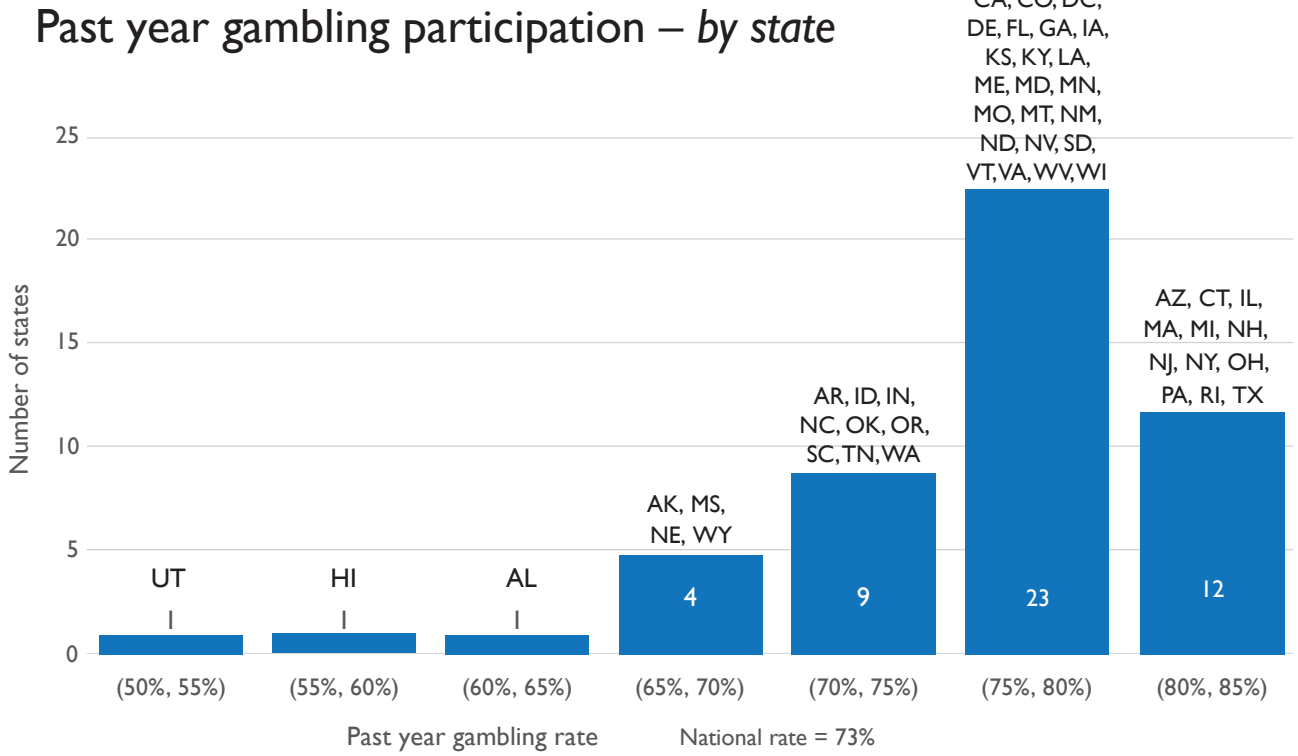


Figure 3-2

### Past year gambling activities – by type

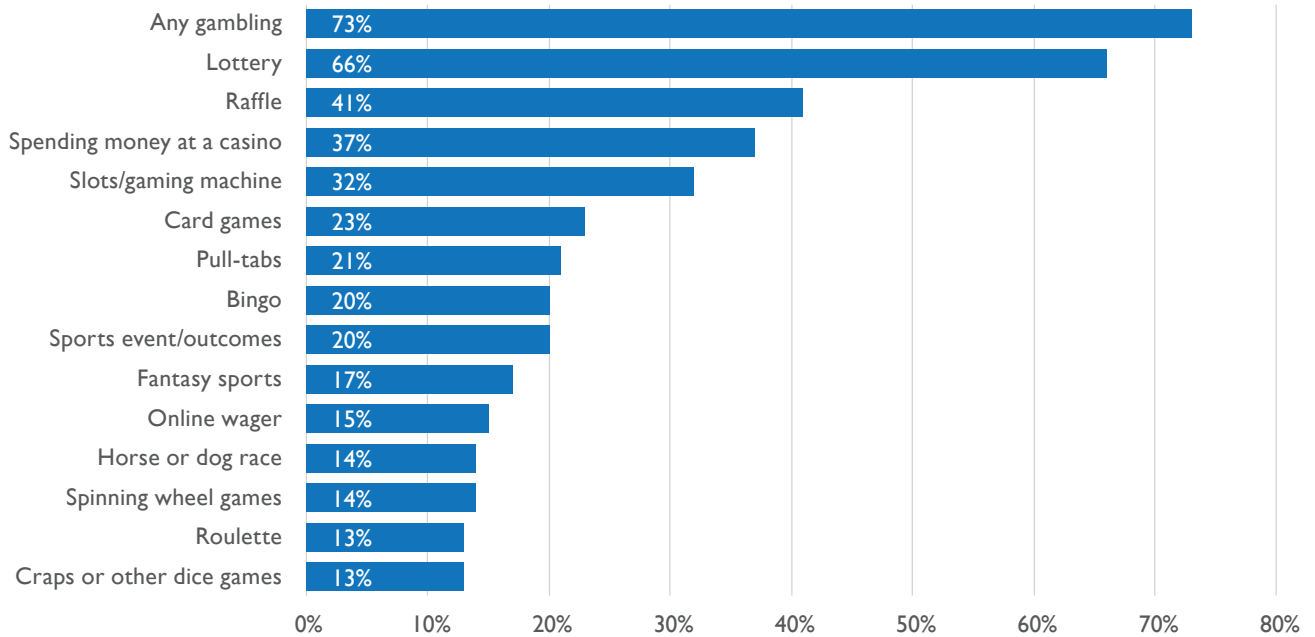




Figure 3-3

### Number of past year gambling activities

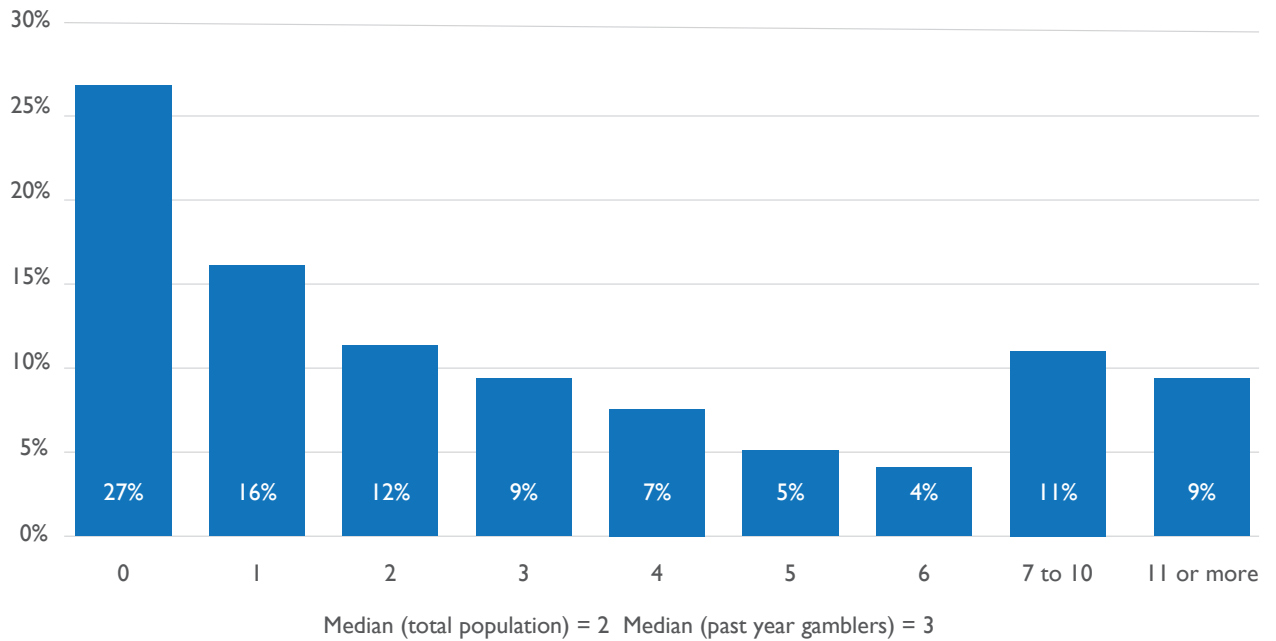
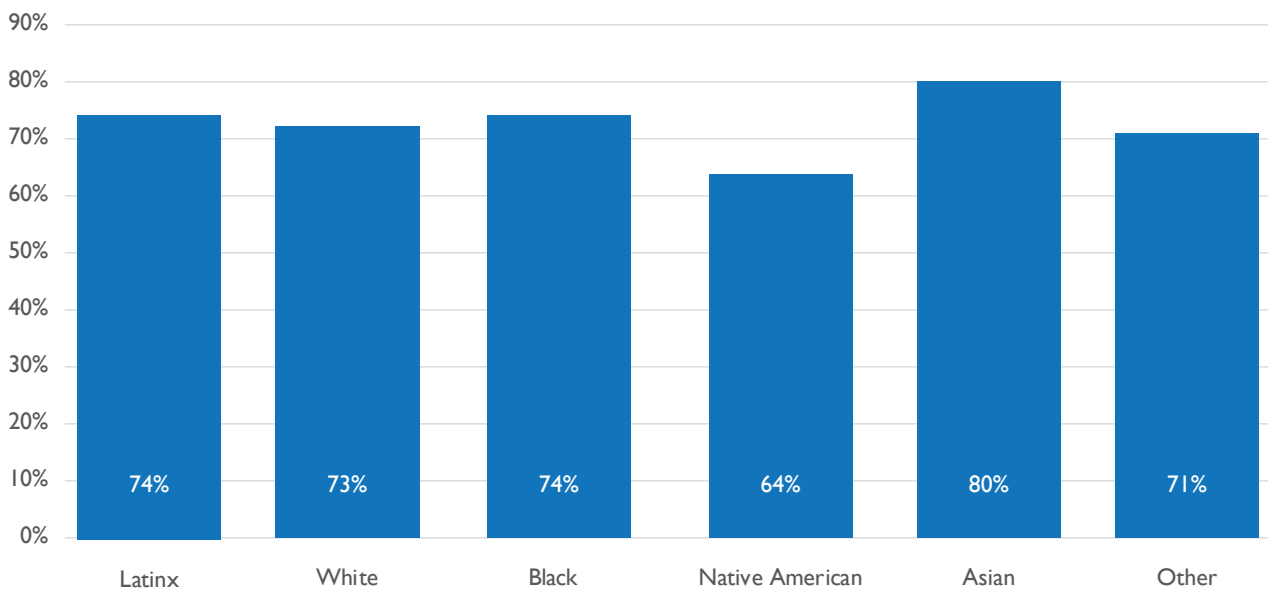


Figure 3-4

### Past year gambling – by racial/ethnic origin



Note: Respondents could list multiple racial/ethnic origins

Figure 3-5

### Past year gambling – by educational attainment

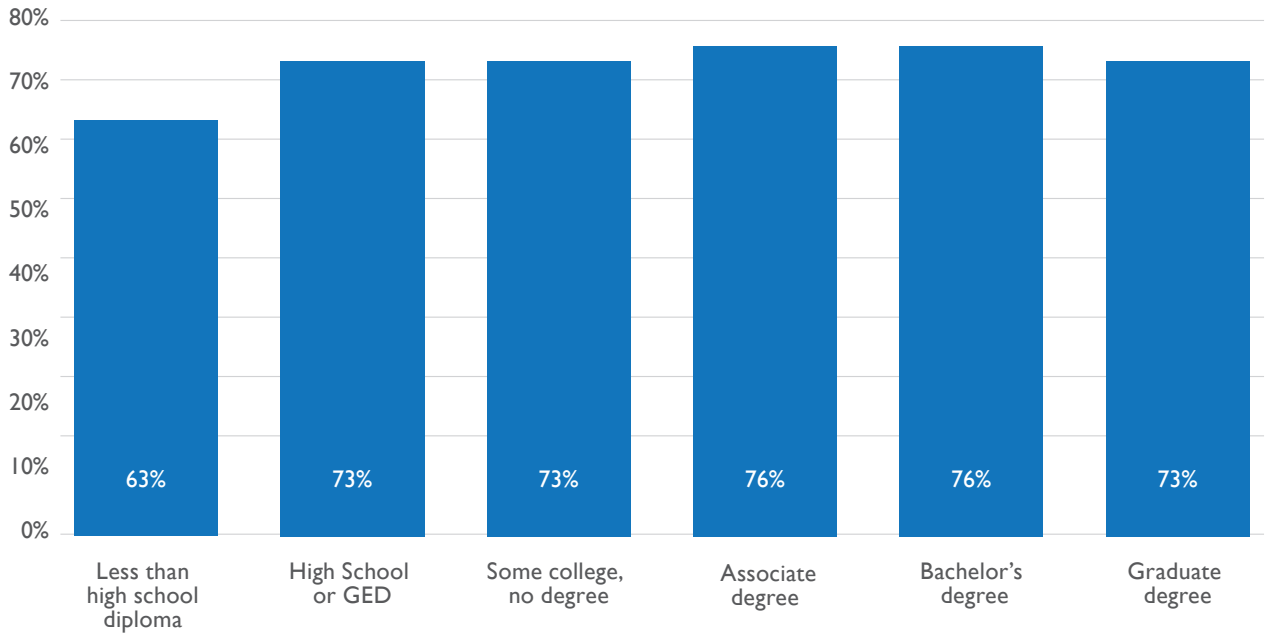


Figure 3-6

### Past year gambling – by household income

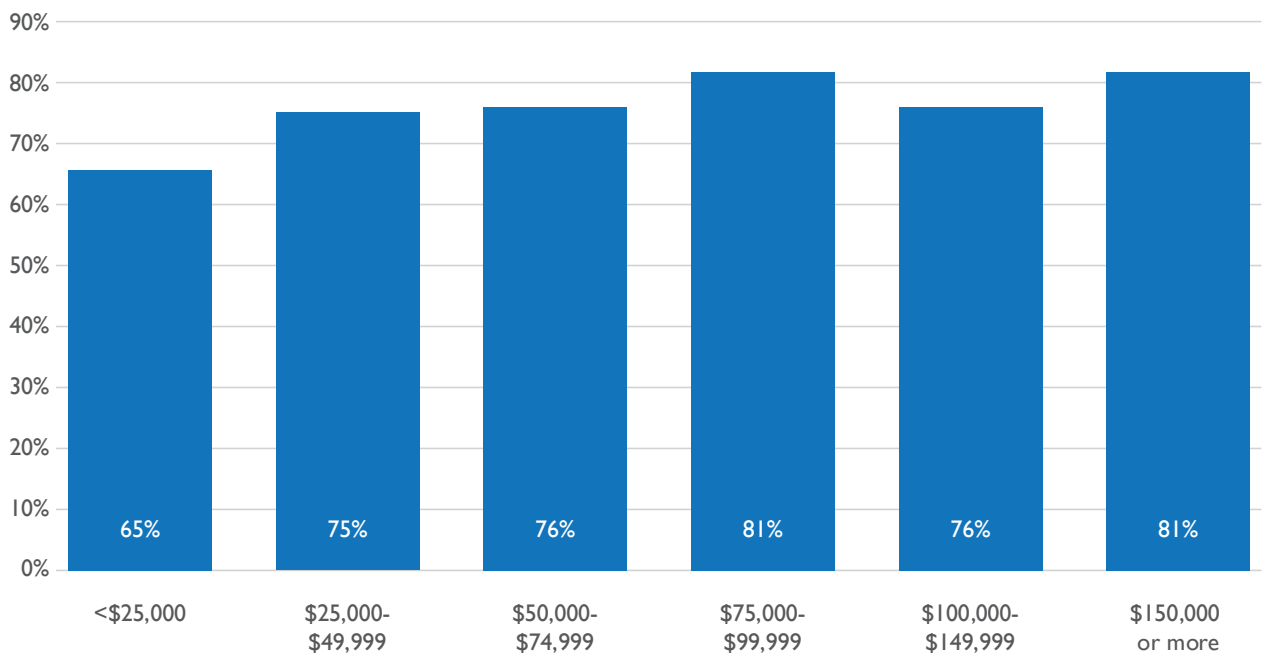


Figure 3-7

### Past year gambling – by age

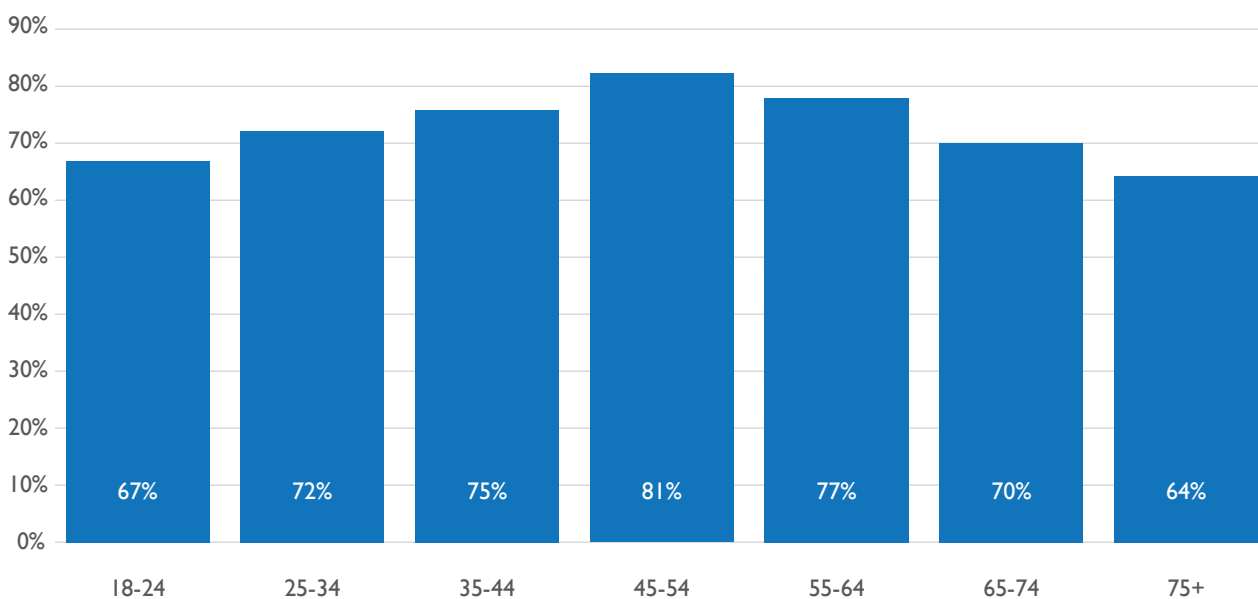


Figure 3-8

### Gambling participation – by gender

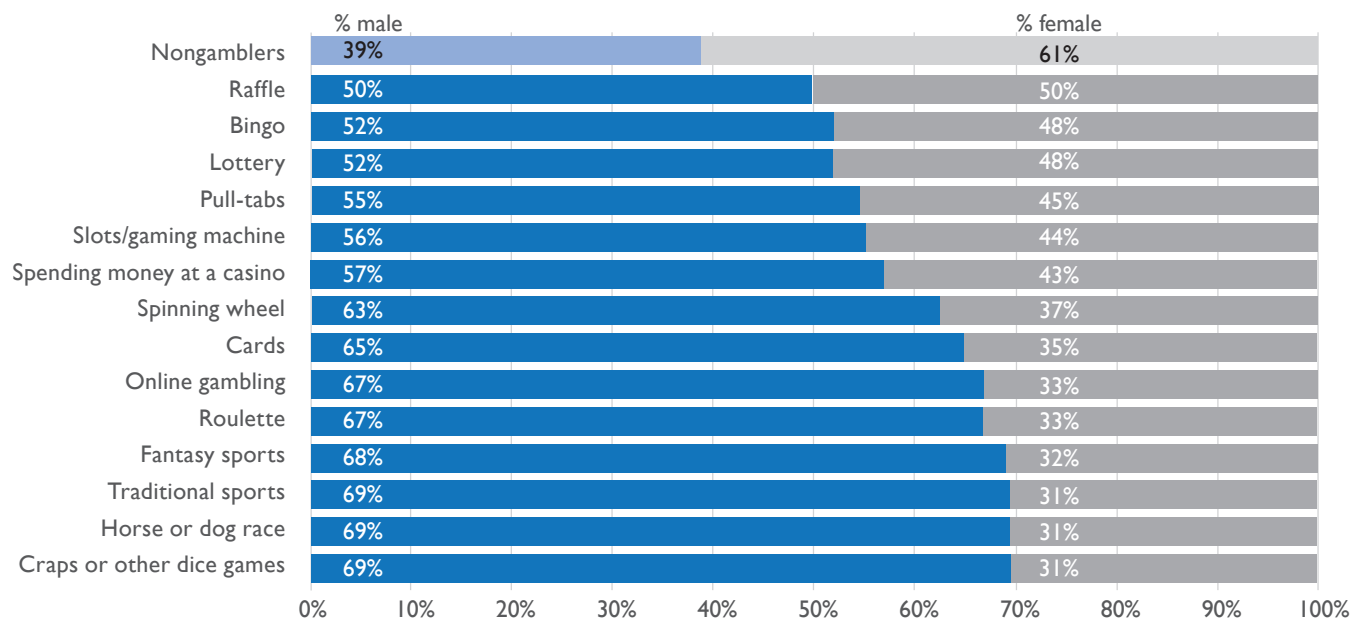


Figure 3-9

### Median age – by gambling type

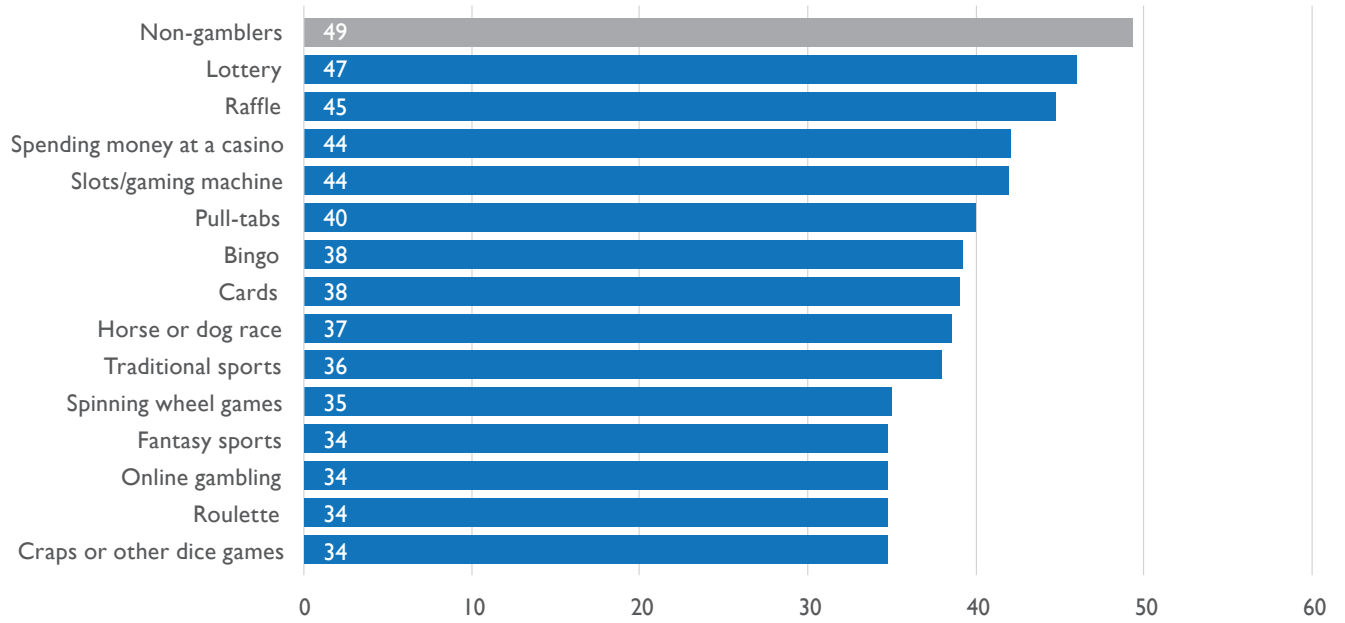


Figure 4-1

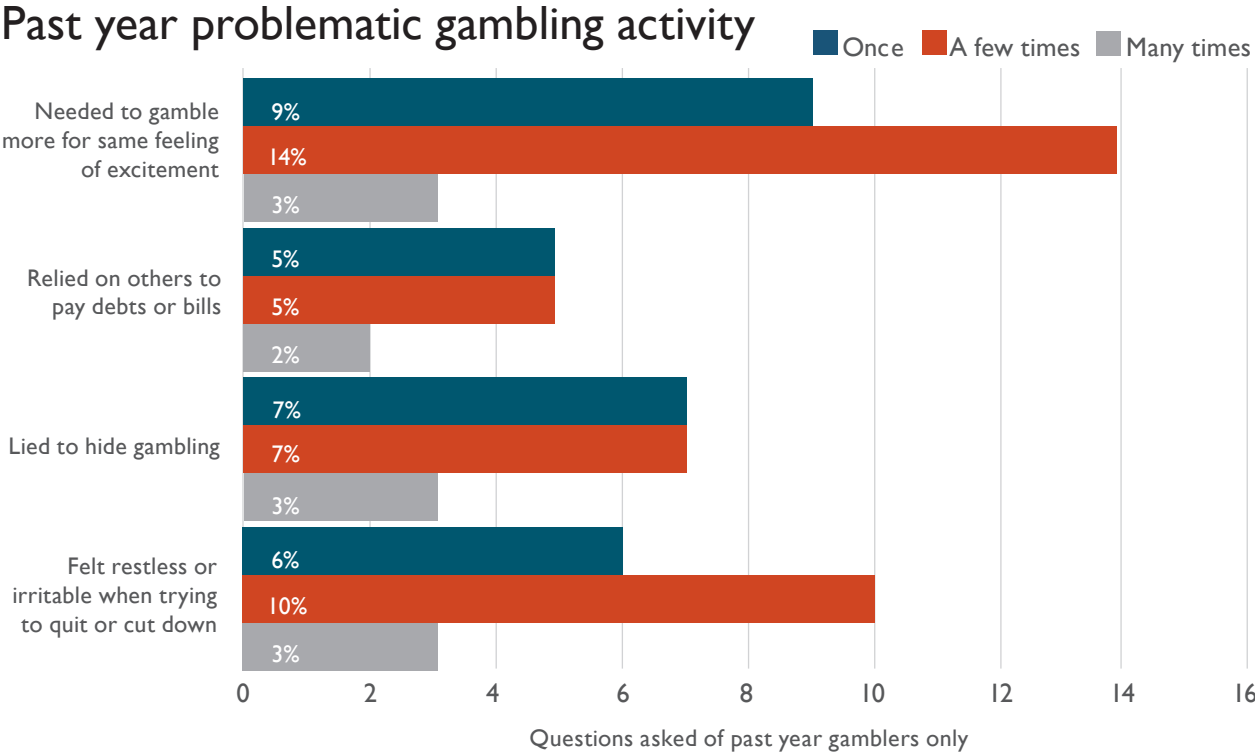


Figure 4-2

### Percentage of gamblers showing no problematic play – by age

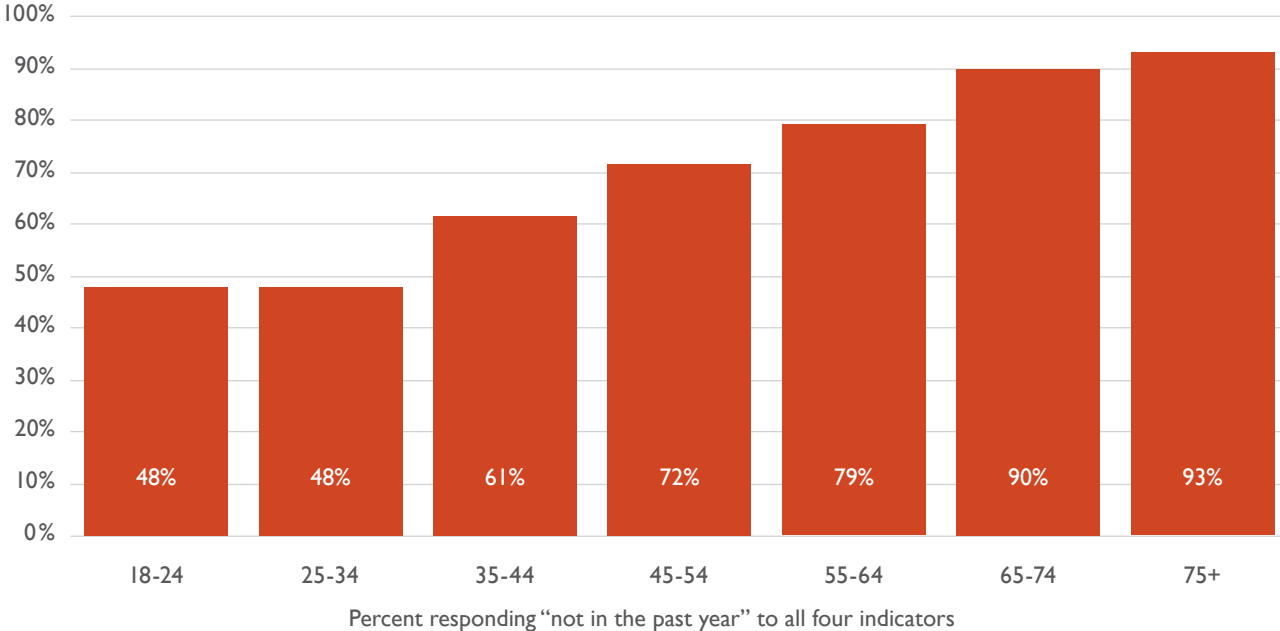


Figure 4-3

### Percentage of gamblers answering “once or more” to three or four problematic play indicators – *by age*

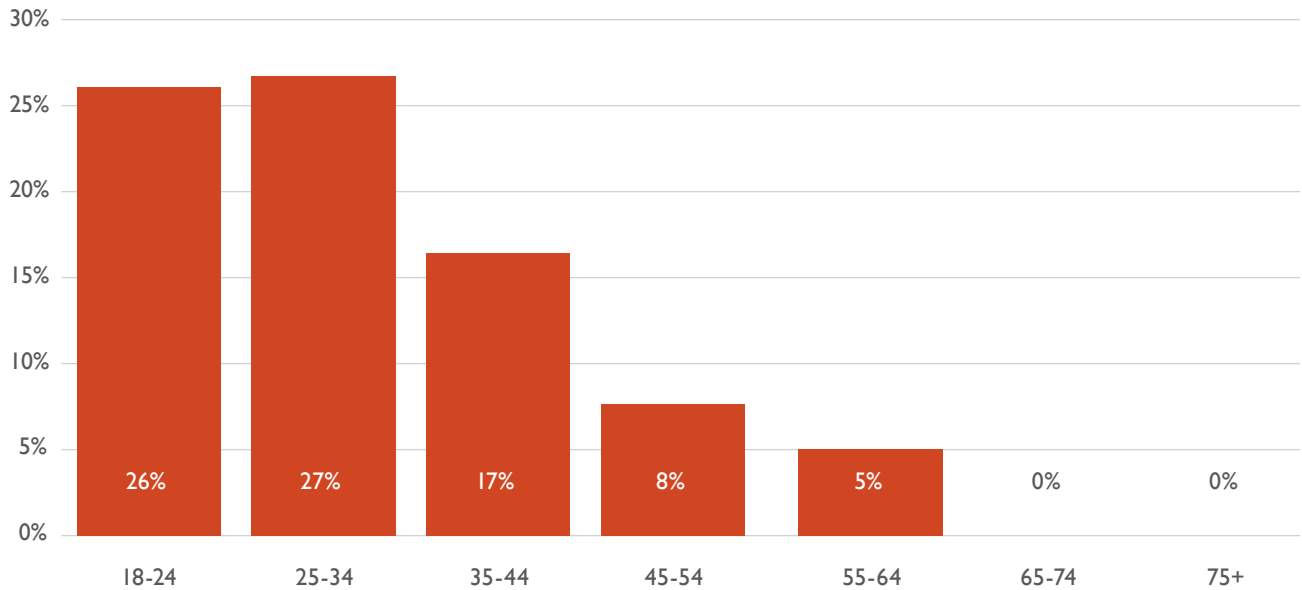


Figure 4-4

### Percentage of gamblers answering “many times” to at least one problematic play indicator – *by age*

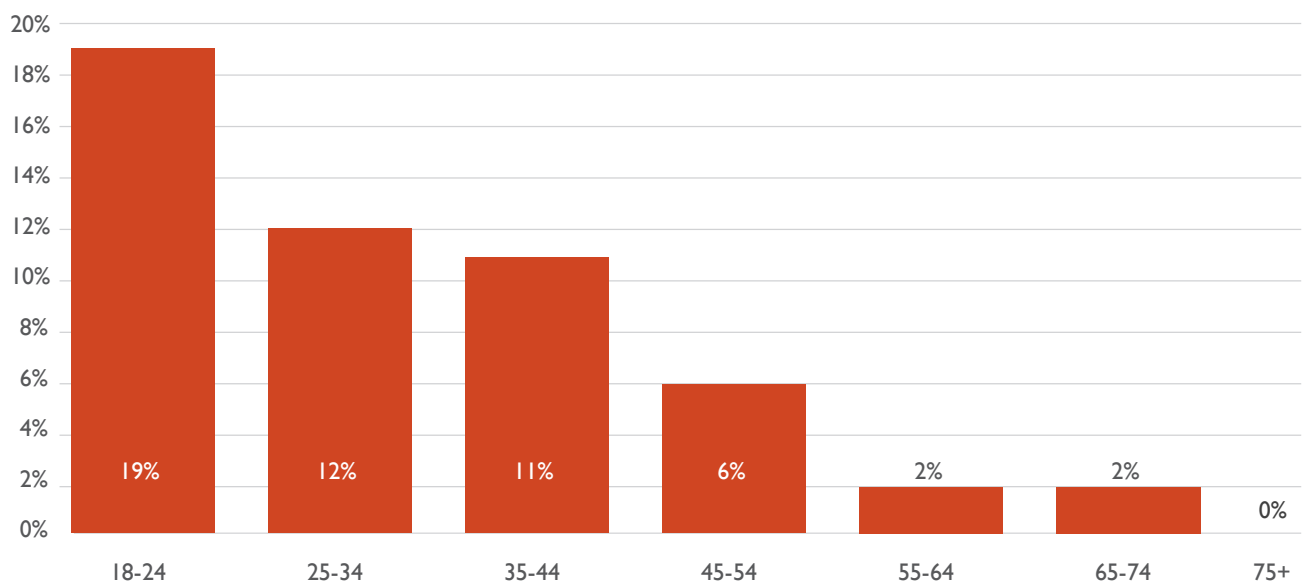


Figure 4-5

### Percentage of gamblers showing no problematic play – by annual household income – percent agreeing

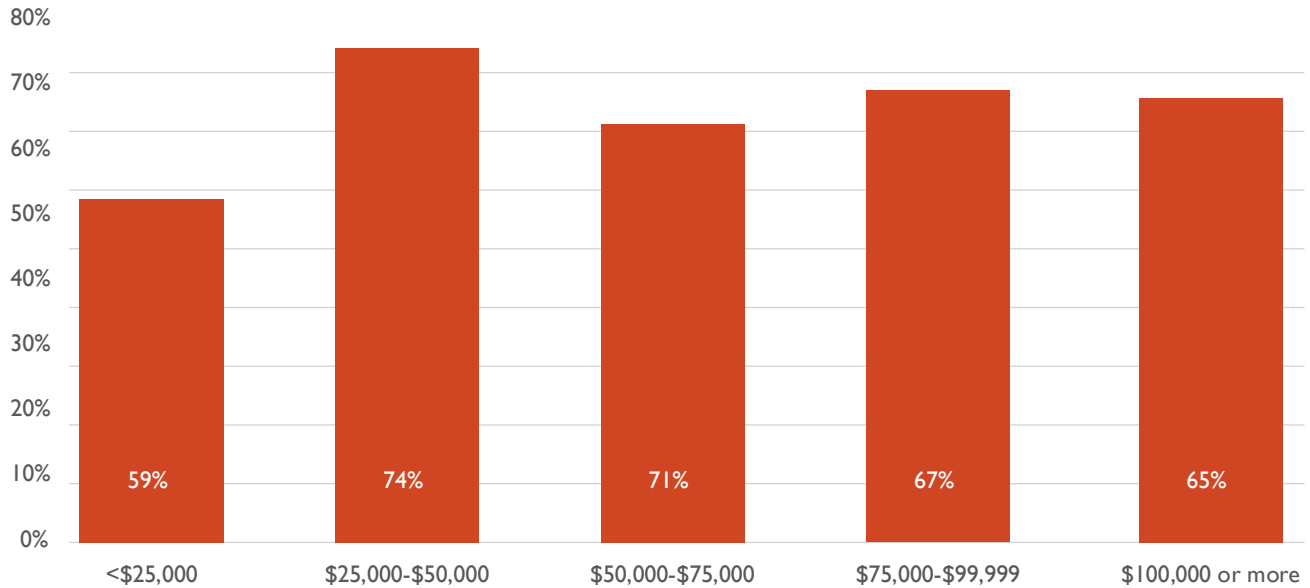


Figure 5-1

### Past year positive play – personal responsibility – percent agreeing

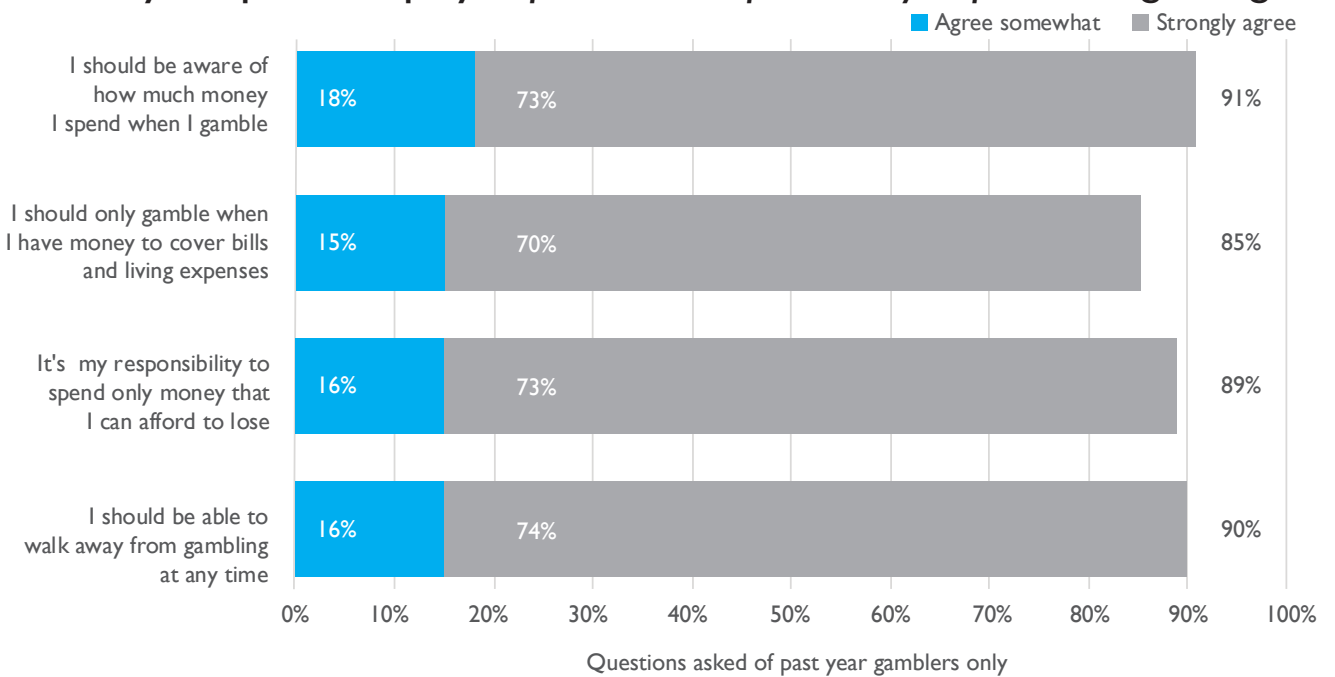


Figure 5-2

### Past year positive play – gambling literacy

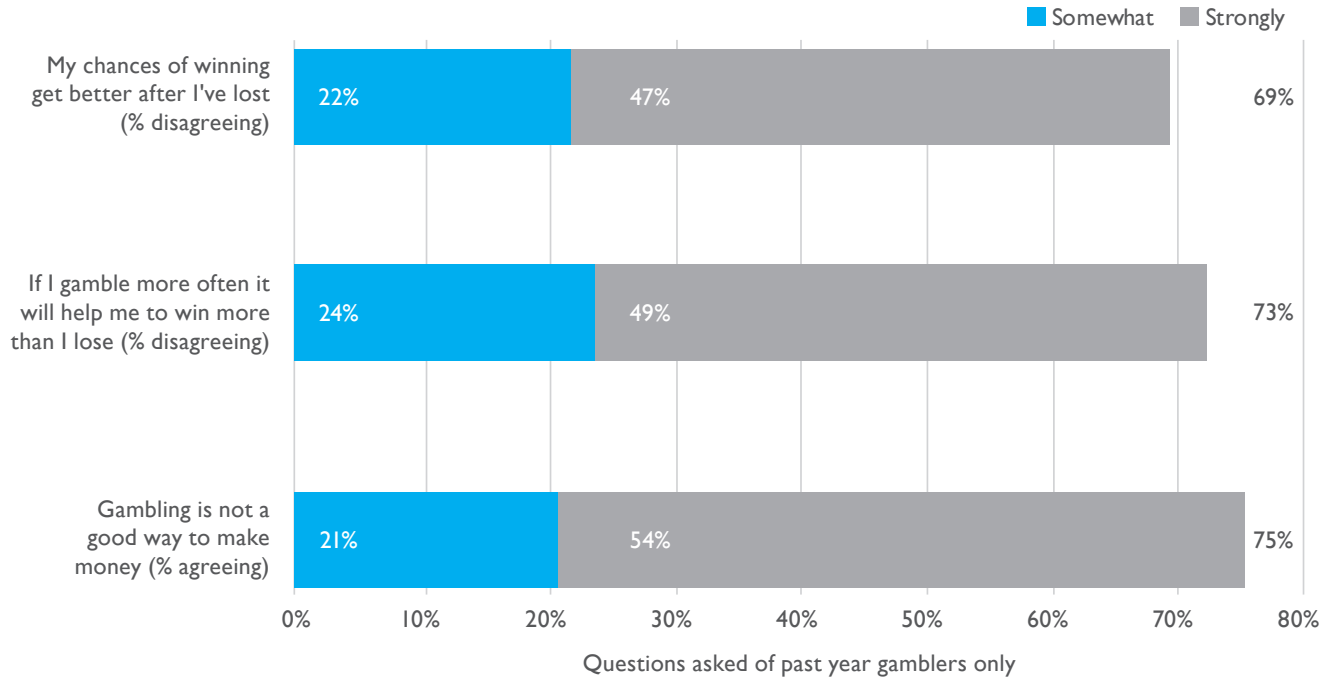


Figure 5-3

### “I should be able to walk away from gambling at any time” – by age

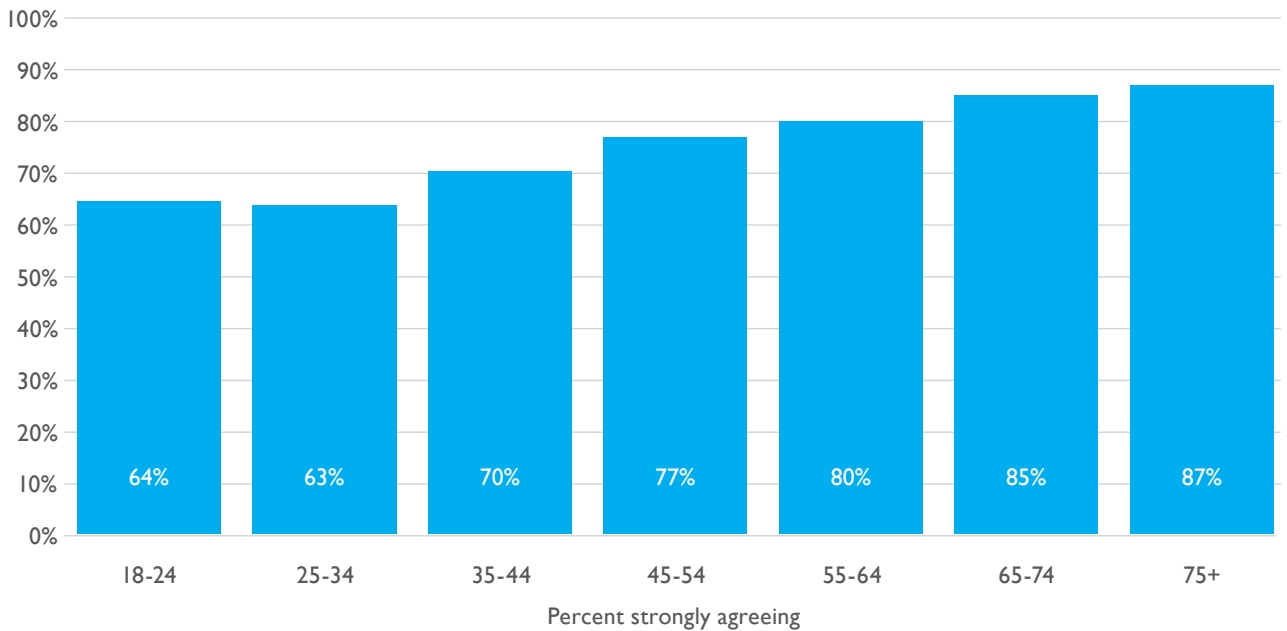




Figure 5-4

“I should only gamble when I have money to cover my bills and living expenses” – by age

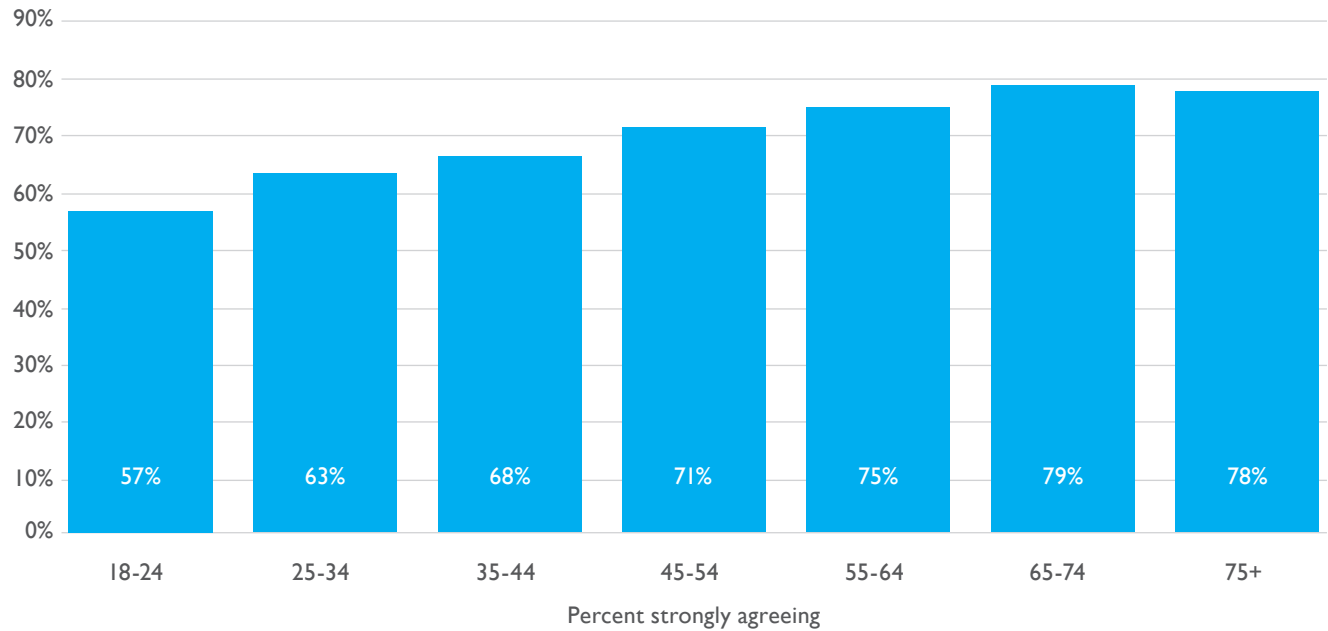


Figure 5-5

“If I gamble more often, it will help me to win more than I lose” – by age

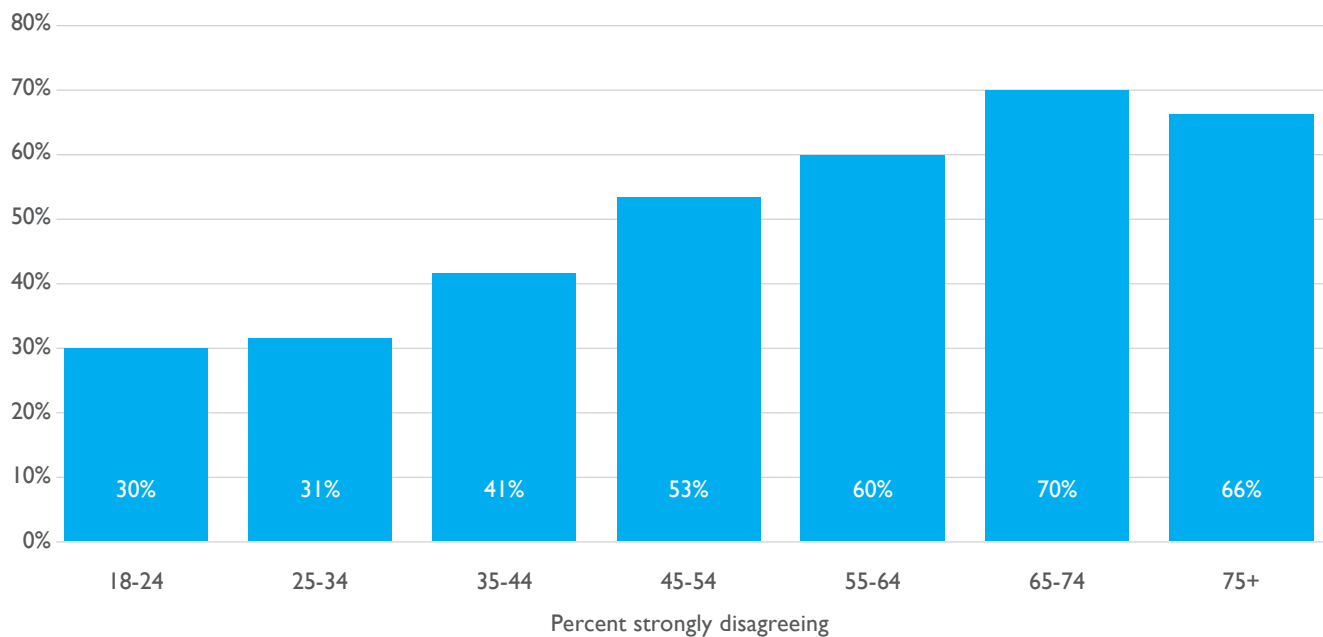


Figure 5-6

### “Gambling is not a good way to make money” – by age

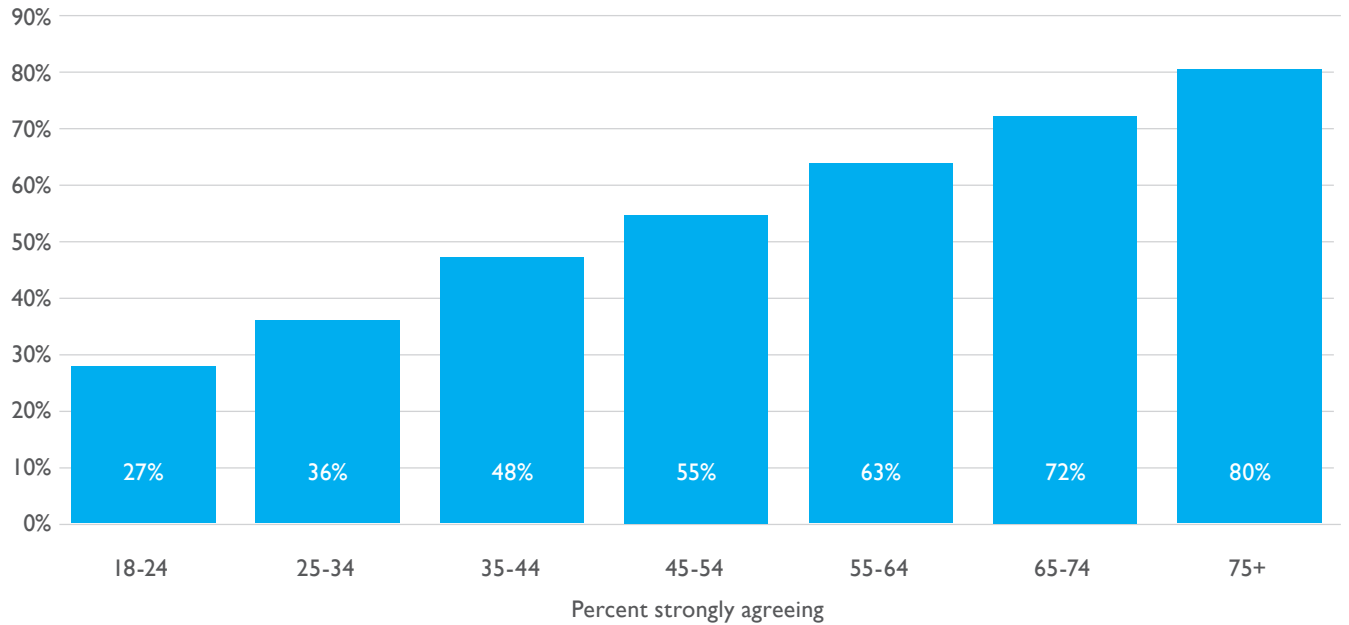


Figure 5-7

### “I should be aware of how much money I spend when I gamble” – by educational attainment

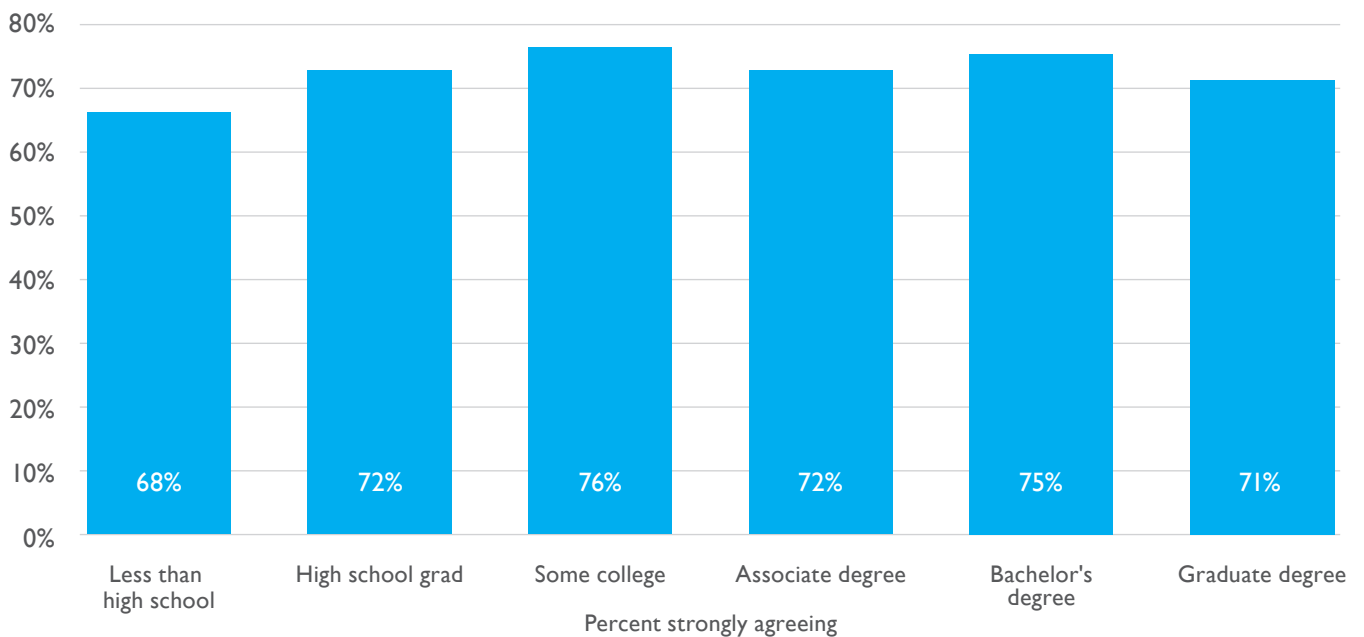


Figure 5-8

**“I should be able to walk away from gambling at any time” –  
by household income**

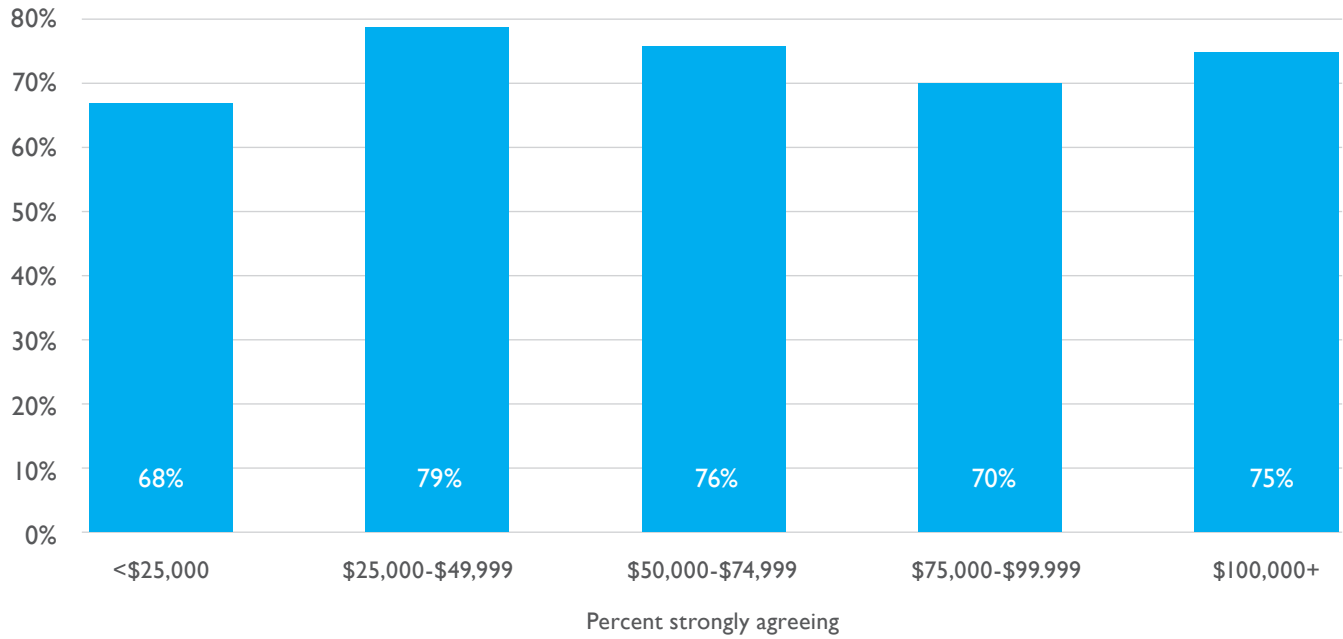


Figure 6A-1

## Gambling Activities Participation – Lottery draw game frequency

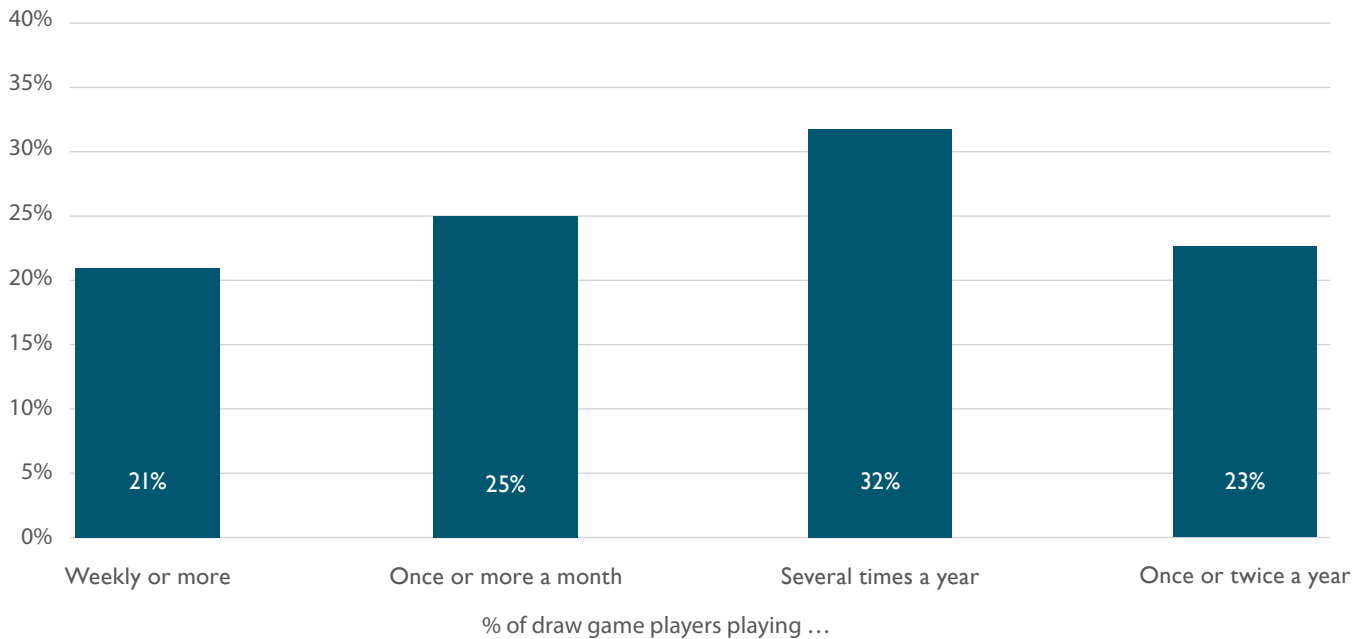


Figure 6A-2

## Gambling Activities Participation – Lottery instant/scratch game frequency

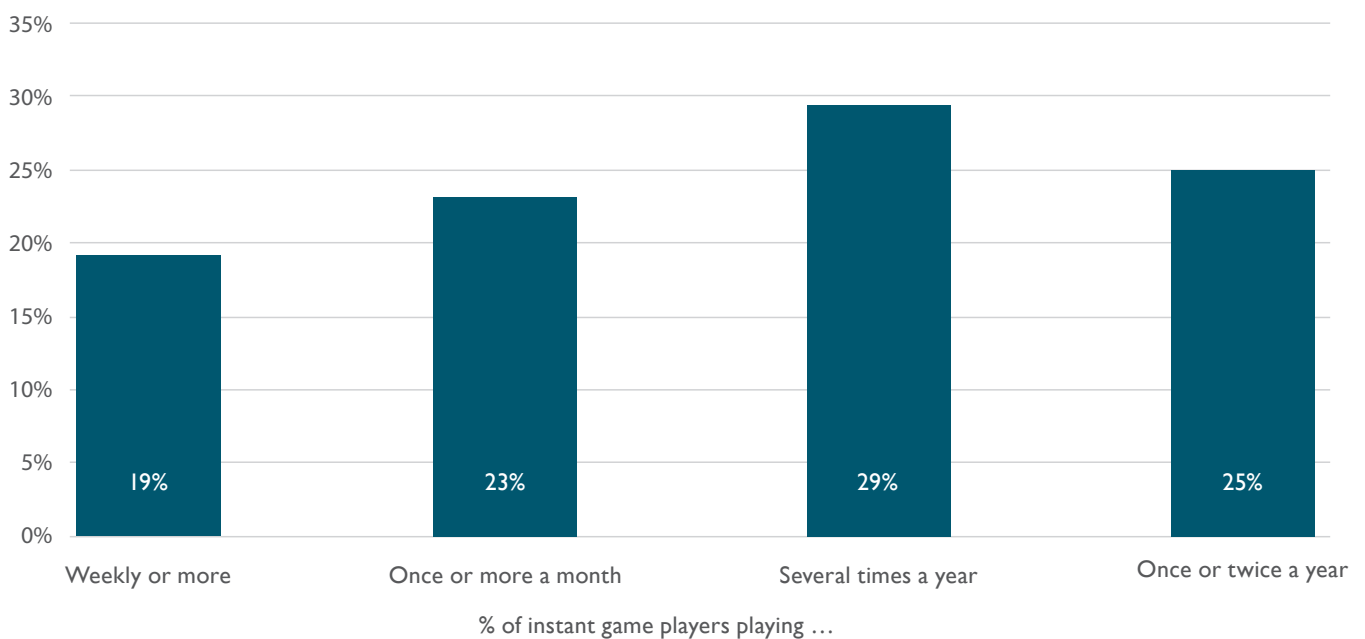


Figure 6A-3

### Gambling Activities Participation – Past year lottery play – *by age*

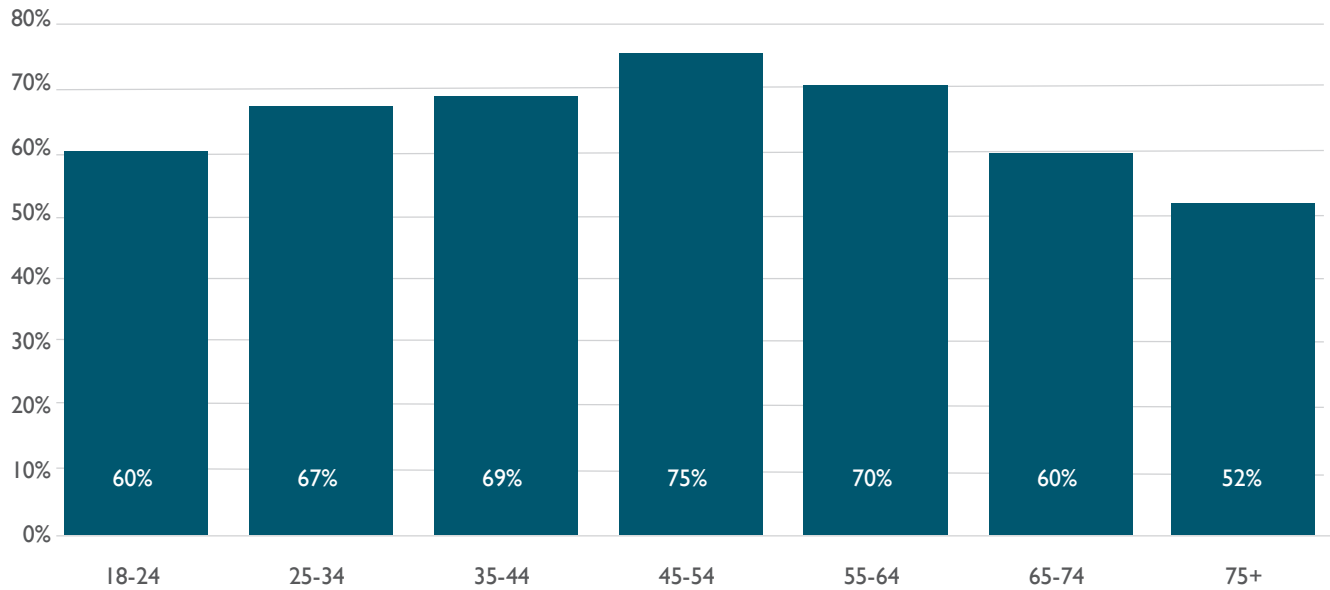
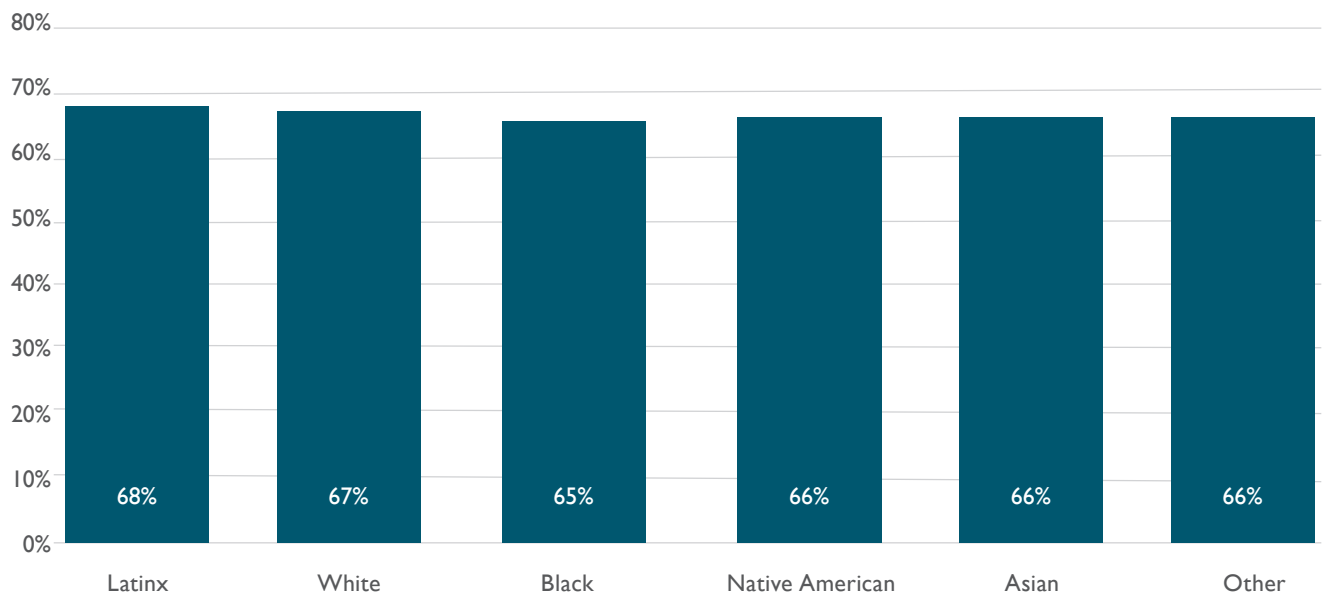


Figure 6A-4

### Gambling Activities Participation – Past year lottery play – *by racial/ethnic origin*



Note: Respondents could list multiple racial/ethnic origins

Figure 6A-5

### Gambling Activities Participation – Past year lottery play – *by educational attainment*

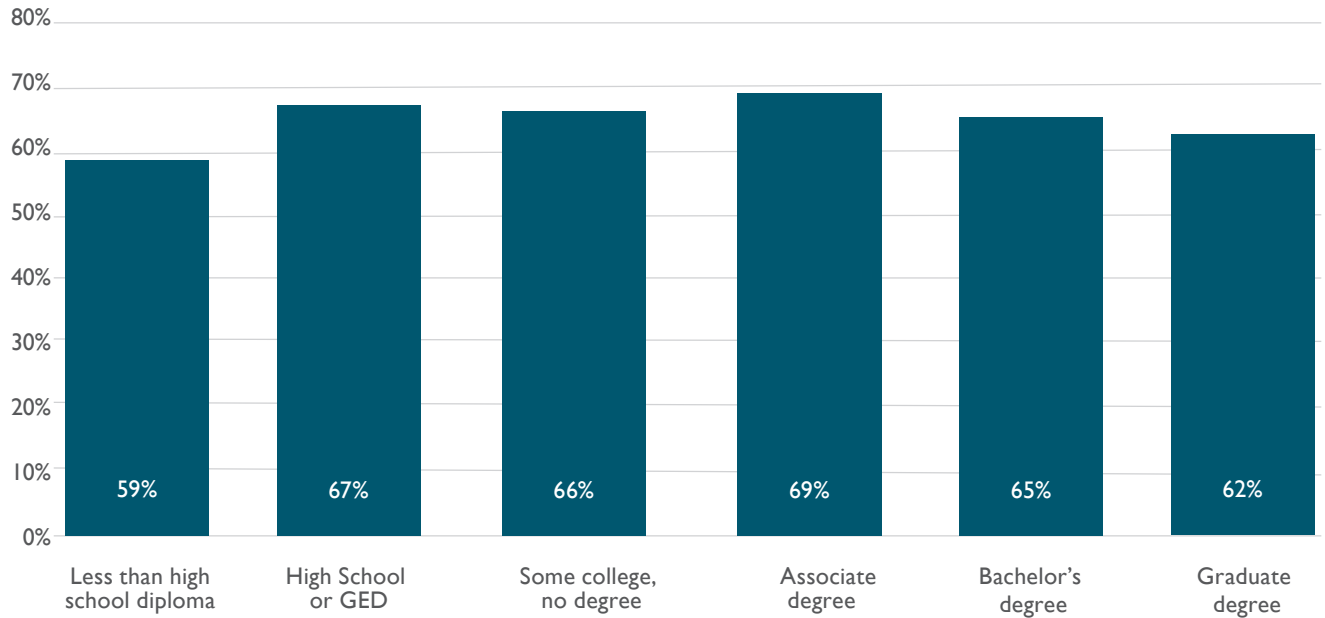


Figure 6A-6

### Gambling Activities Participation – Past year lottery play – *by household income*

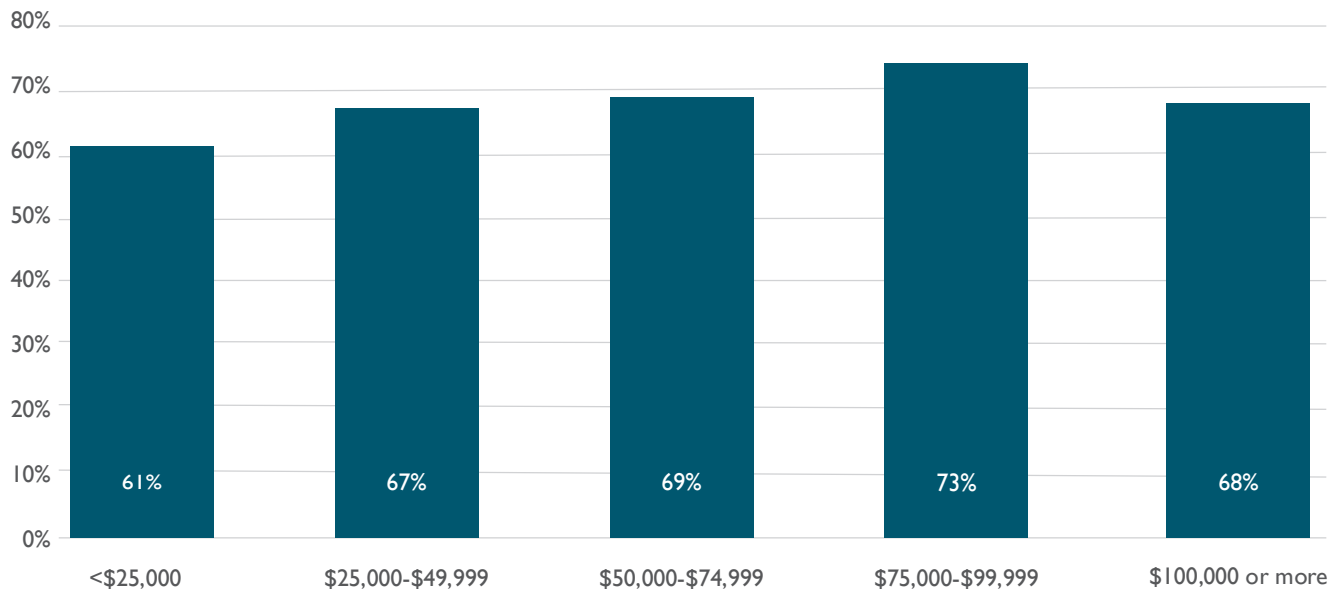


Figure 6A-7

### Past year problematic gambling activity among weekly lottery players

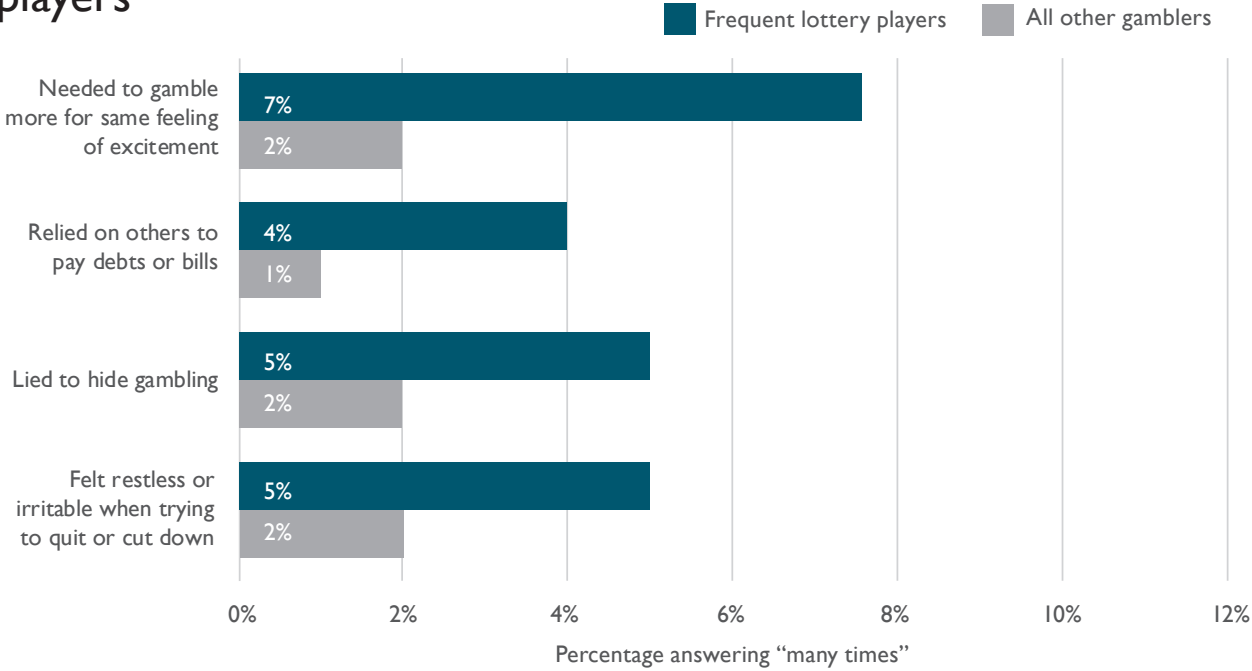


Figure 6A-8

### Weekly lottery players vs all other gamblers – gambling literacy

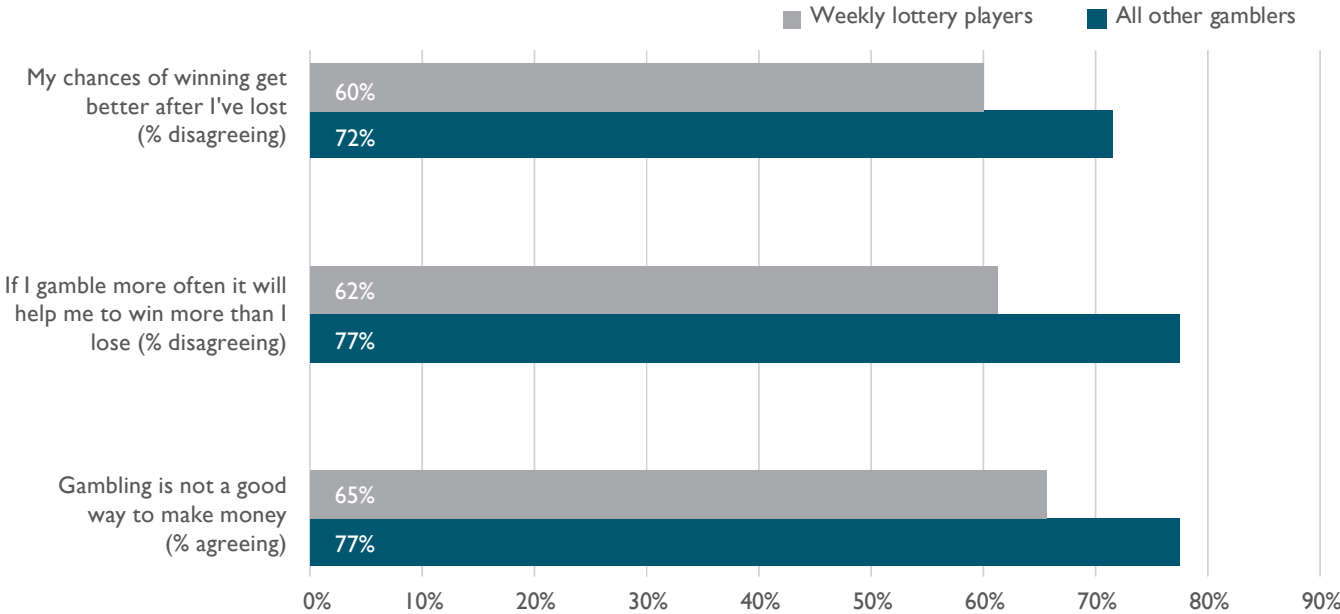


Figure 6B-1

### Where are the casinos that you have been to in the past year?

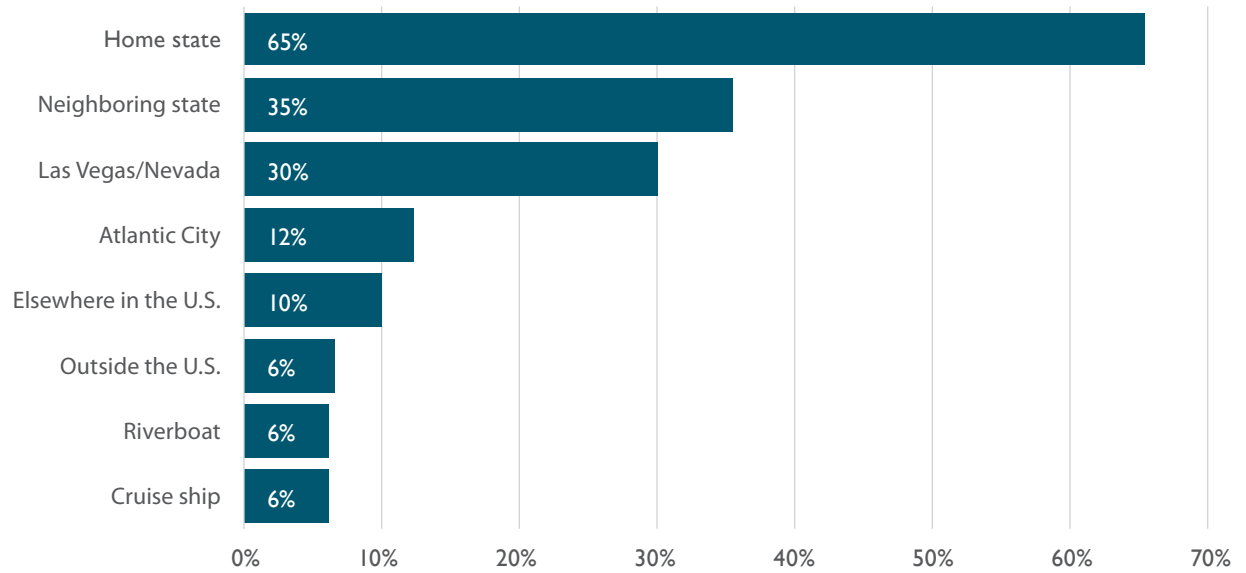


Figure 6B-2

### Past year casino participation by state

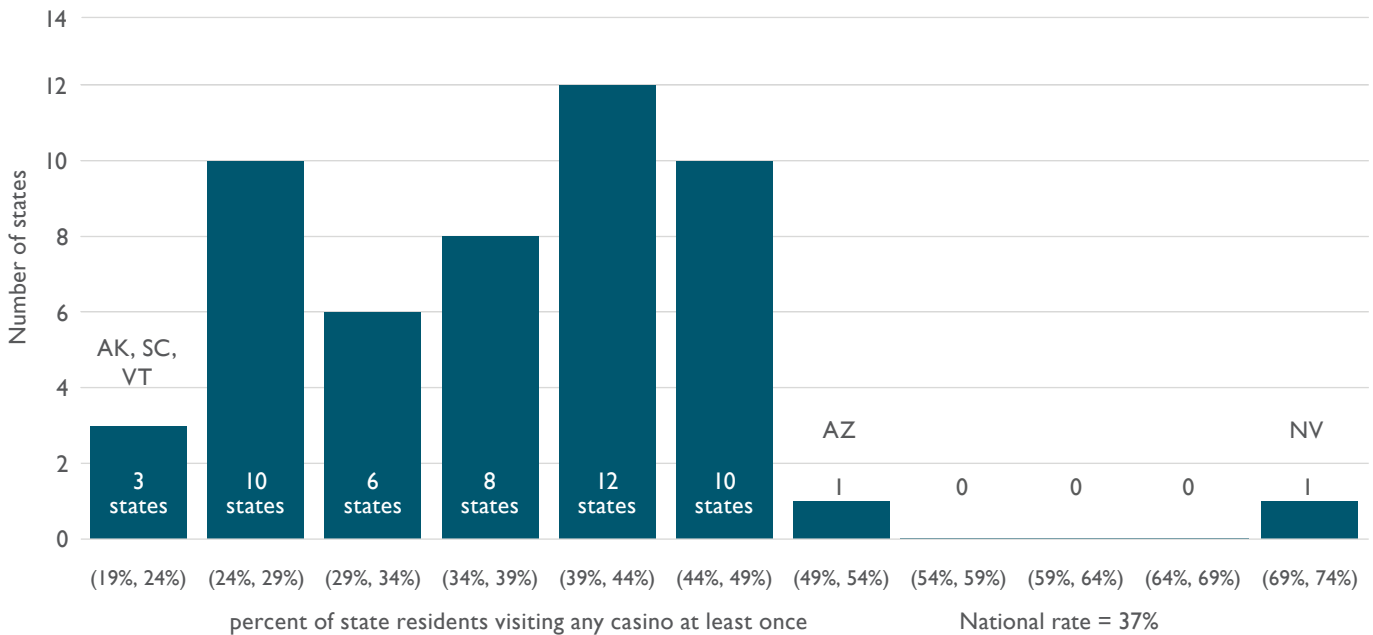




Figure 6B-3

## Why have you been to a casino in the past year?

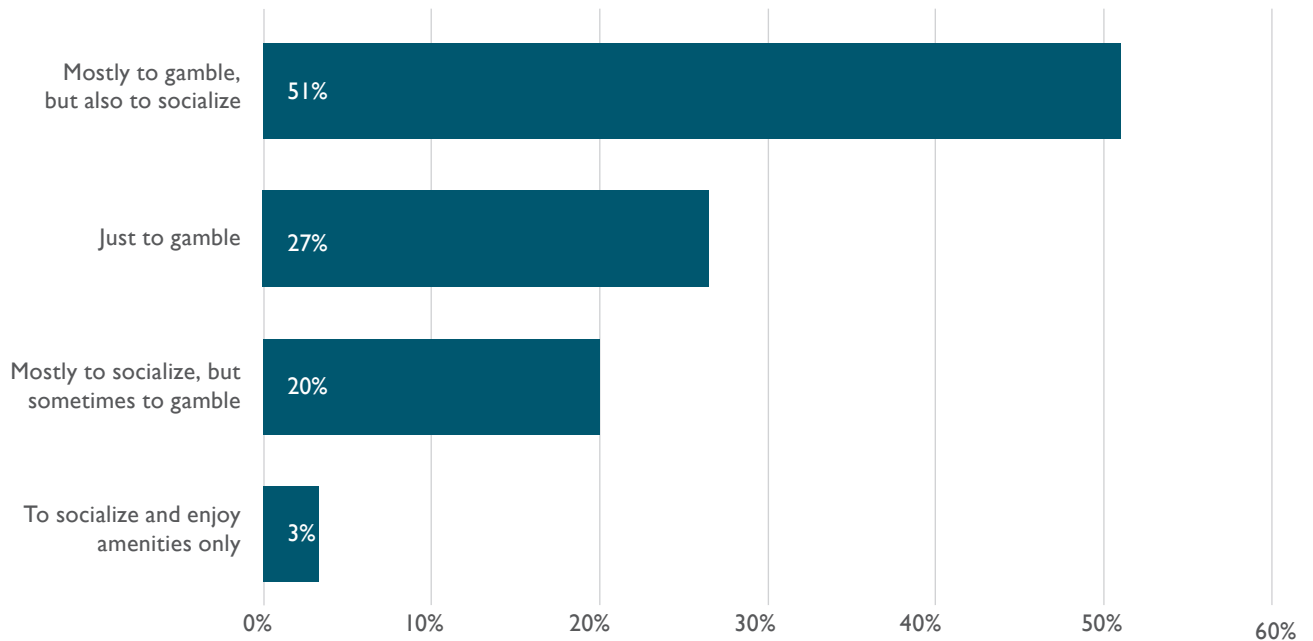


Figure 6B-4

## Casino games played in past year

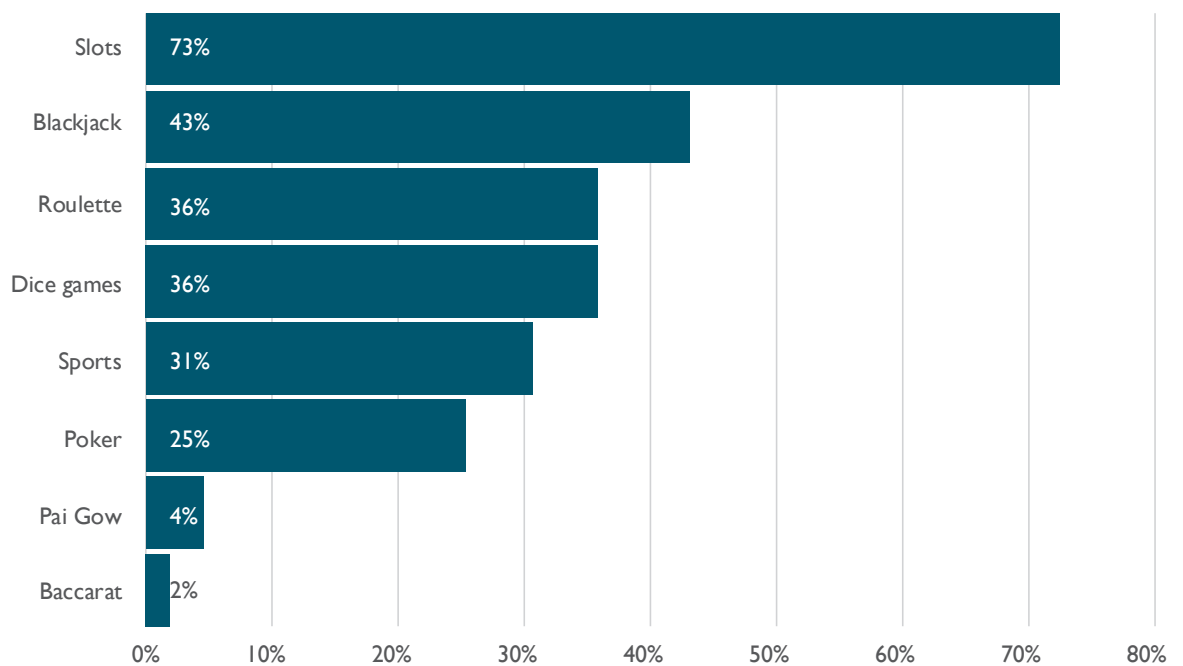
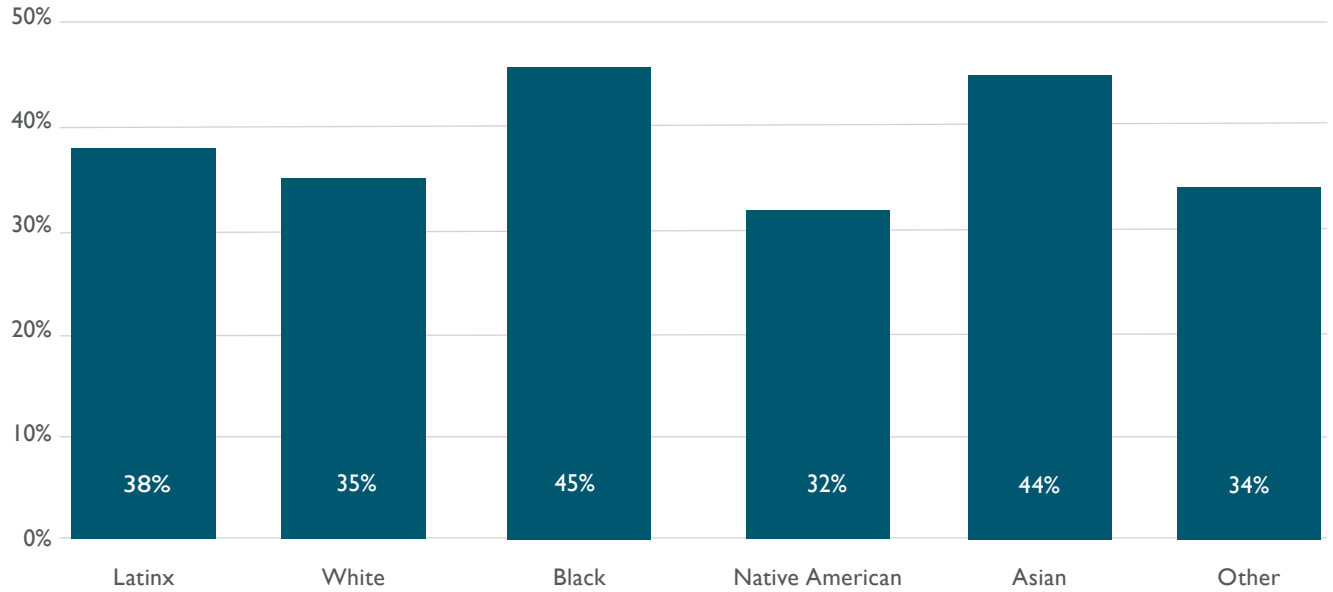


Figure 6B-5

### Past year casino gambling – *by racial/ethnic origin*



Note: Respondents could list multiple racial/ethnic origins

Figure 6B-6

### Past year casino gambling – *by educational attainment*

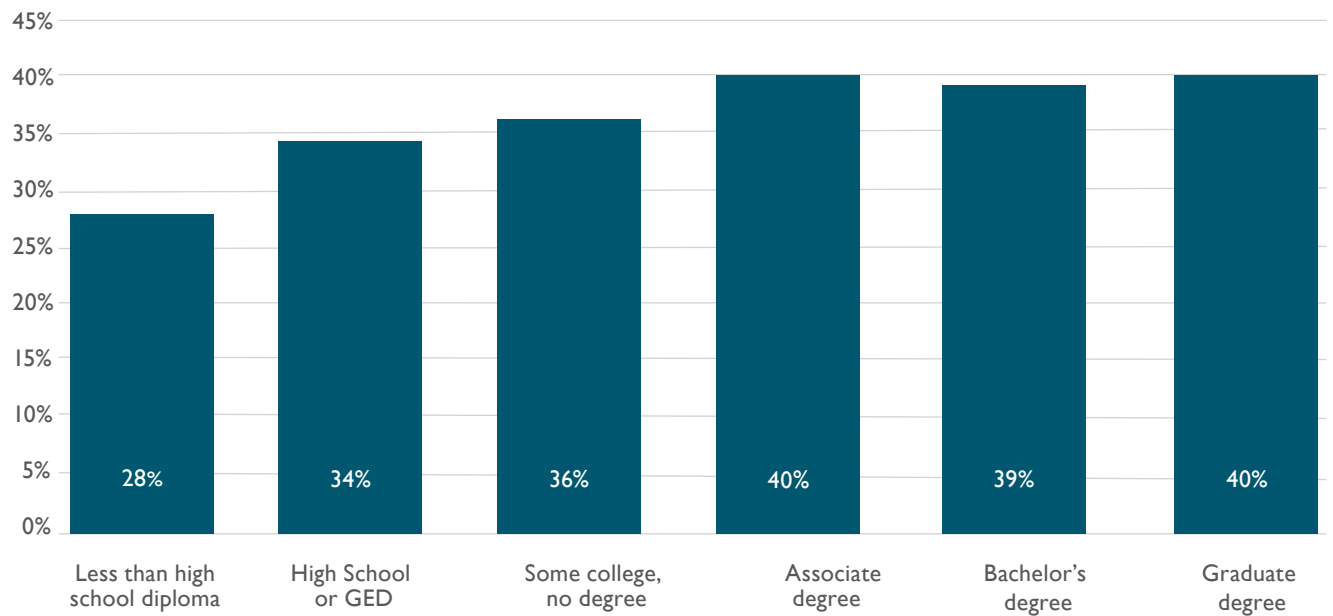


Figure 6B-7

### Past year casino gambling – by household income

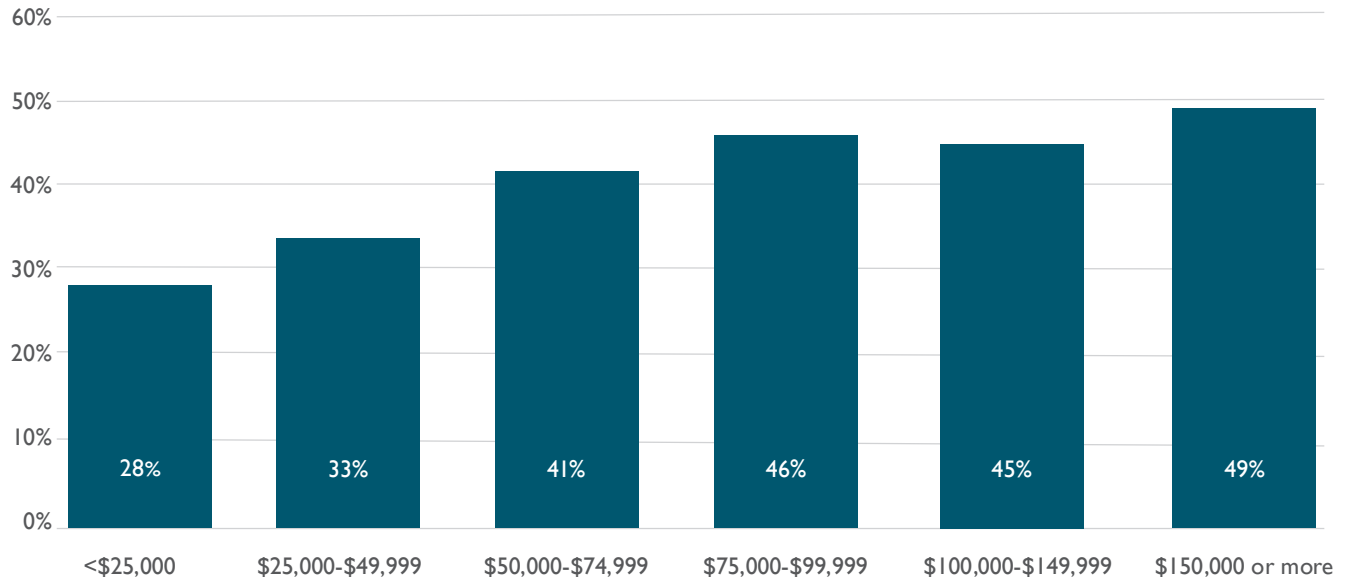


Figure 6B-8

### Past year casino attendance – by age

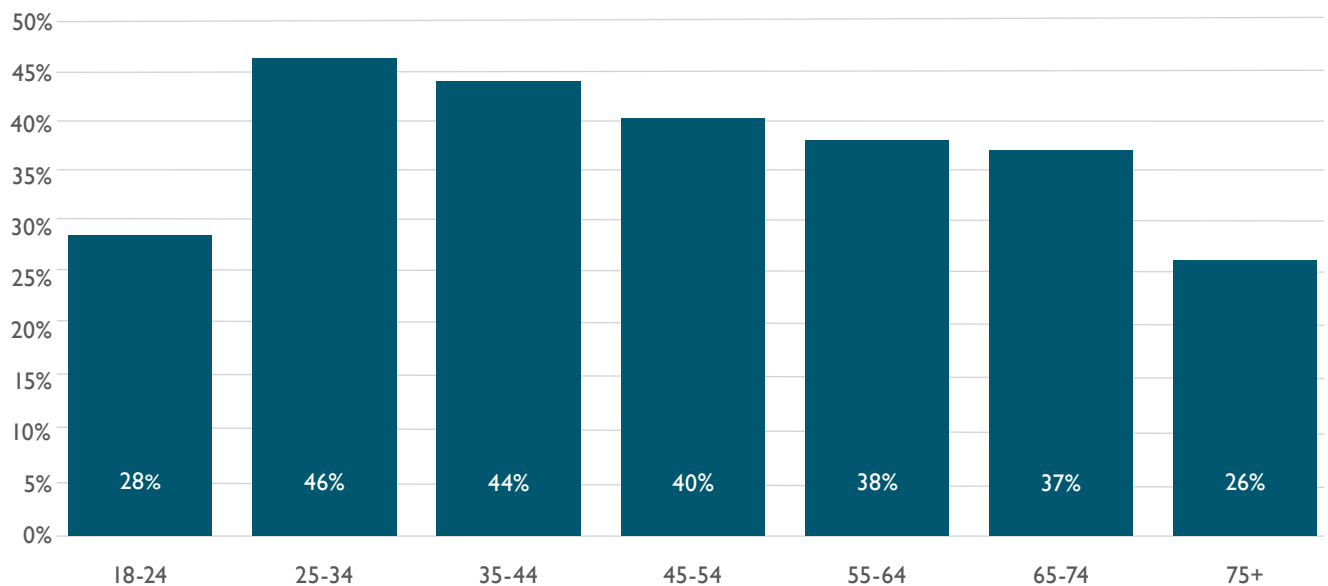


Figure 6B-9

### Monthly or more casino attendance – by age

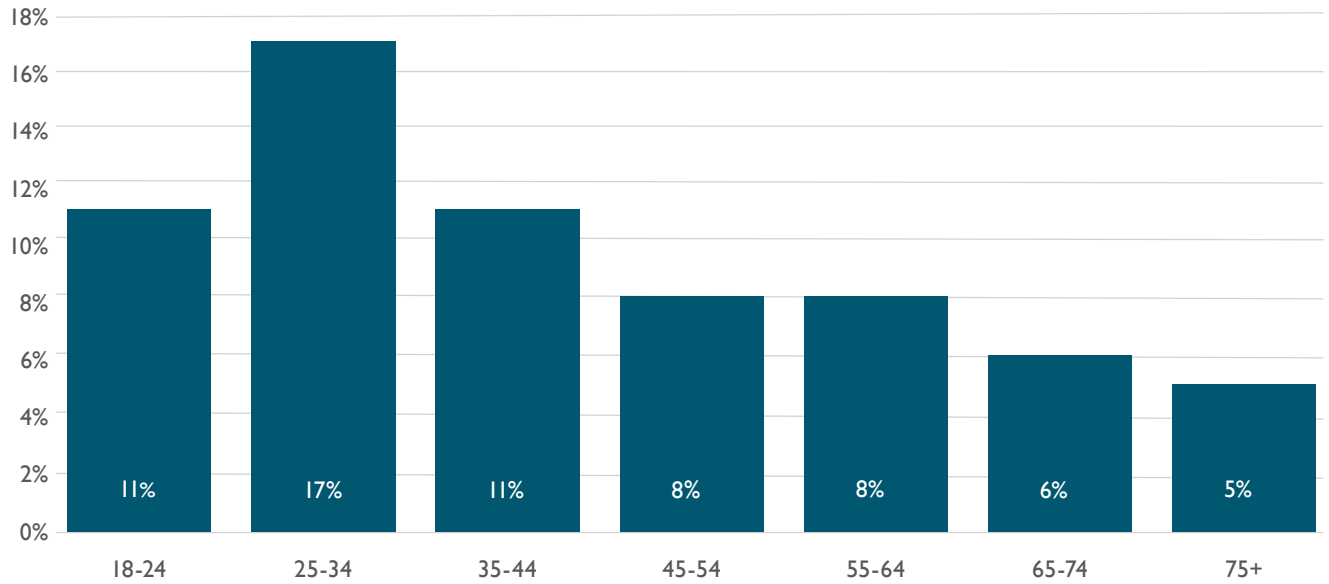


Figure 6B-10

### Past year problematic gambling activity among casino gamblers

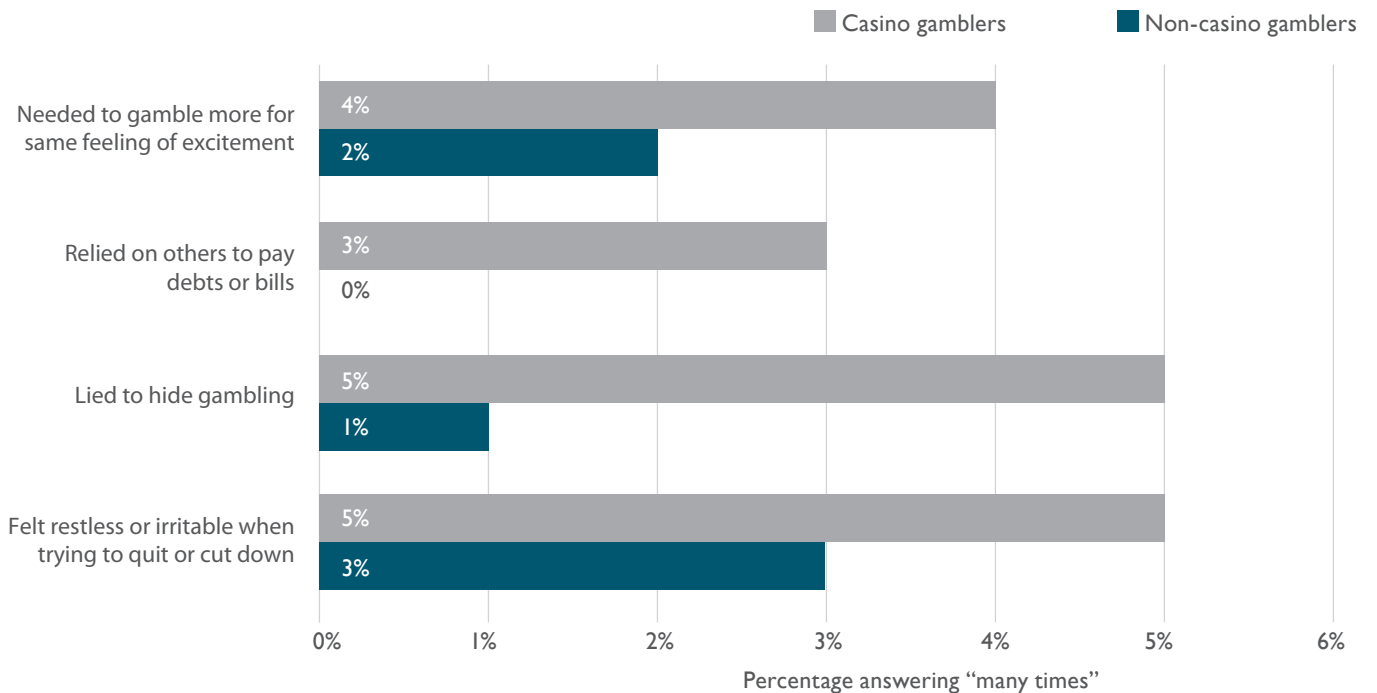


Figure 6B-11

### Casino gamblers vs non-casino gamblers past year positive play – *personal responsibility*

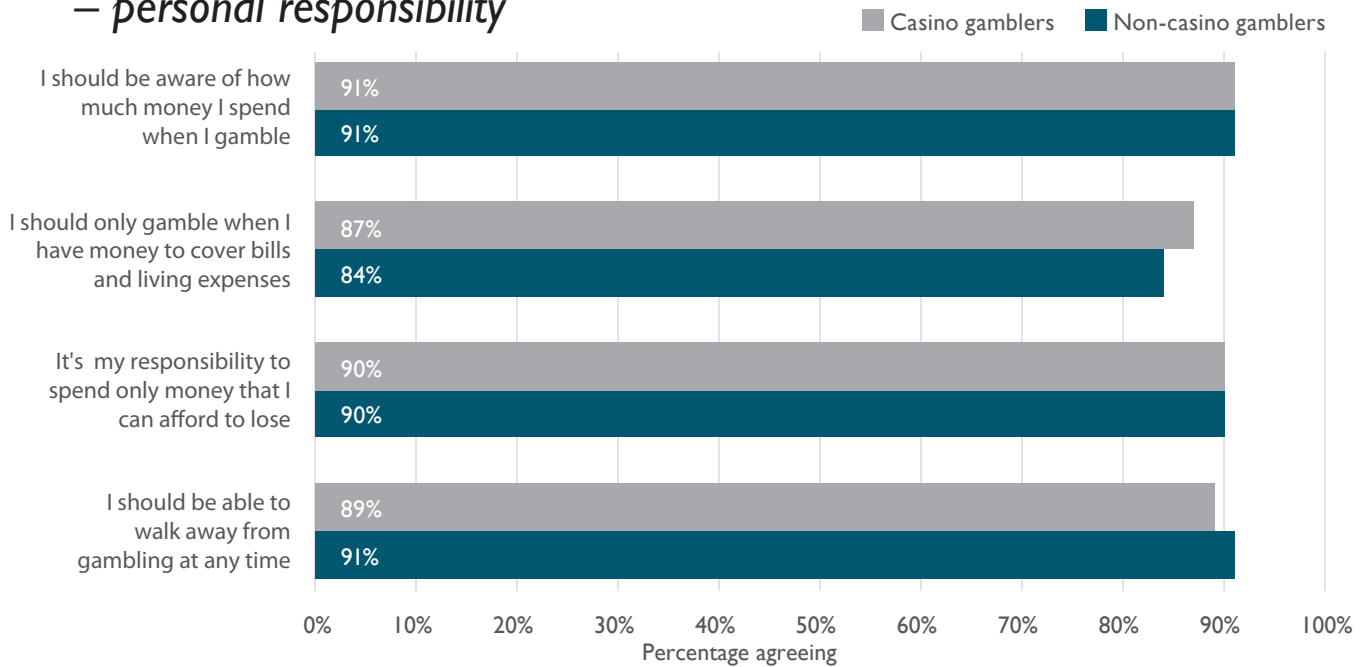


Figure 6B-12

### Casino gamblers vs non-casino gamblers past year positive play – *gambling literacy*

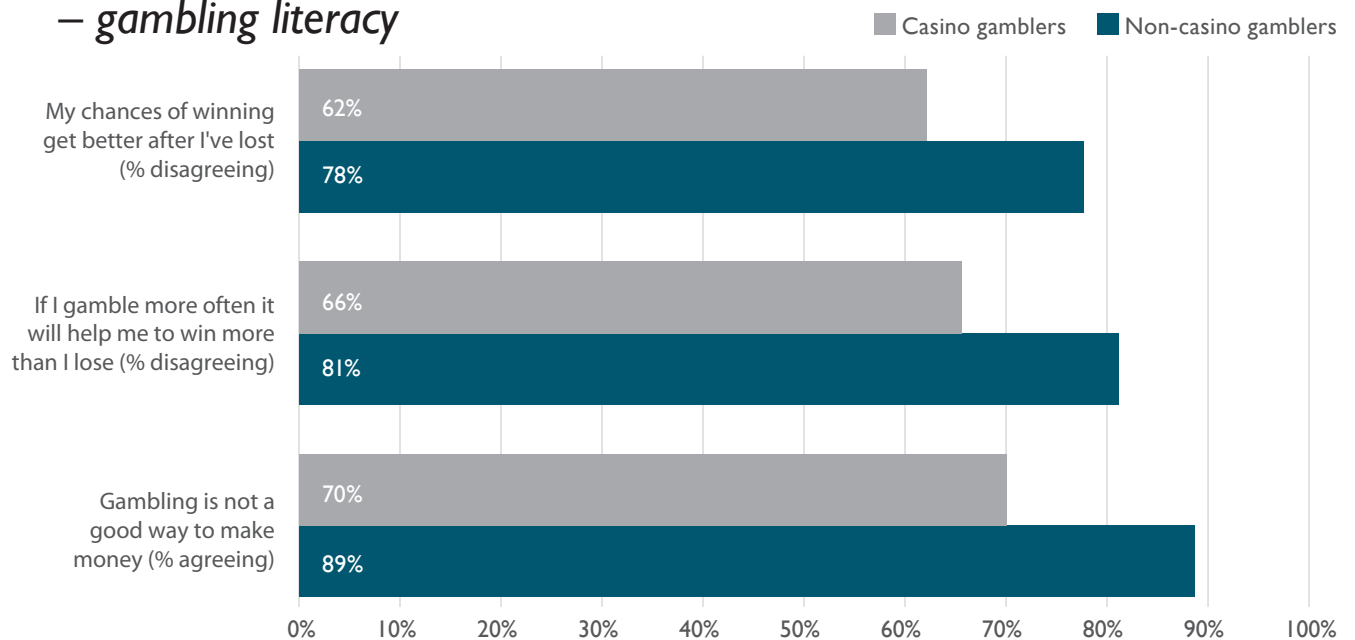


Figure 6B-13

### “My chances of winning get better after I’ve lost”

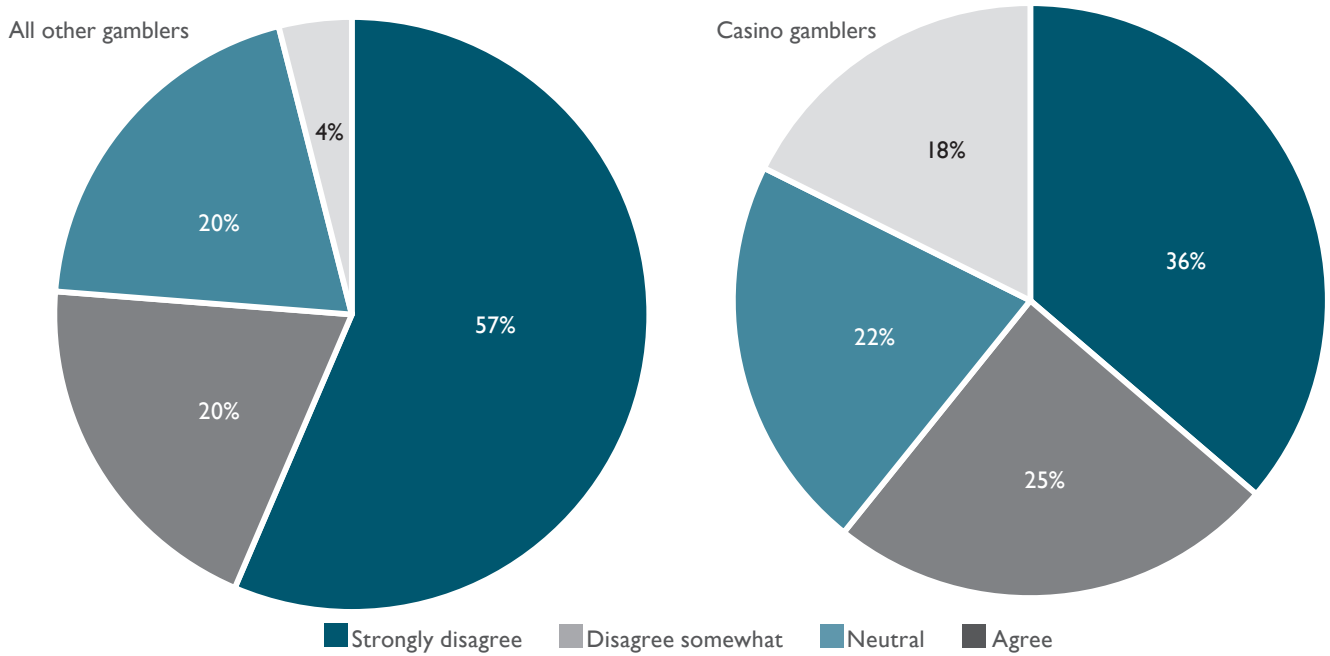


Figure 6B-14

### Past year problematic gambling activity among weekly casino gamblers

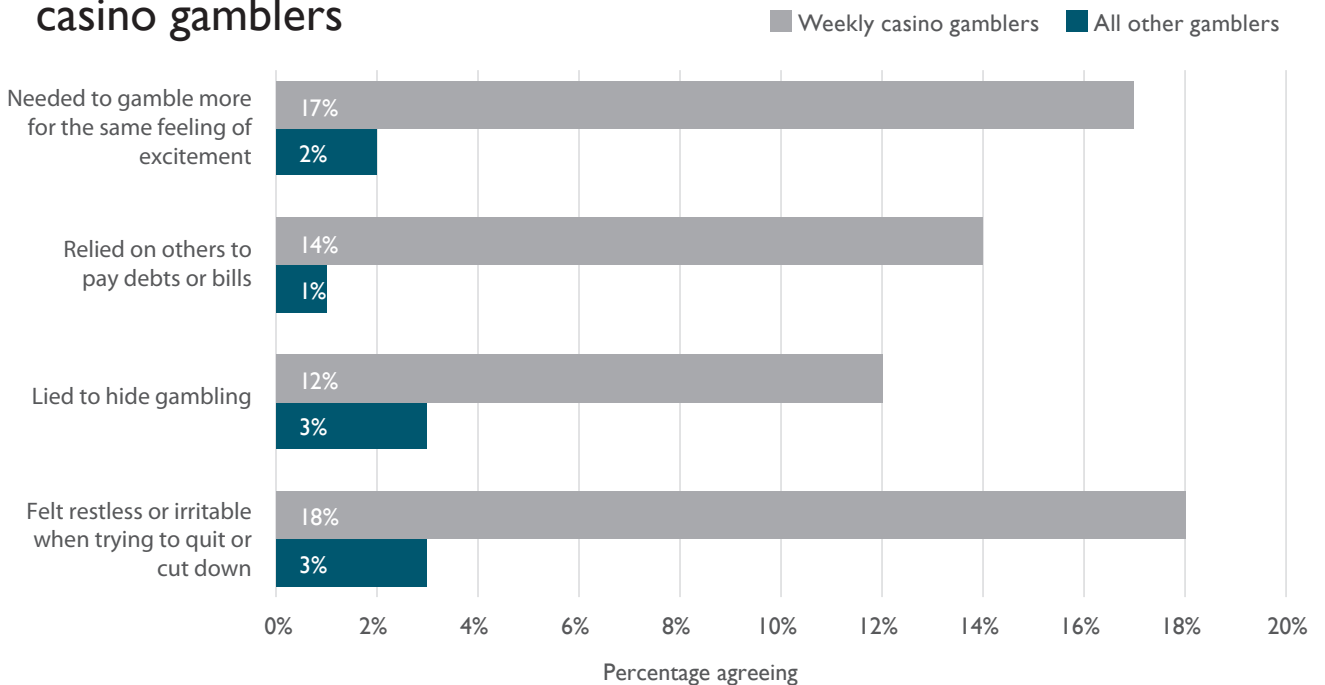


Figure 6B-15

### Weekly casino gamblers vs all other gamblers – *personal responsibility*

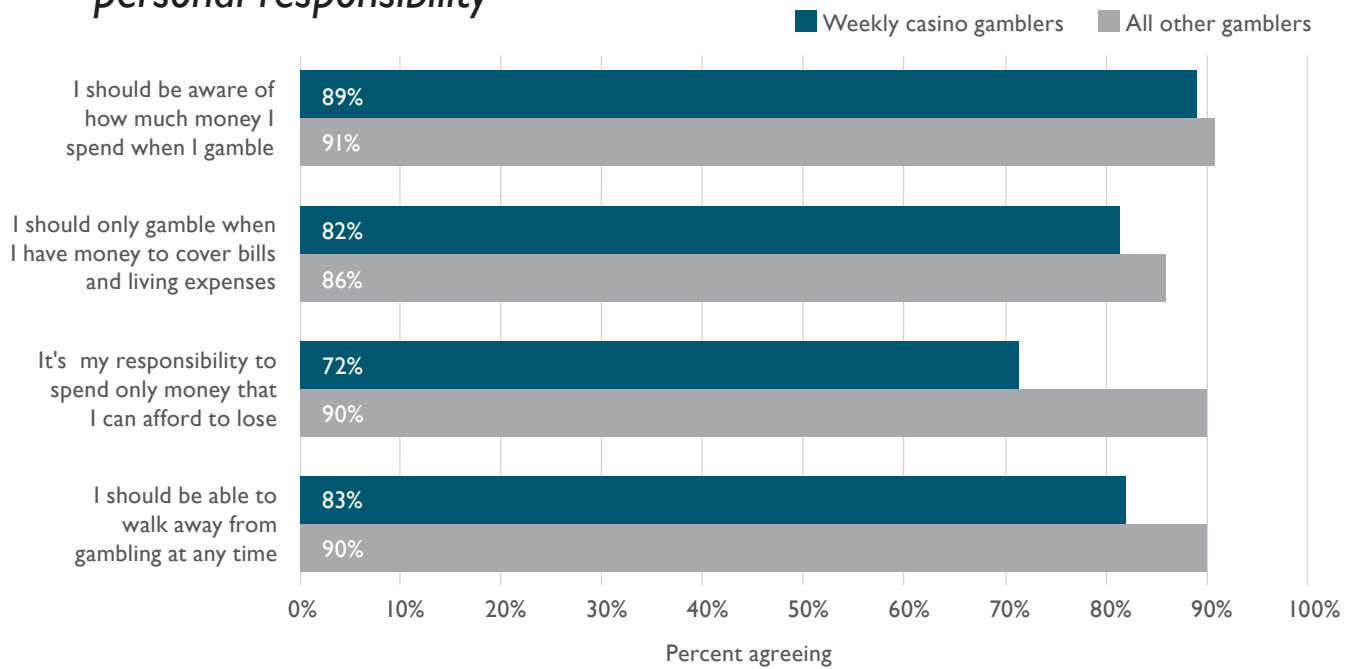


Figure 6B-16

### Weekly casino gamblers vs all other gamblers – *gambling literacy*

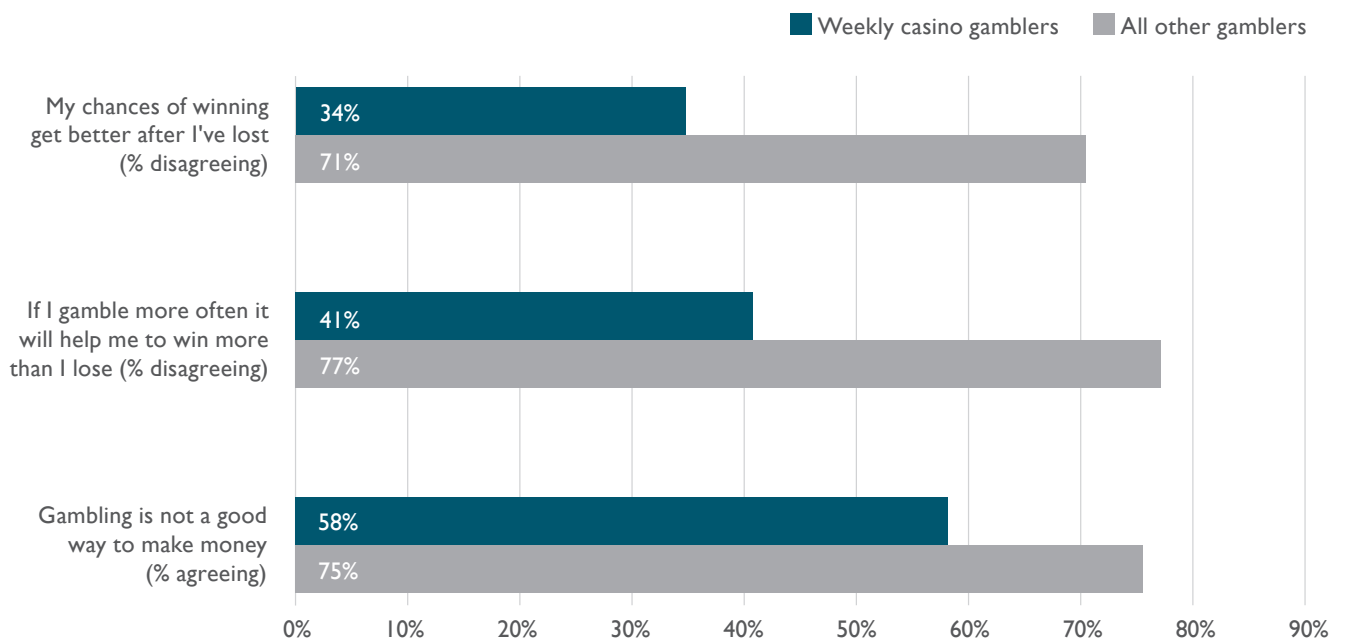


Figure 6C-1

### Where did you play slots, VLTs or other gaming machines in the past year?

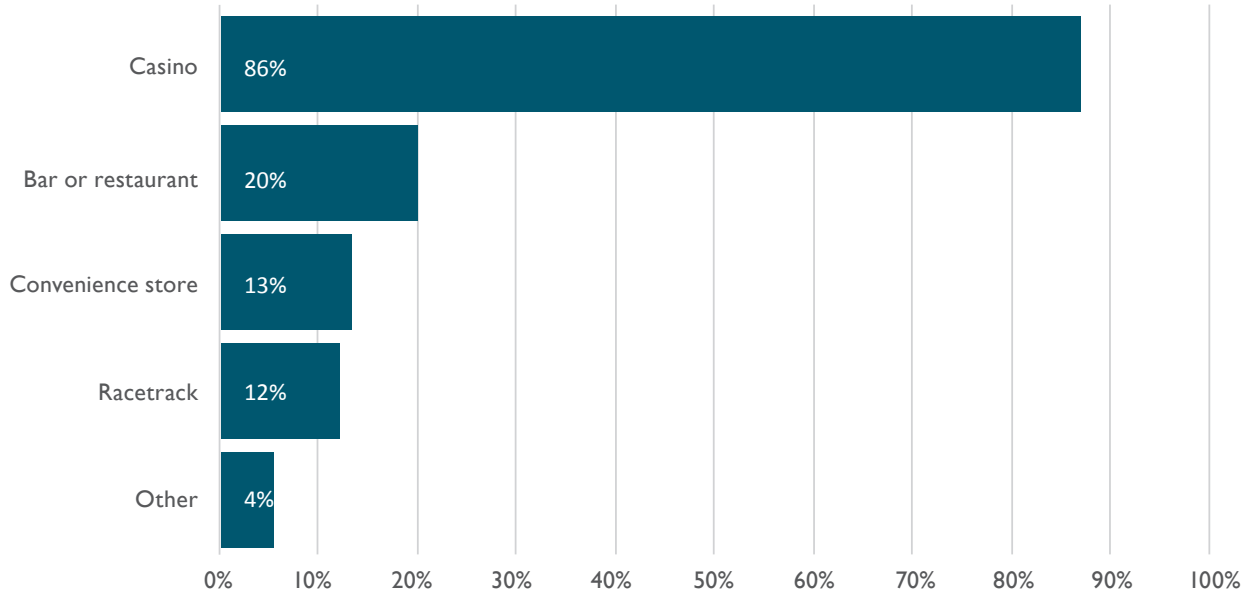


Figure 6C-2

### Frequency of gaming machine play

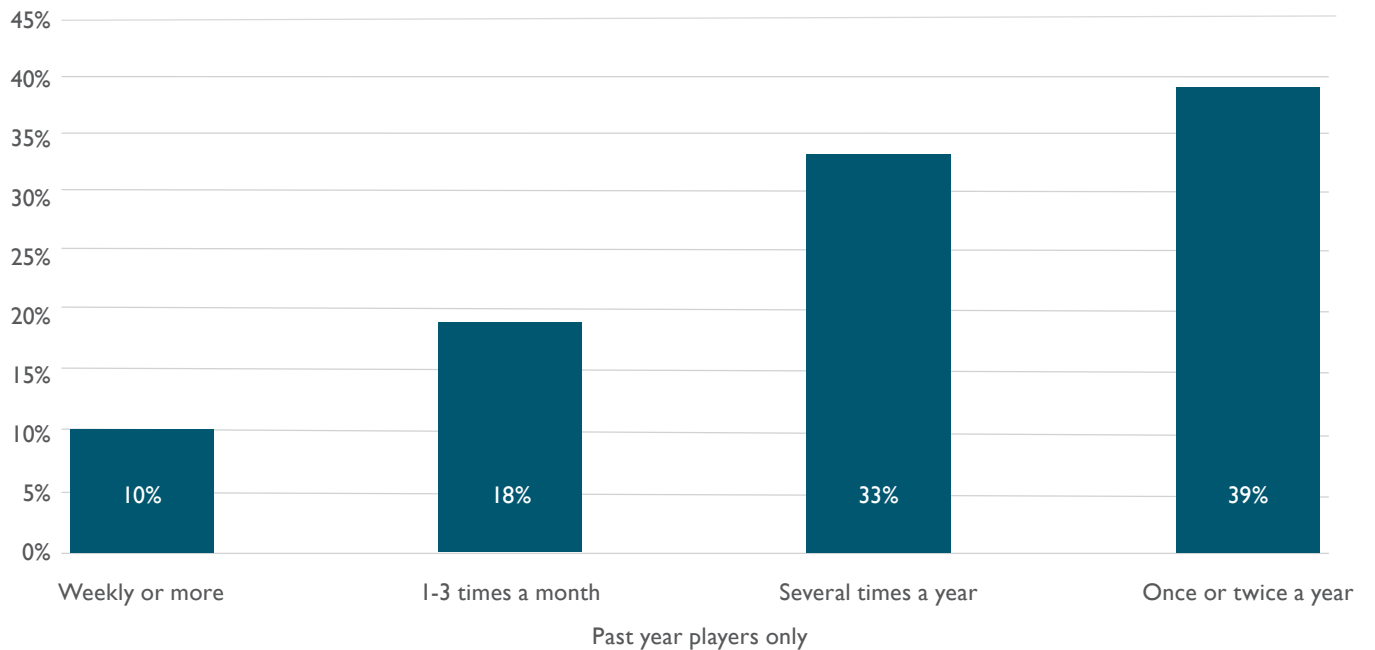




Figure 6C-3

### Past year gaming machine betting – by age

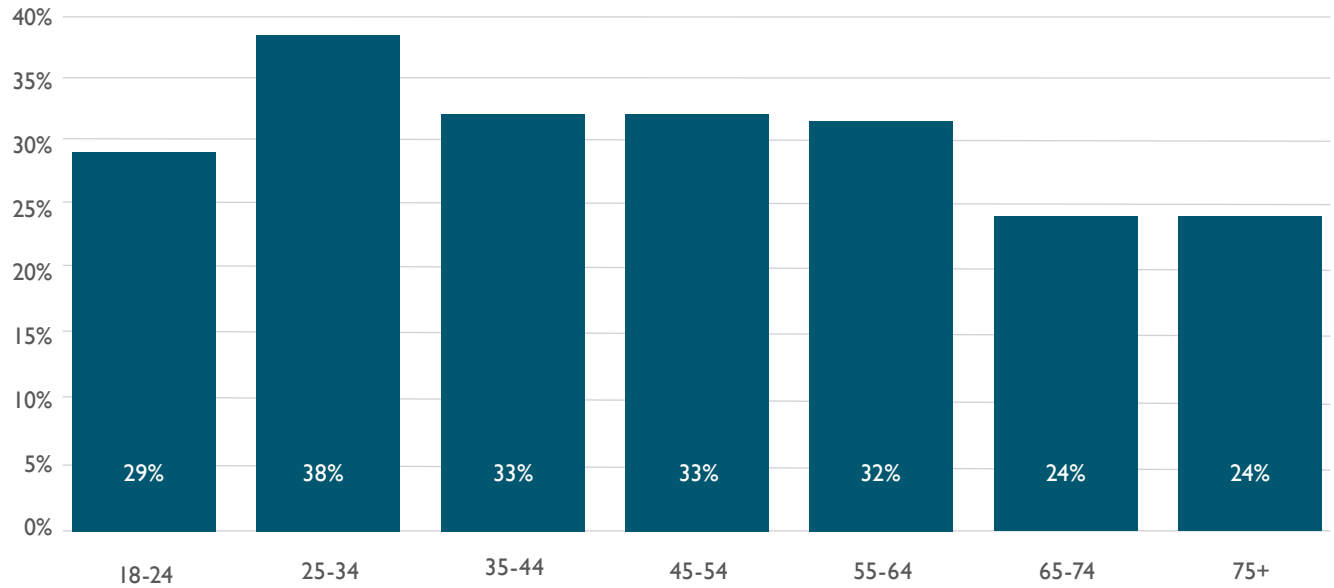


Figure 6C-4

### Monthly or more gaming machine play – by age

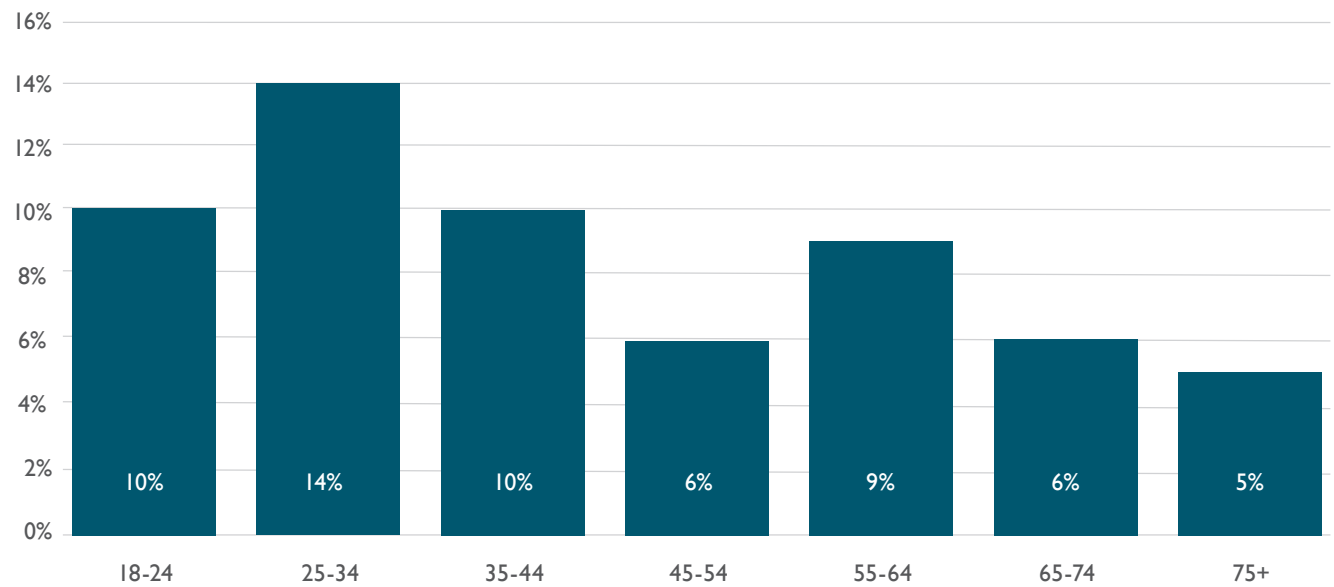
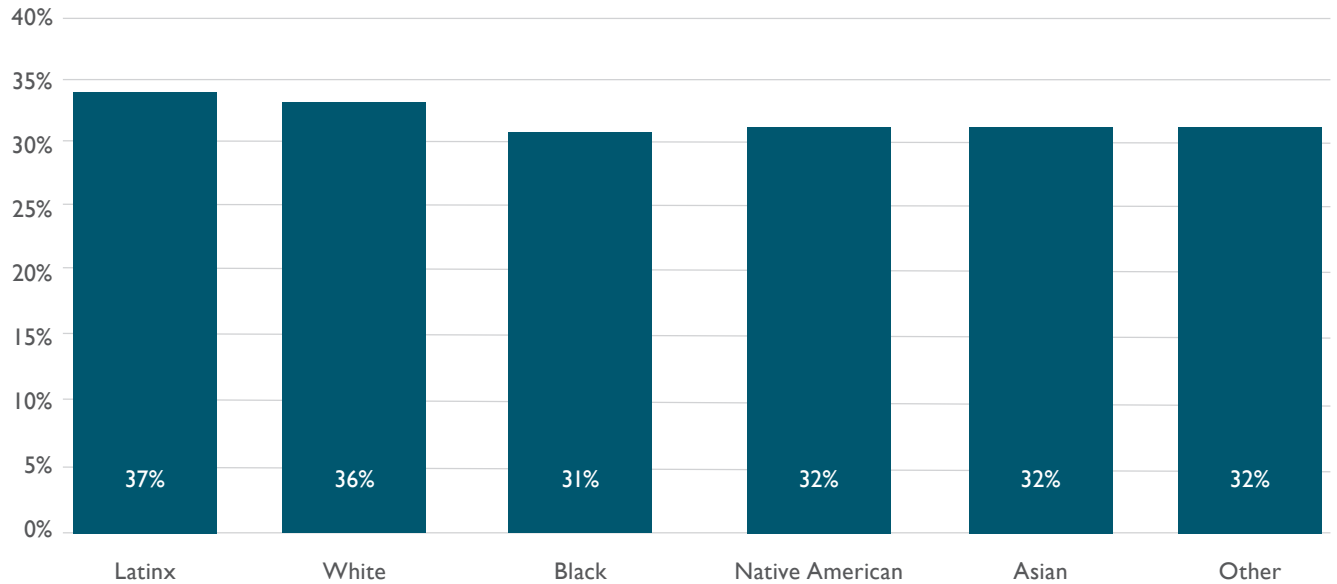


Figure 6C-5

### Past year gaming machine play – by racial/ethnic origin



Note: Respondents could list multiple racial/ethnic origins

Figure 6C-6

### Past year gaming machine play – by household income

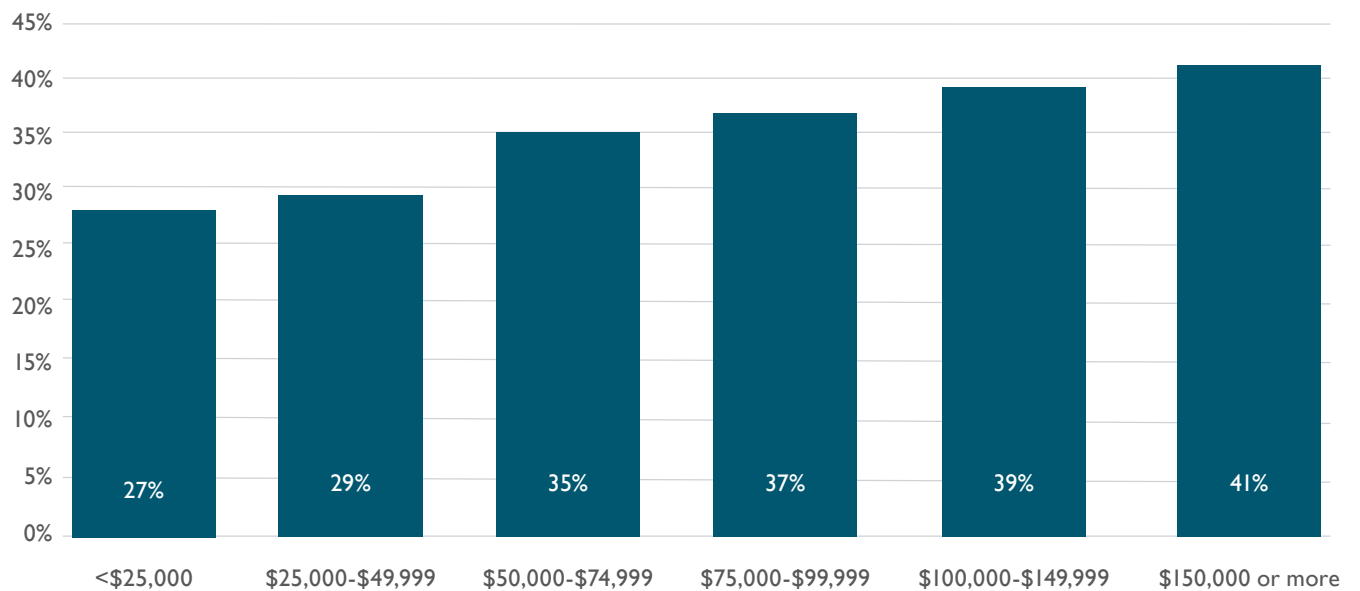


Figure 6C-7

### Past year gaming machine play – by educational attainment

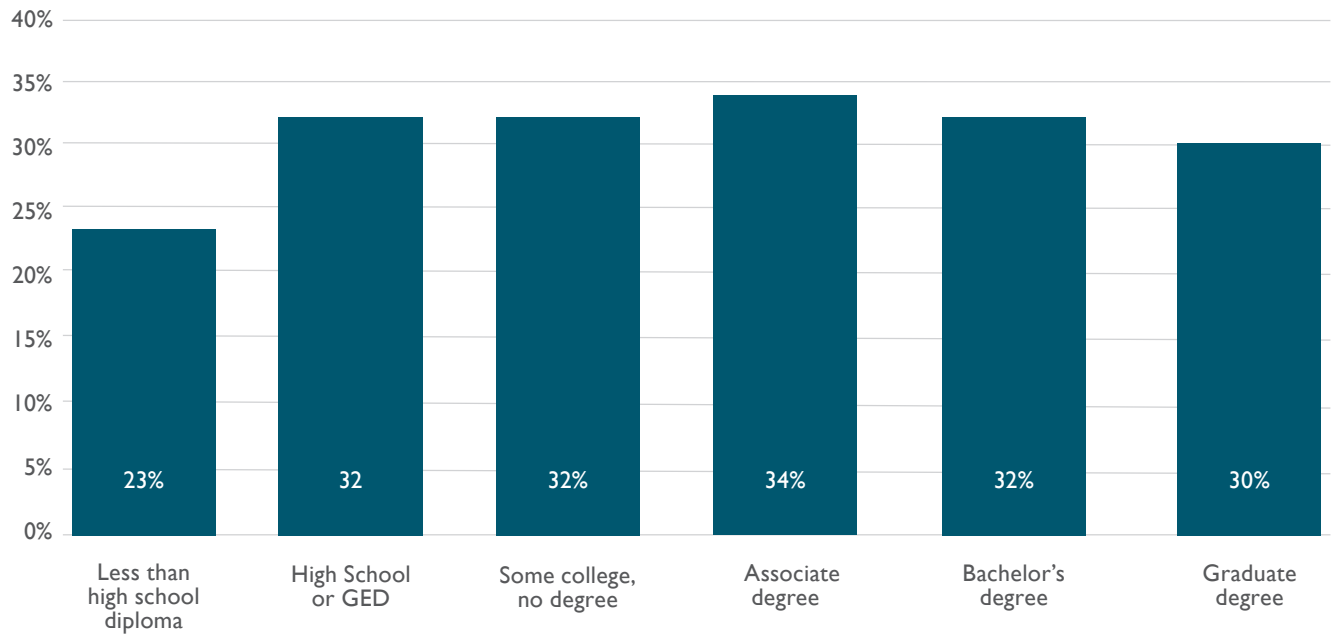


Figure 6C-8

### Past year problematic gambling activity among machine gamblers

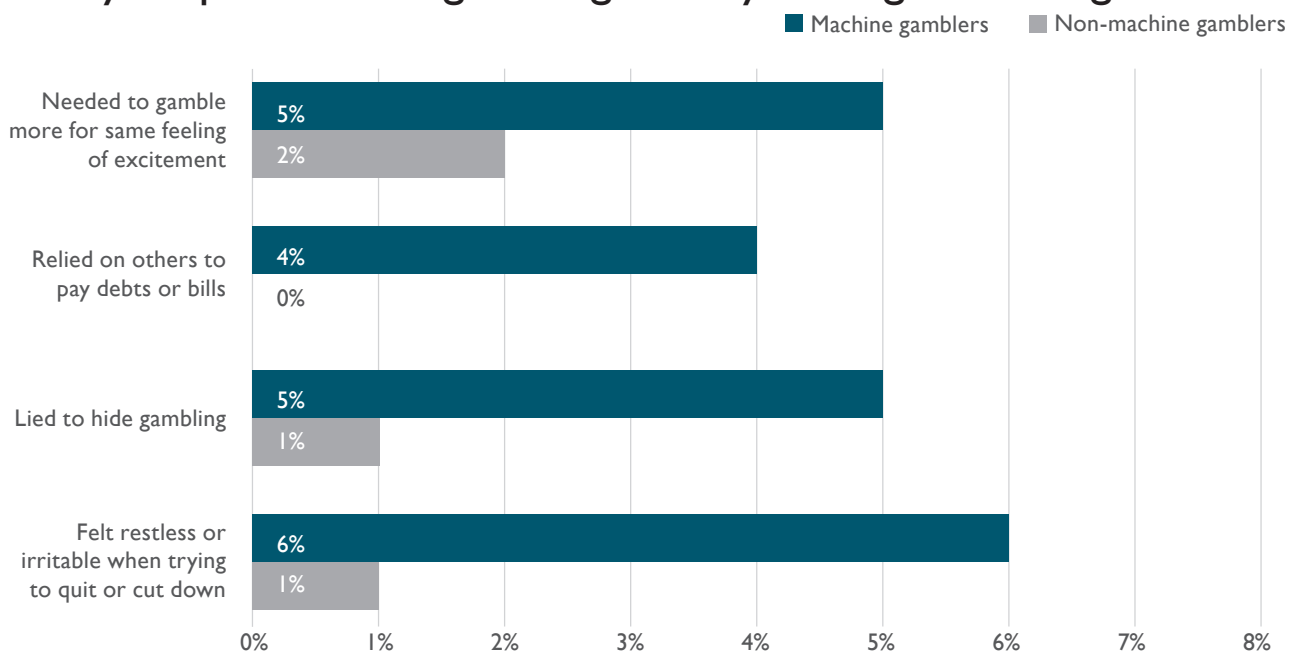


Figure 6C-9

### Weekly machine gamblers vs all other gamblers – *personal responsibility*

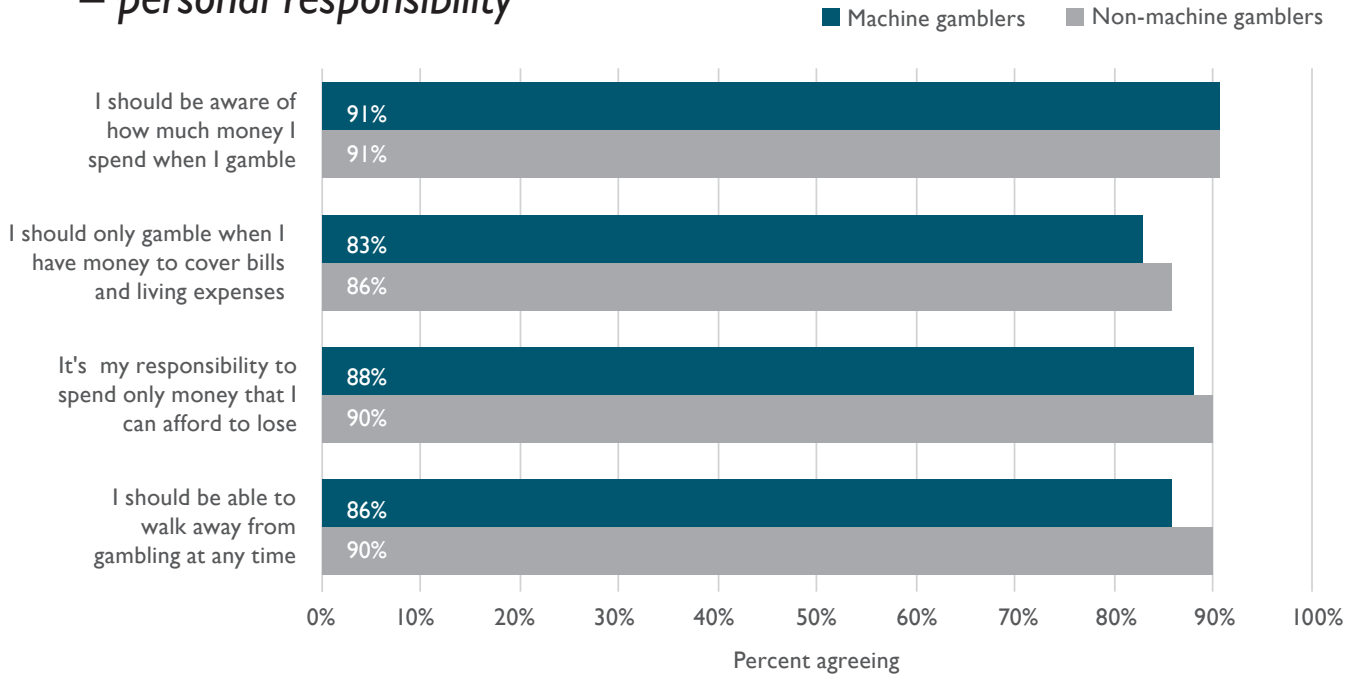


Figure 6C-10

### Weekly machine gamblers vs all other gamblers – *gambling literacy*

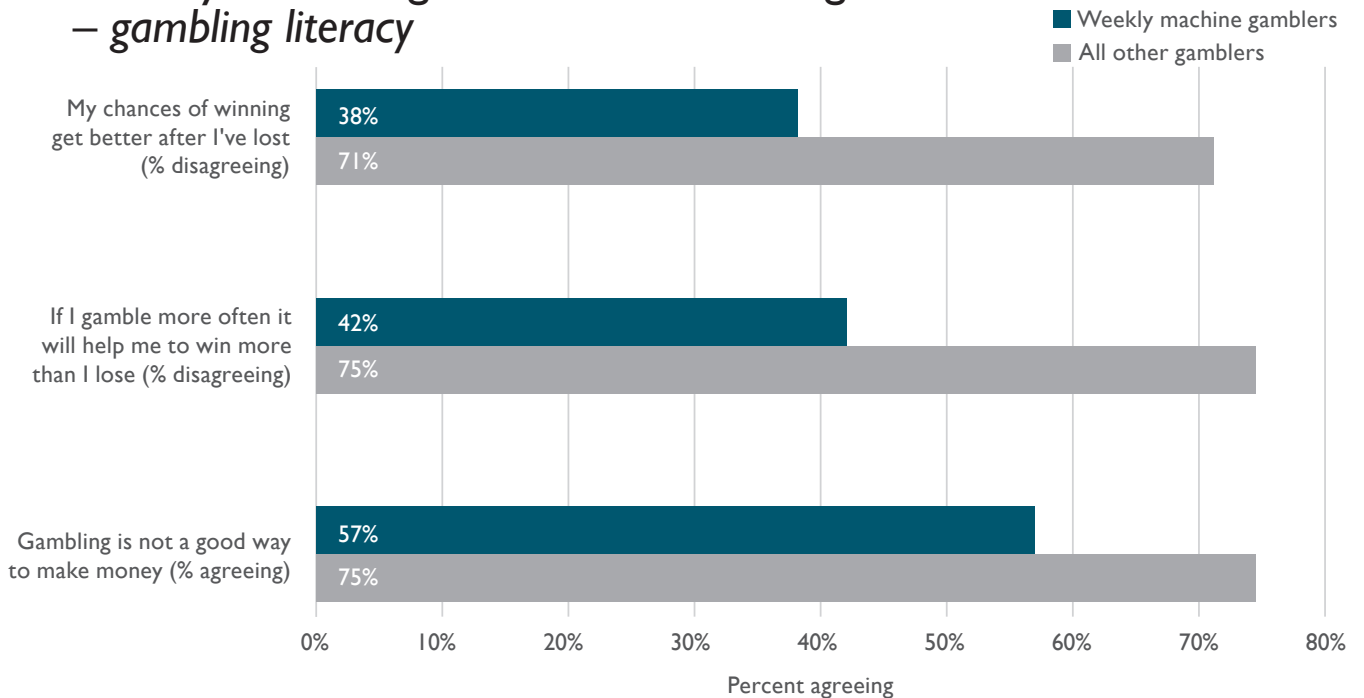


Figure 6D-I

## Type of sports betting

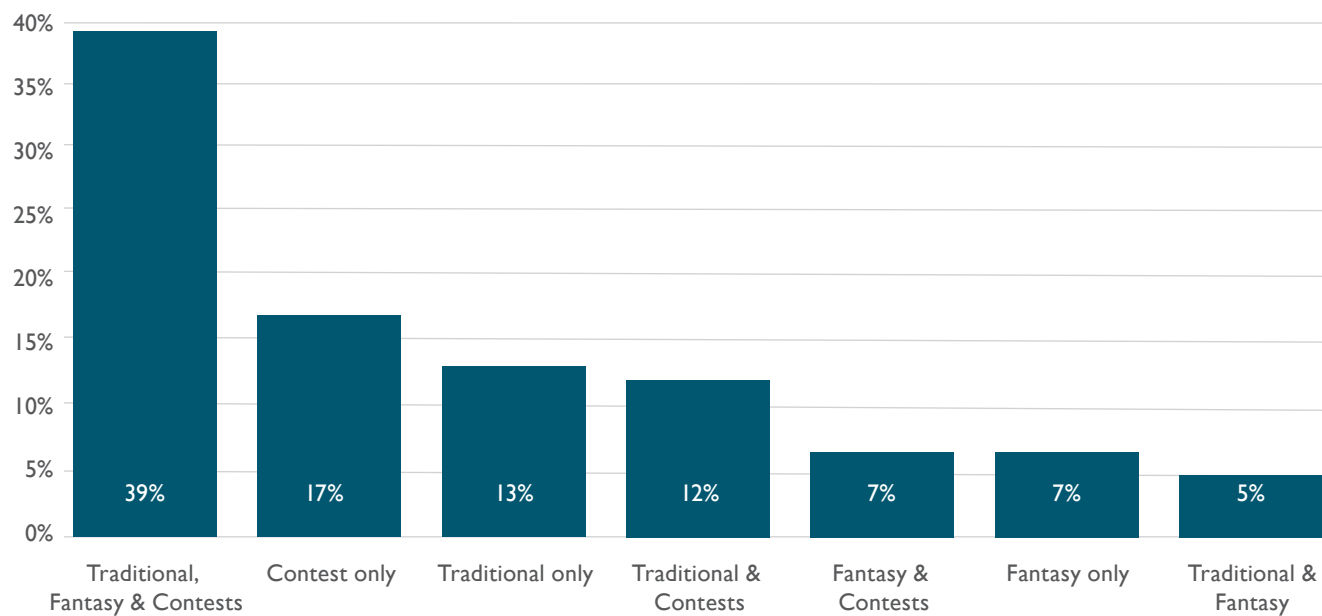


Figure 6E-I

## Types of sports bets made

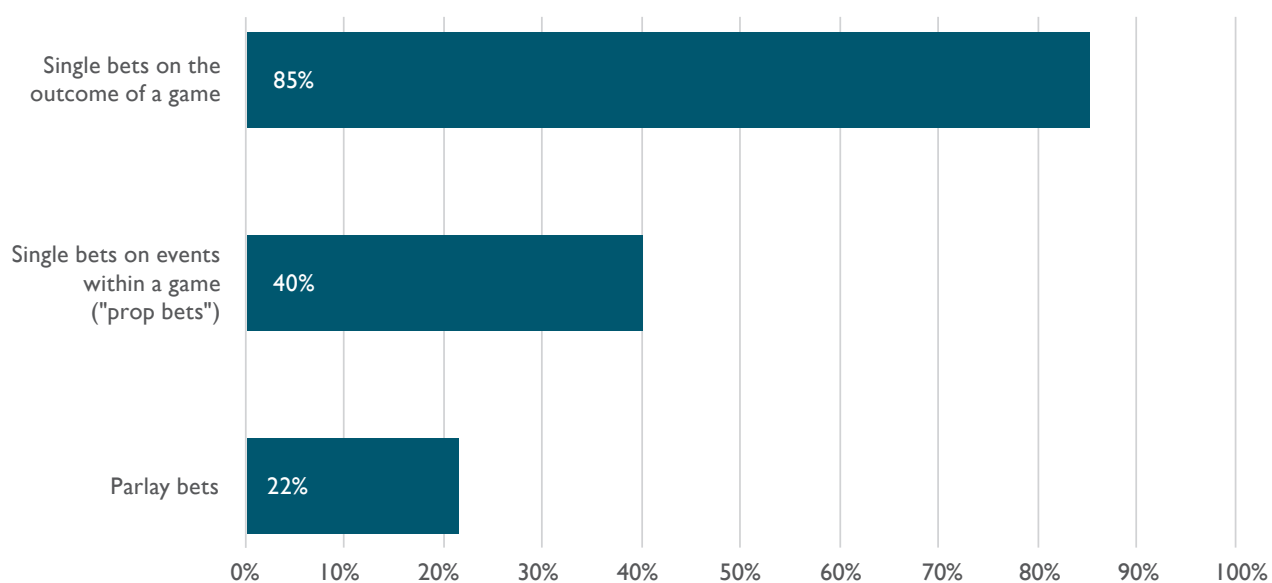


Figure 6E-2

## Sports bet on in past year for real money

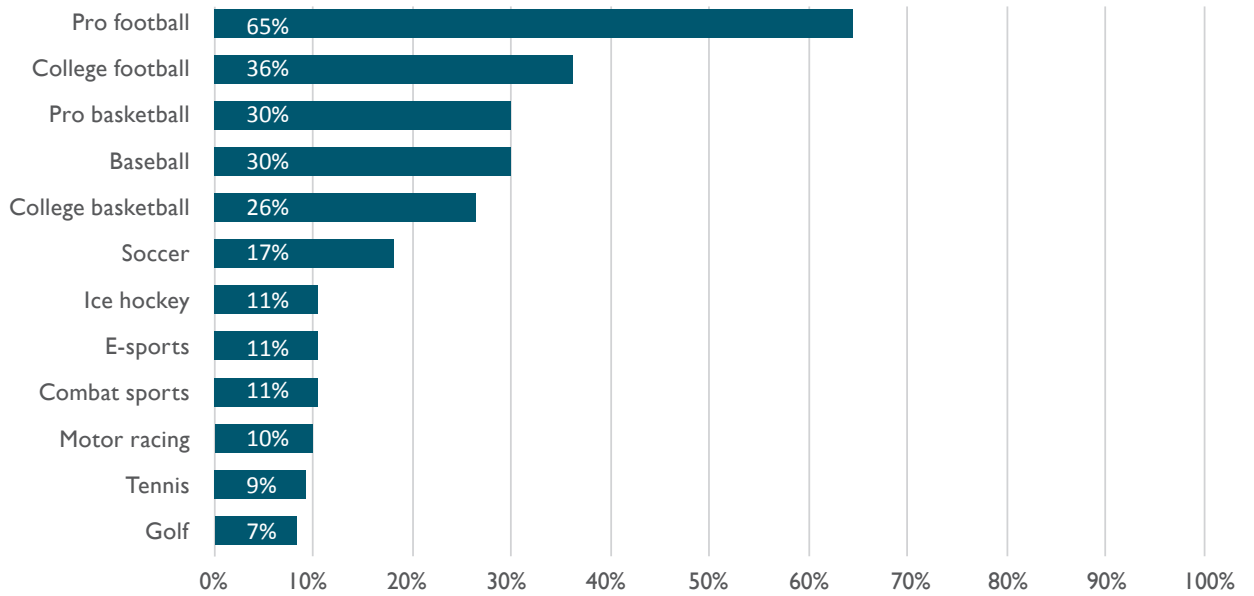


Figure 6E-3

## Number of sports bet on

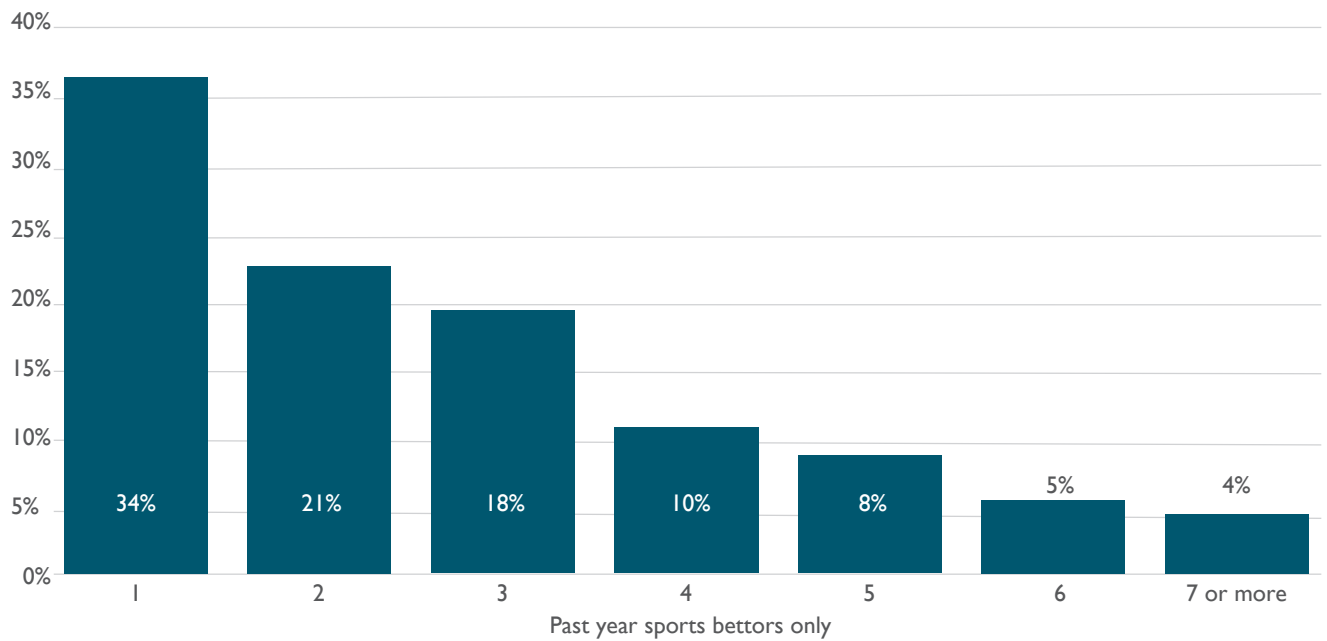


Figure 6E-4

### How do you make sports bets?

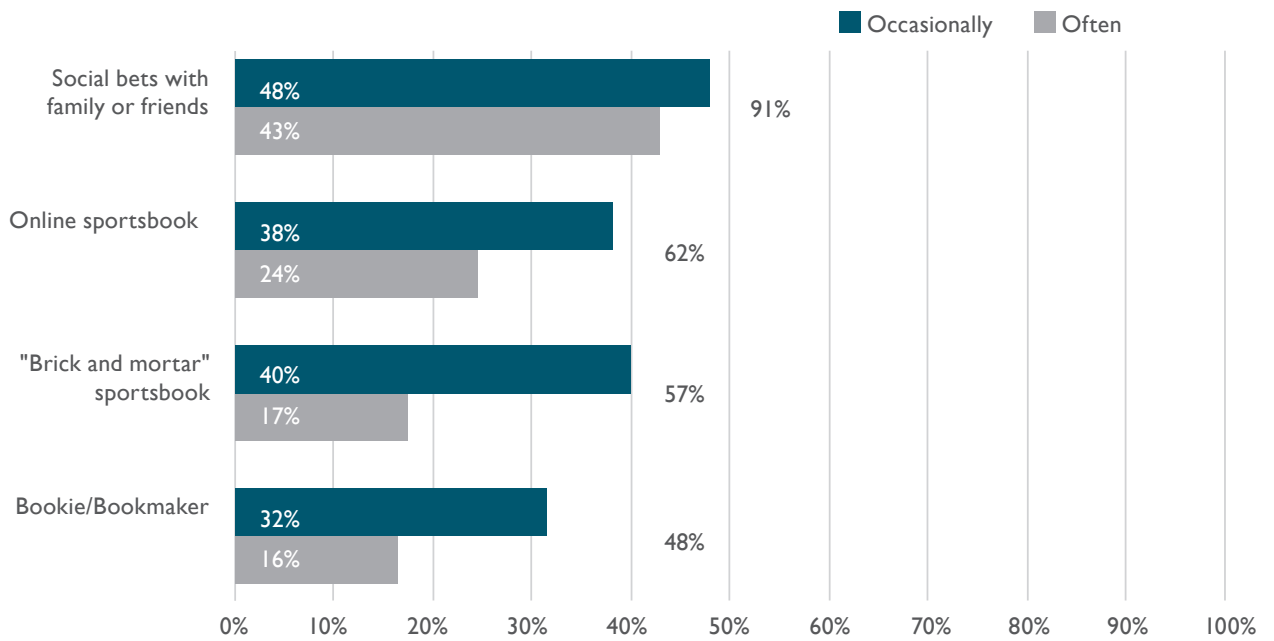


Figure 6E-5

### What is the average size of a wager you would make on the outcome of a game?

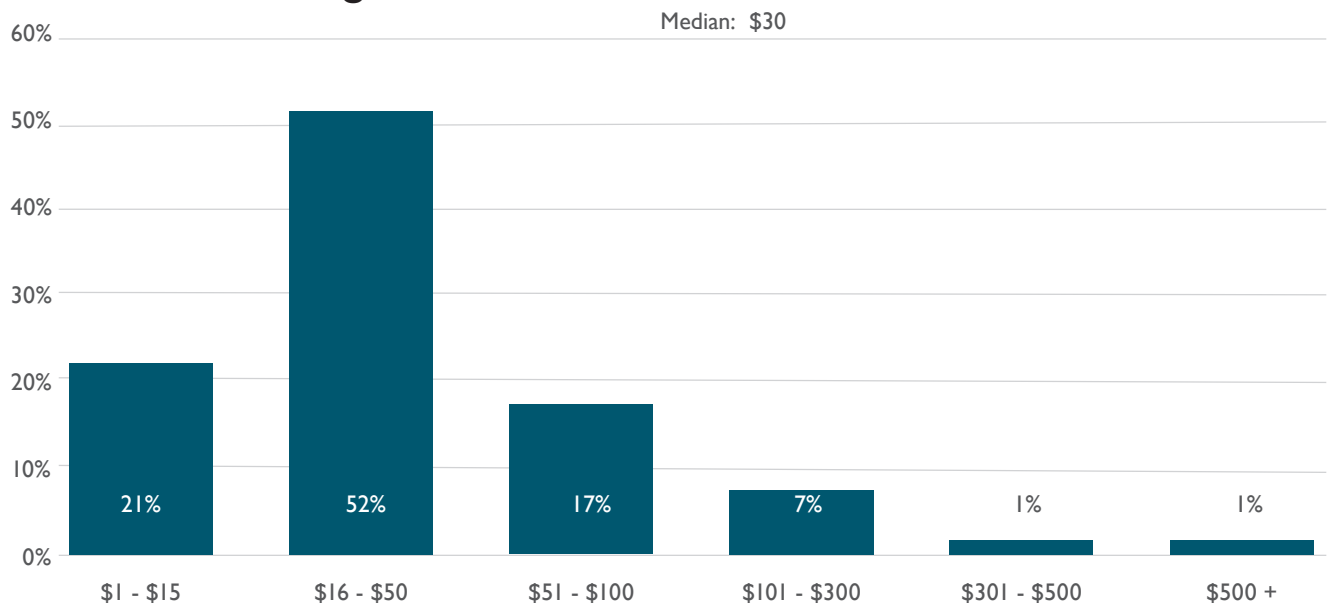


Figure 6E-6

### Past year sports betting – *by age*

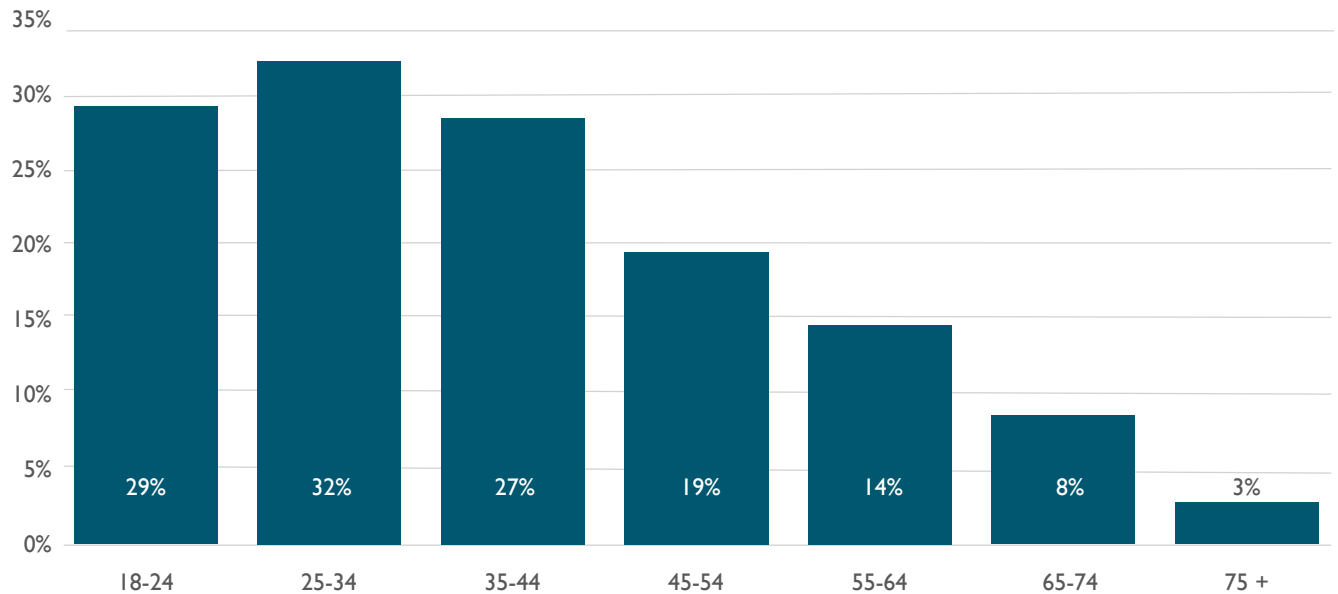


Figure 6E-7

### Past year sports betting – *by educational attainment*

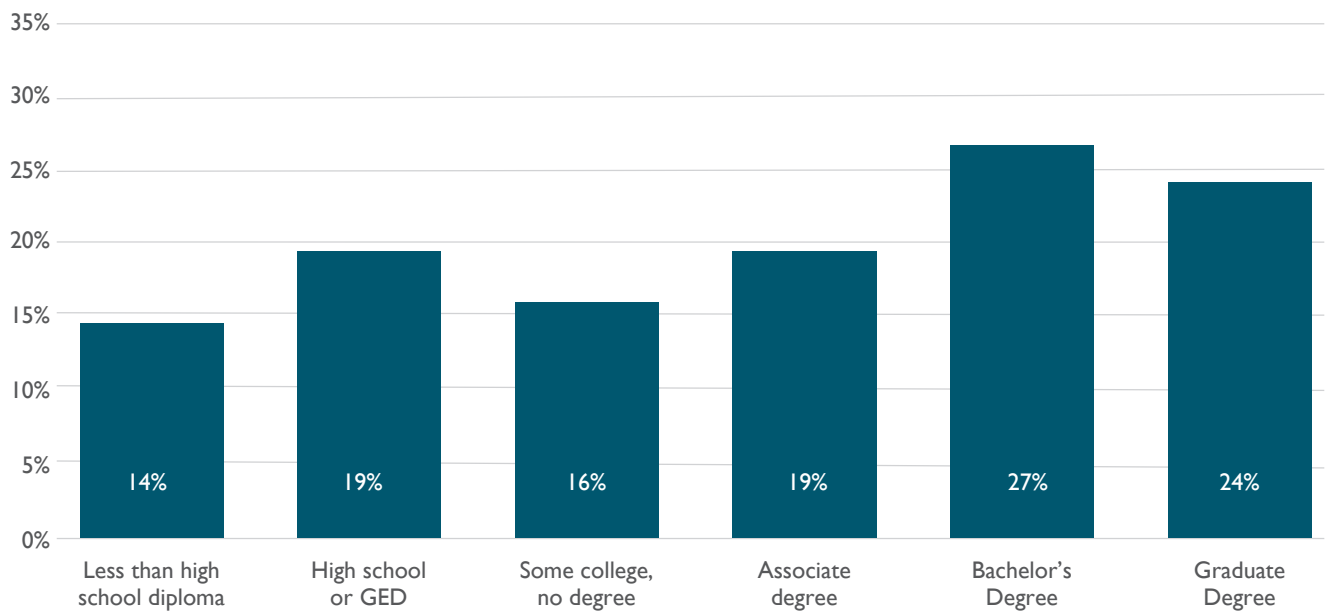




Figure 6E-8

### Past year sports betting – *by household income*

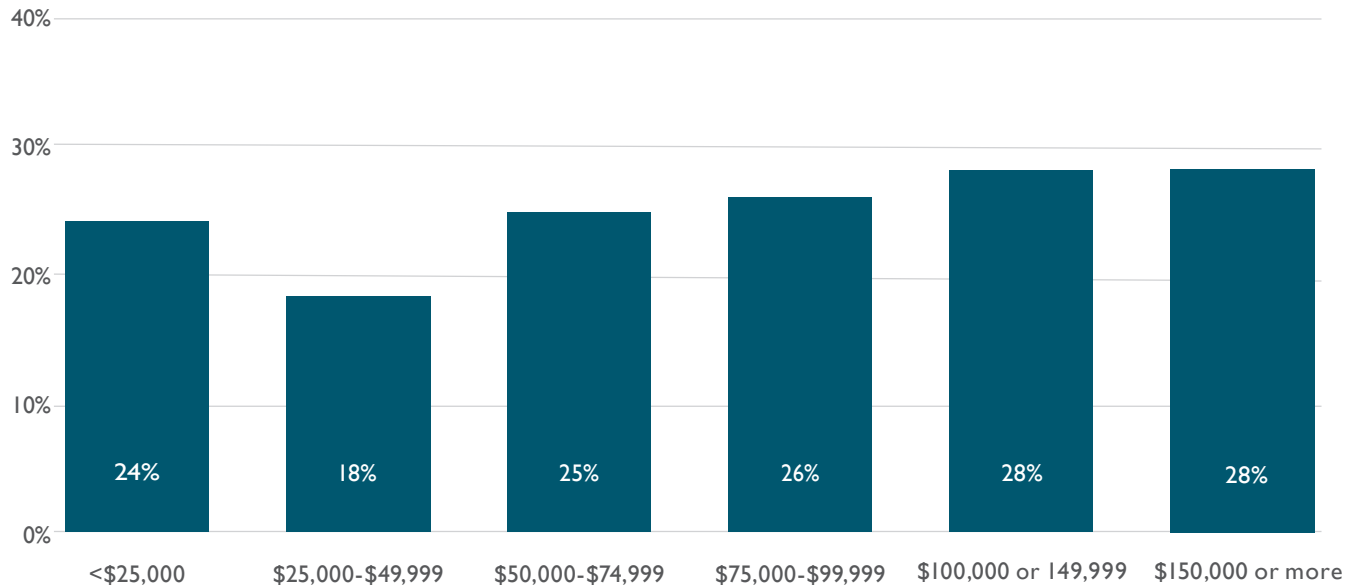
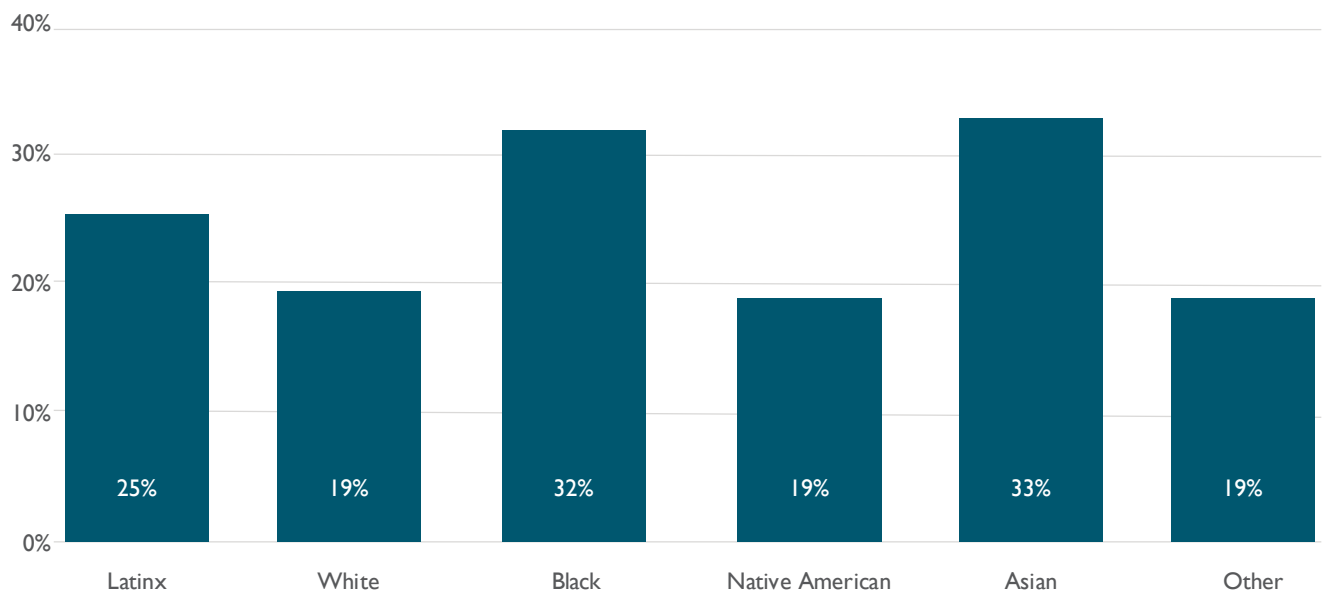


Figure 6E-9

### Past year sports betting – *by racial/ethnic origin*



Note: Respondents could list multiple racial/ethnic origins

Figure 6E-10

### Past year problematic gambling activity among sports bettors

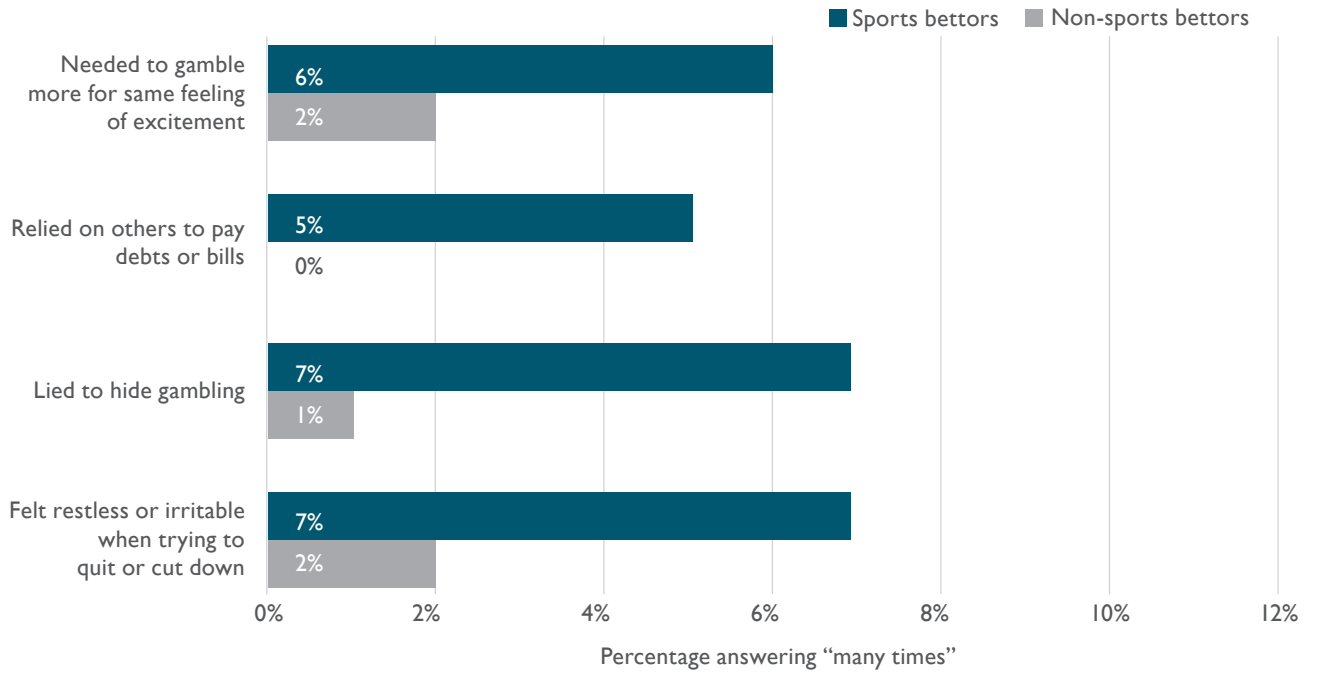


Figure 6E-11

### Past year problematic gambling activity among sports bettors – by type

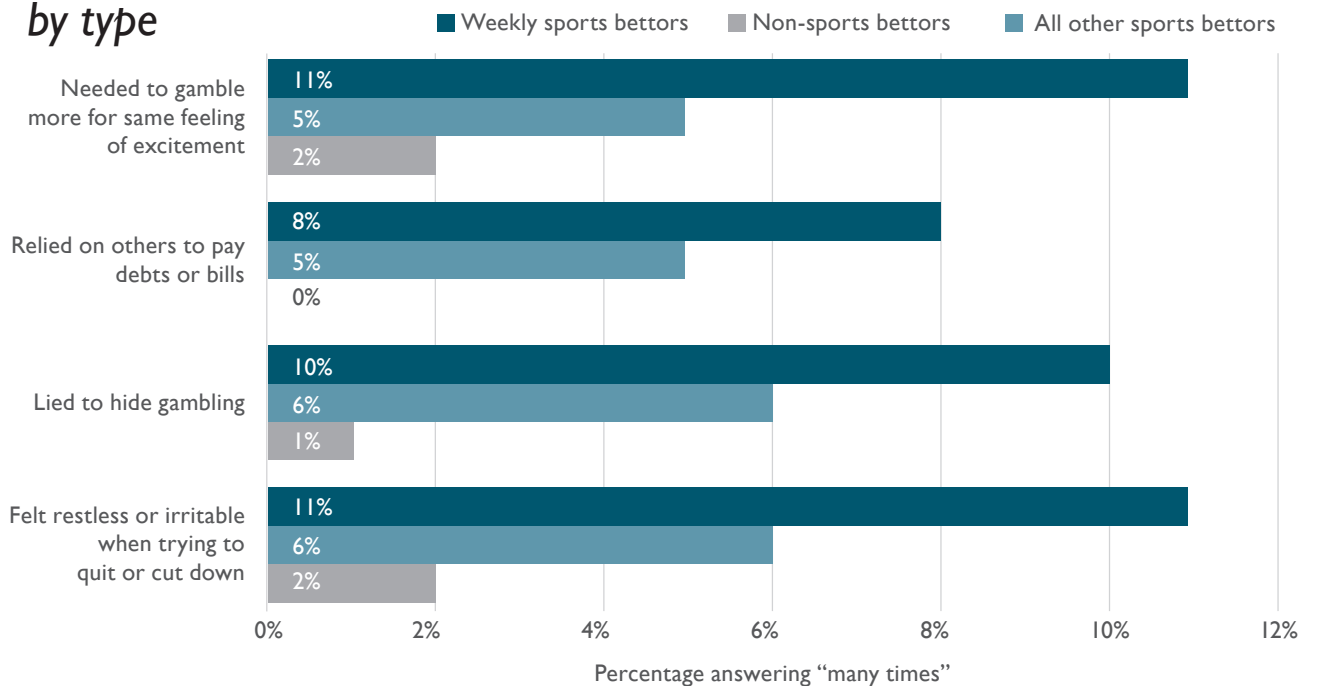


Figure 6E-12

### Past year problematic gambling activity among sports bettors – *under age 35*

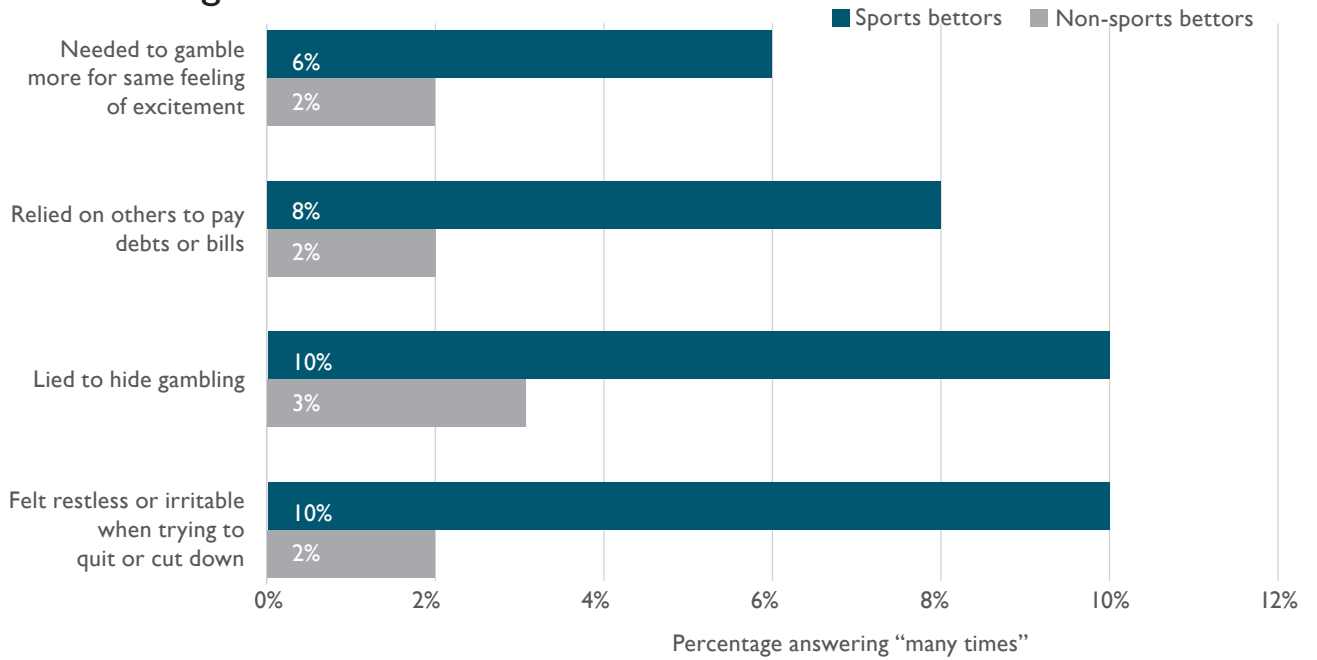


Figure 6E-13

### Sports bettors vs non-sports bettors – *personal responsibility*

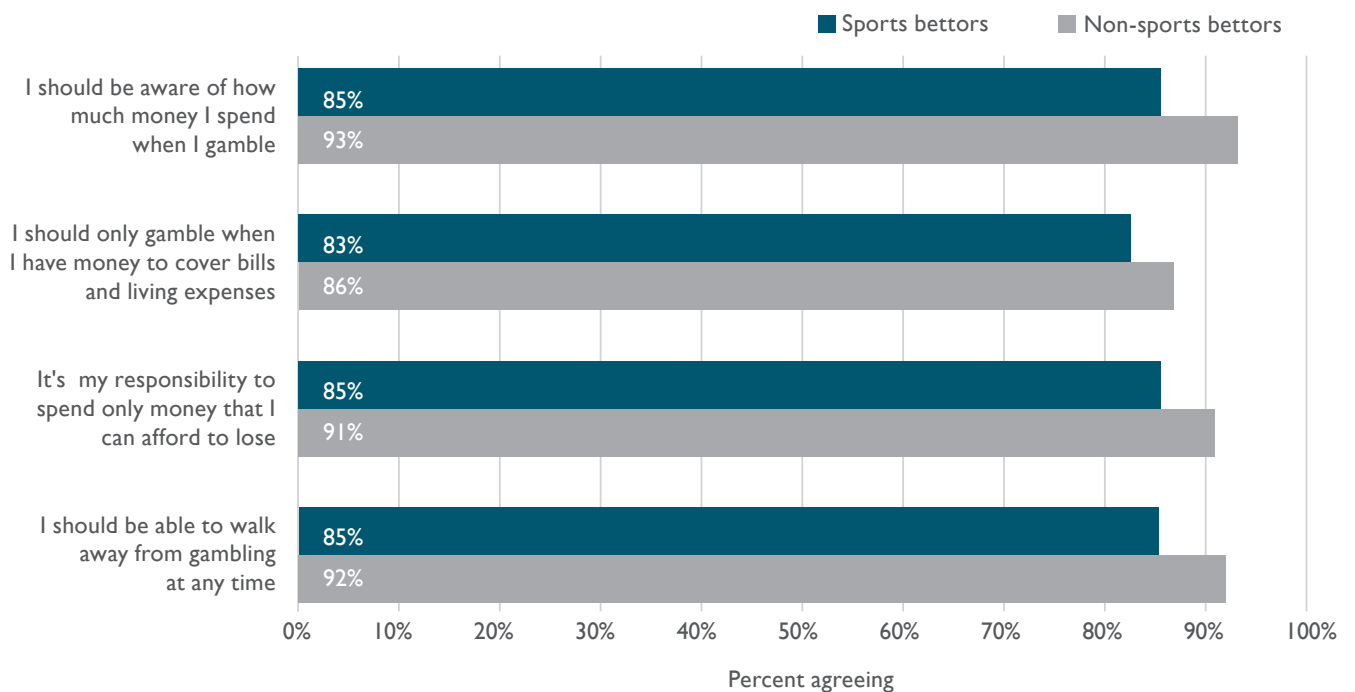


Figure 6E-14

### Sports bettors vs non sports bettors – *gambling literacy*

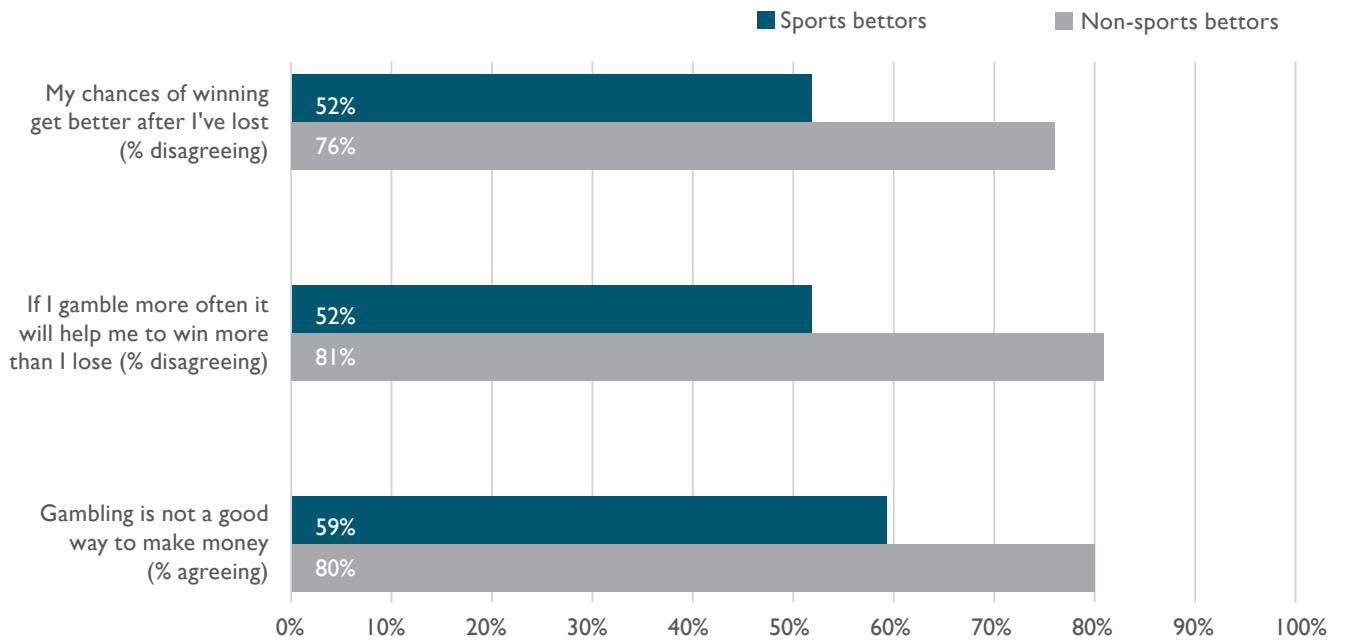


Figure 6F-1

### Fantasy sports participation

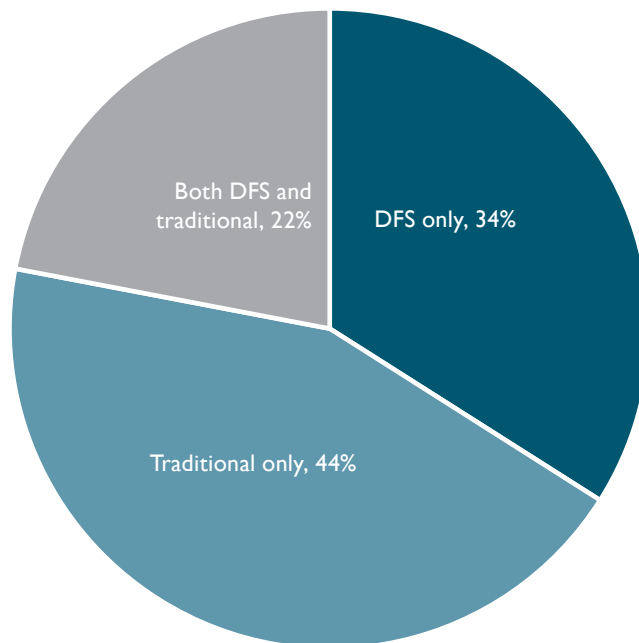


Figure 6F-2

## Method of playing traditional fantasy sports

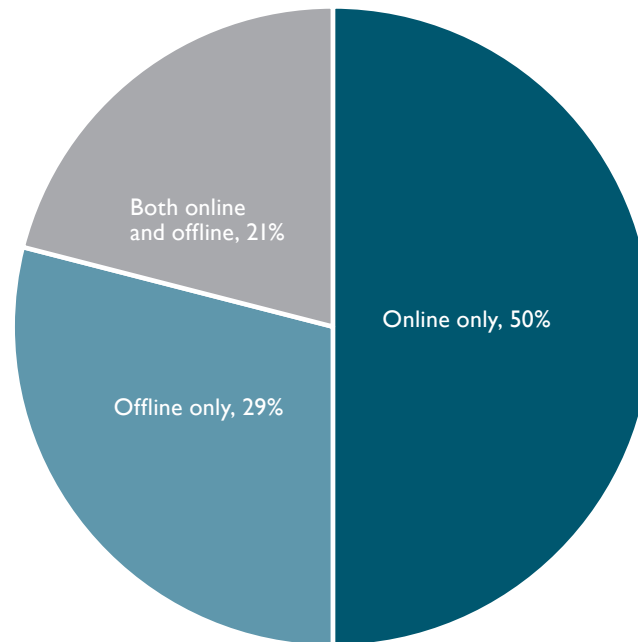


Figure 6F-3

## Fantasy sports played in past year

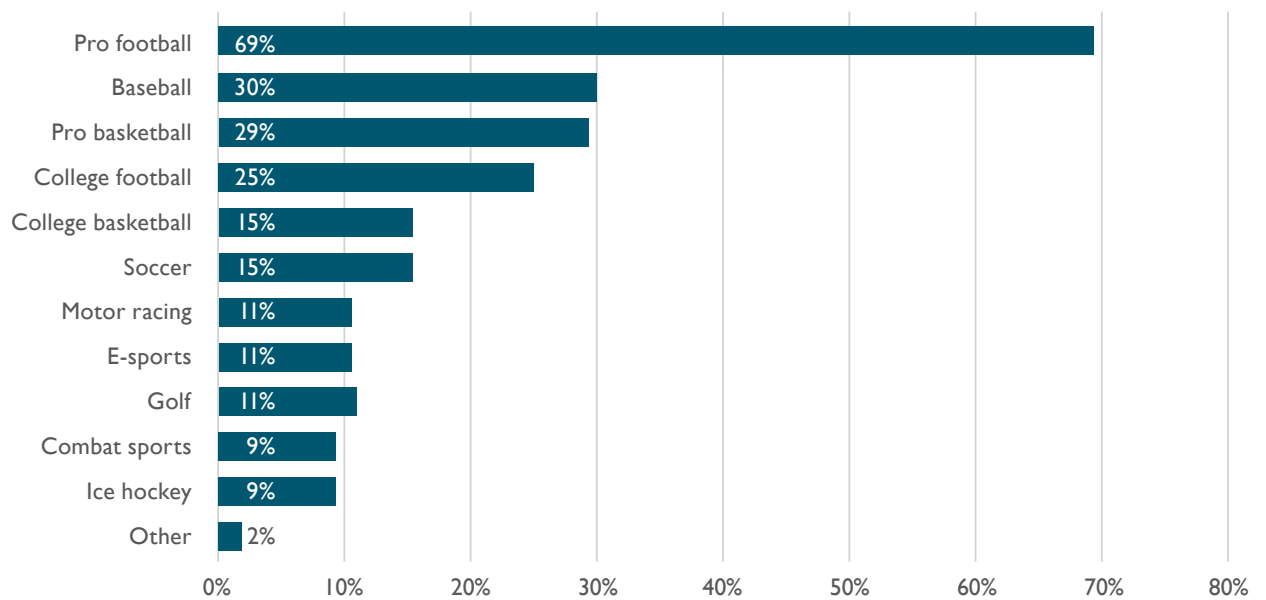


Figure 6F-4

### Number of fantasy sports bet on

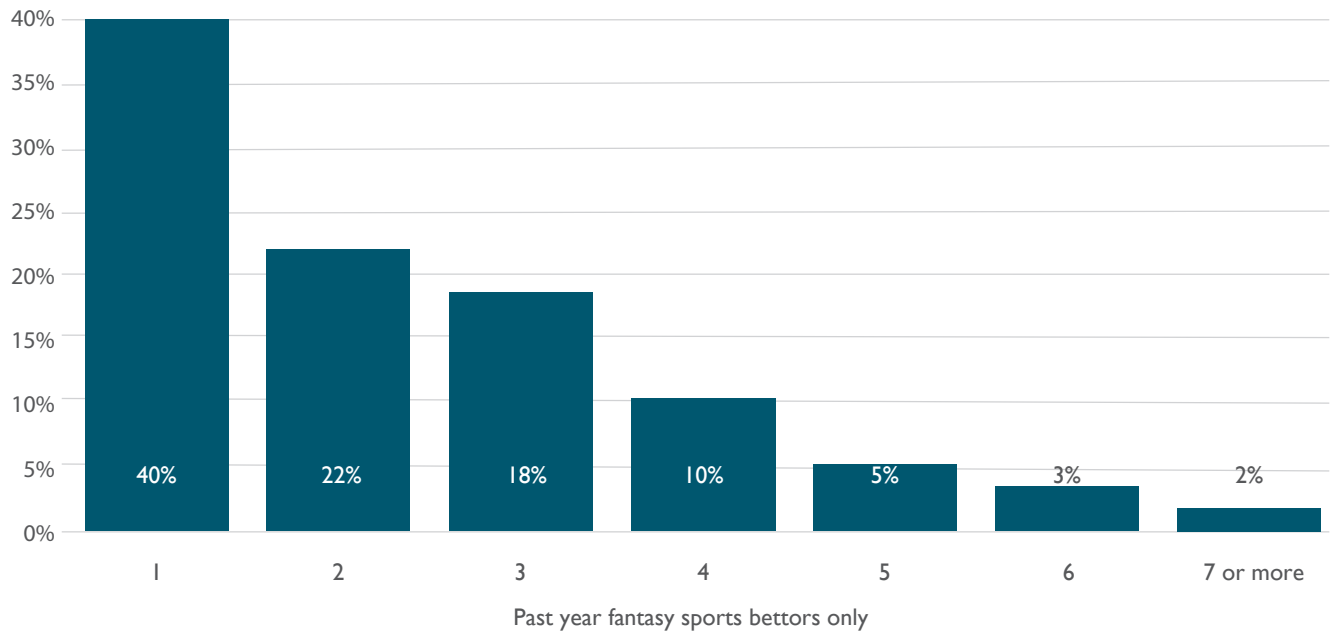


Figure 6F-5

### Fantasy sports played in past year

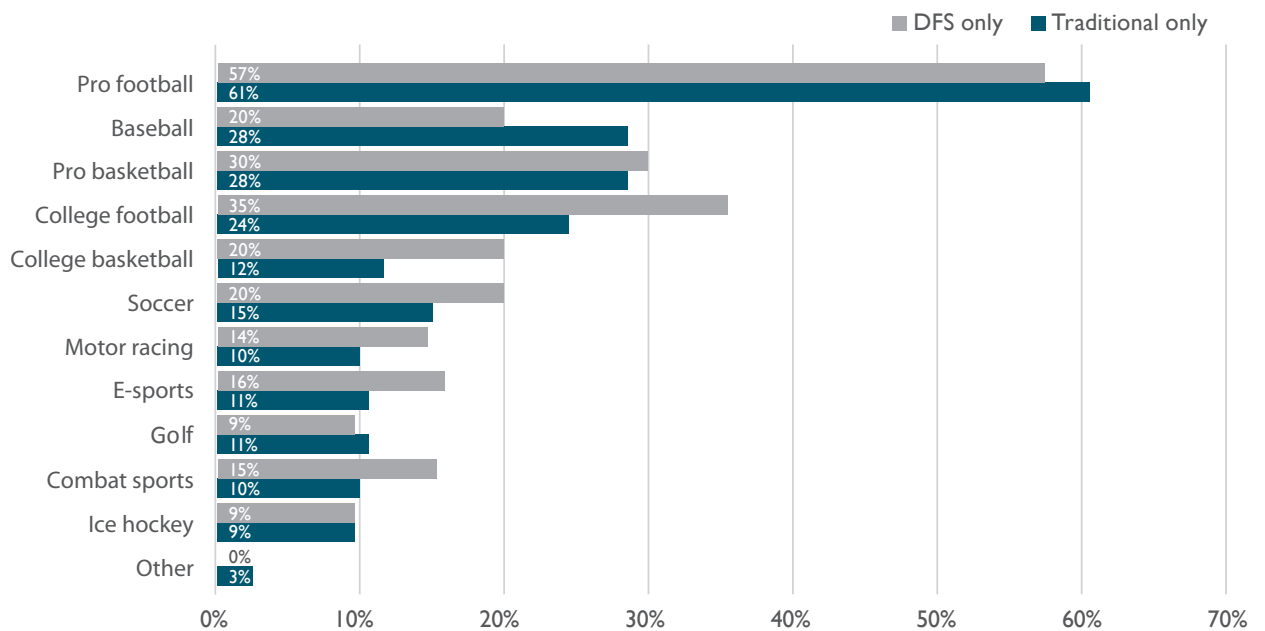


Figure 6F-6

### Number of traditional fantasy sports leagues

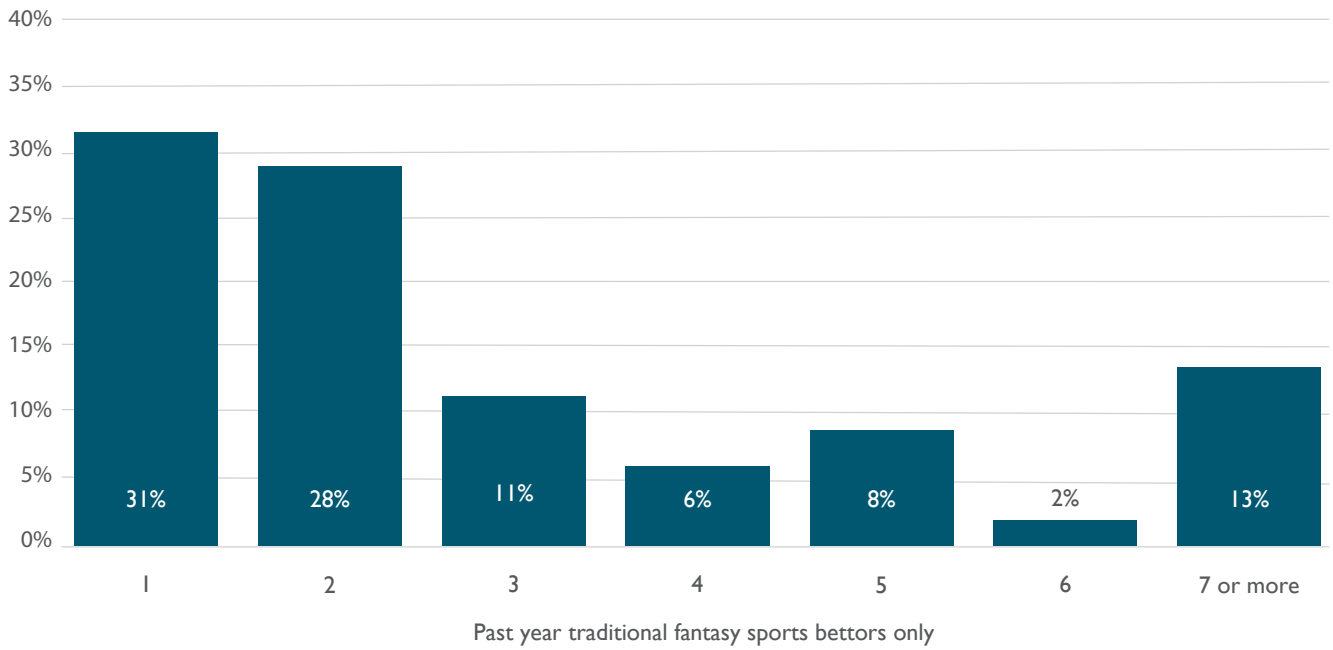


Figure 6F-7

### Frequency of daily fantasy sports bets

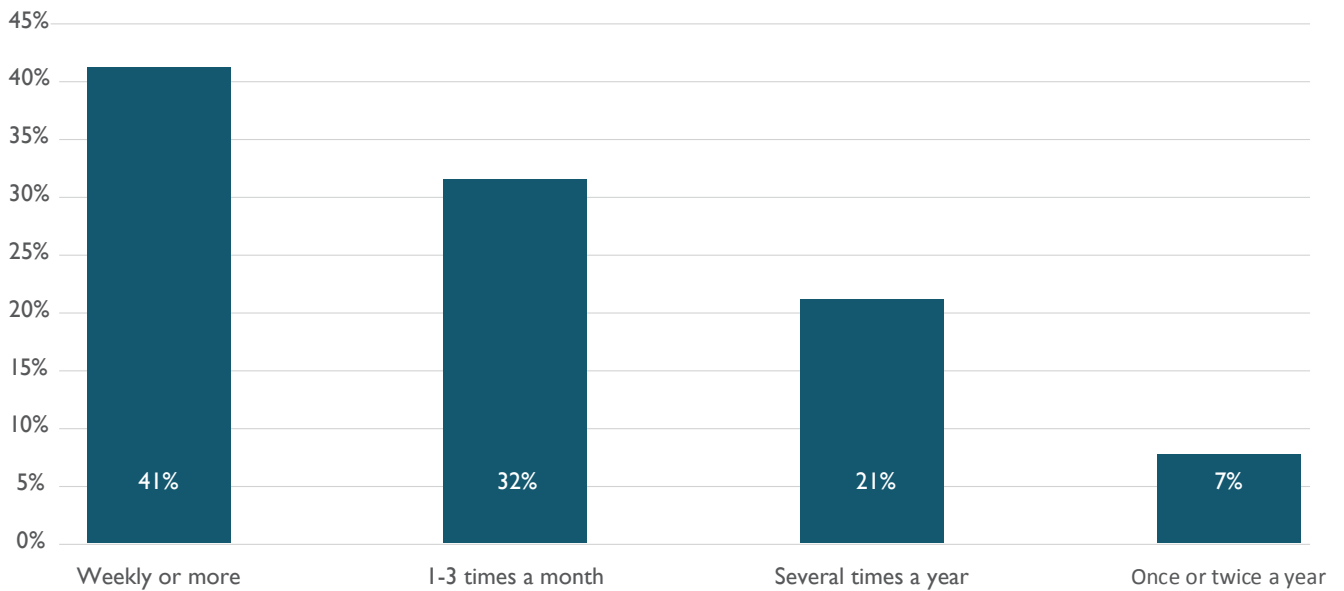


Figure 6F-8

### Past year fantasy sports betting – by age

Median age = 34

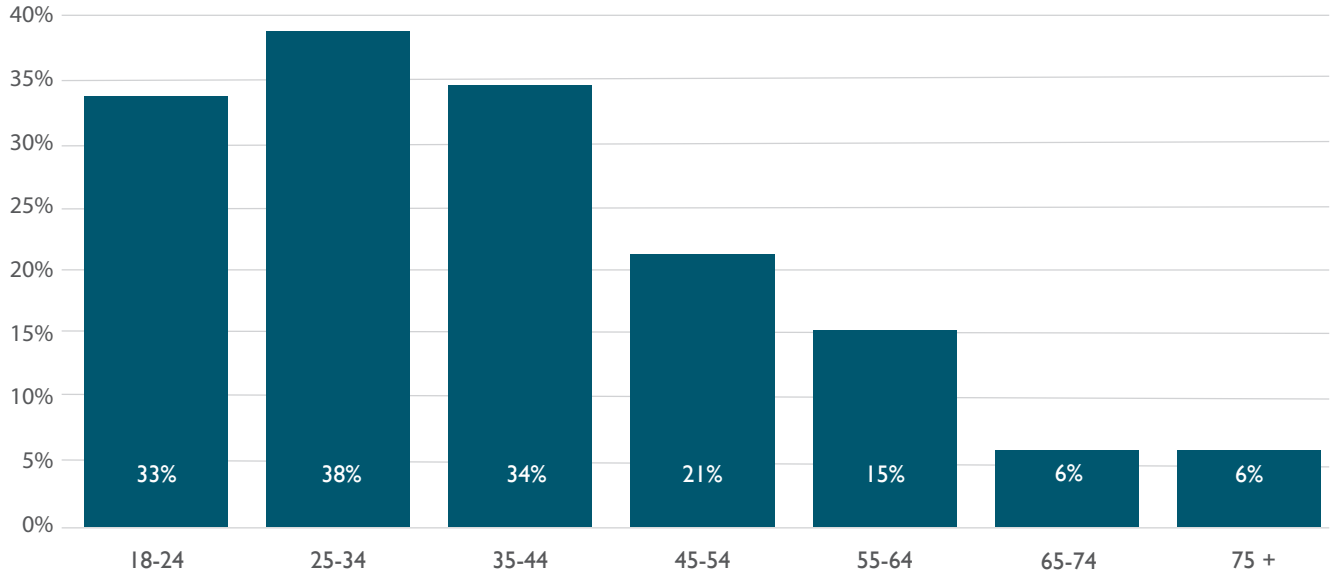
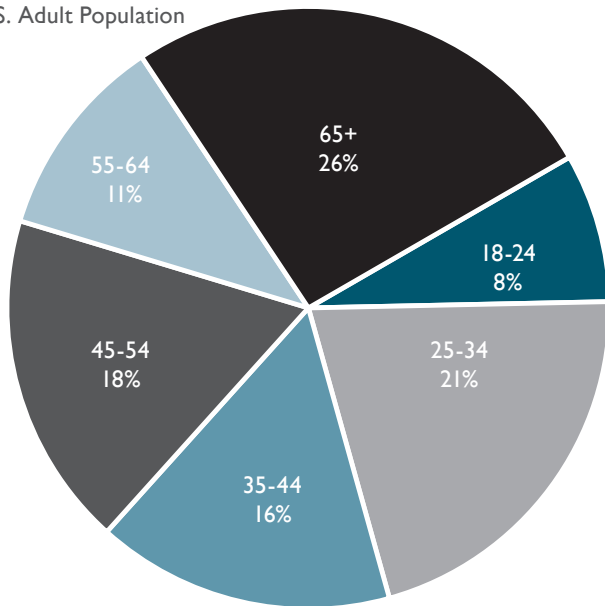


Figure 6F-9

### Age composition of ...

U.S. Adult Population



Past Year Fantasy Sports Players

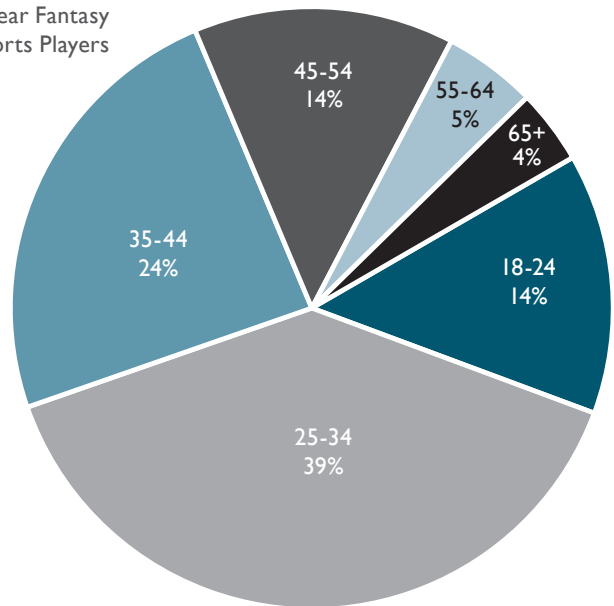




Figure 6F-10

### Past year fantasy sports betting – by household income

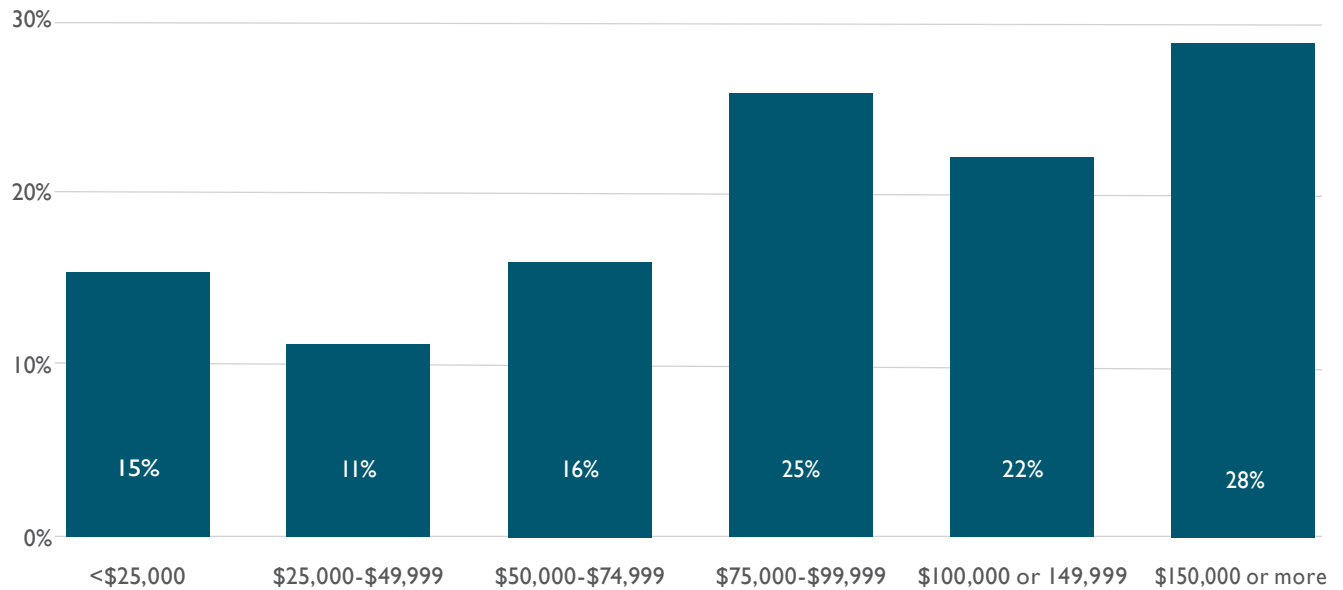


Figure 6F-11

### Past year fantasy sports betting – by educational attainment

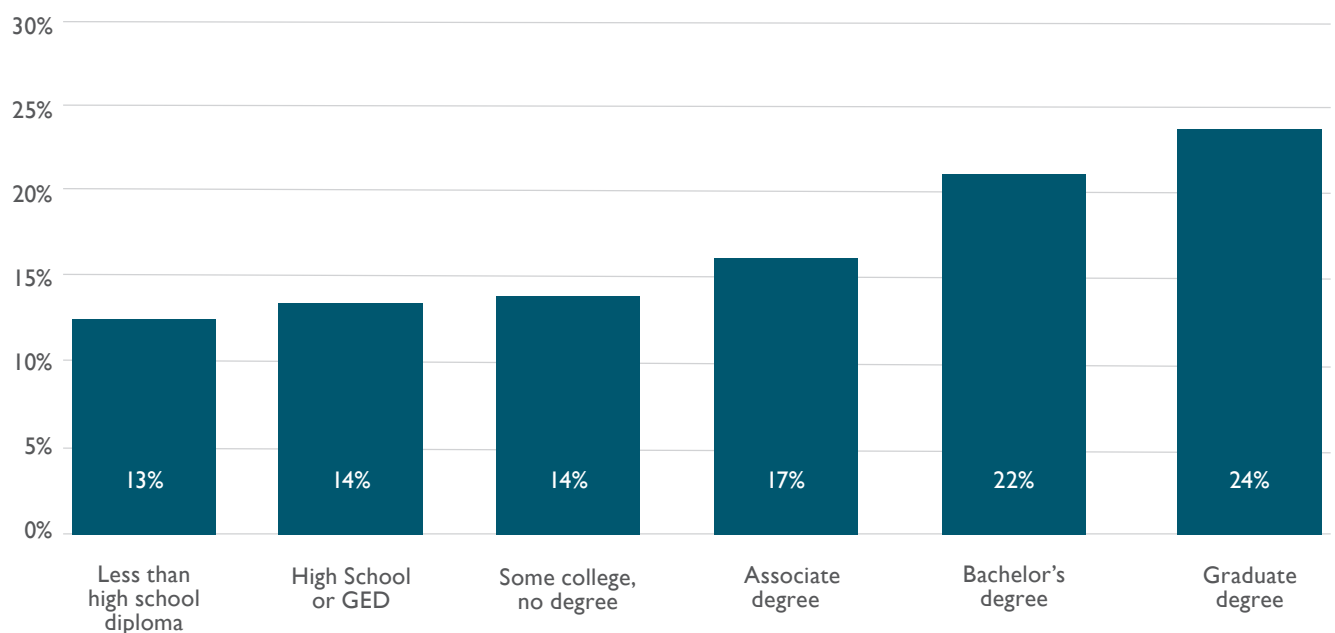
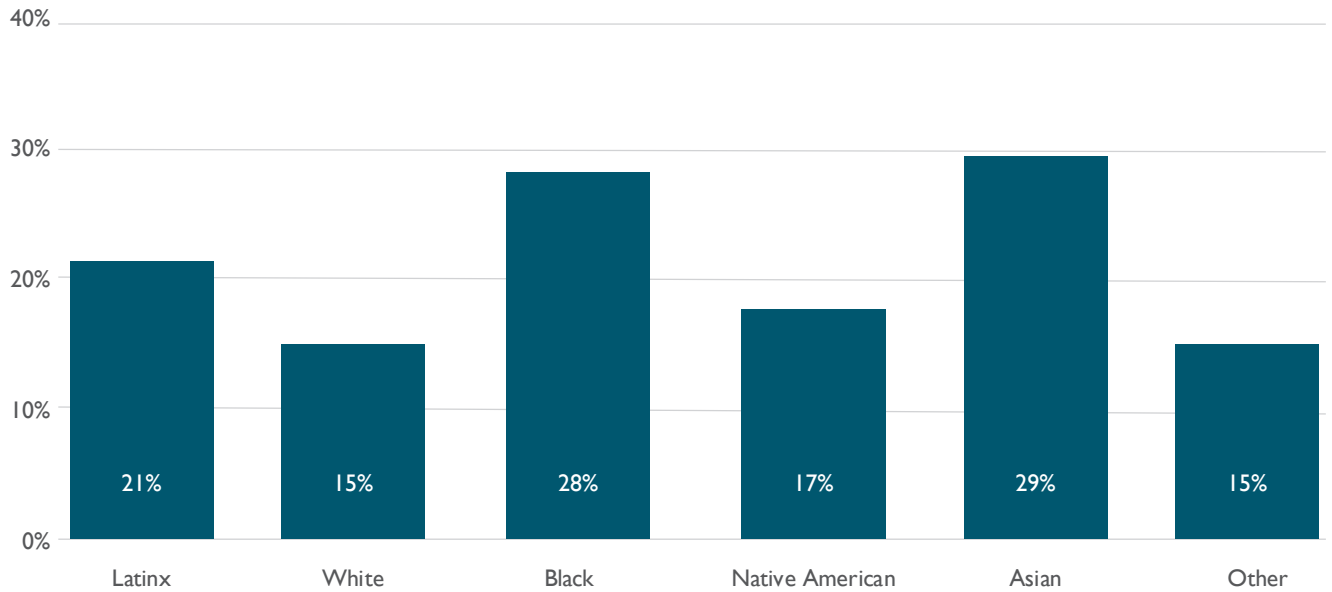


Figure 6F-12

### Past year fantasy sports betting – by racial/ethnic origin



Note: Respondents could list multiple racial/ethnic origins

Figure 6F-13

### Past year problematic gambling activity among fantasy sports players

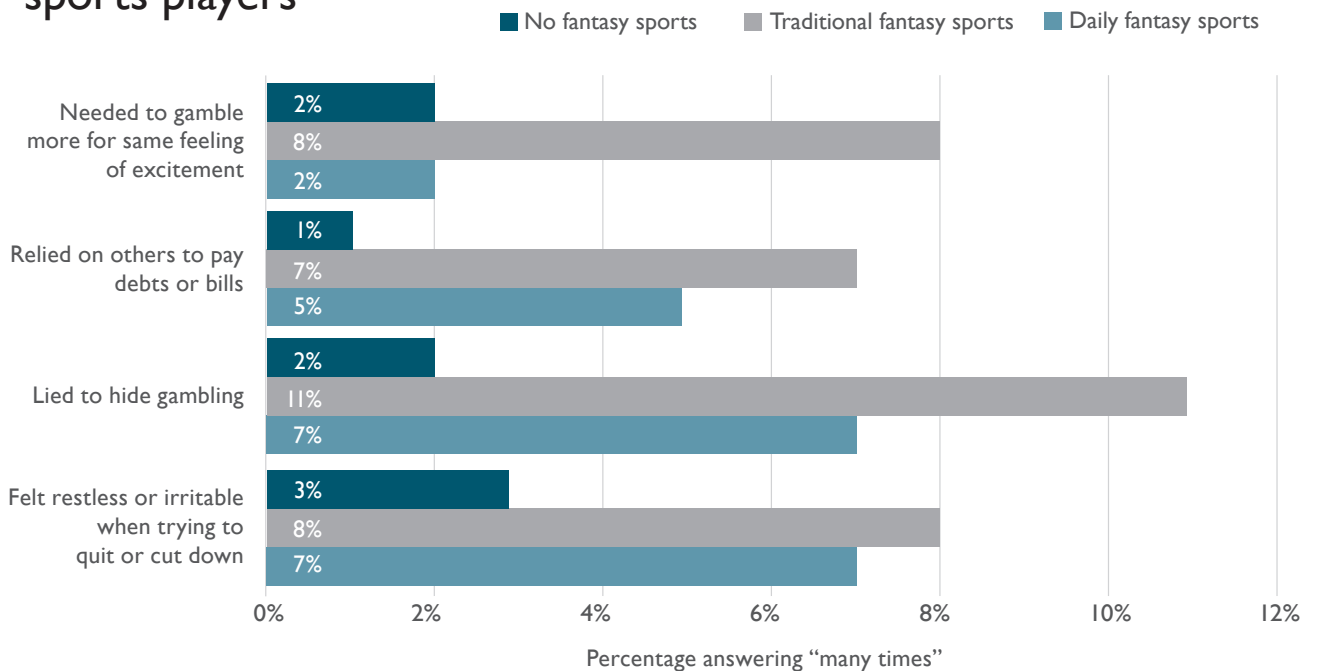


Figure 6F-14

### Fantasy sports players vs non-fantasy sports players – *personal responsibility*

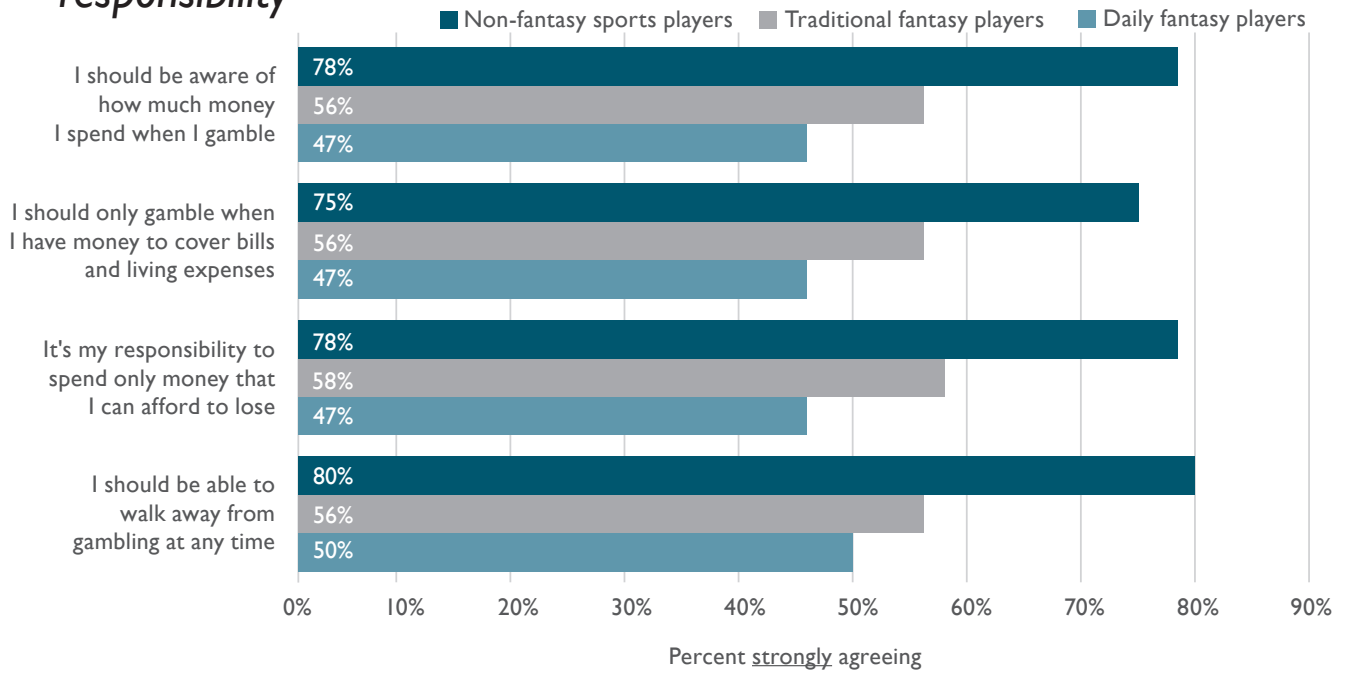


Figure 6F-15

### Fantasy sports players vs non-fantasy sports players – *gambling literacy*

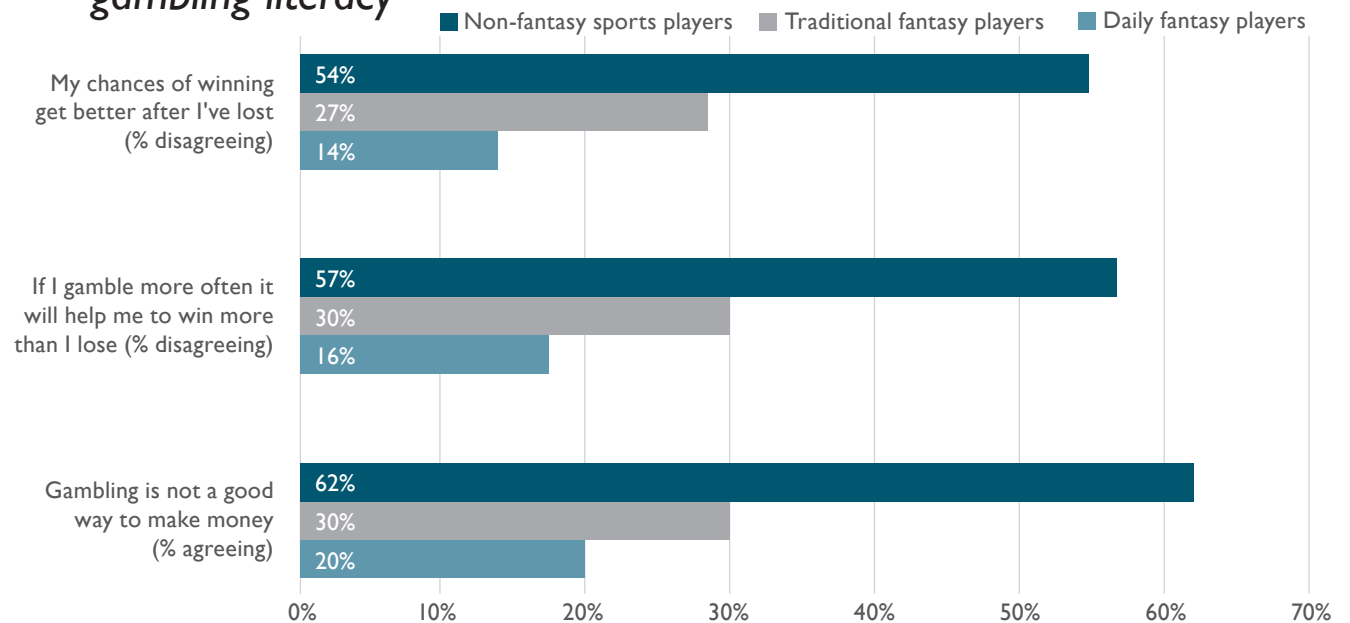


Figure 6G-1

### What type of card games have you wagered money on in the past year?

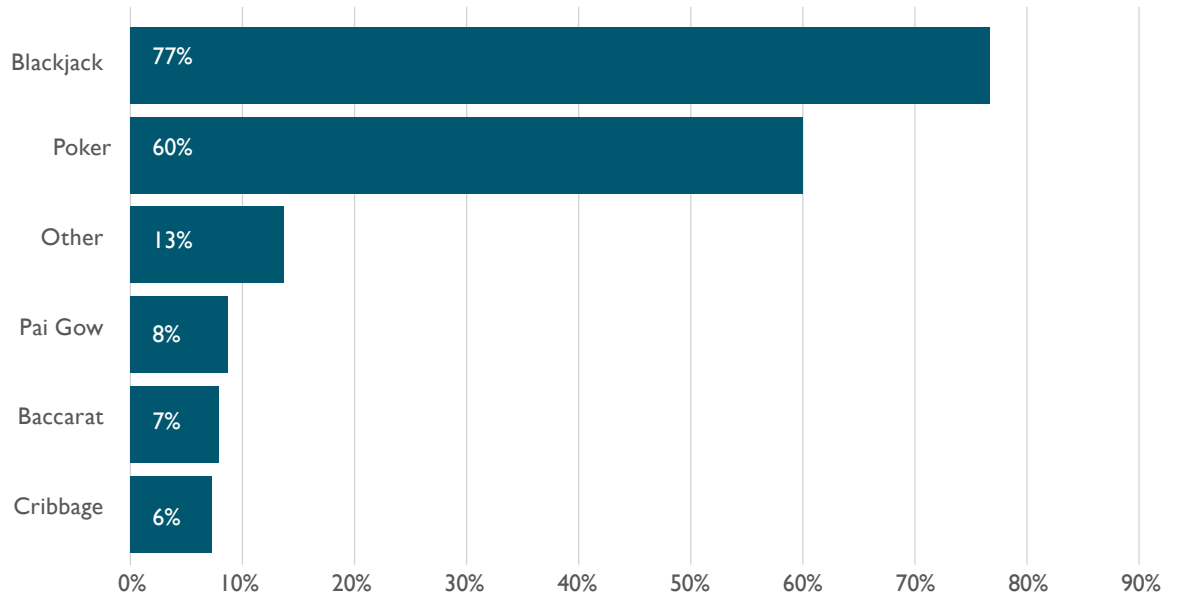
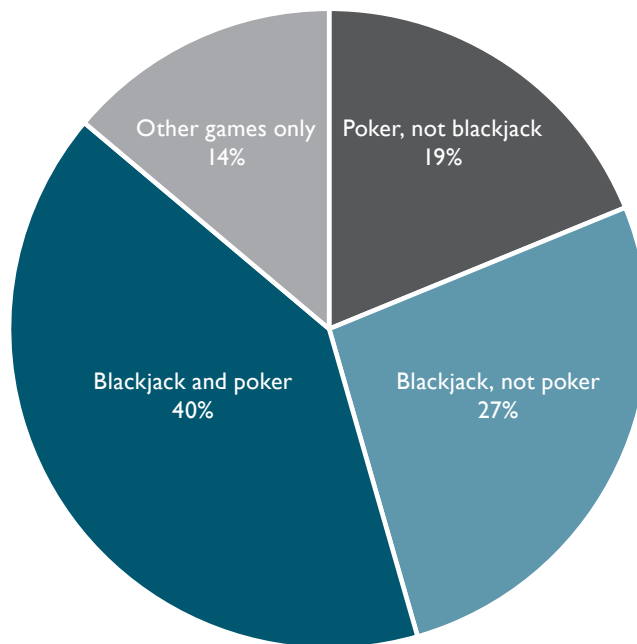


Figure 6G-2

### What type of card games have you wagered money on in the past year?



Note: Blackjack and poker players may have played other games as well

Figure 6G-3

## Where have you played blackjack?

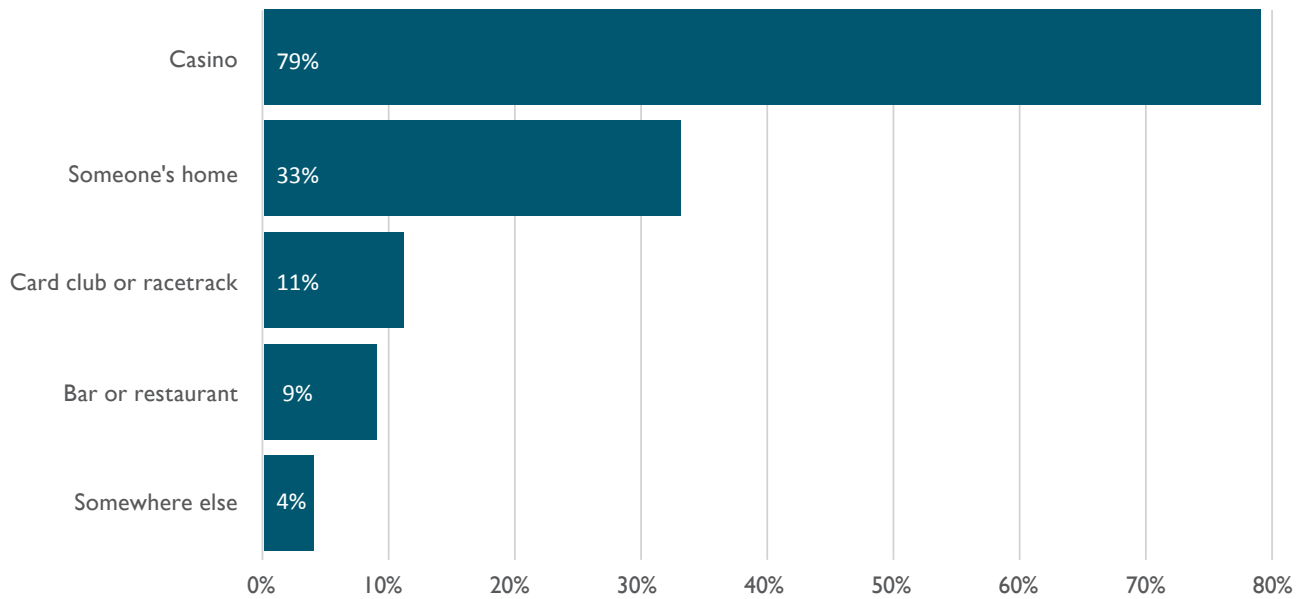


Figure 6G-4

## Where have you played poker?

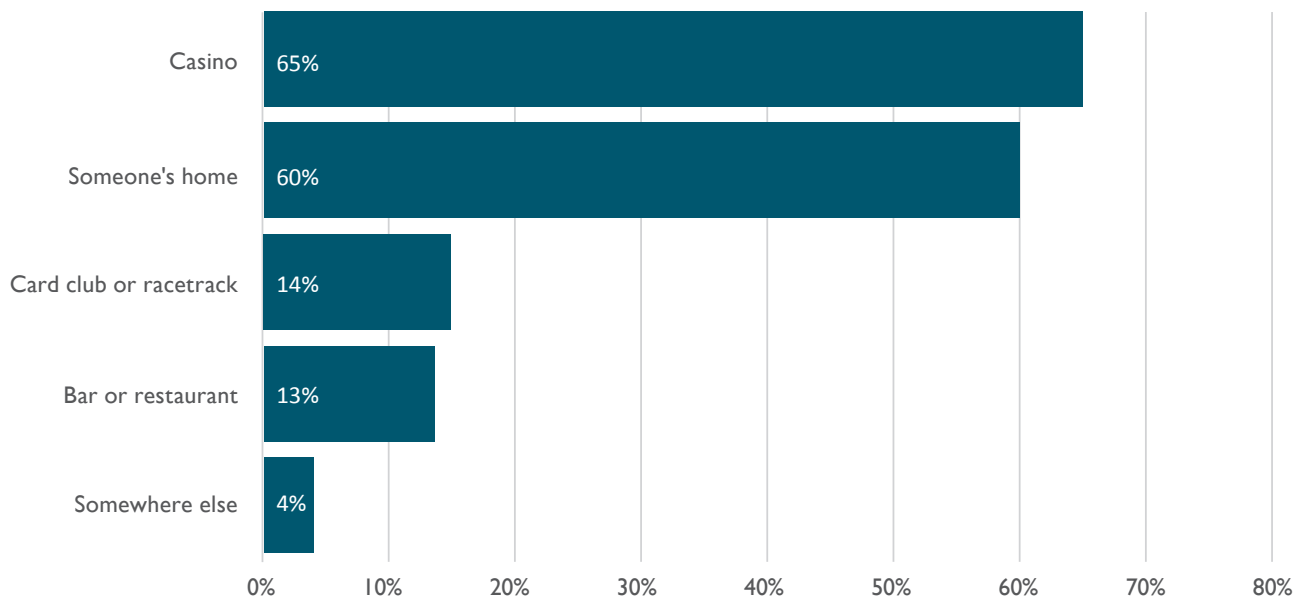
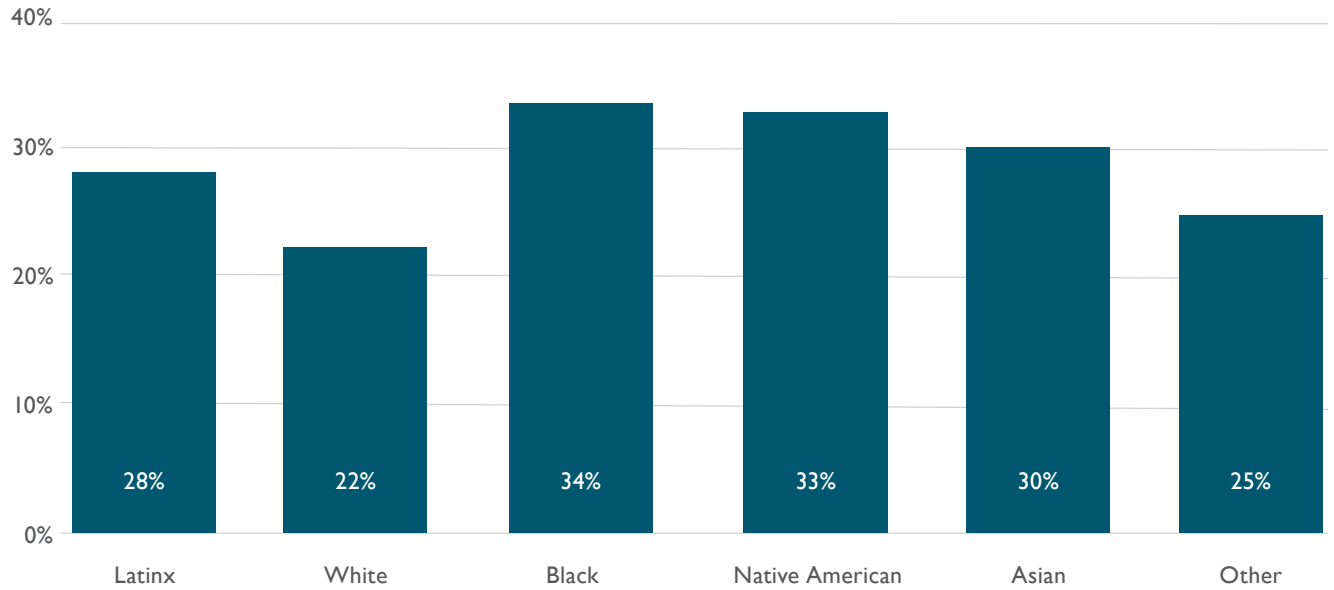


Figure 6G-5

Past year card play – *by racial/ethnic origin*



Note: Respondents could list multiple racial/ethnic origins

Figure 6G-6

Past year card play – *by household income*

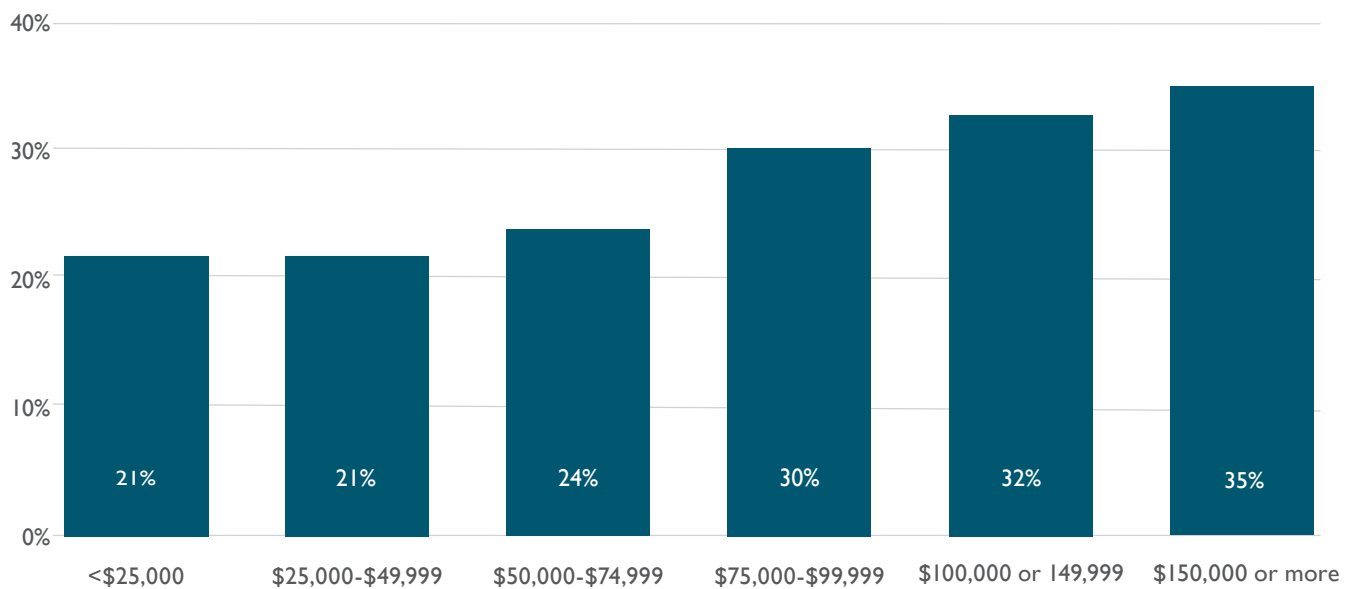


Figure 6G-7

### Past year card play – by educational attainment

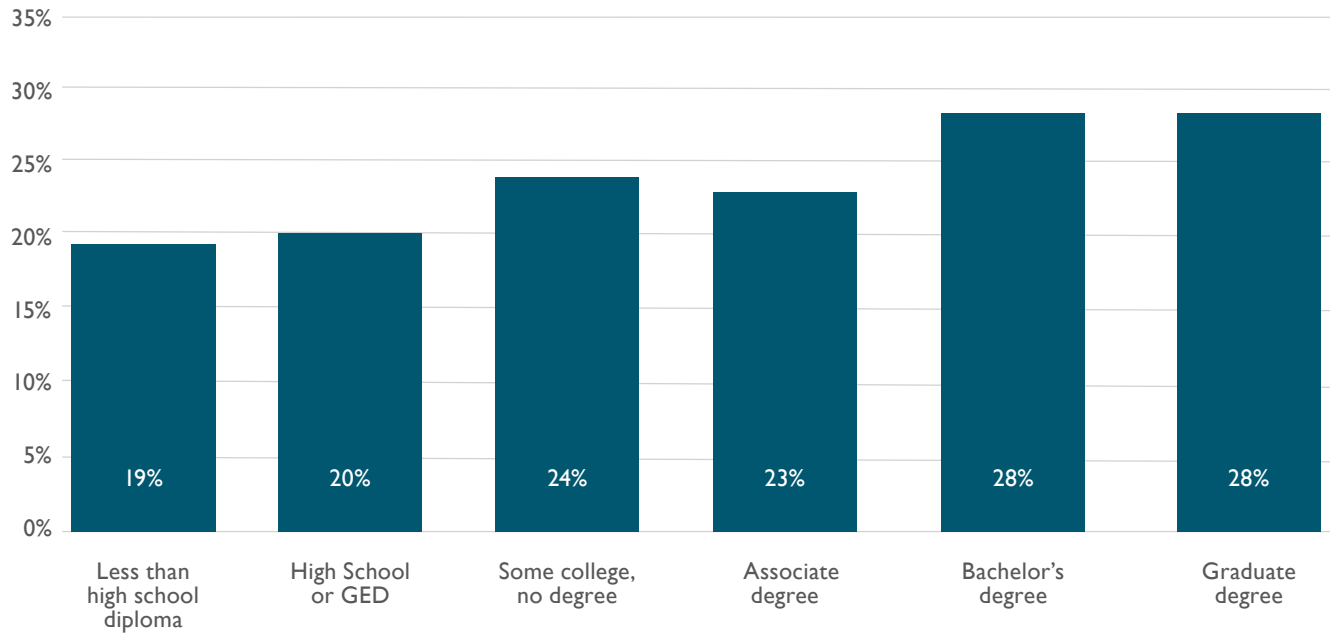


Figure 6G-8

### Past year card play – by age

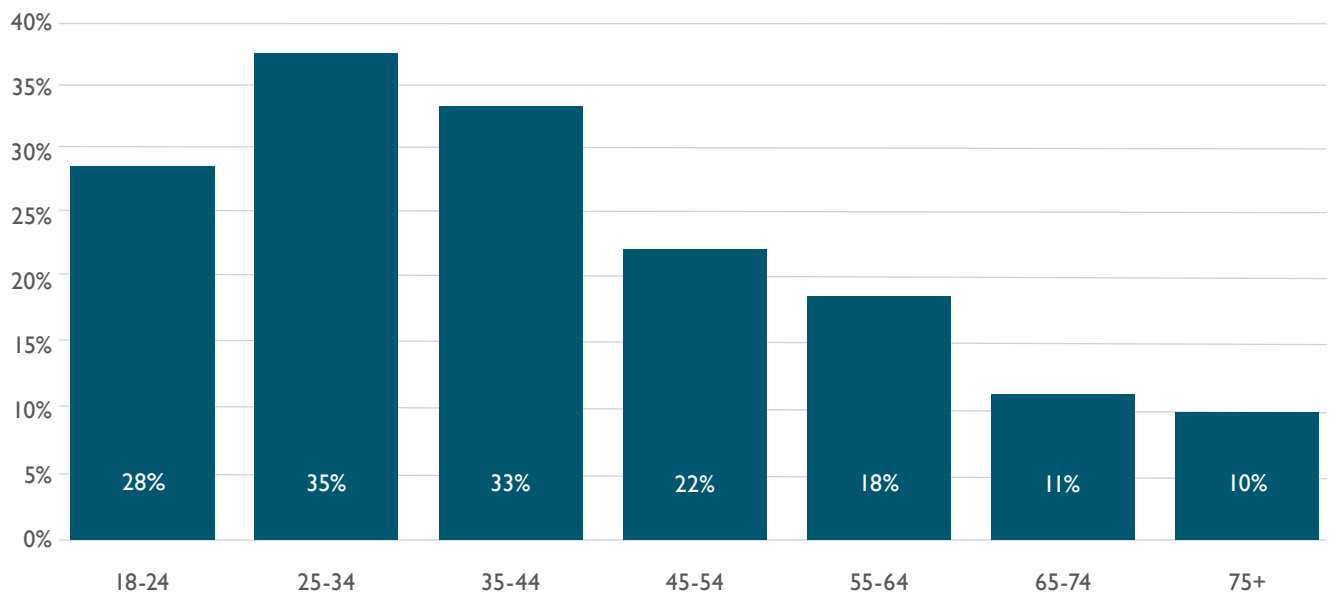


Figure 6G-9

### Past year problematic gambling activity among card players

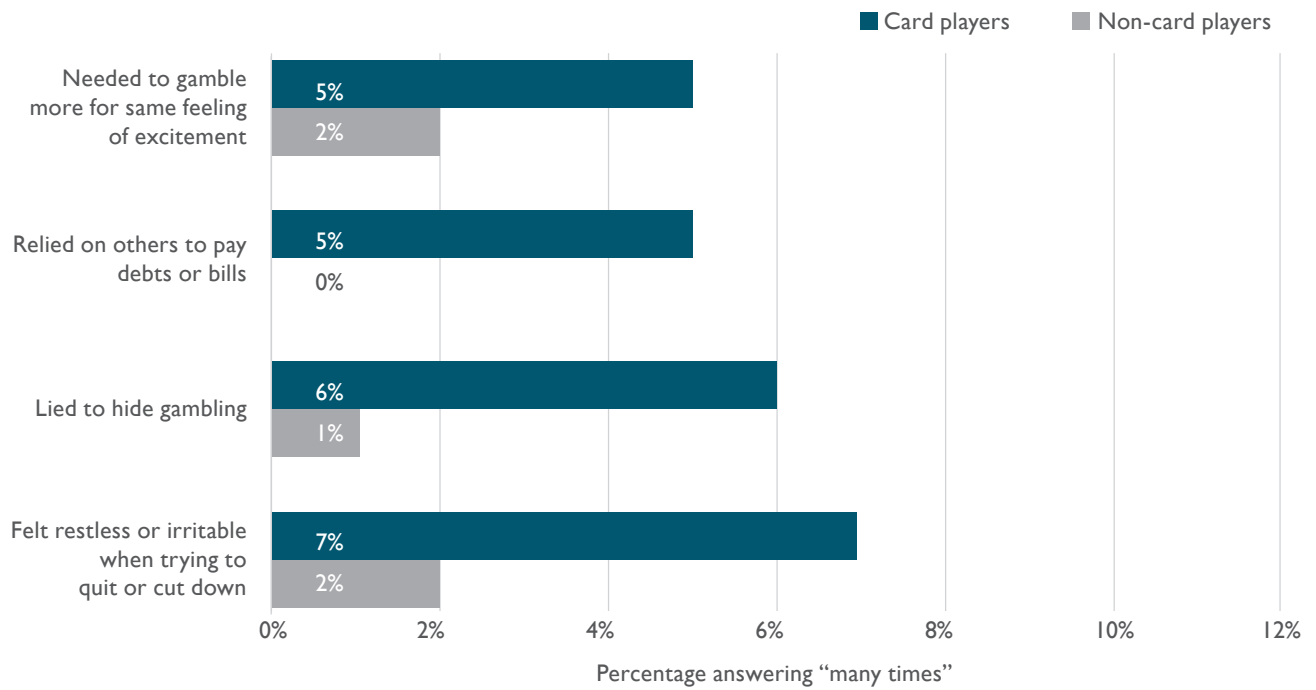


Figure 6G-10

### Card players vs all other gamblers – *personal responsibility*

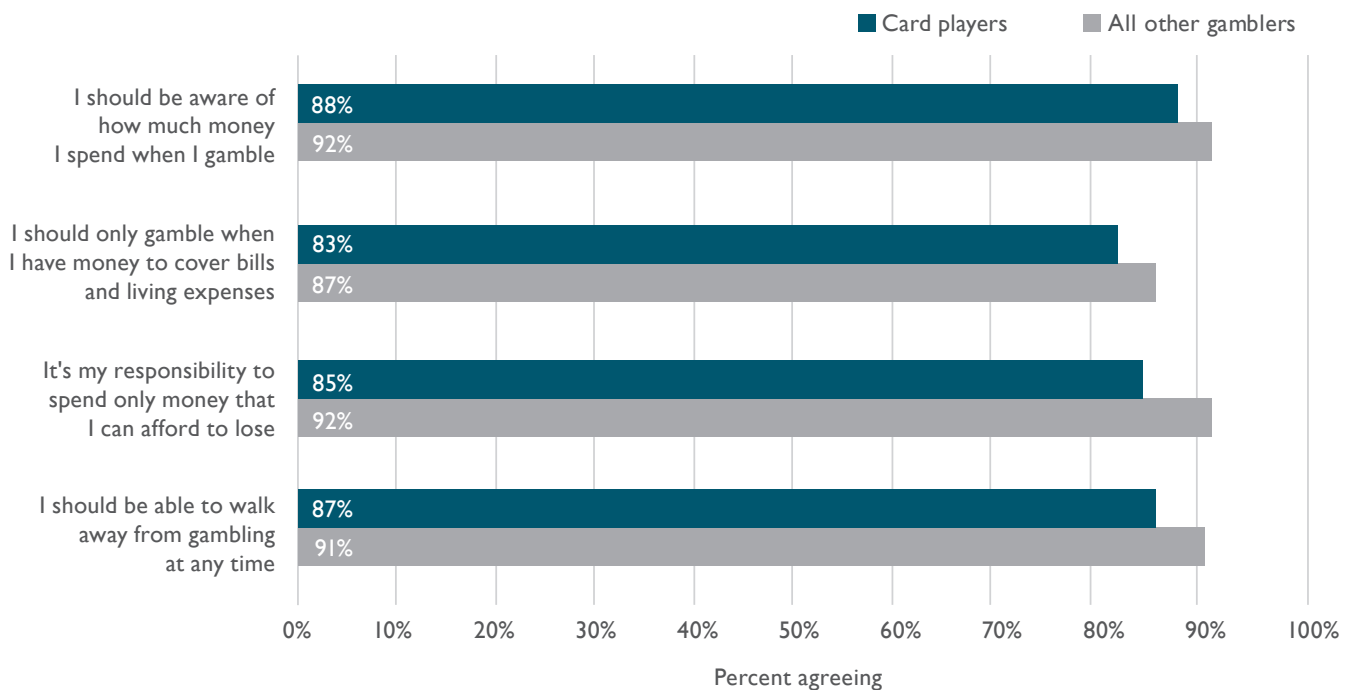




Figure 6G-11

### Card players vs all other gamblers – *gambling literacy*

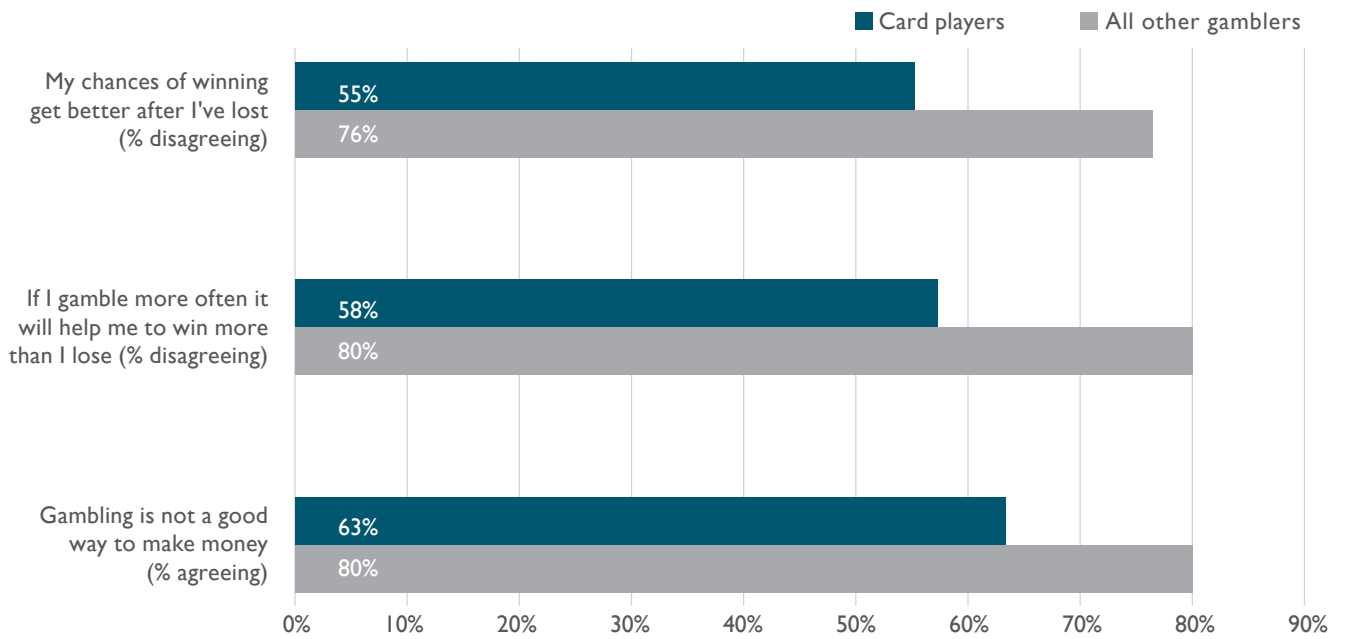


Figure 6H-1

### What type of gambling have you done online, on a website, or on a mobile app in the past year?

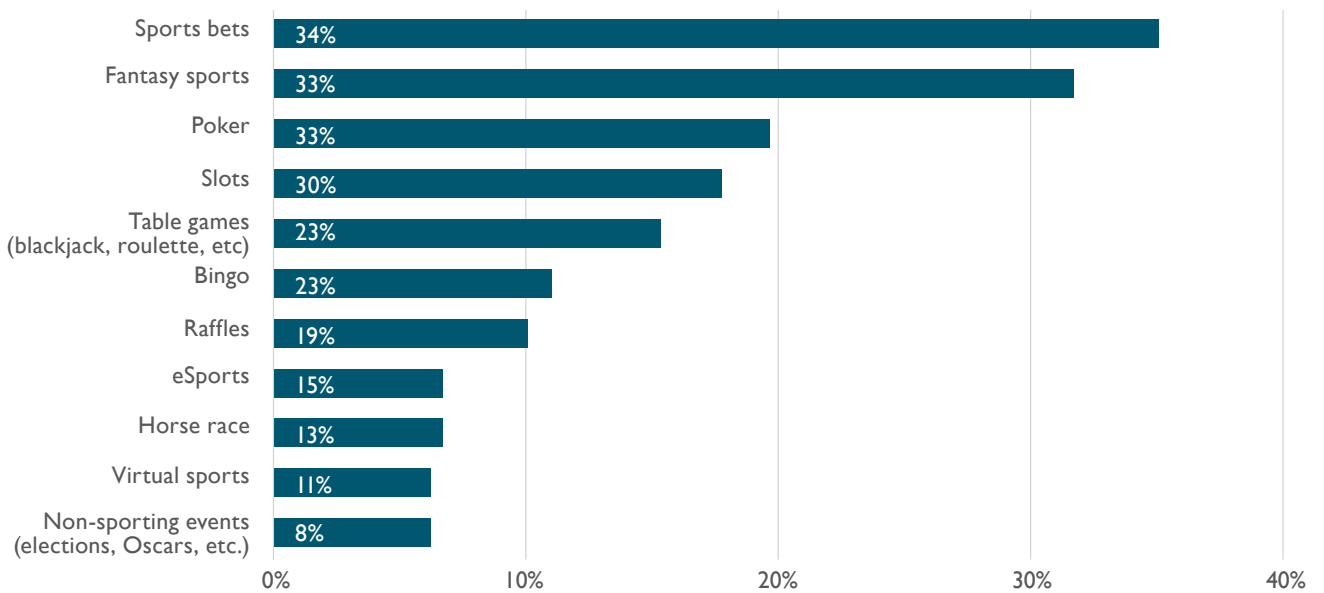


Figure 6H-2

## Frequency of online gambling

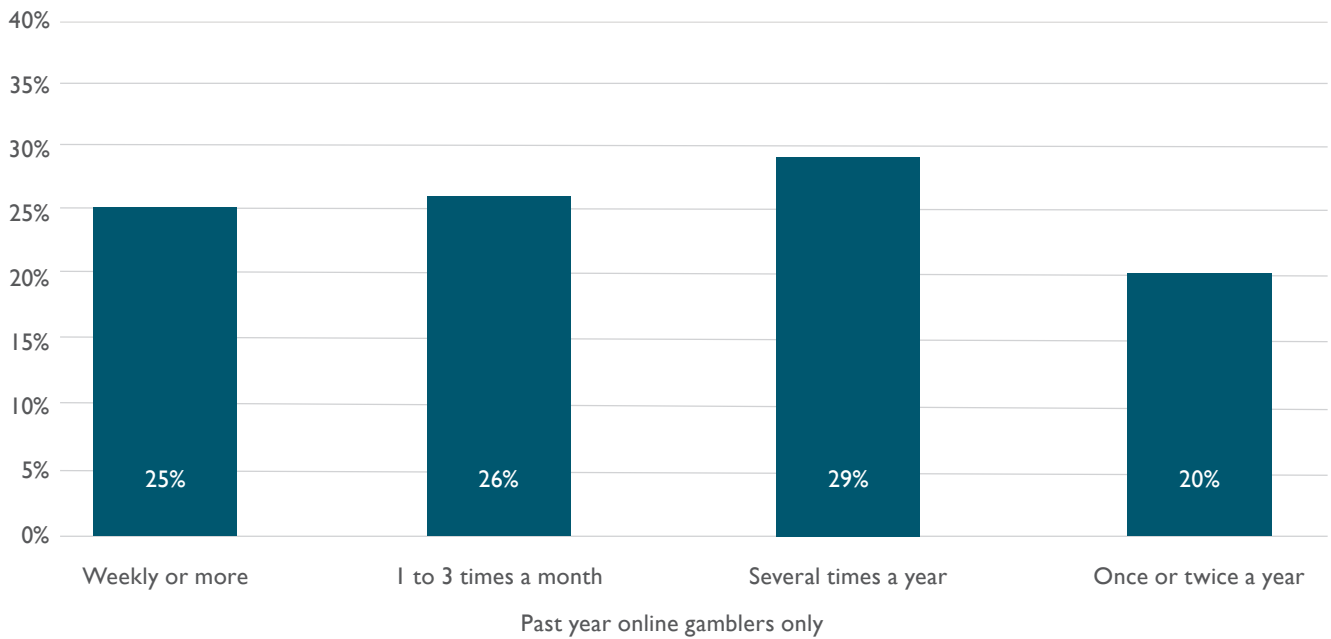


Figure 6H-3

## Percent of monthly or more play – *by type of game*

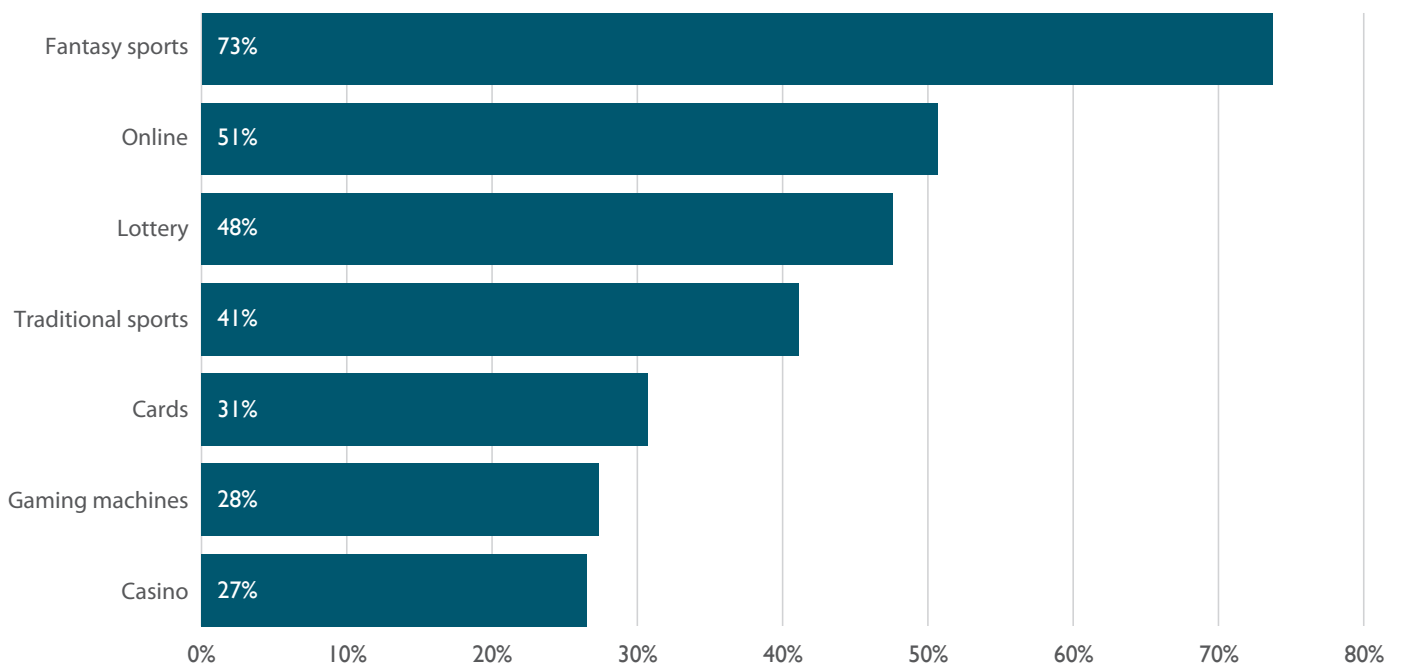


Figure 6H-4

### Past year online gambling – by age

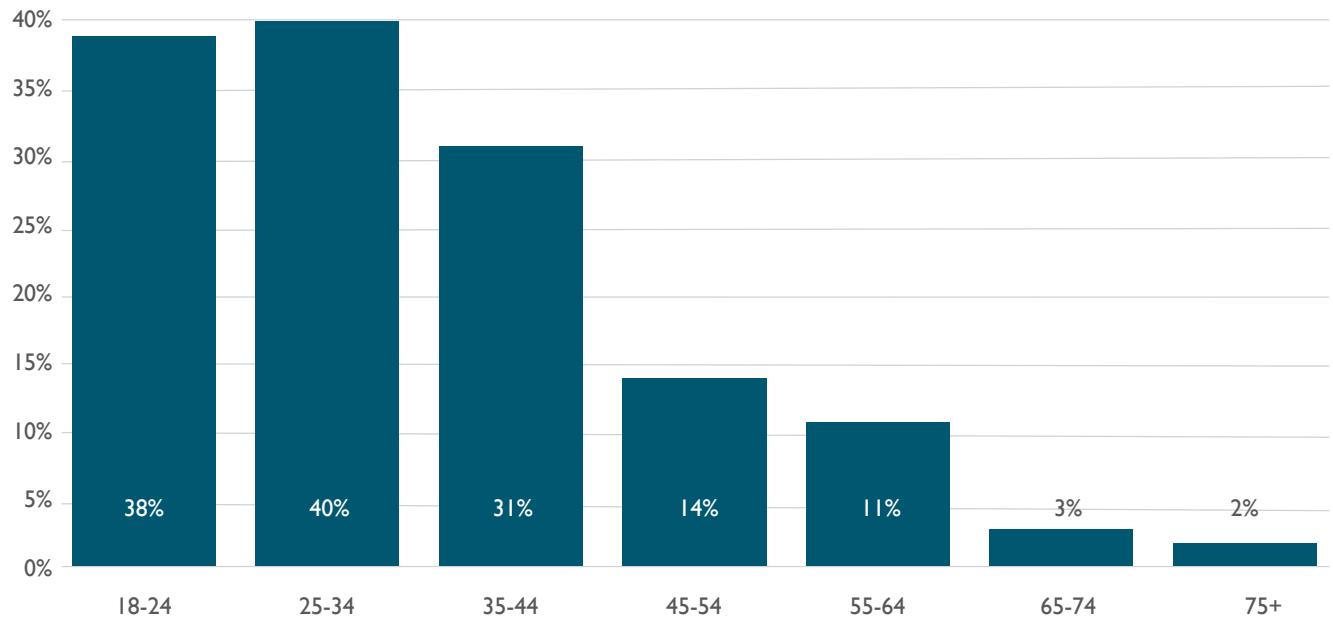


Figure 6H-5

### Past year online gambling – by educational attainment

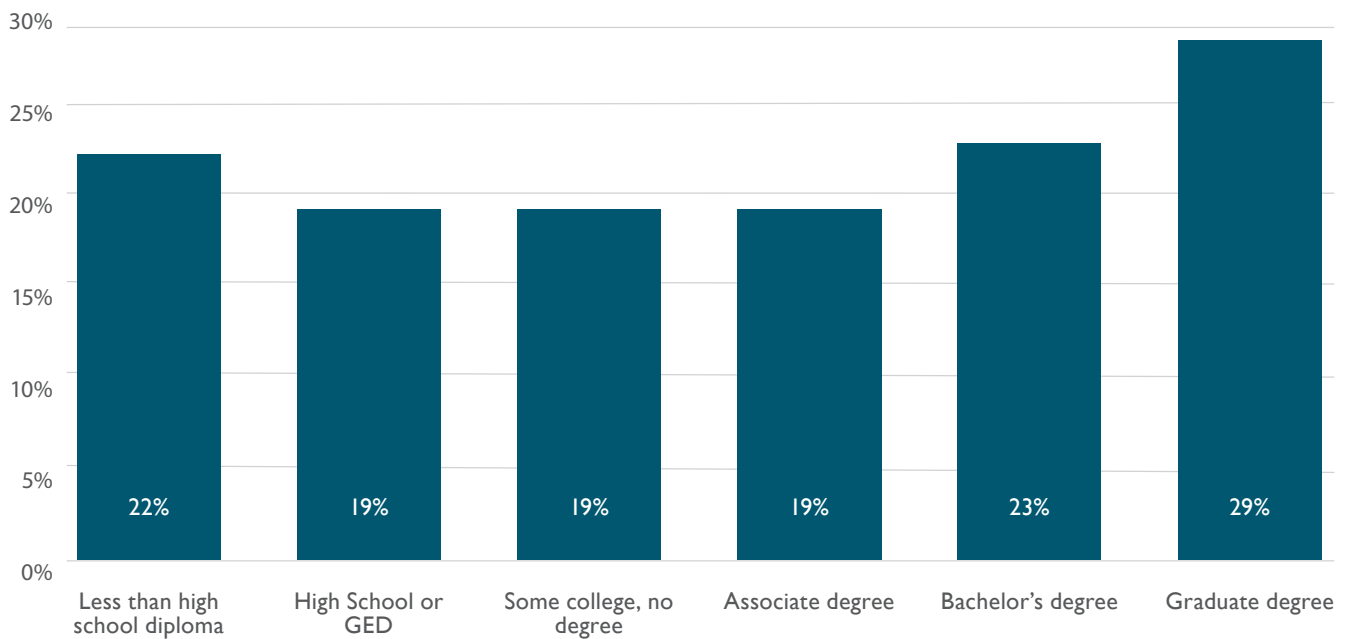


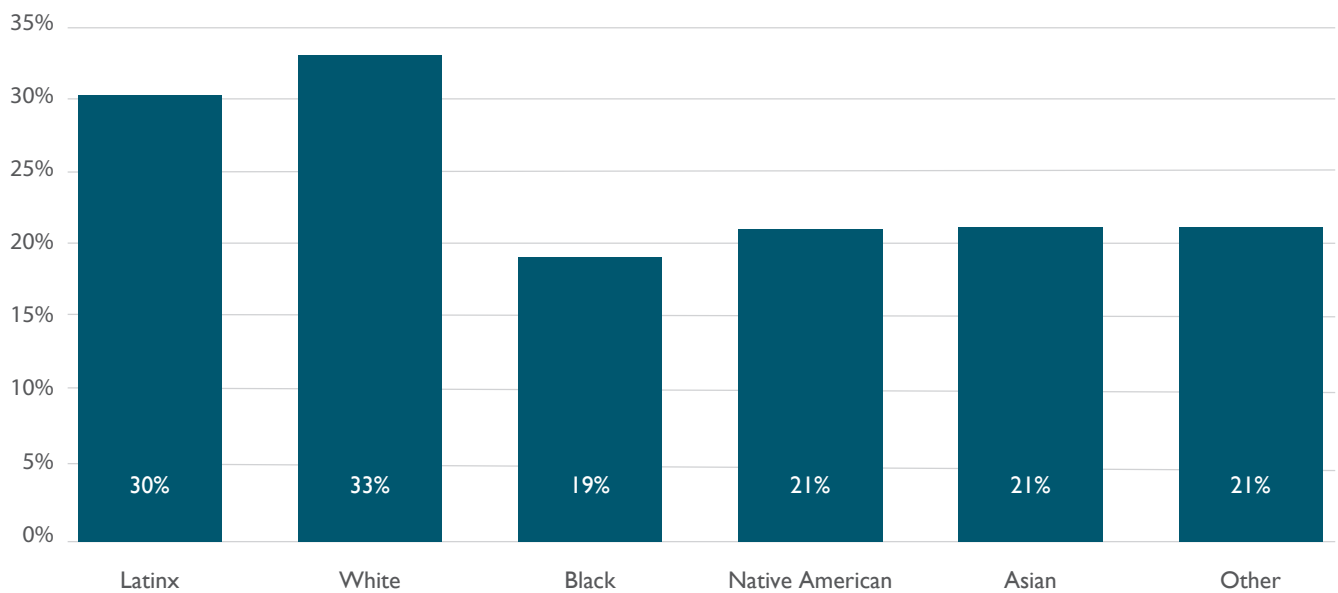
Figure 6H-6

### Past year online gambling – by household income



Figure 6H-7

### Past year online gambling – by racial/ethnic origin



Note: Respondents could list multiple racial/ethnic origins

Figure 6H-8

### Past year problematic gambling activity among online gamblers

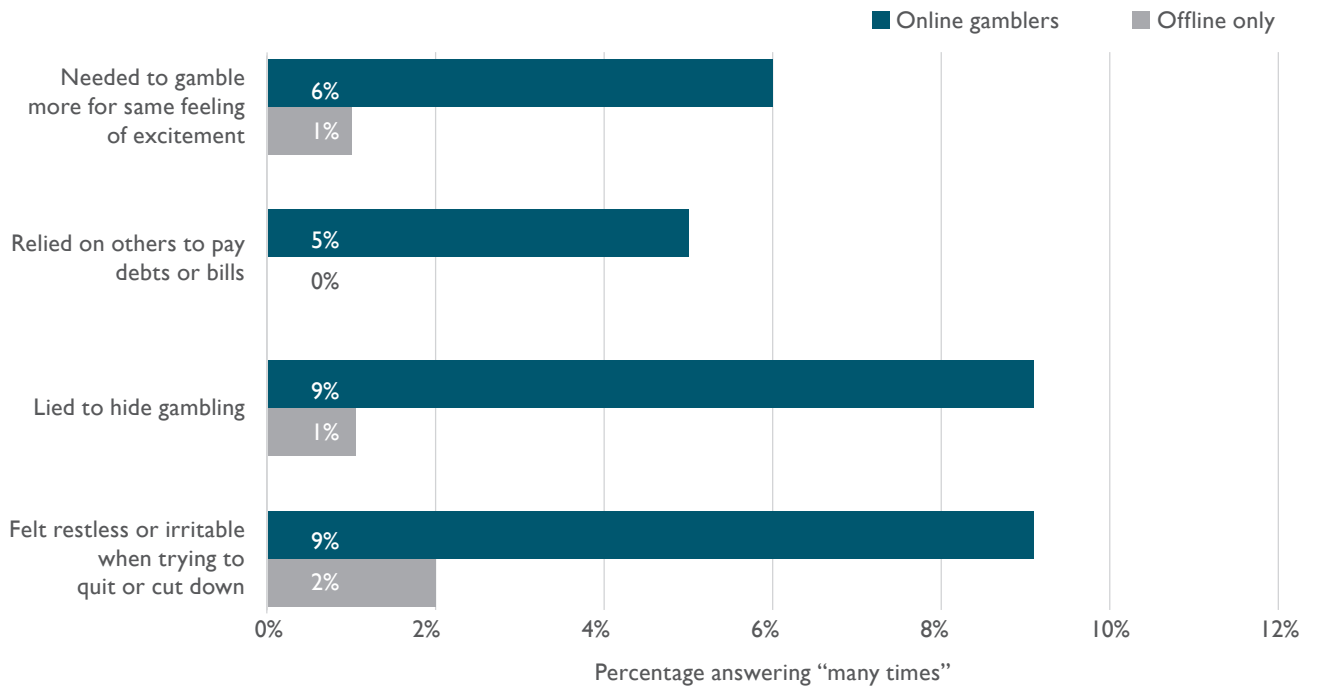


Figure 6H-9

### Online gamblers vs offline gamblers – *personal responsibility*

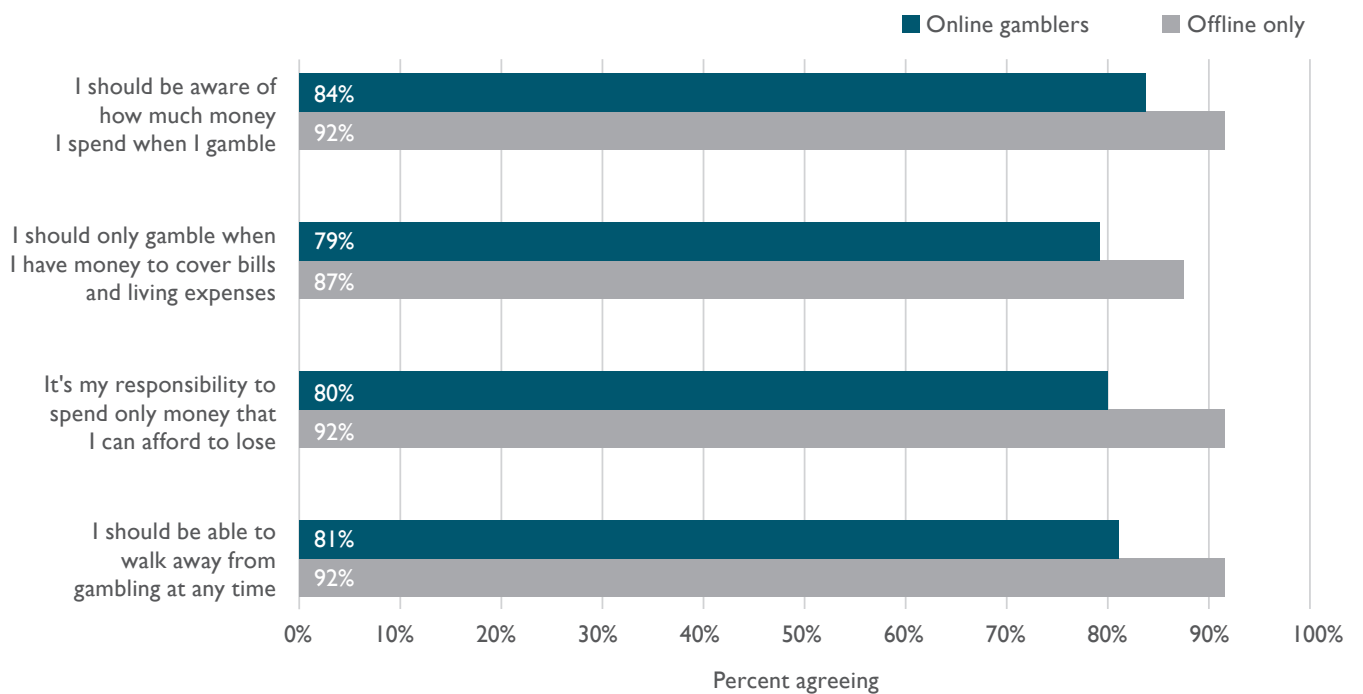


Figure 6H-10

### Online gamblers vs offline only gamblers – *gambling literacy*

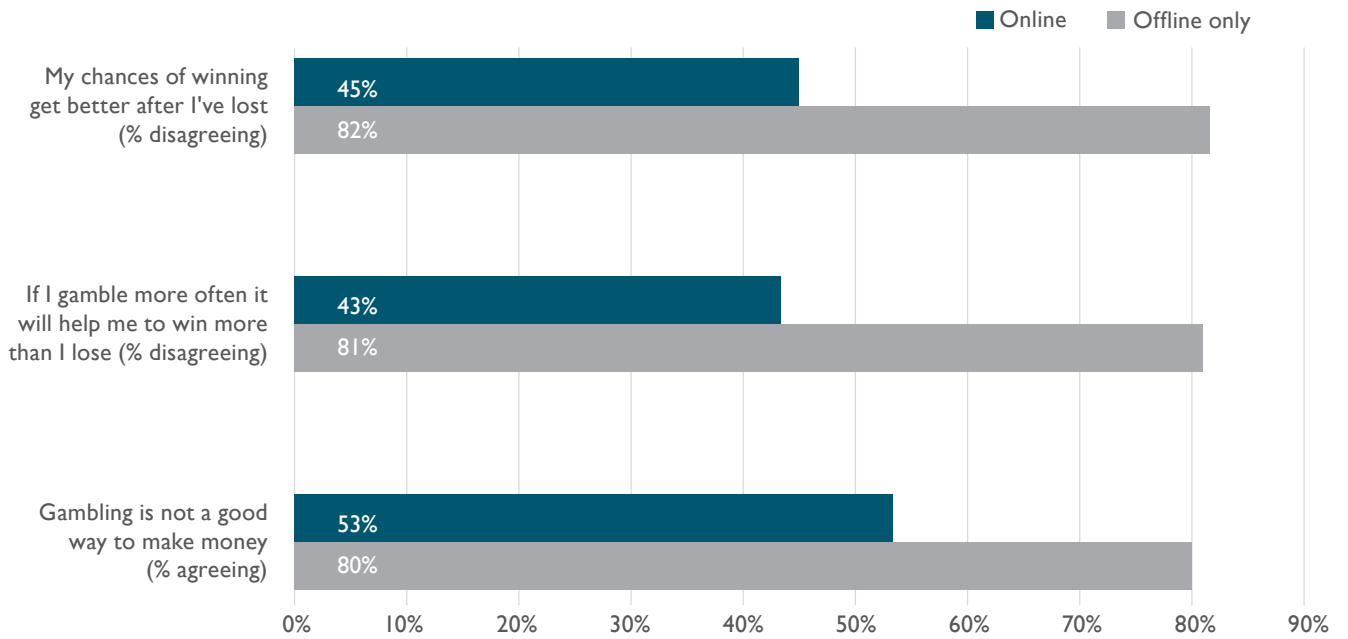


Figure 6I-1

### Past year bingo play – *by age*

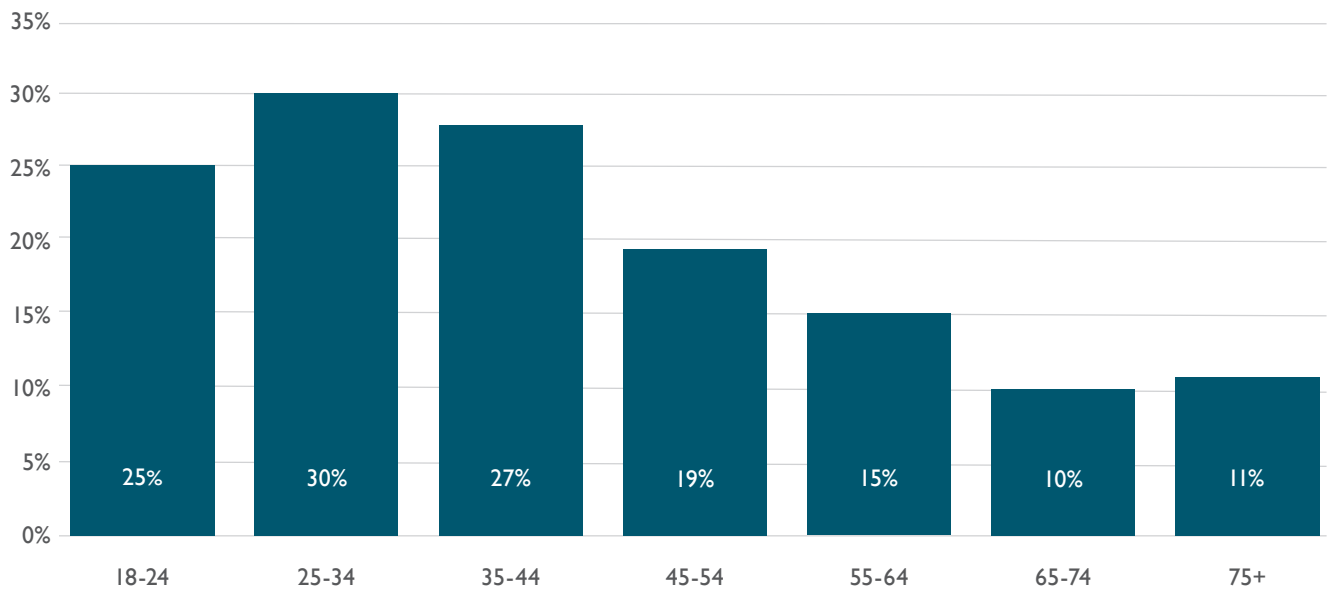


Figure 7A-1

### Addiction to gambling is a lot like addiction to drugs or alcohol

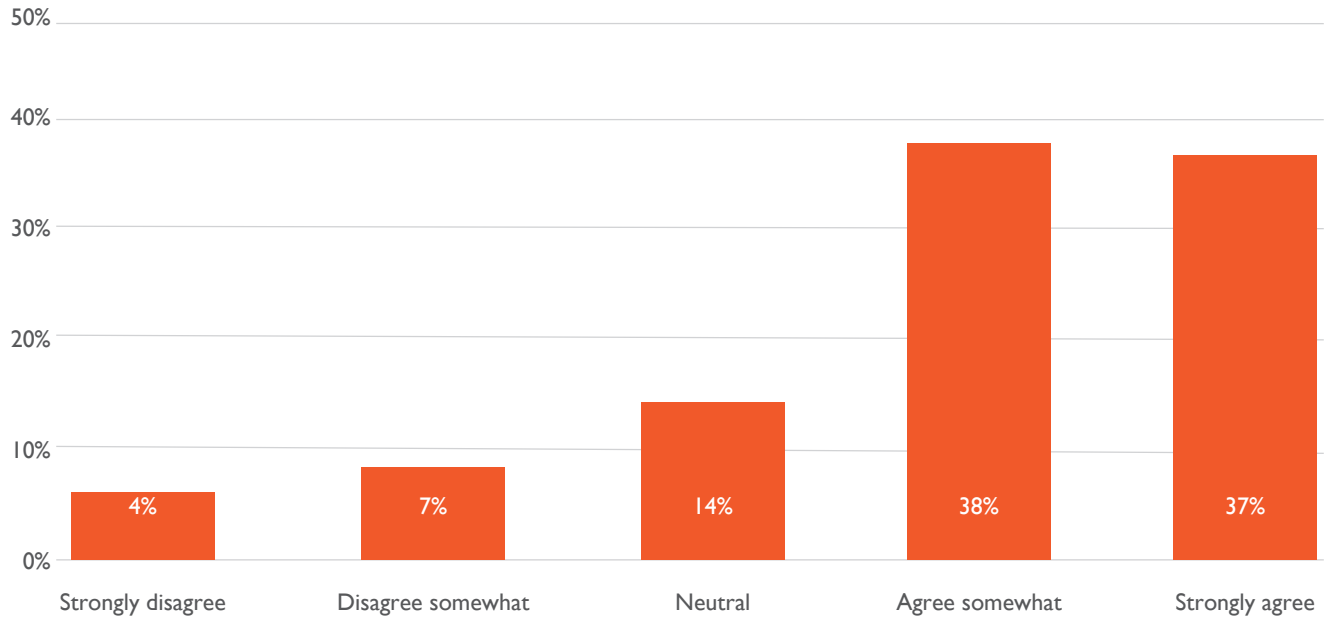


Figure 7A-2

### Addiction to gambling is a lot like addiction to drugs or alcohol – nongambler vs gambler

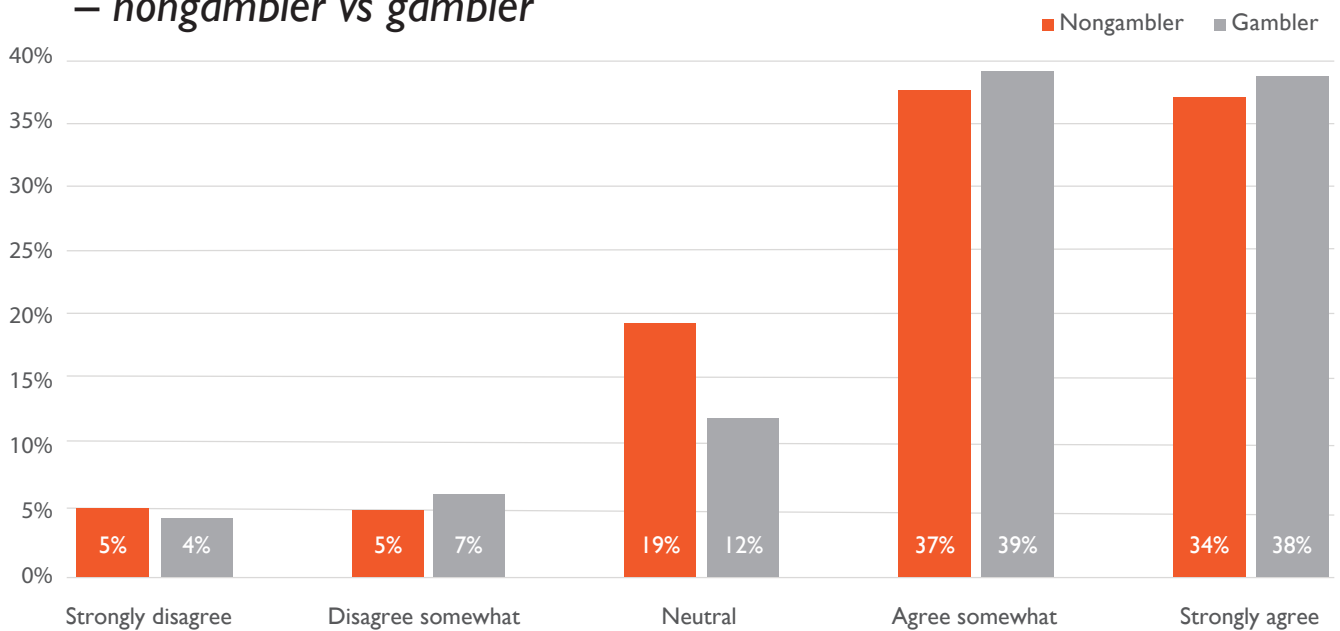


Figure 7A-3

### Percent agreeing that addiction to gambling is a lot like addiction to drugs or alcohol – by age

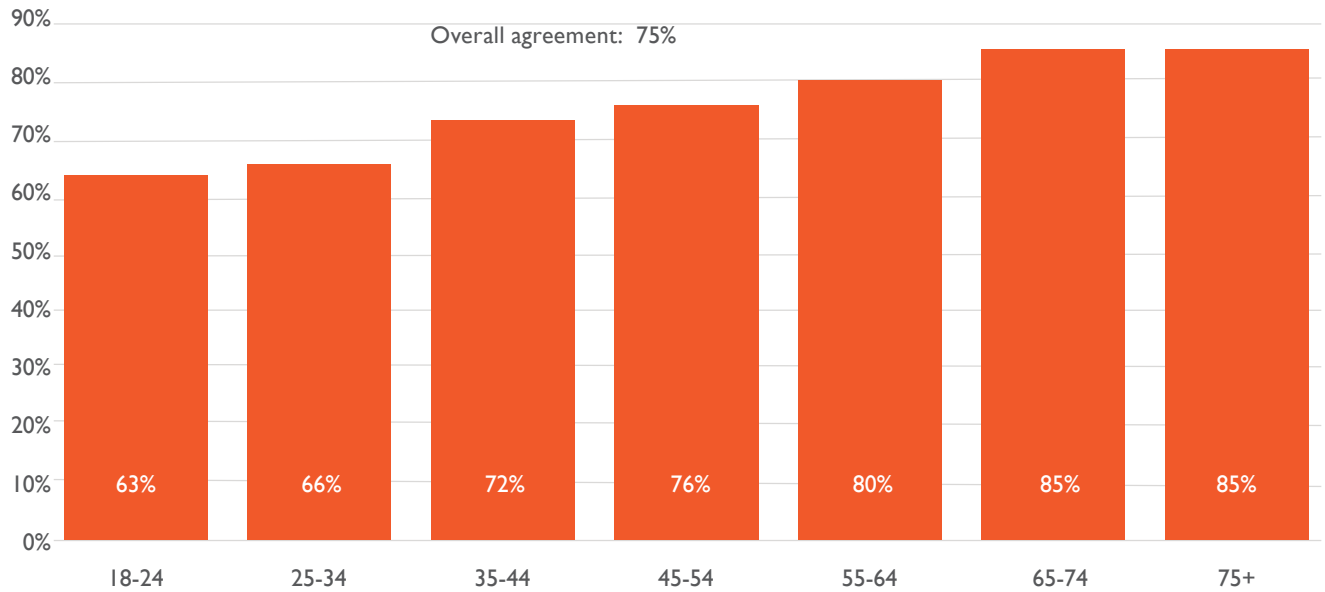


Figure 7A-4

### How likely is the following to cause a gambling problem?

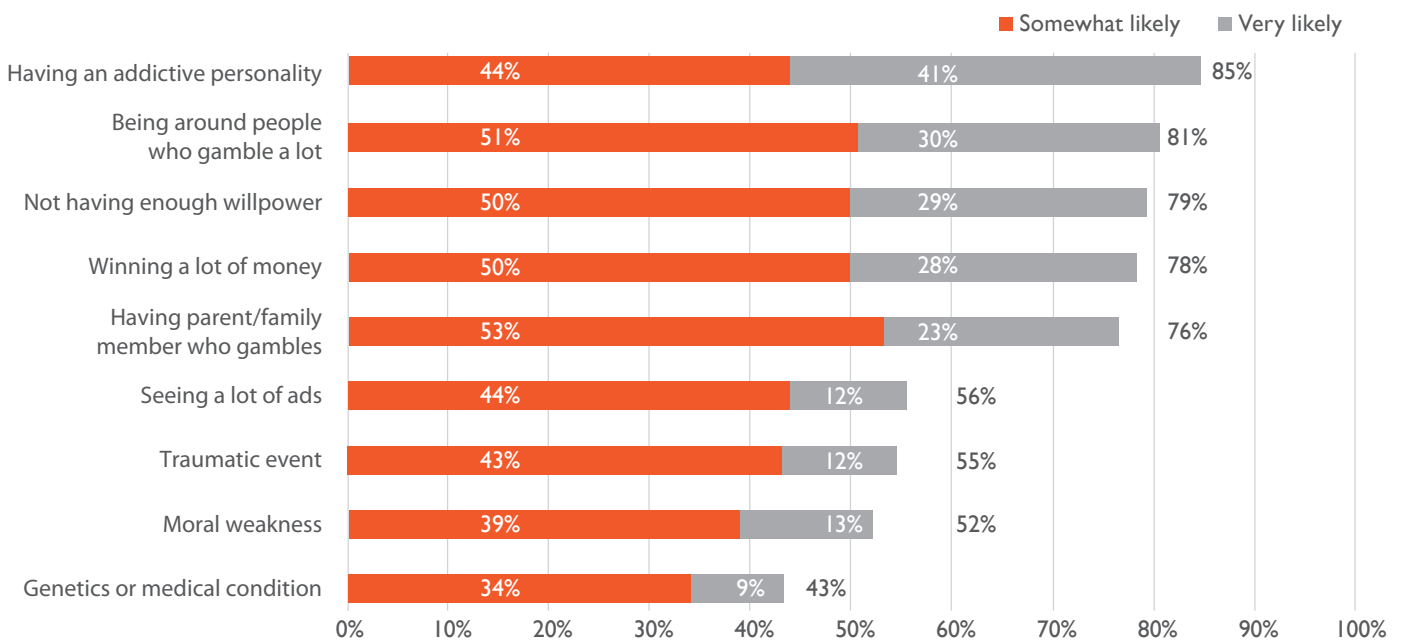




Figure 7A-5

### Percent agreeing that an addictive personality is likely to cause a gambling problem – *by age*

Overall agreement: 85%

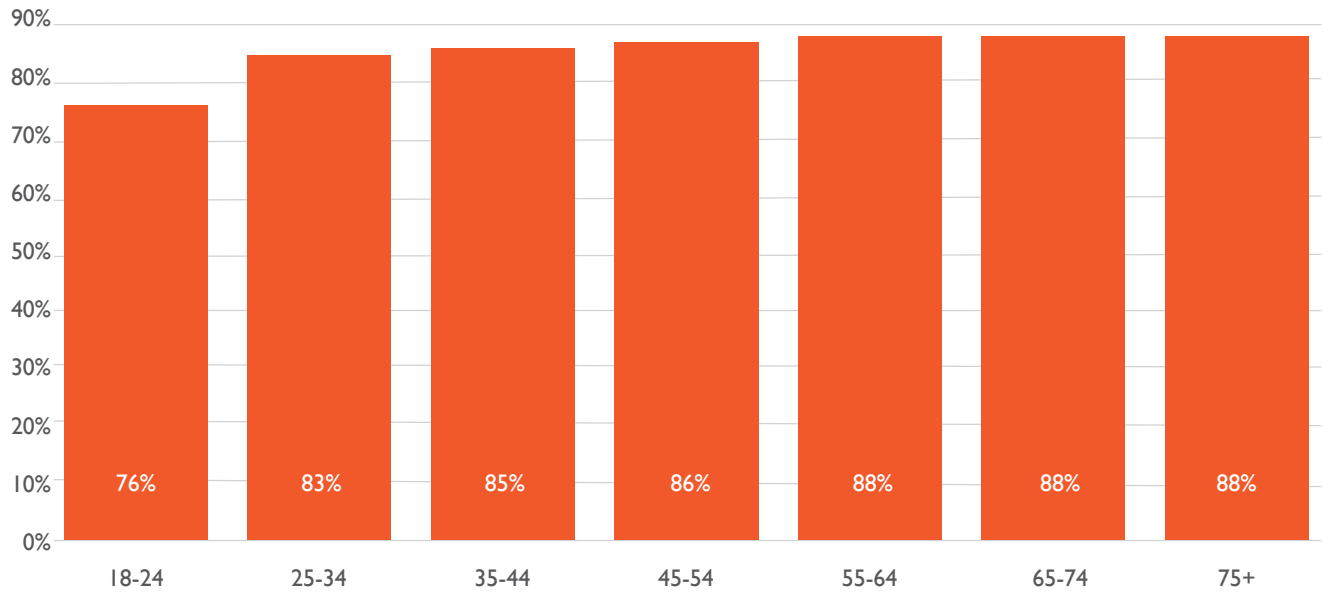


Figure 7A-6

### Percent agreeing that an addictive personality is likely to cause a gambling problem – *by educational attainment*

Overall agreement: 85%

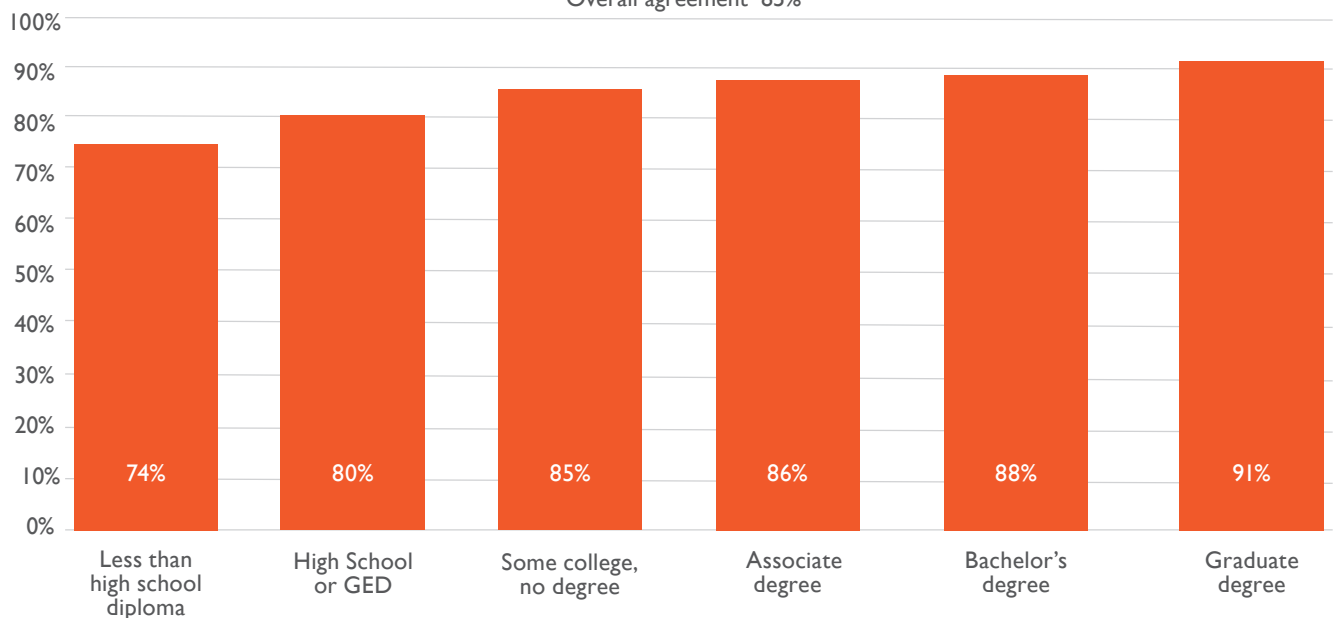


Figure 7A-7

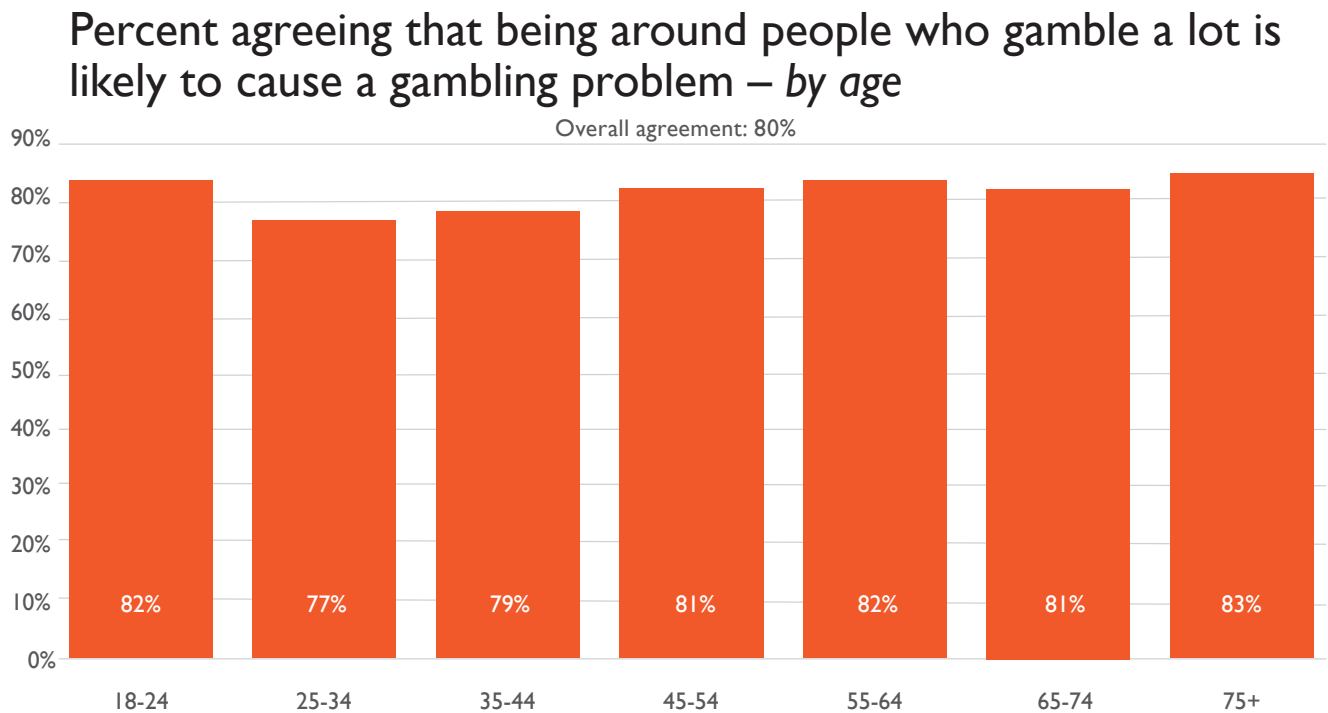


Figure 7A-8

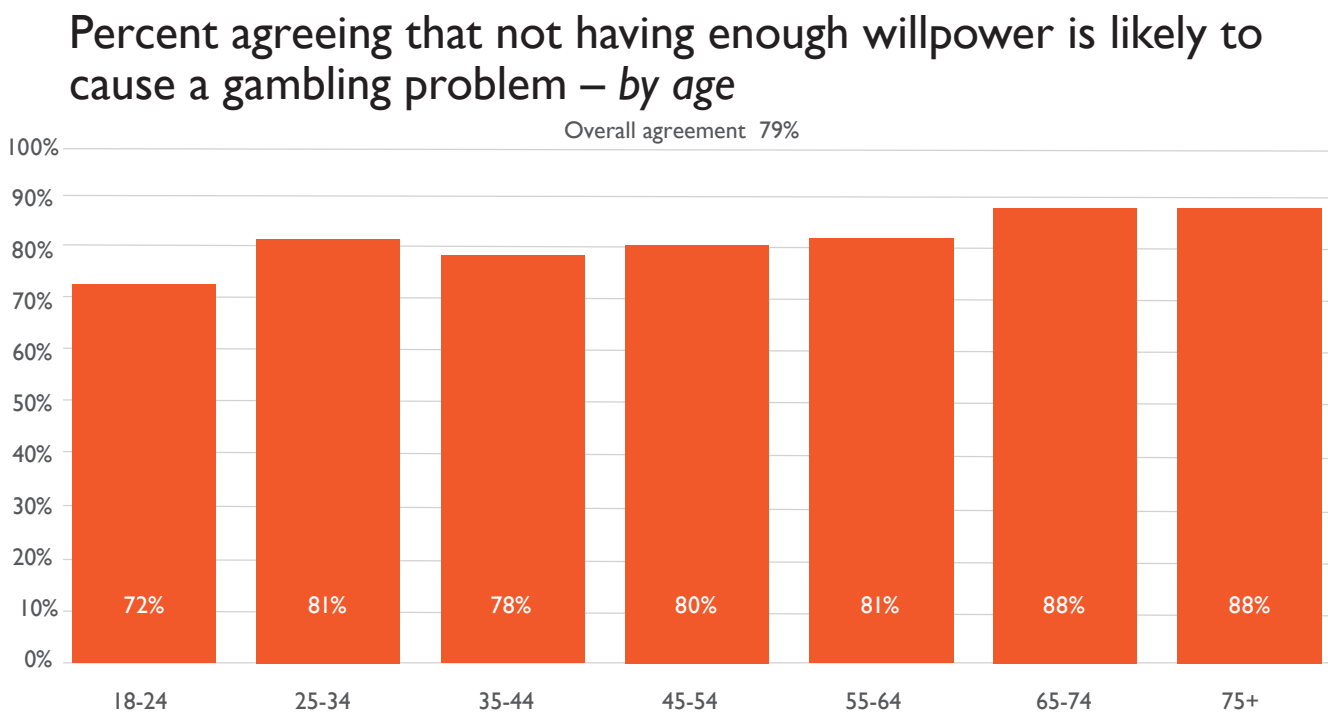


Figure7A-9

### Percent agreeing that not having enough willpower is likely to cause a gambling problem – *by educational attainment*

Overall agreement 79%

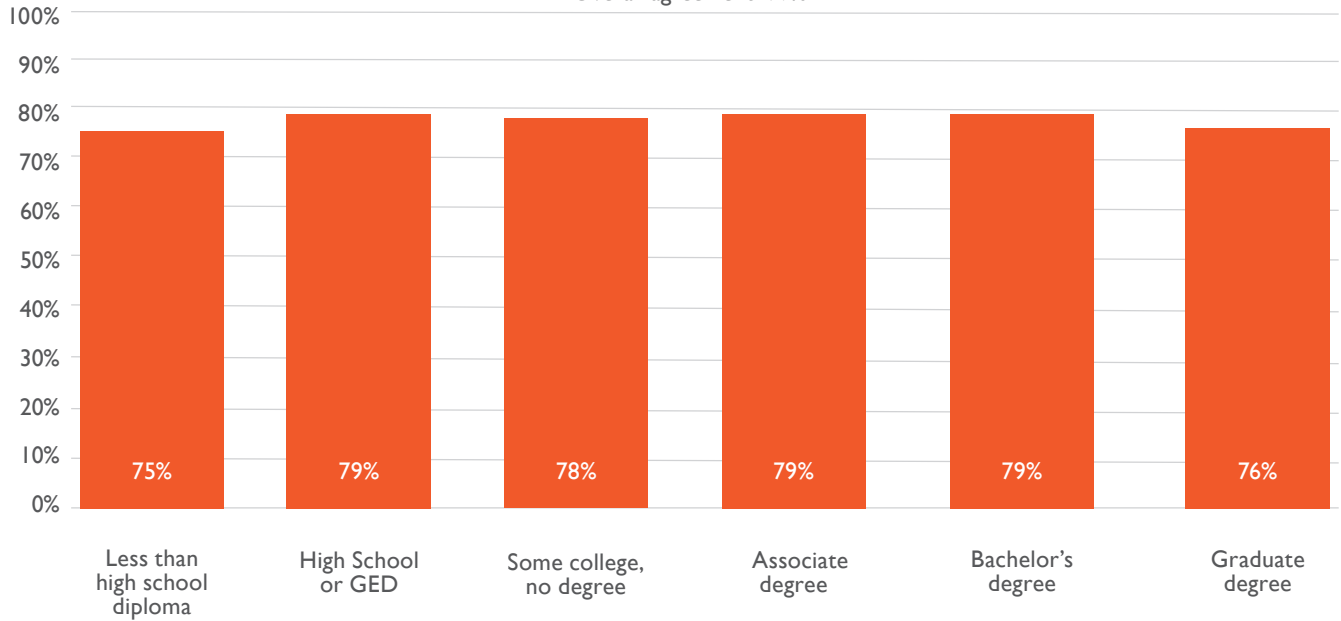


Figure 7A-10

### Percent agreeing that winning a lot of money is likely to cause a gambling problem – *by age*

Overall agreement 77%

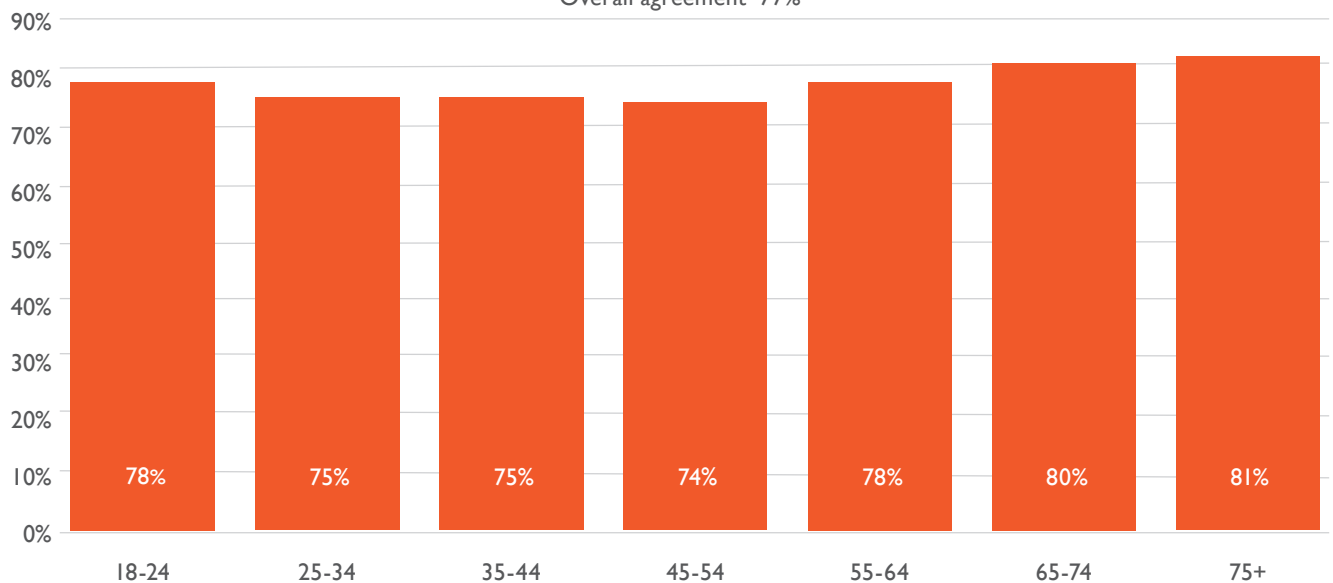


Figure 7A-11

### Percent agreeing that winning a lot of money is likely to cause a gambling problem – *by educational attainment*

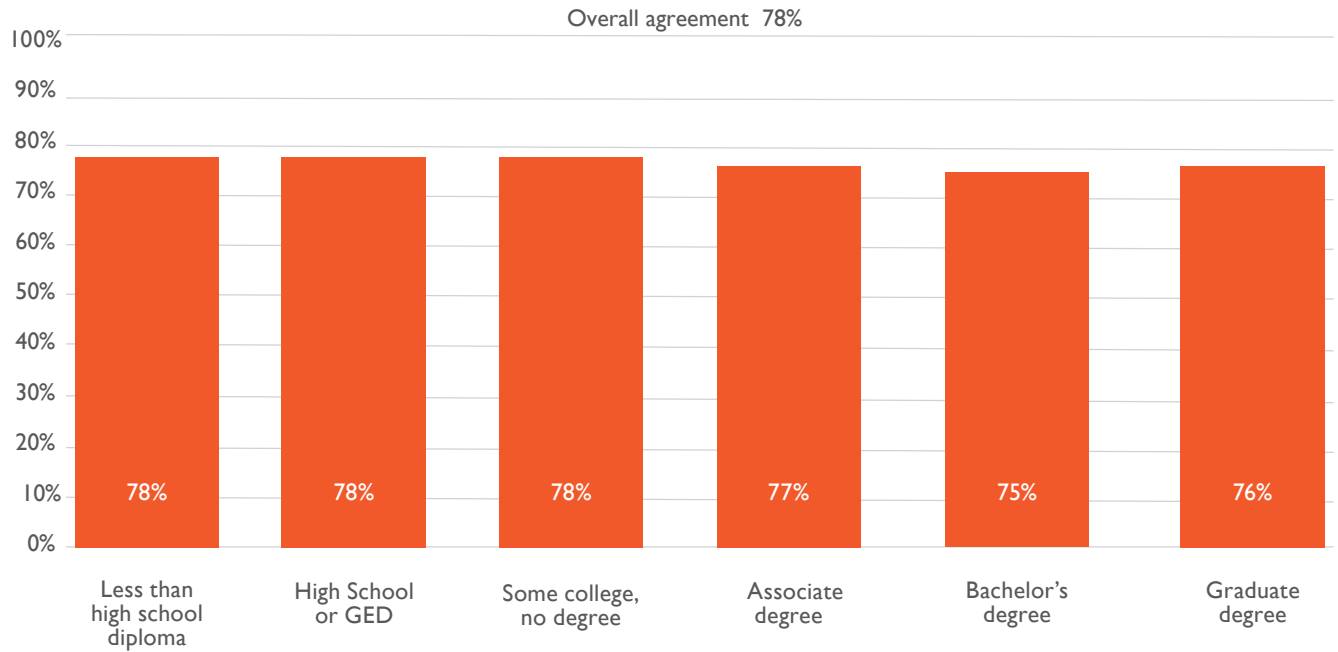


Figure 7A-12

### Percent agreeing that having a parent or family member who gambles is likely to cause a gambling problem – *by educational attainment*

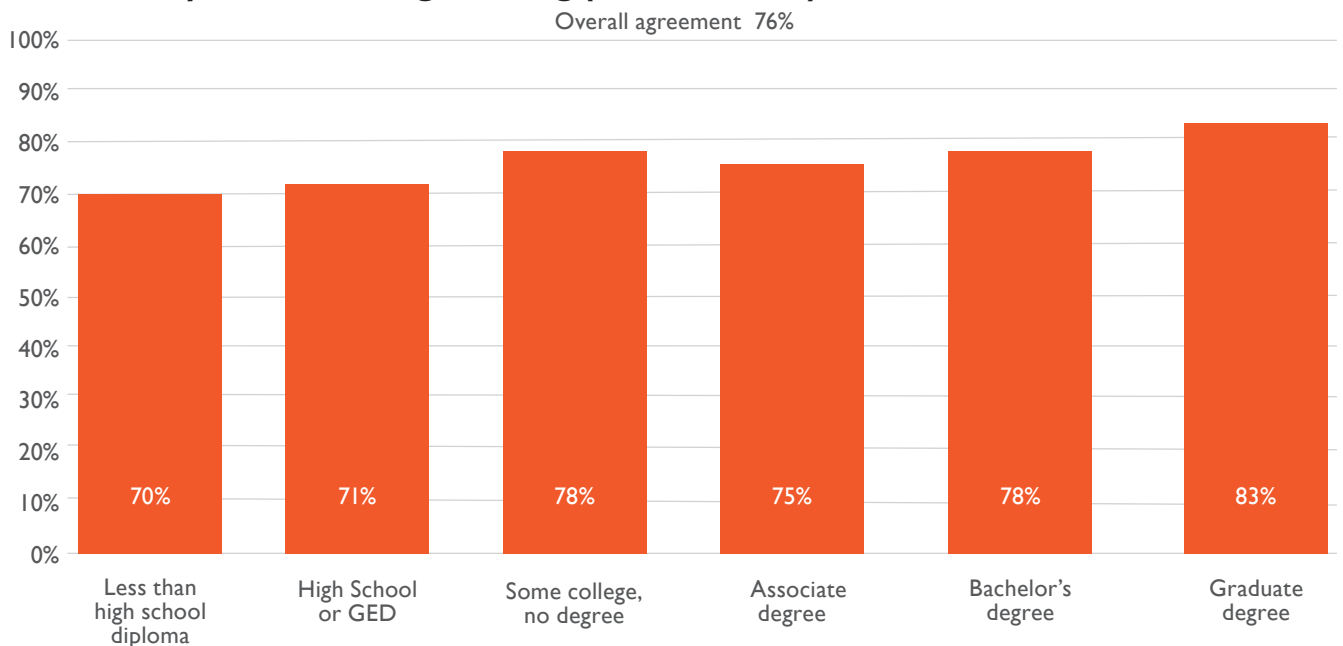


Figure 7A-13

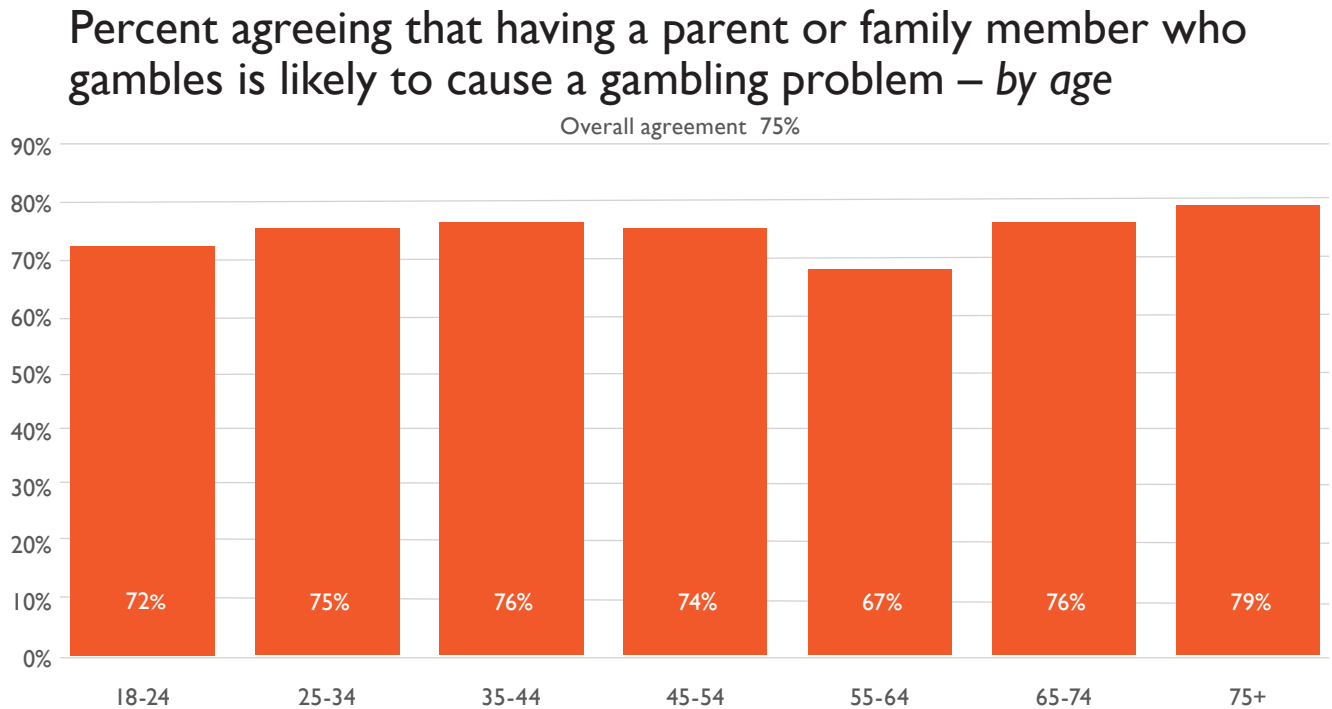


Figure 7A-14

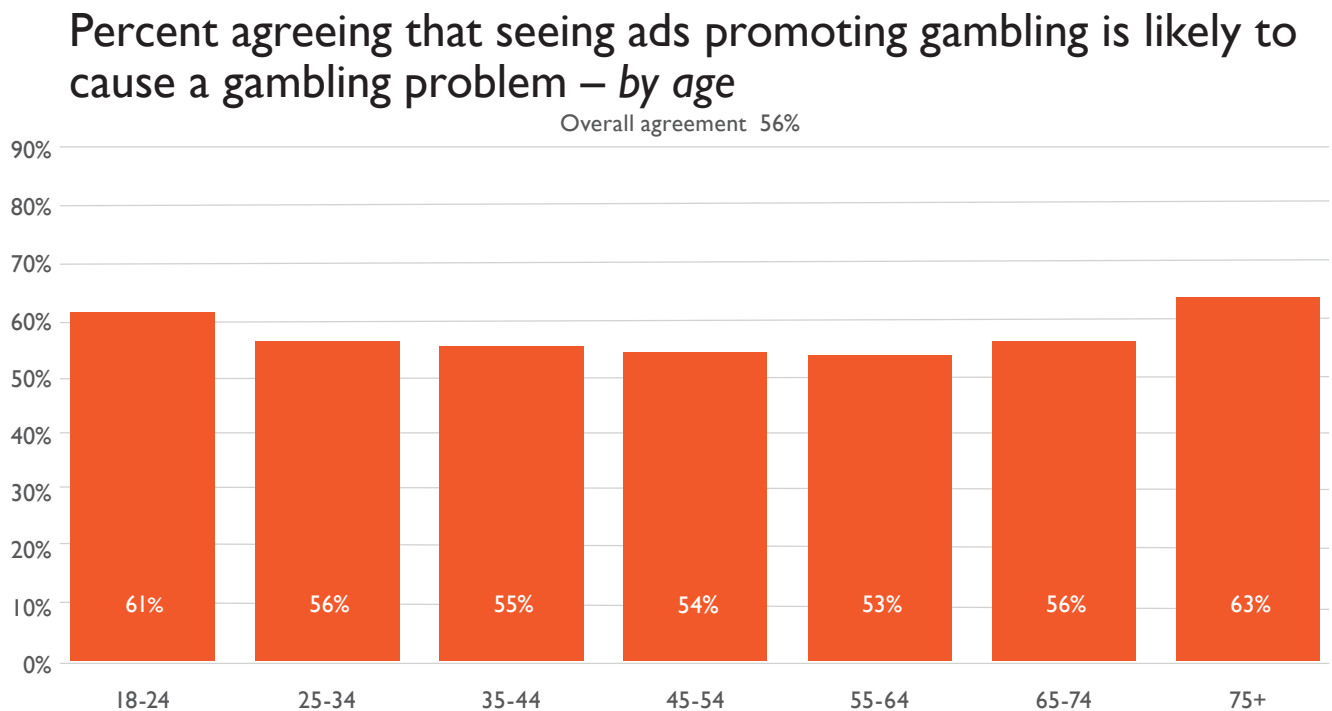


Figure 7A-15

Percent agreeing that seeing a lot of ads promoting gambling is likely to cause a gambling problem – *by educational attainment*

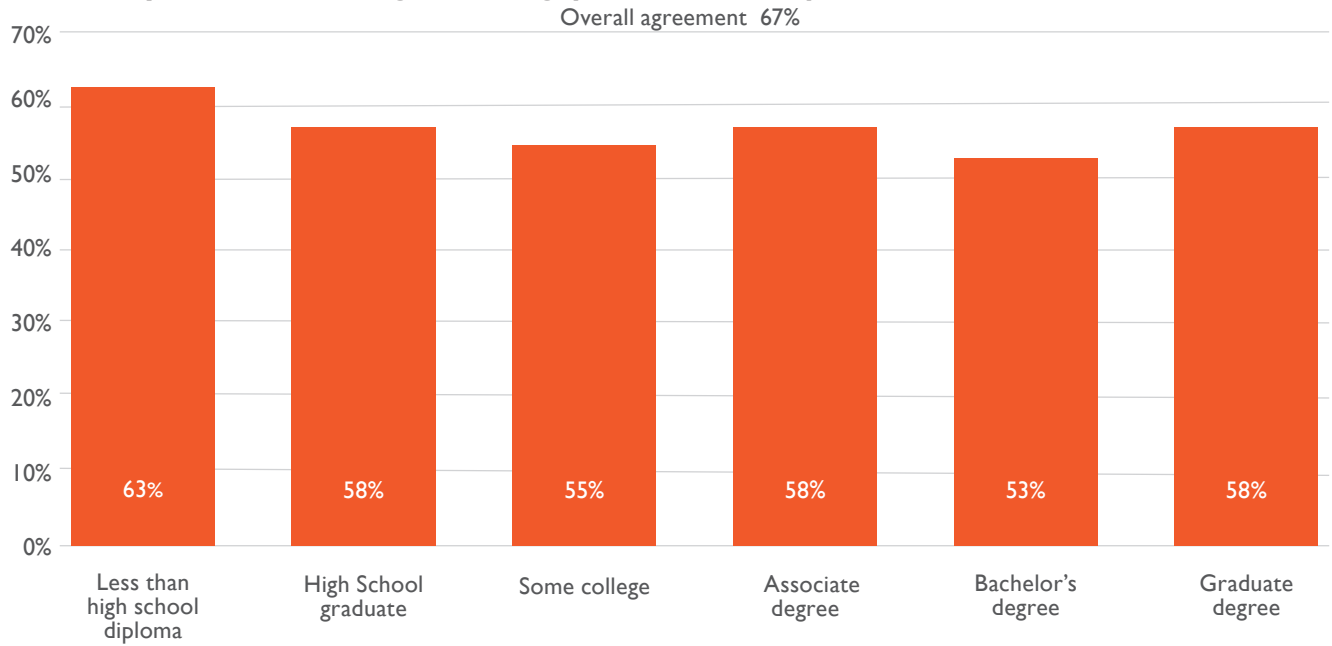


Figure 7A-16

Percent agreeing that a traumatic event in one's life is likely to cause a gambling problem – *by age*

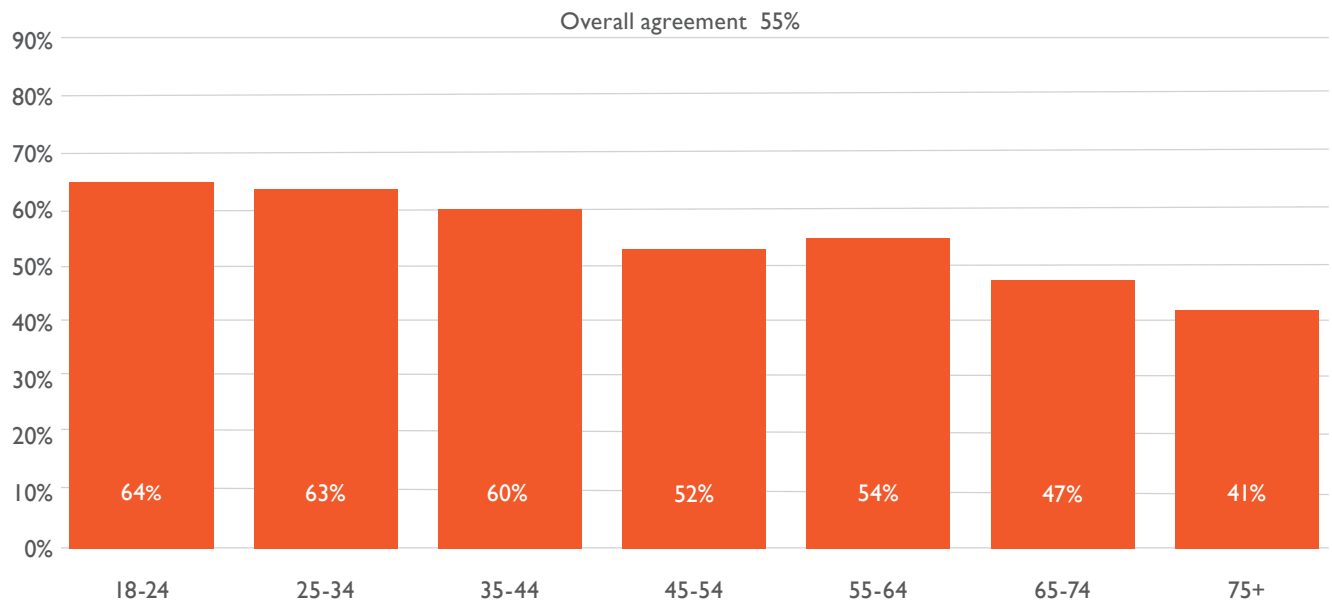


Figure 7A-17

### Percent agreeing that a traumatic event in one's life is likely to cause a gambling problem – by educational attainment

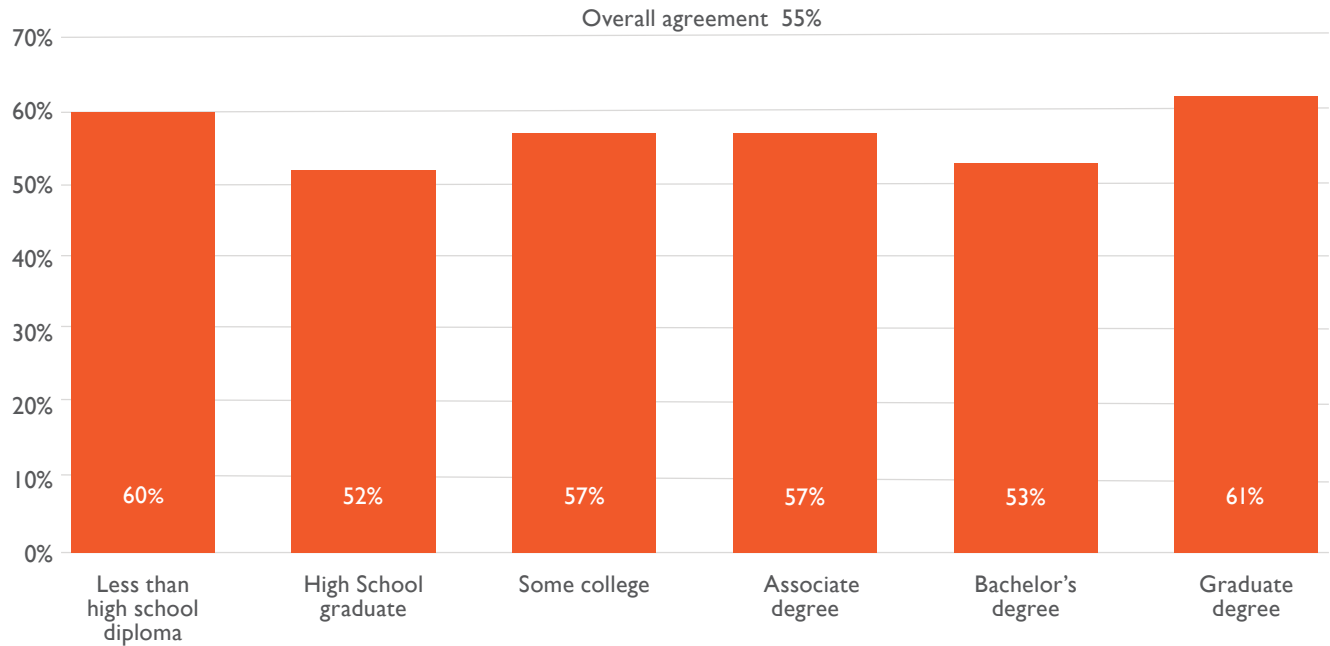


Figure 7A-18

### Percent agreeing that moral weakness is likely to cause a gambling problem – by age

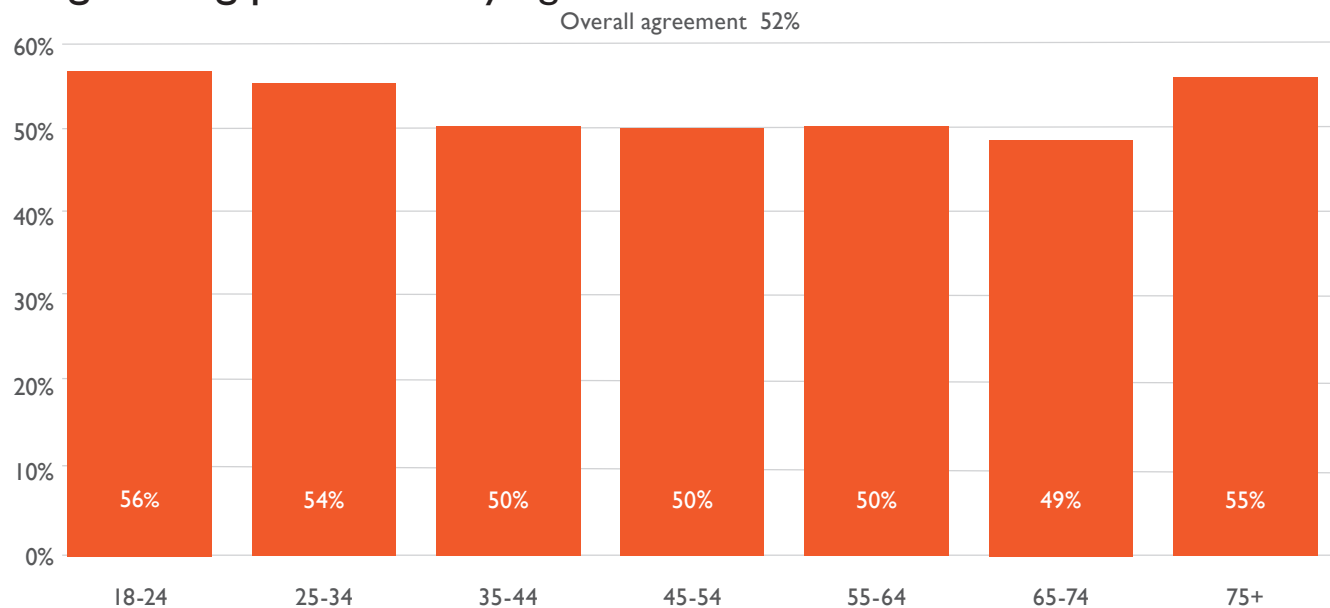


Figure 7A-19

### Percent agreeing that moral weakness is likely to cause a gambling problem – *by educational attainment*

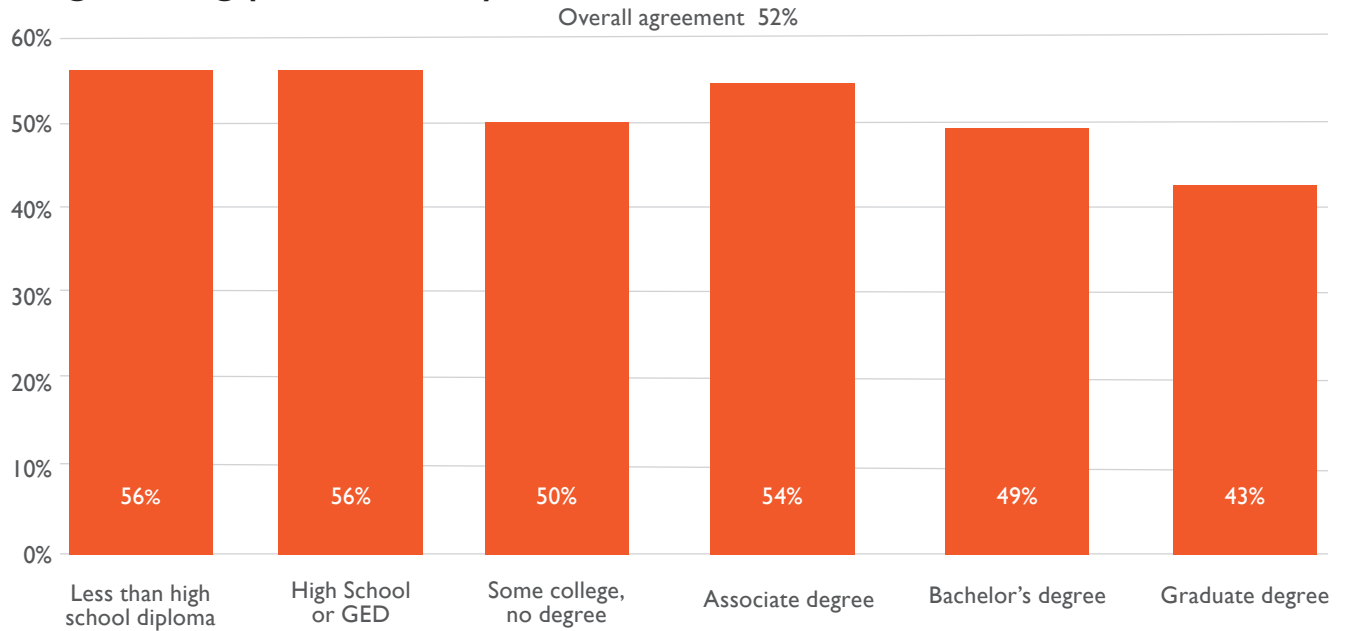


Figure 7A-20

### Percent agreeing that genetics or other medical condition is likely to cause a gambling problem – *by age*

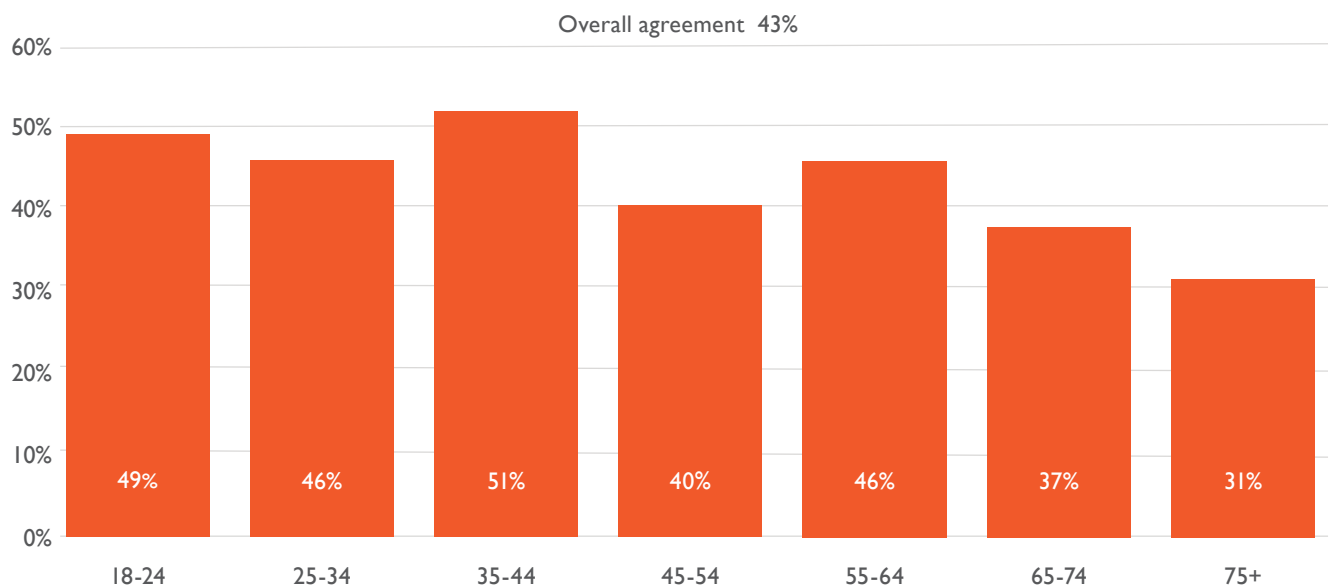




Figure 7A-21

### Percentage agreeing that a person's genetics or other medical condition is likely to cause a gambling problem – *educational attainment*

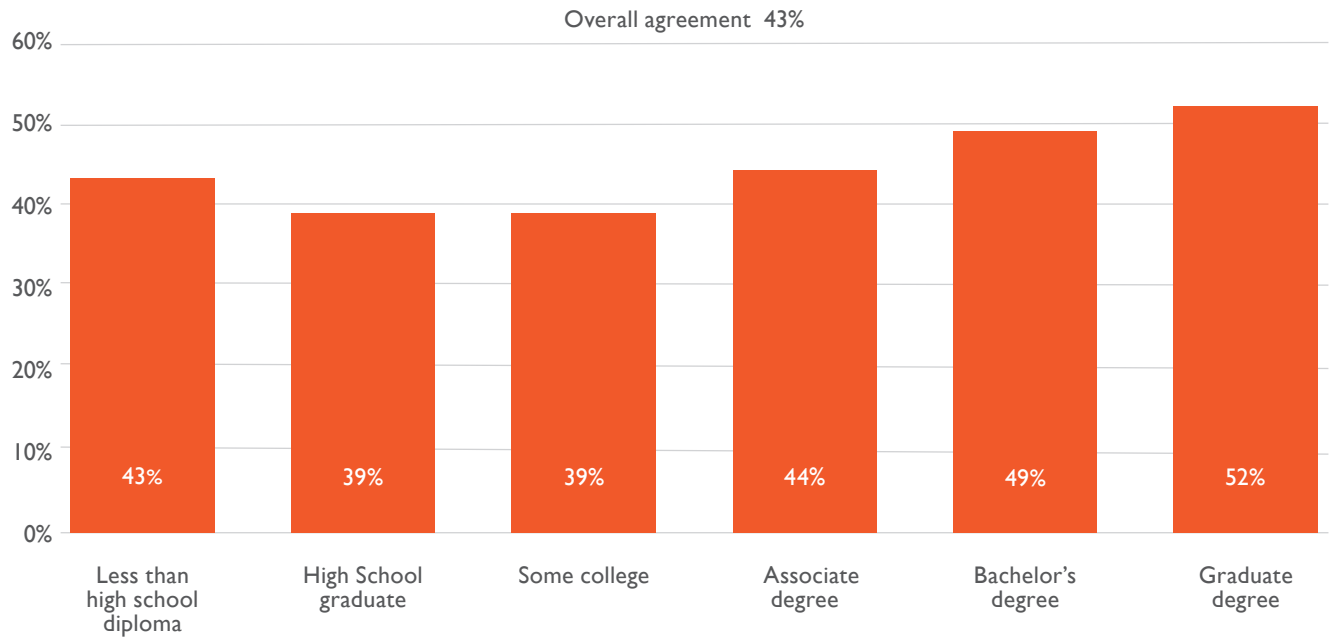


Figure 7A-22

### People with a gambling problem are to blame for their problems

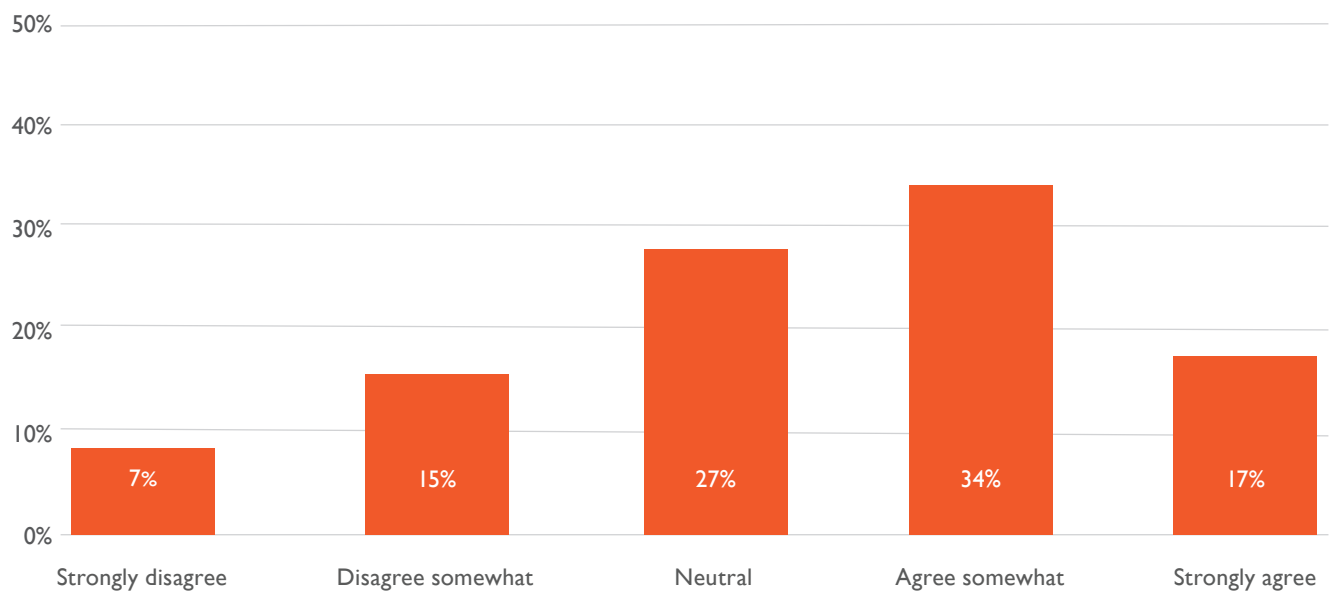


Figure 7A-23

### Percentage agreeing that people with a gambling problem are to blame for their problems – by age

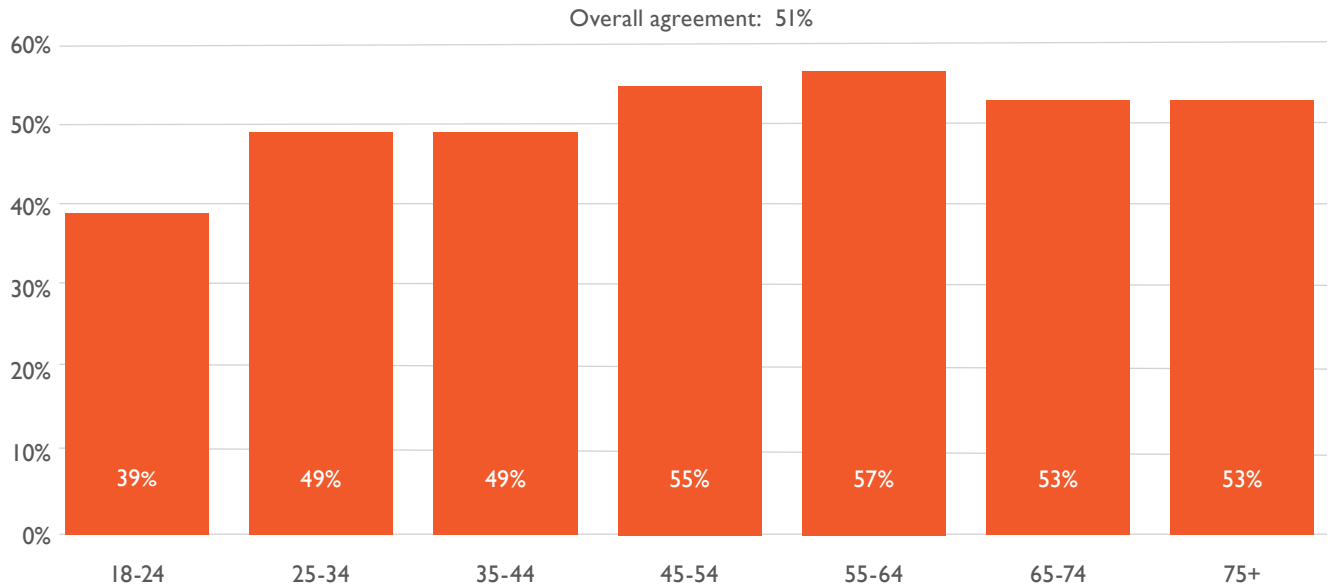


Figure 7A-24

### Percentage agreeing that people with a gambling problem are below average in intelligence

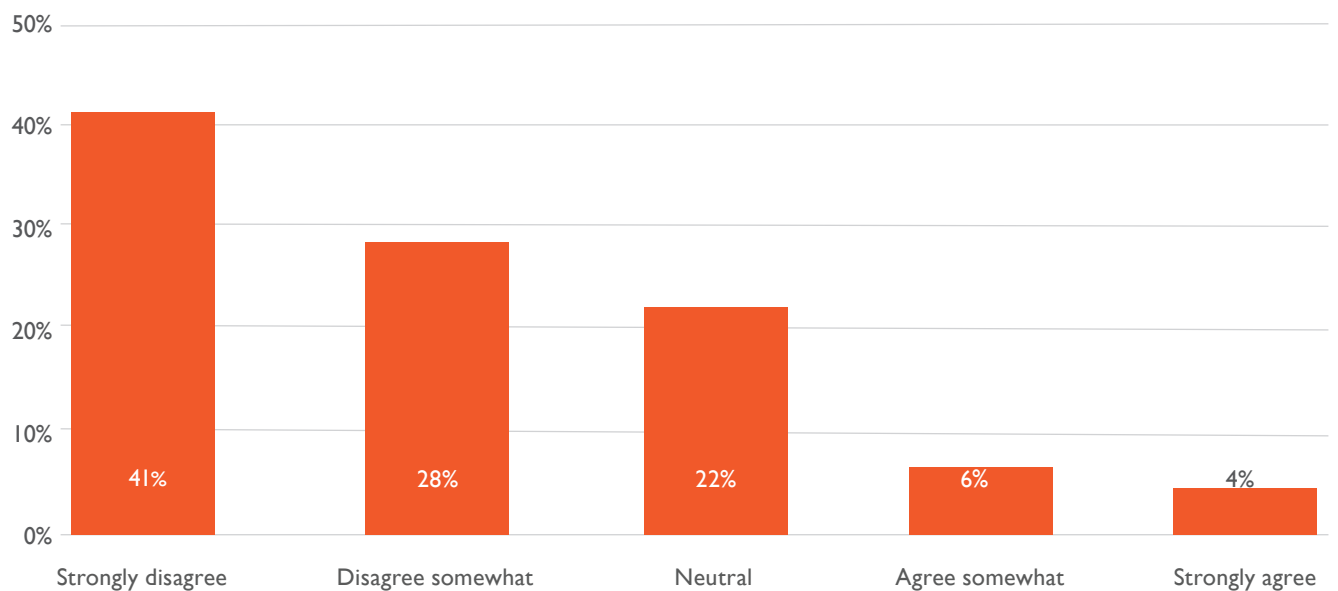


Figure 7A-25

### Percentage agreeing that people with a gambling problem are below average in intelligence – by age

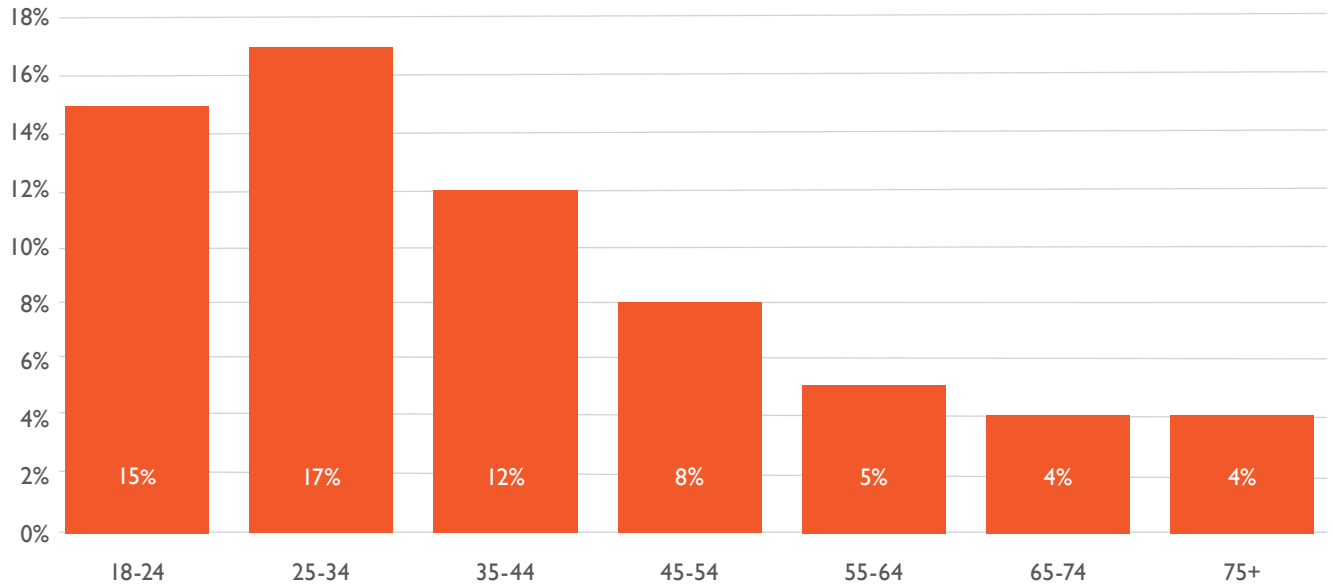


Figure 7B-1

### Services to treat compulsive gambling are available in my community

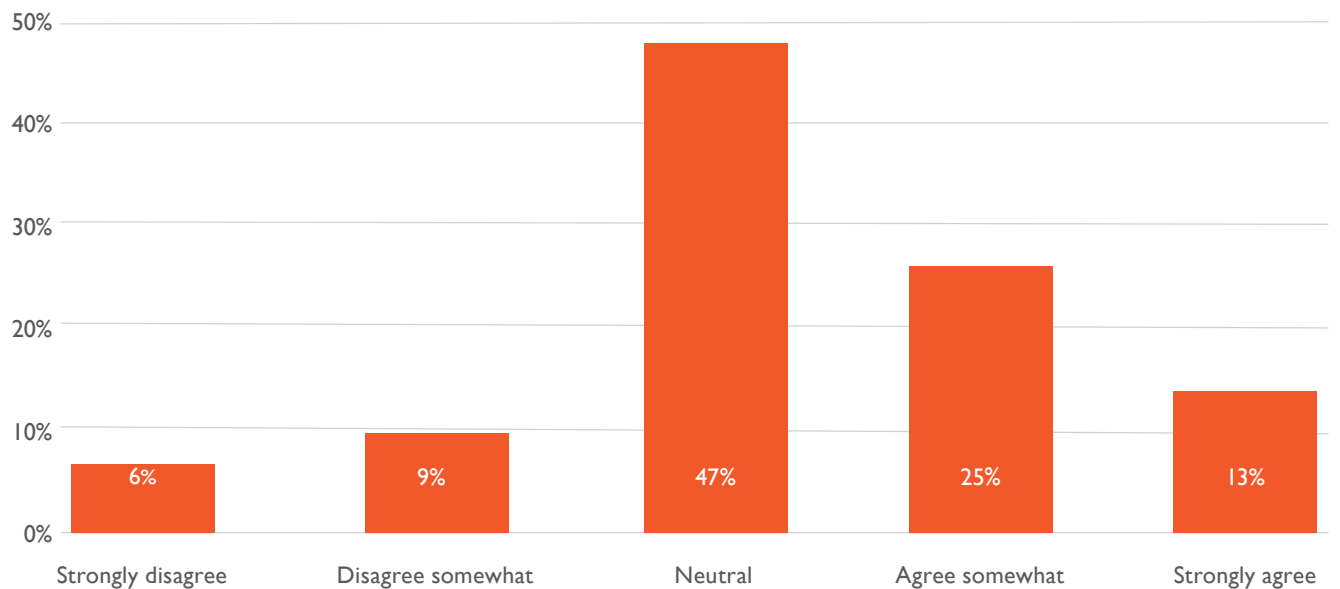


Figure 7B-2

Services to treat compulsive gambling are available in my community – *nongambler vs gambler*

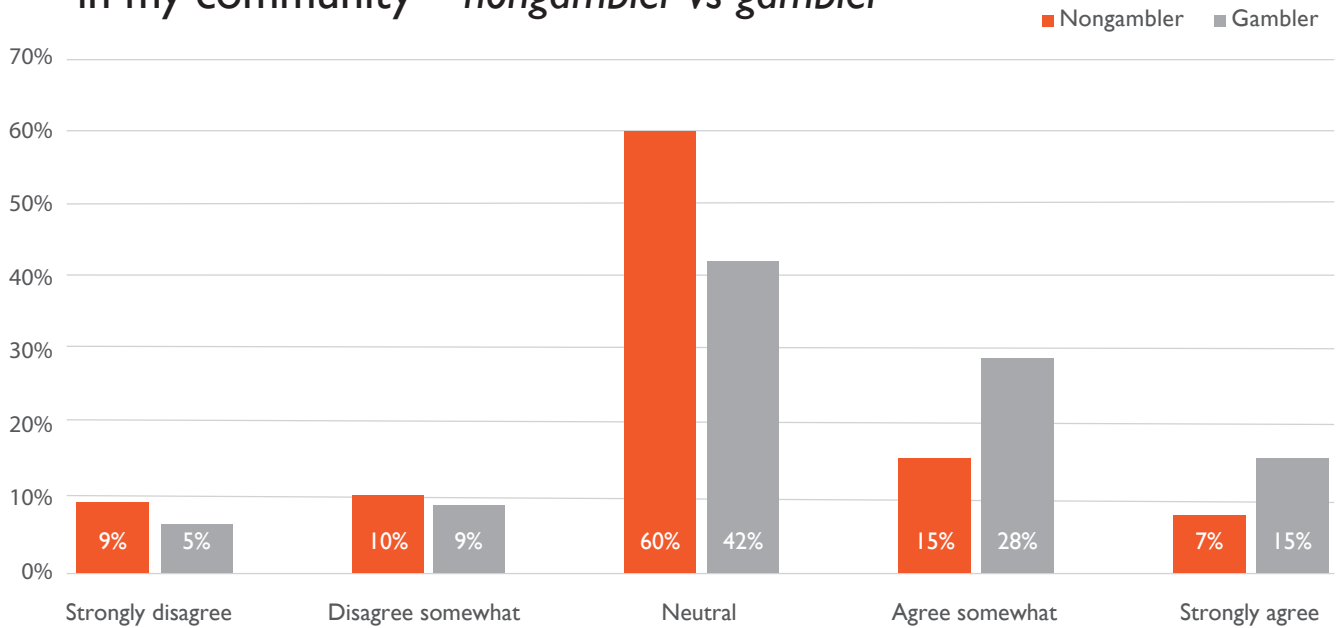


Figure 7B-3

If someone close to me had a gambling problem, I would know where to get them help.

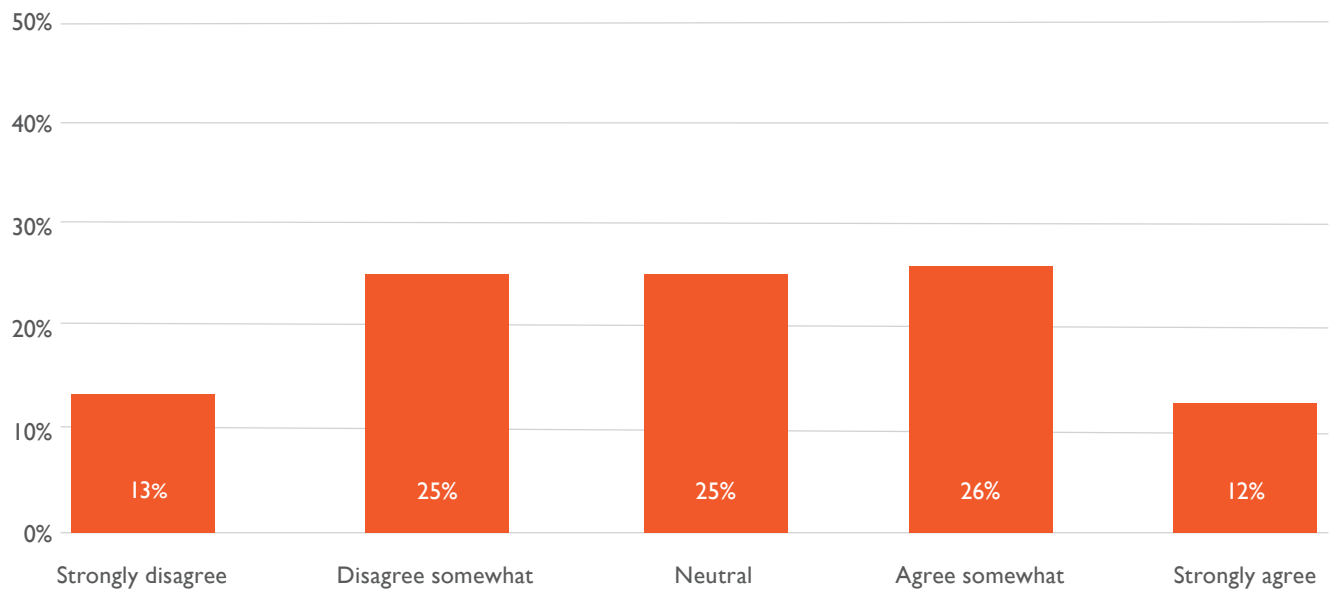


Figure 7B-4

If someone in my family had a gambling problem, I would advise them not to discuss it with anyone outside the family.

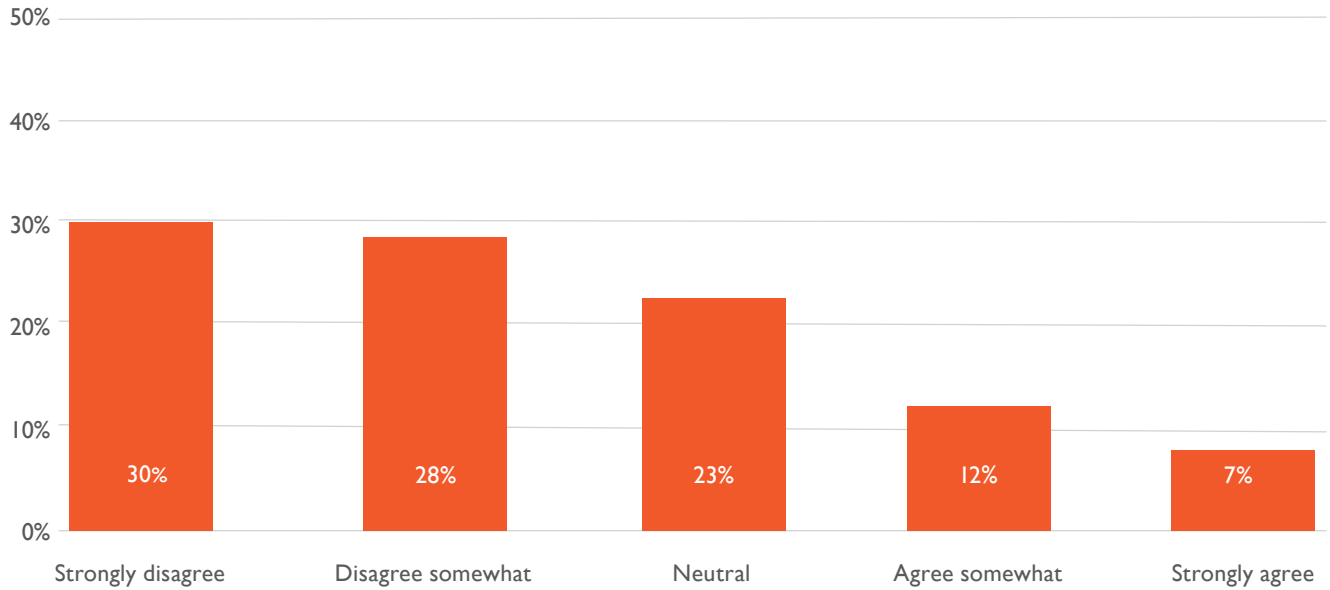


Figure 7B-5

Percent agreeing that if someone in their family had a gambling problem, they would advise them not to discuss it outside the family – by age

Overall agreement: 19%

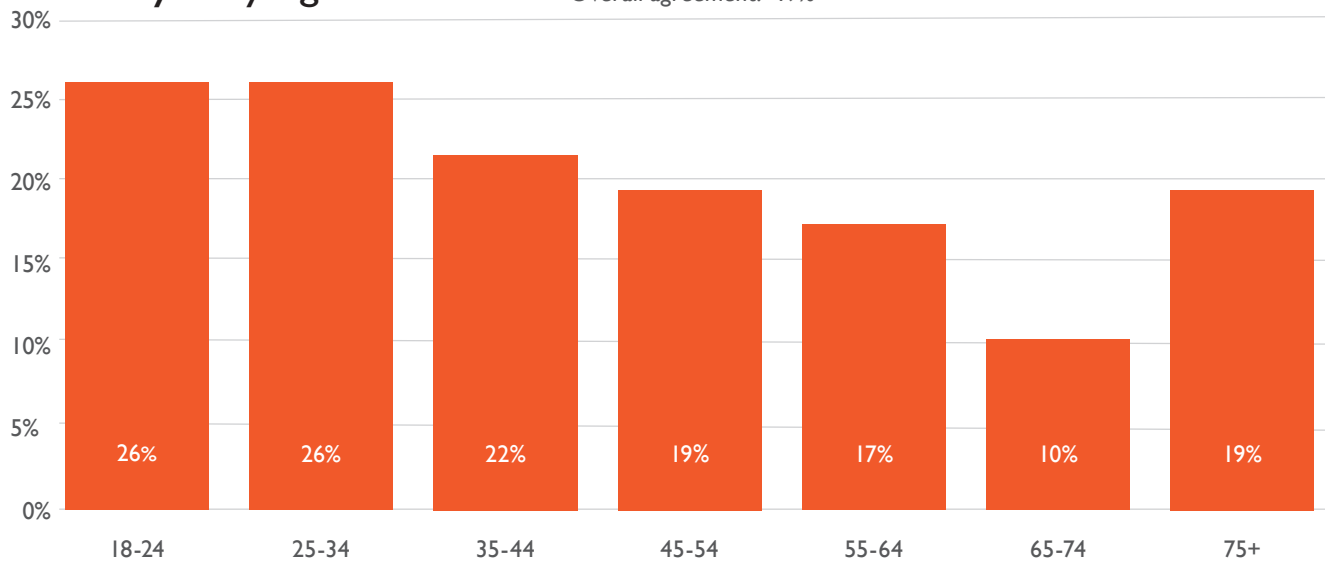


Figure 7B-6

### Percentage agreeing that if someone in their family had a gambling problem, they would advise them not to discuss it outside the family – *by race/ethnicity*

Overall agreement: 19%

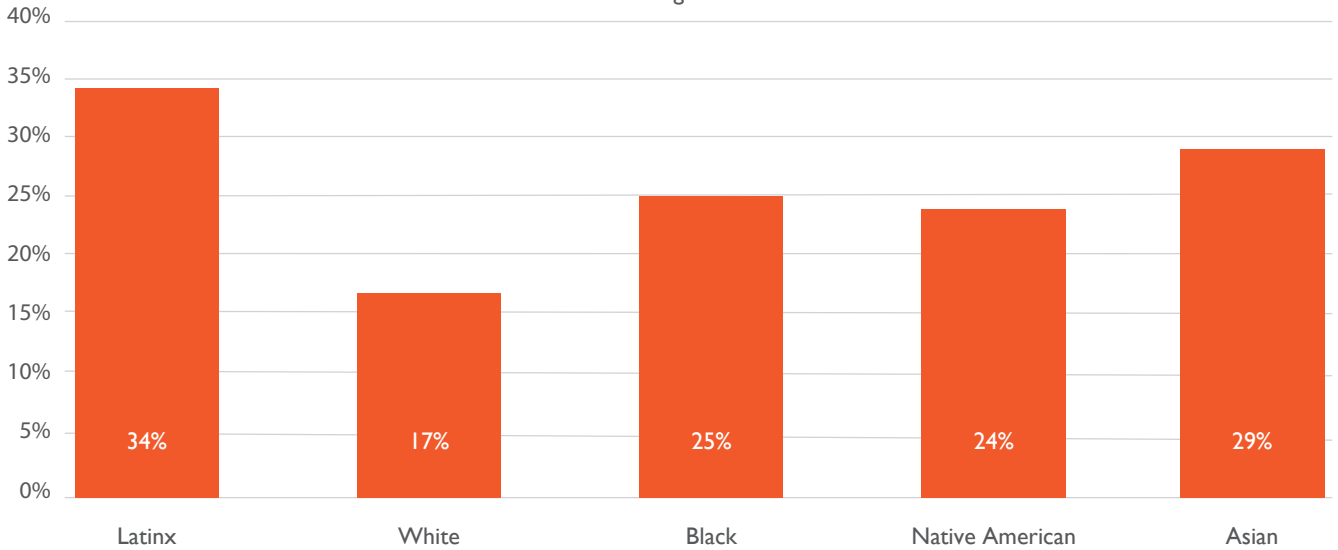


Figure 7B-7

### People with a gambling problem are unlikely to recover or get better

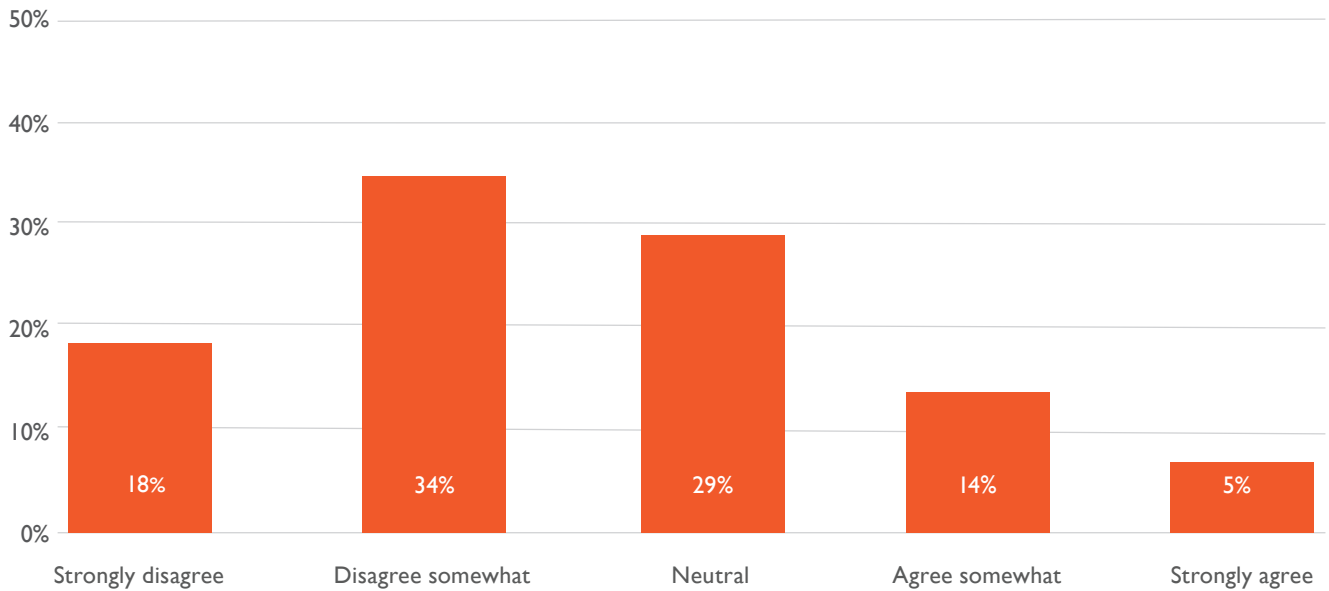


Figure 7B-8

### Percentage disagreeing that people with a gambling problem are unlikely to recover or get better – *by age*

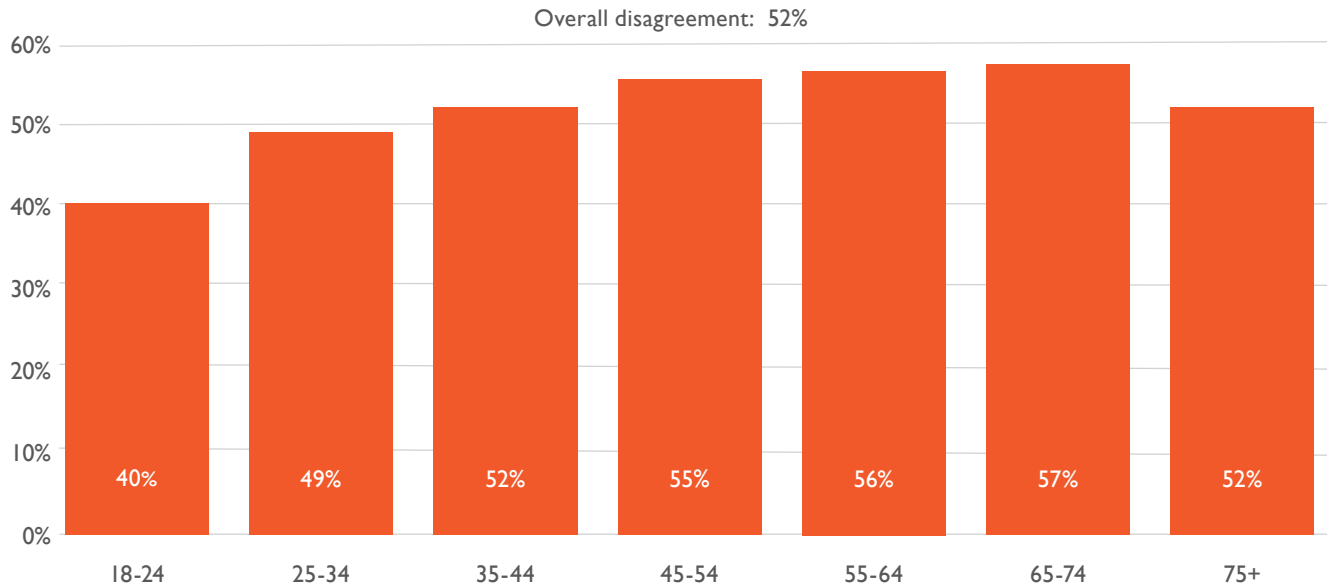


Figure 7B-9

### Percentage agreeing that people with a gambling problem are unlikely to recover – *by race/ethnicity*

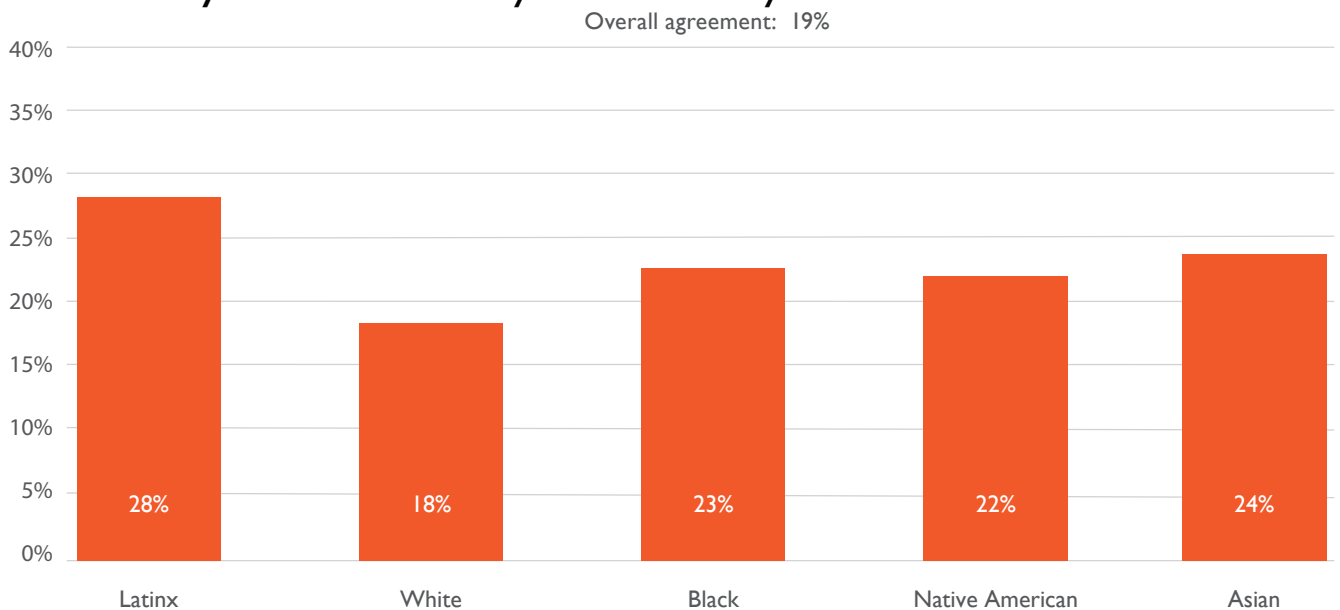


Figure 7C-1

## Gambling is immoral

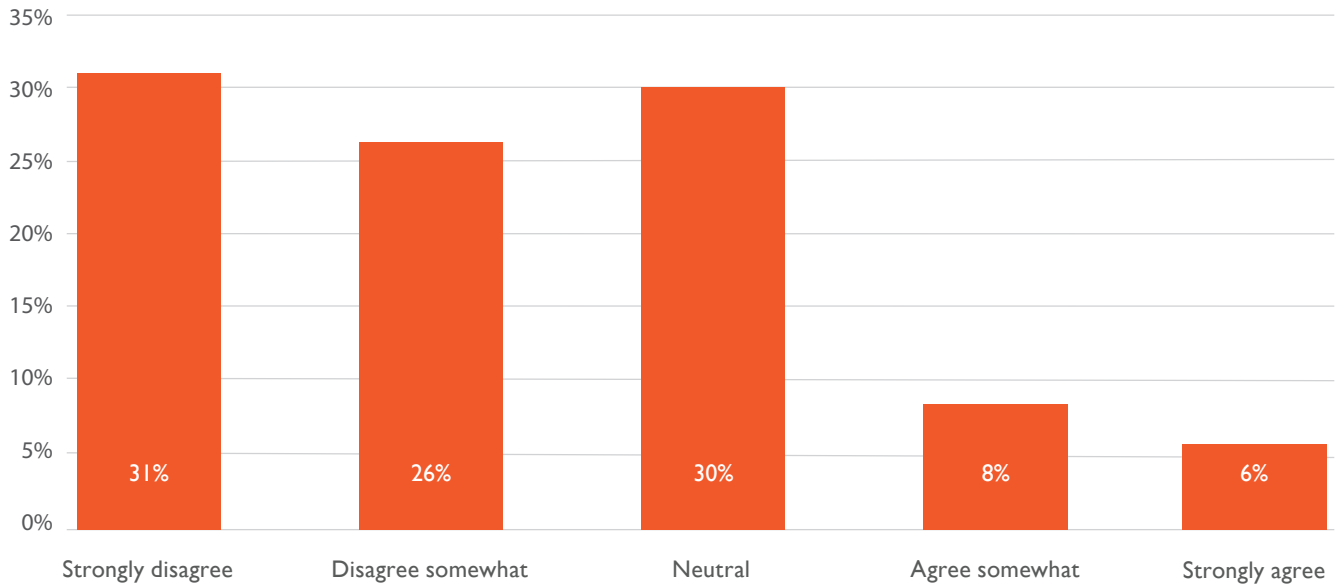


Figure 7C-2

## Gambling is against my religion

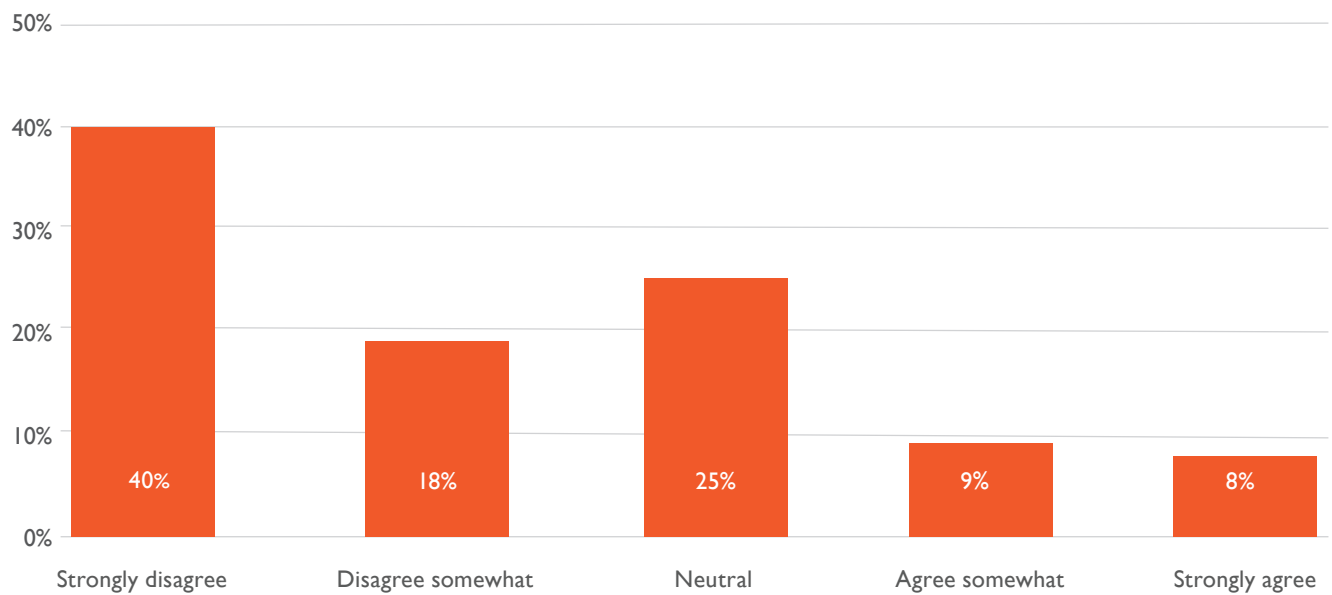




Figure 7C-3

### Gambling is immoral – nongambler vs gambler

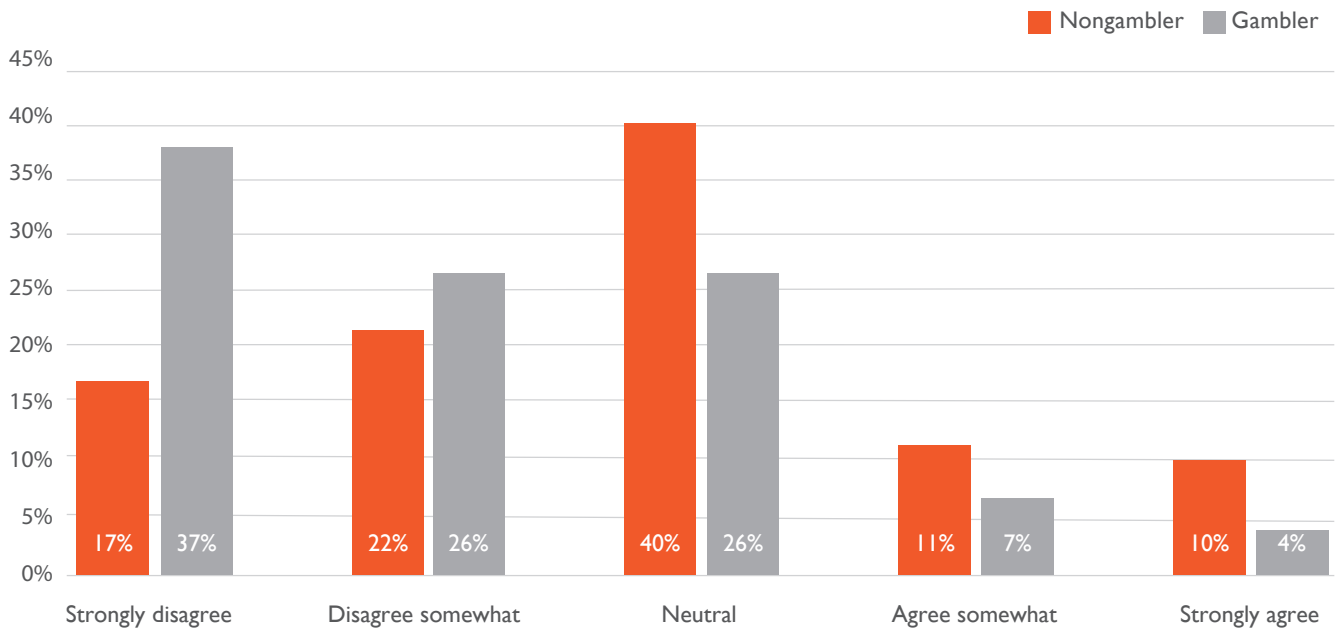


Figure 7C-4

### Percentage agreeing that gambling is immoral

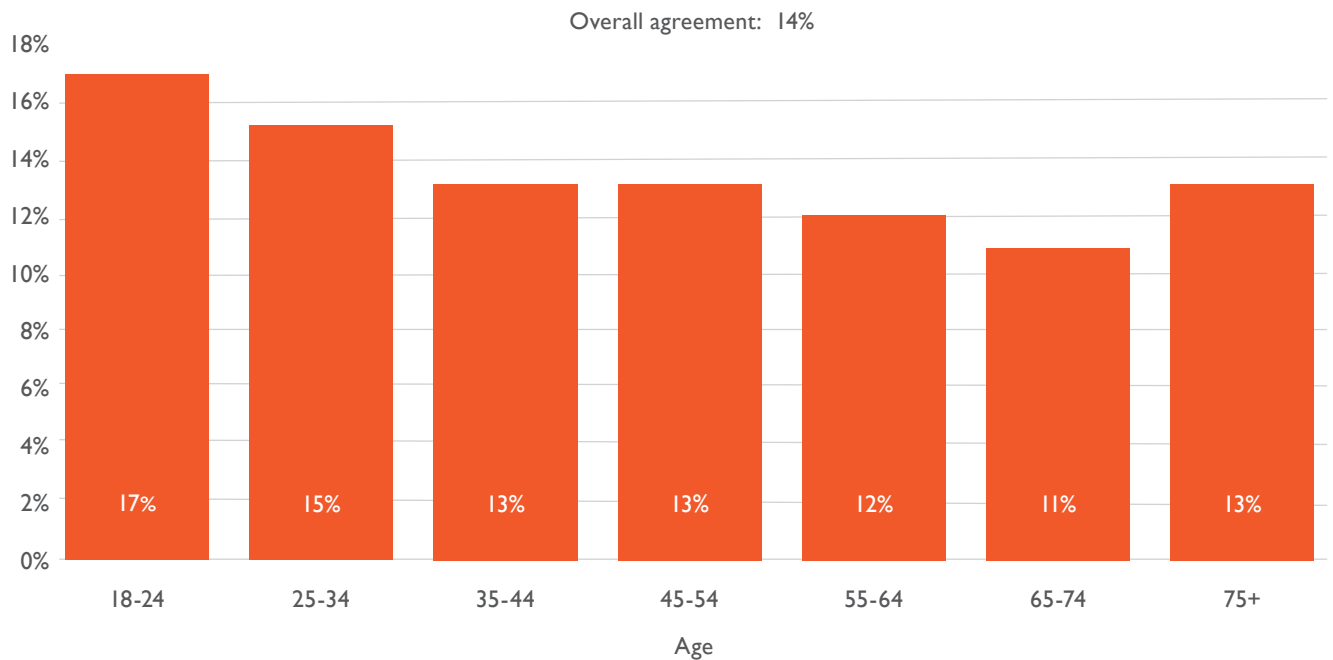


Figure 7D-1

### The government vs gambling industry should do more to help people with a gambling addiction

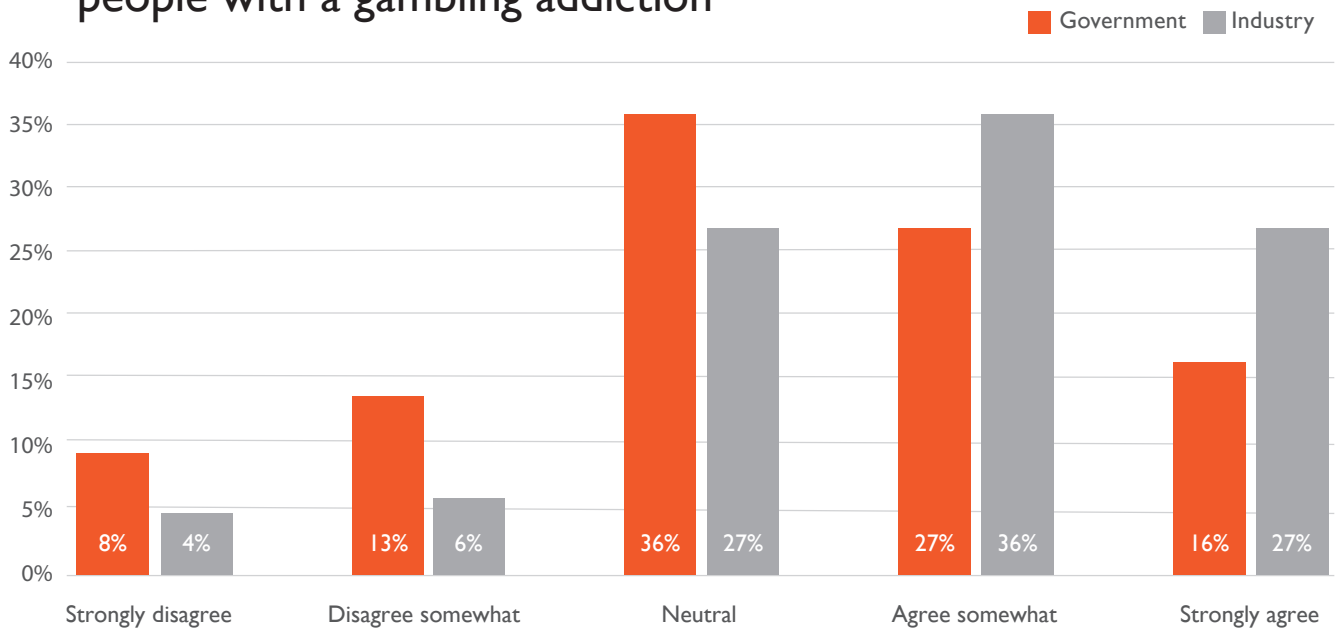


Figure 7D-2

### The government should do more to help people with a gambling addiction

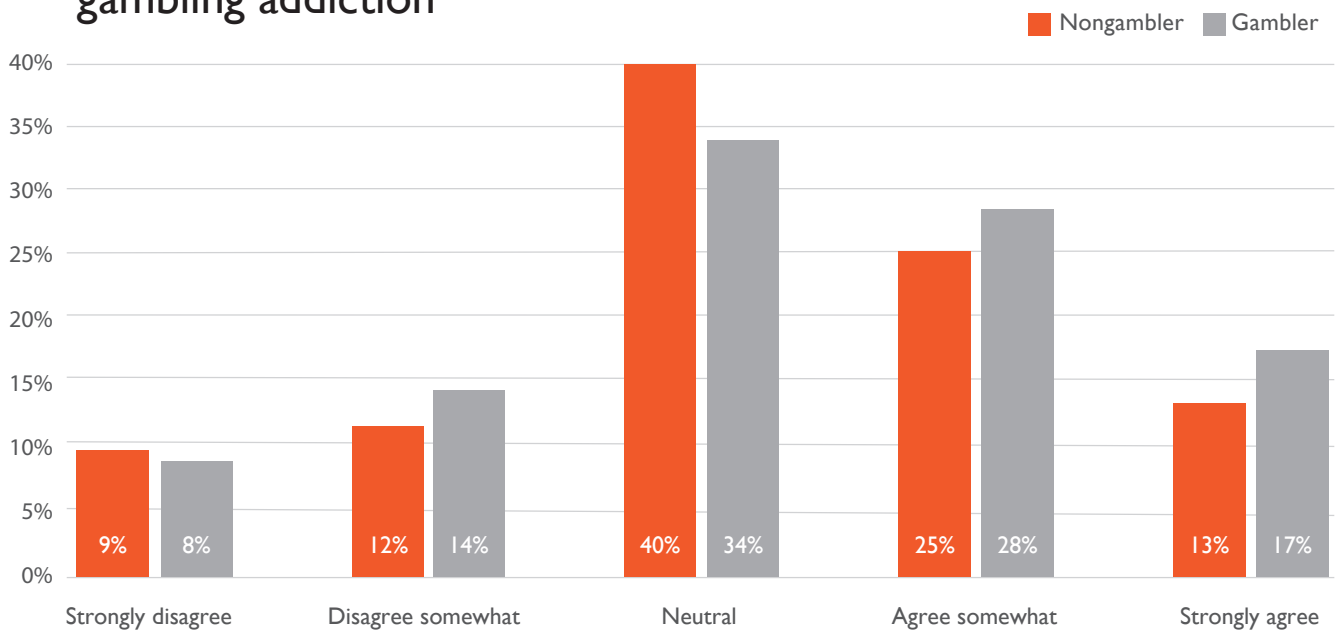


Figure 7D-3

The gambling industry should do more to help people with a gambling addiction.

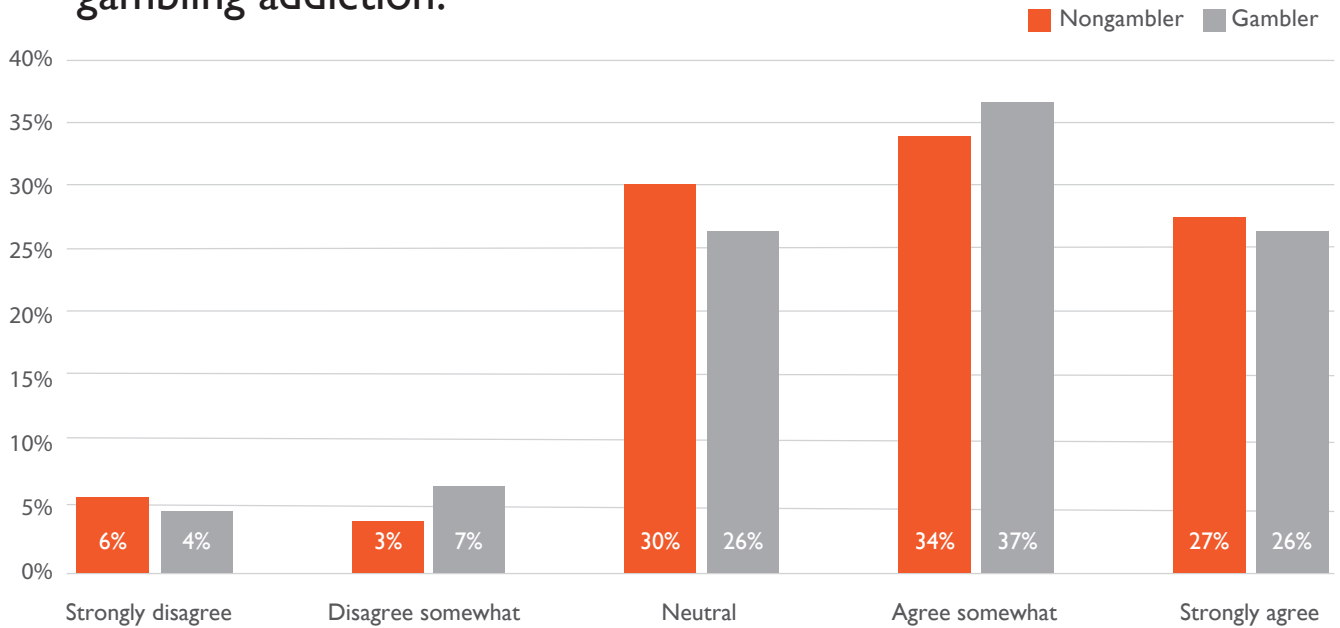


Figure 7D-4

Percentage agreeing that the gambling industry should do more to help people with a gambling addiction – by age

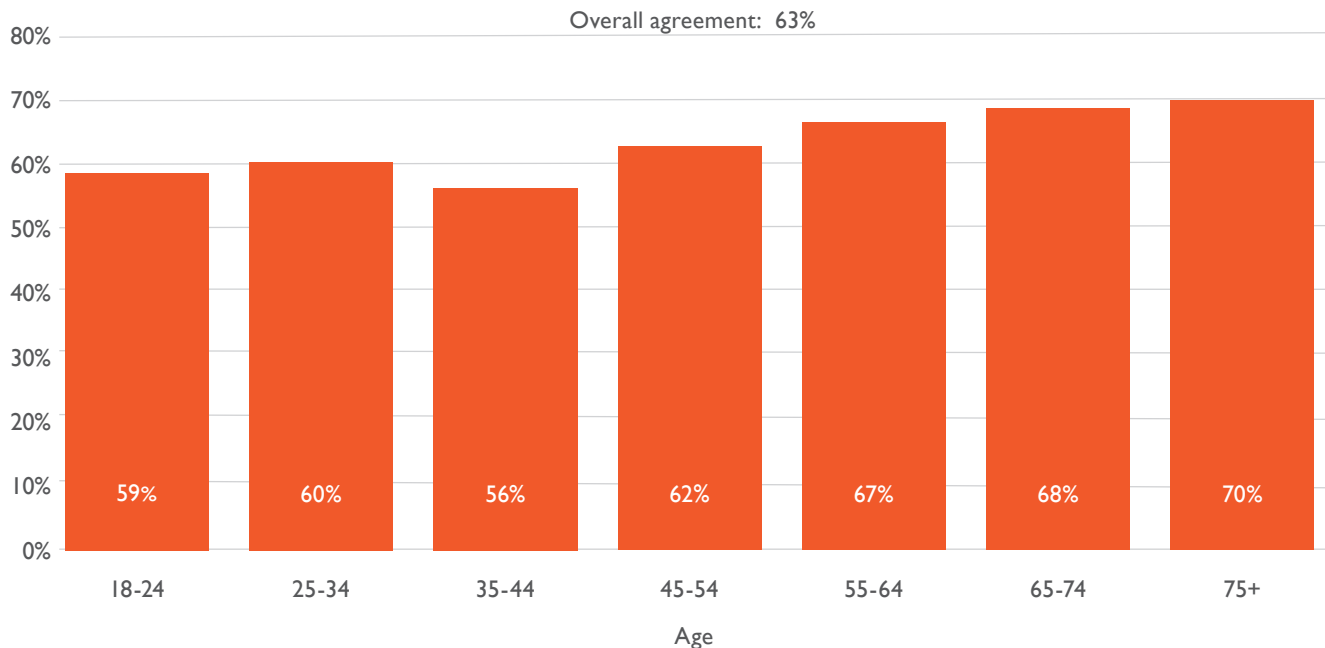


Figure 7D-5

### Percentage agreeing that the government should do more to help people with a gambling addiction – by age

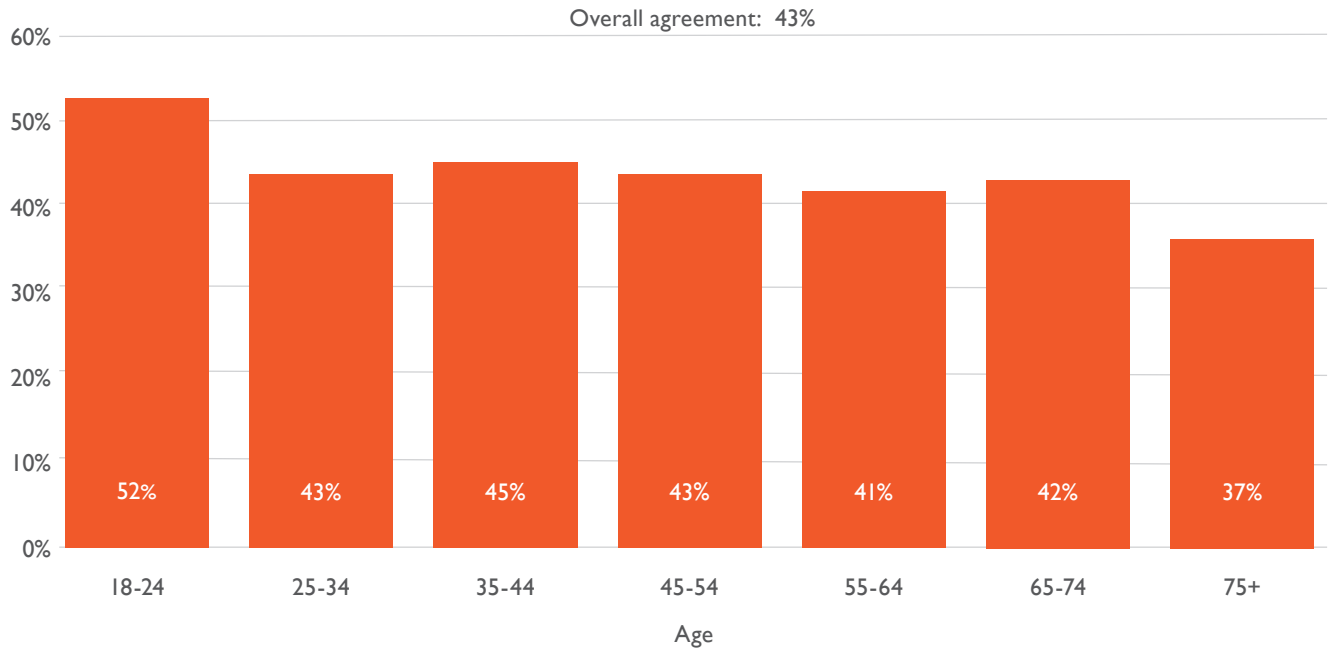


Figure 7D-6

### If your state was to legalize/has legalized sports betting, how important is it to require operators to implement responsible gambling measures?

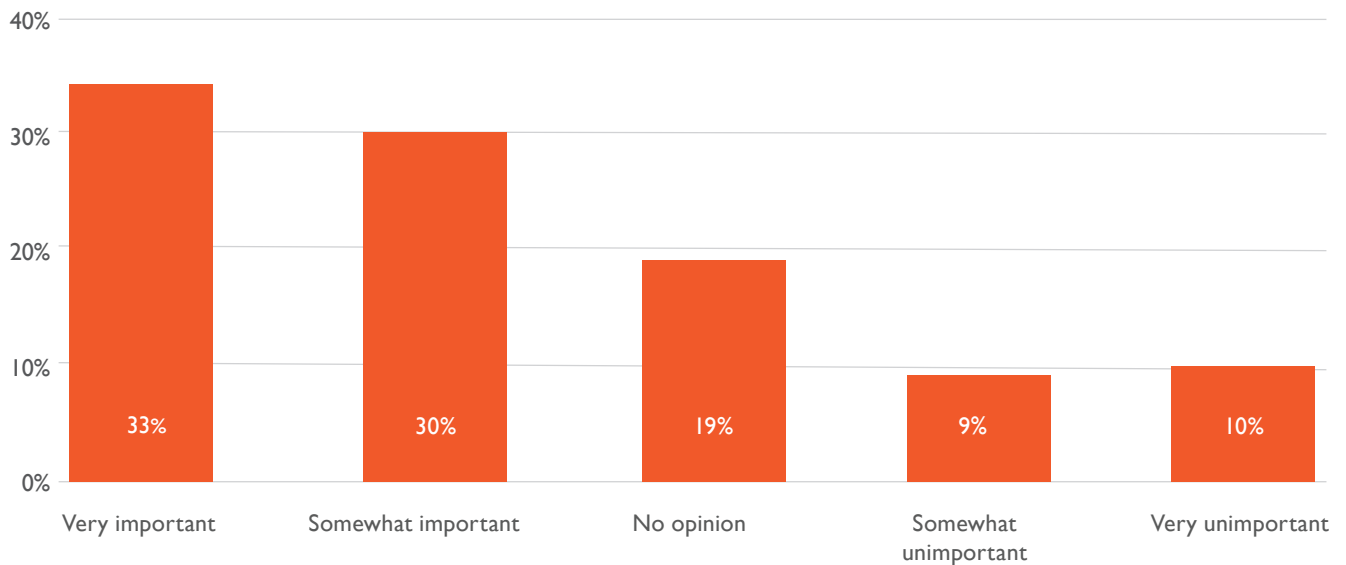


Figure 7D-7

If your state was to legalize/has legalized sports betting, how important is it to set aside revenues to treat people who develop gambling problems?

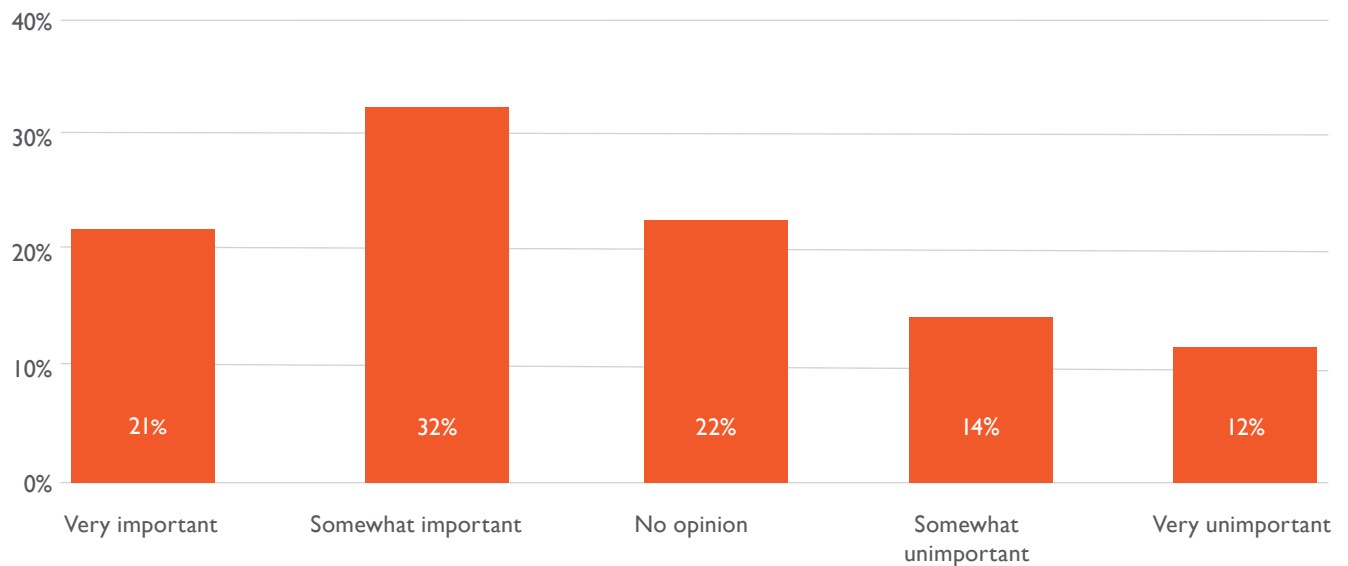


Figure 7D-8

If your state was to legalize/has legalized sports betting, how important is it to set aside revenues for public awareness campaigns?

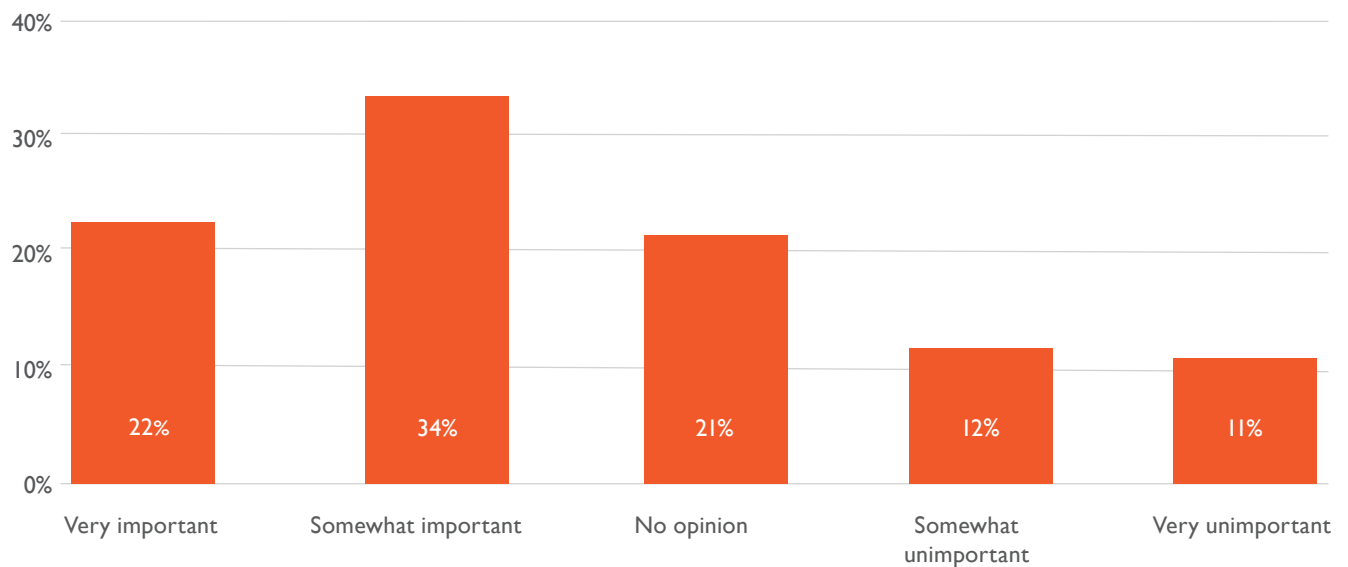


Figure 7E-1

### Segments – by age

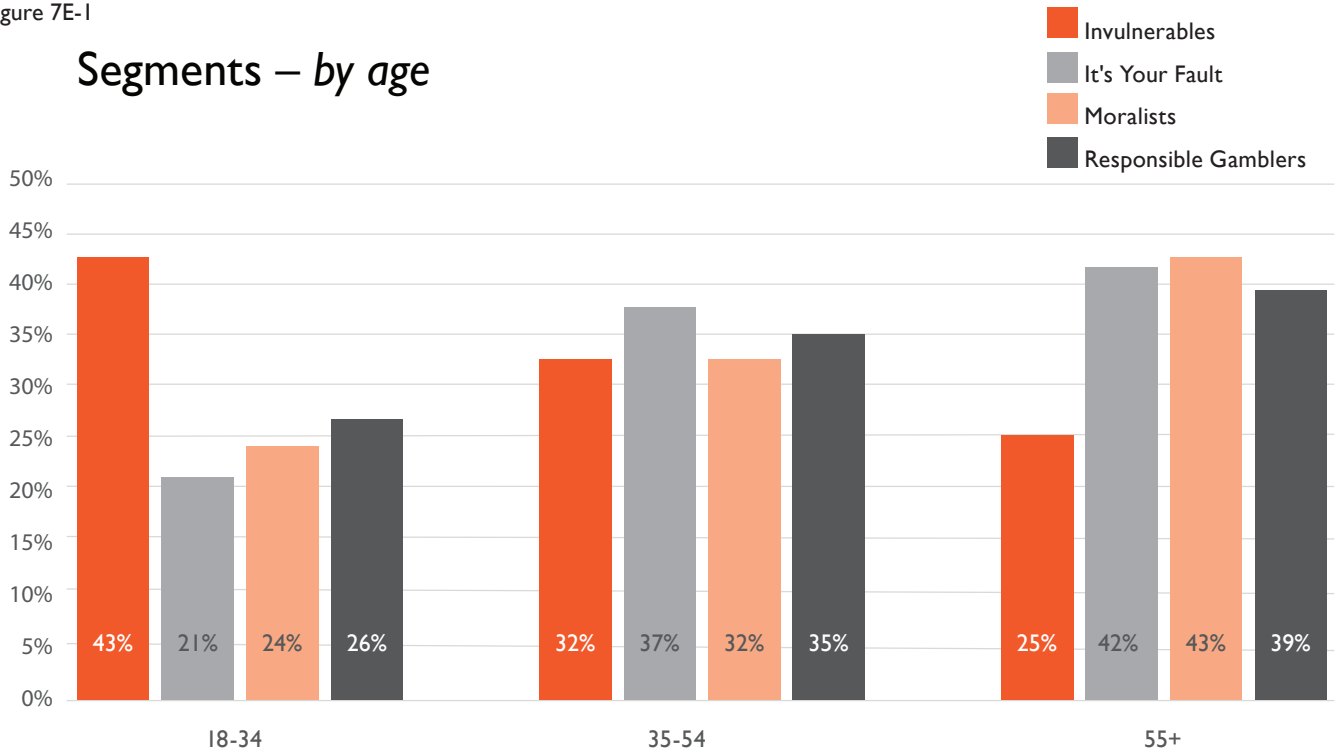


Figure 7E-2

### Segments – by gender

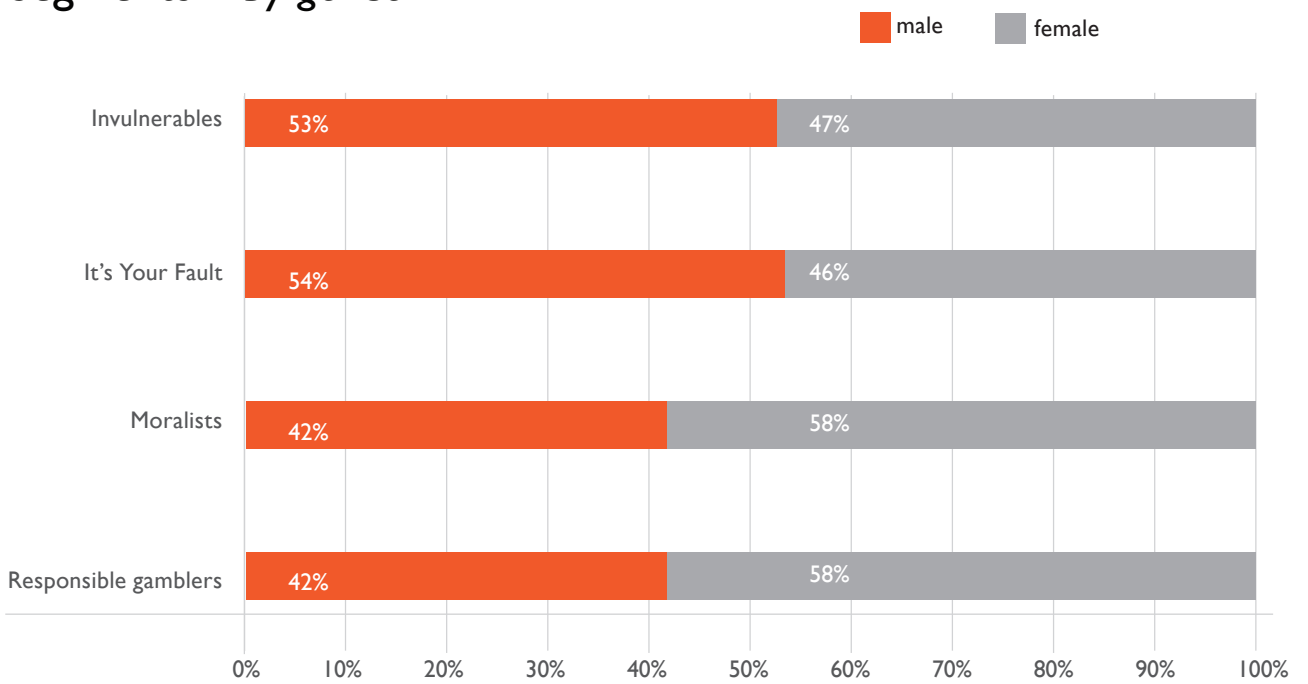


Figure 7E-3

### Segments – by race/ethnicity

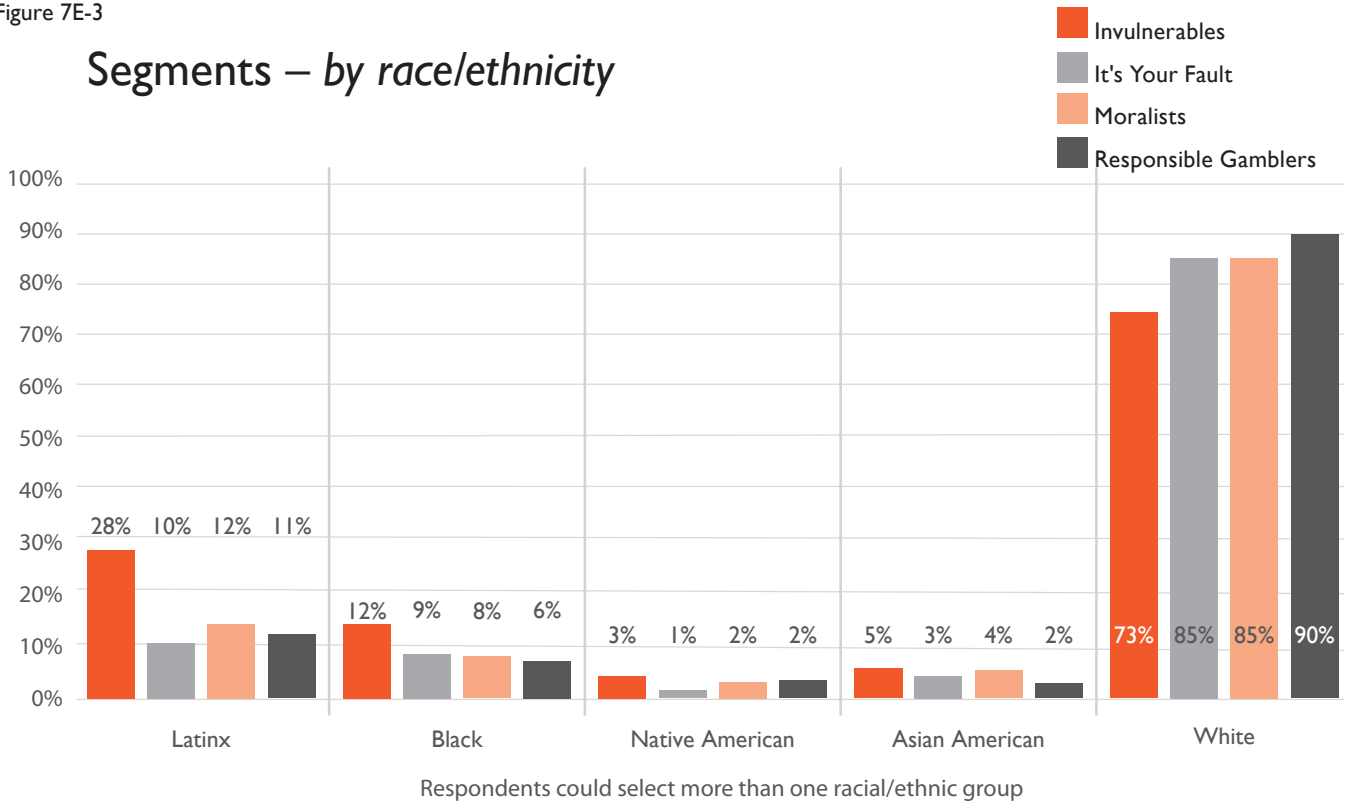


Figure 7E-4

### Segments – by educational attainment

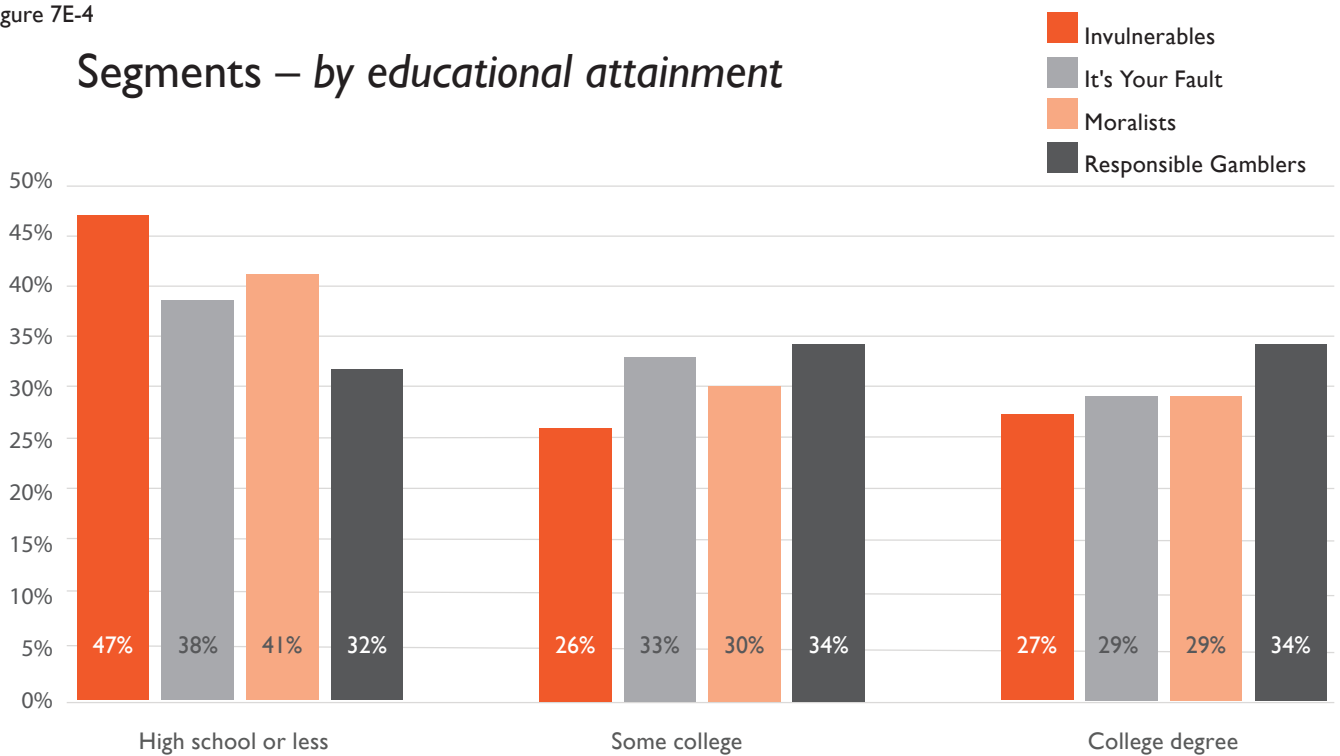


Figure 7E-5

### Segments – by household income

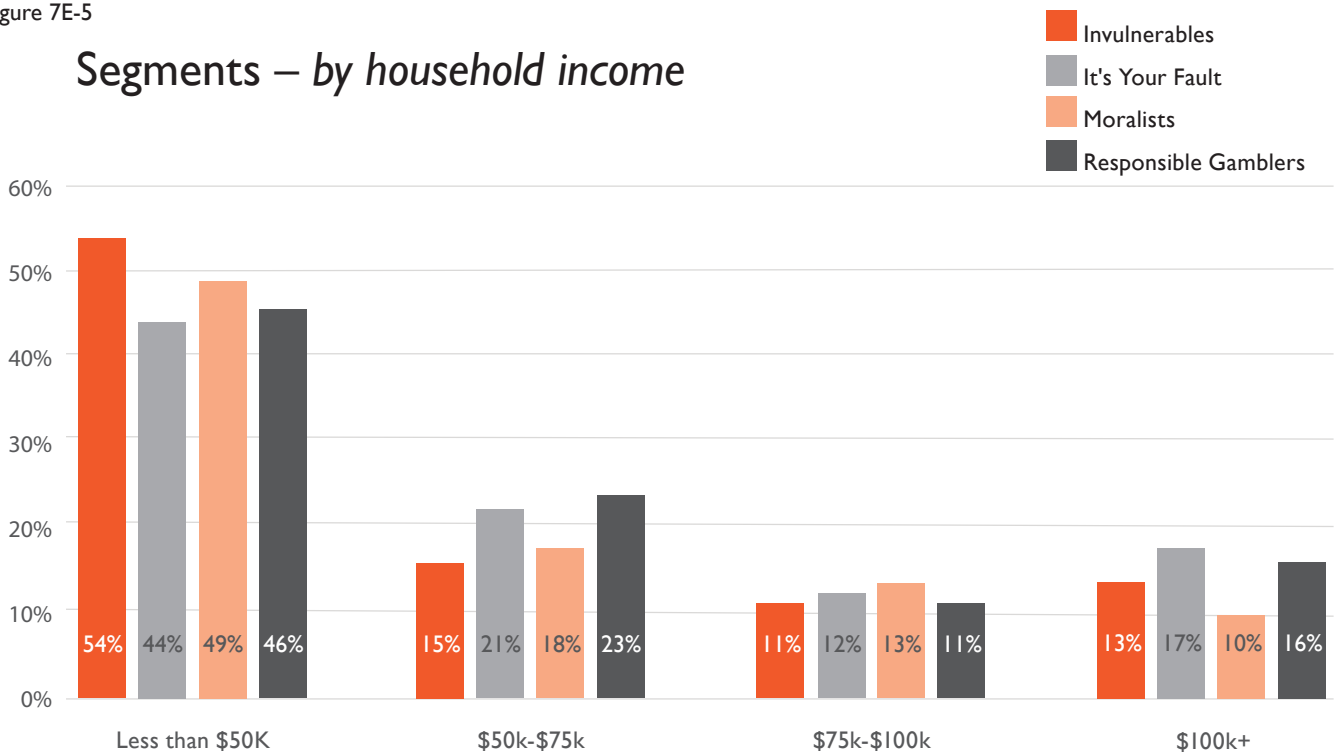


Figure 7E-6

### Segments – by annual gambling participation

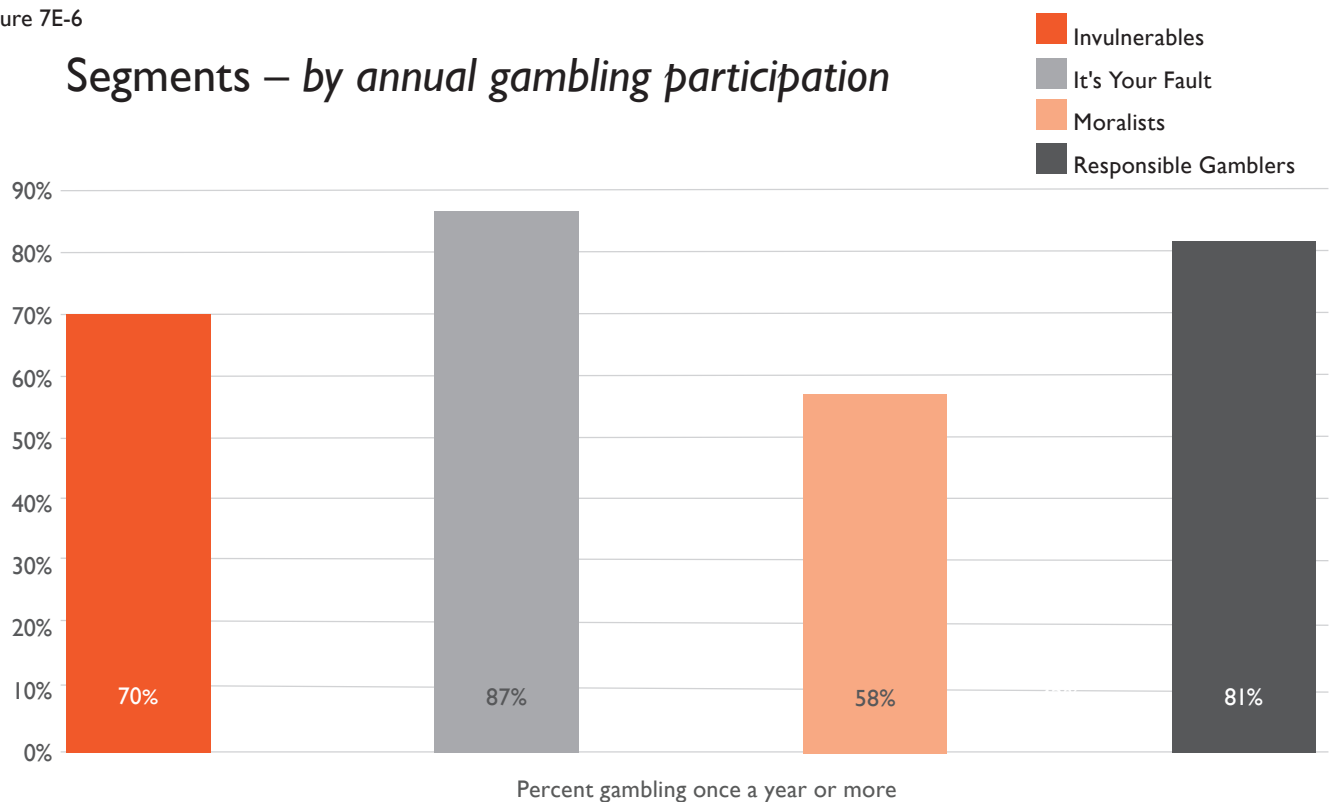




Figure 7E-7

### Segments – by monthly gambling participation



Figure 7E-8

### Segments – by weekly gambling participation

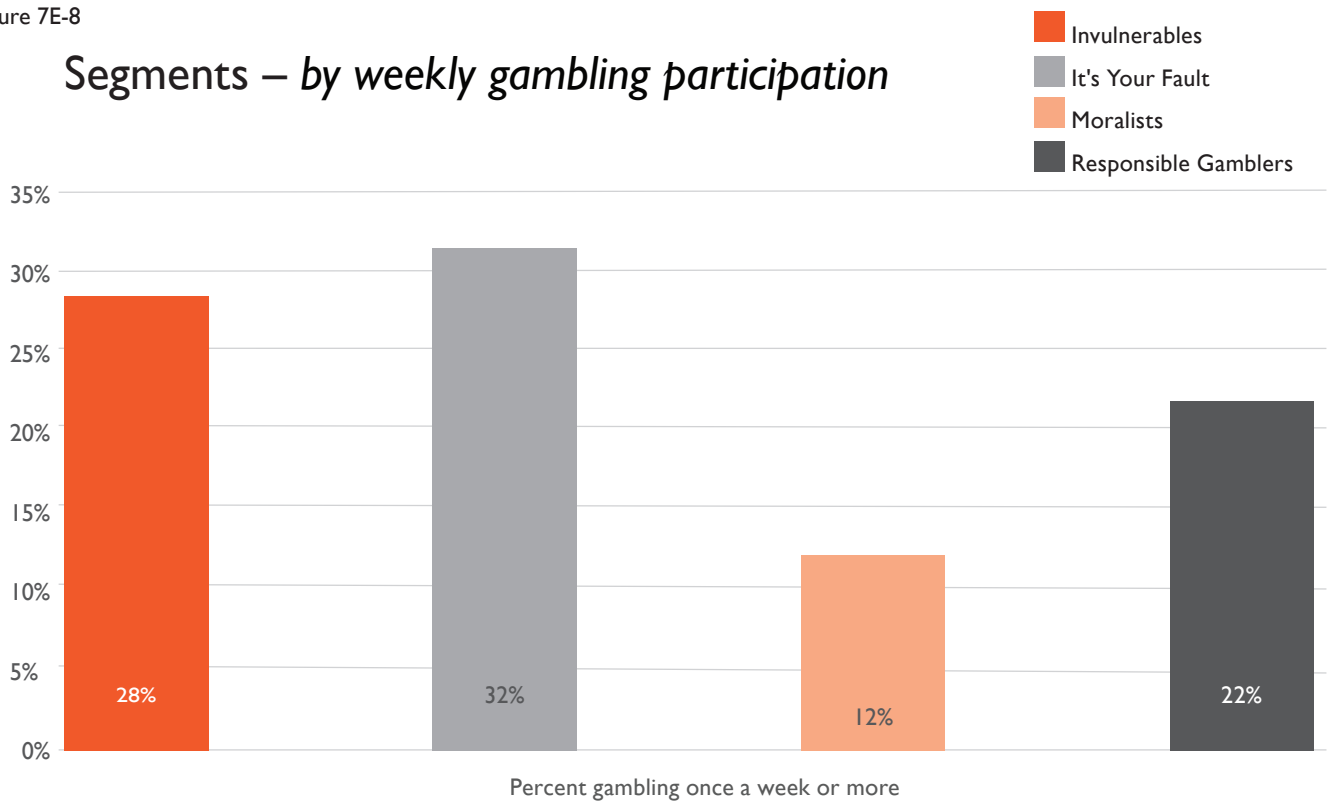


Figure 7E-9

### Segments – by median number of gambling activities (past year gamblers only)

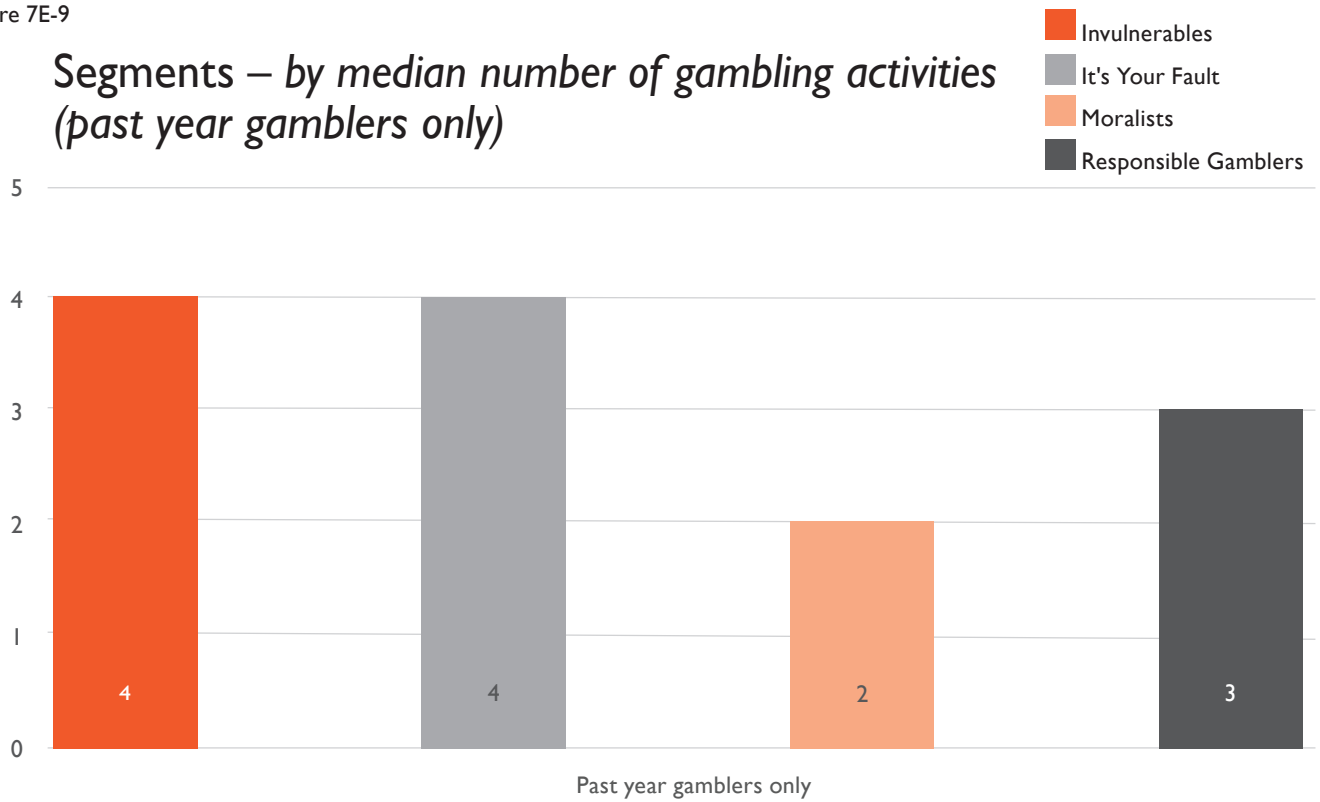


Figure 7E-10

### Segments – by annual gambling participation

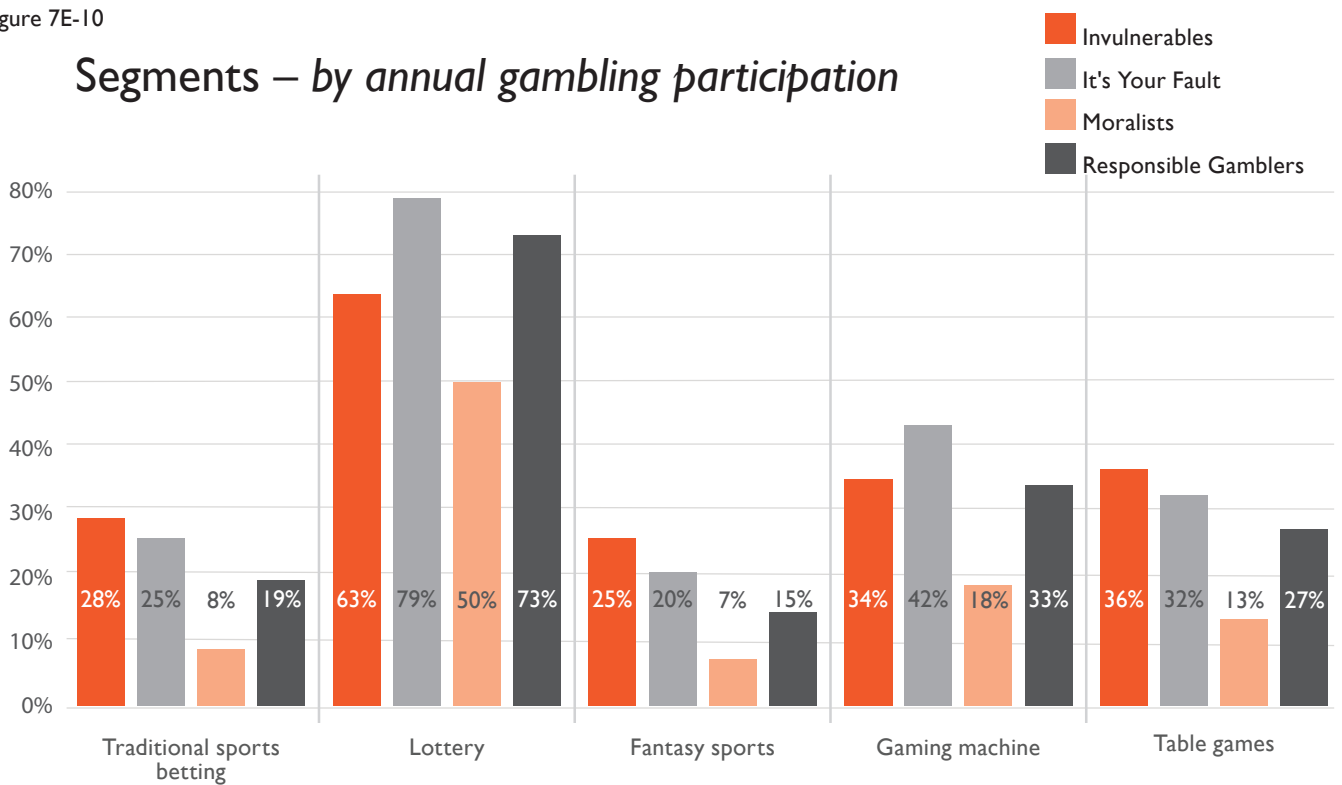


Figure 7E-11

### Segments – by selected positive play indicators

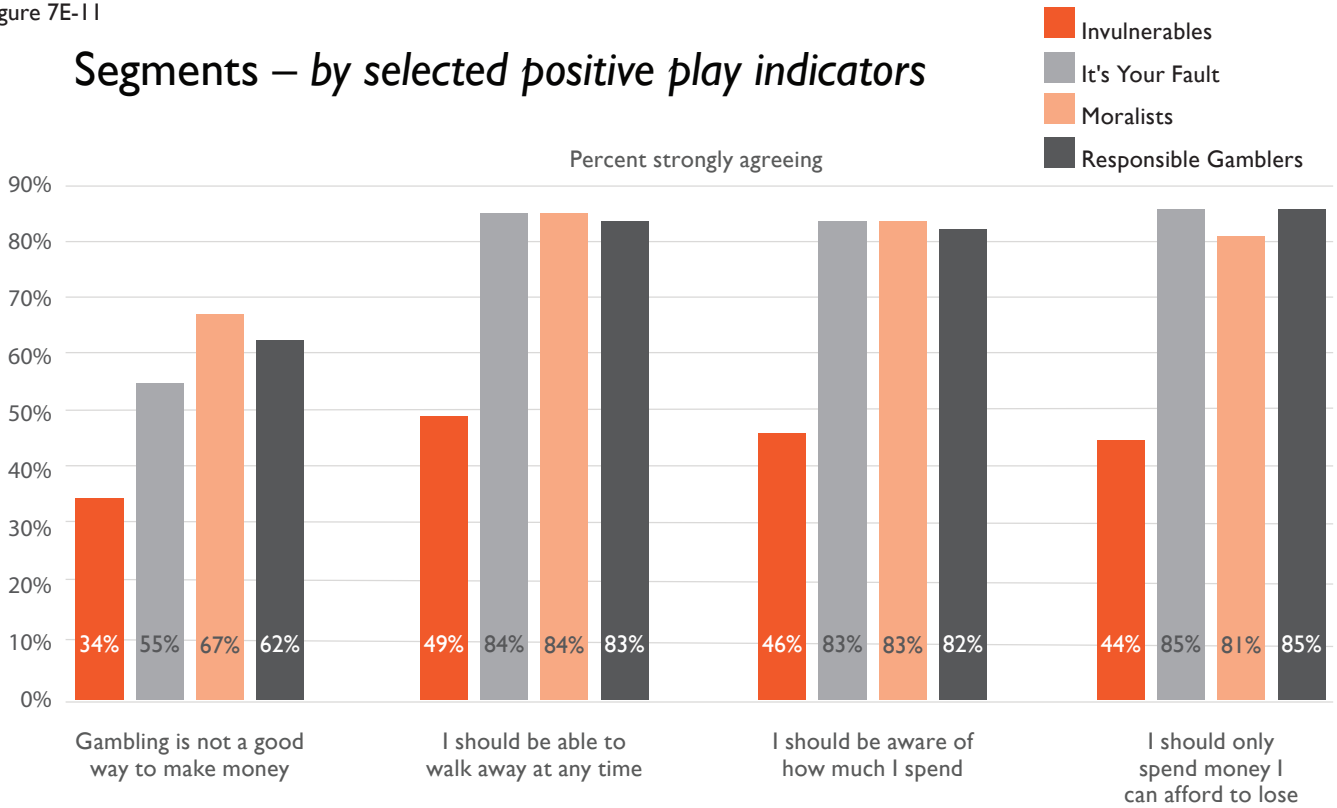


Figure 7E-12

### Segments – by selected problematic play indicators

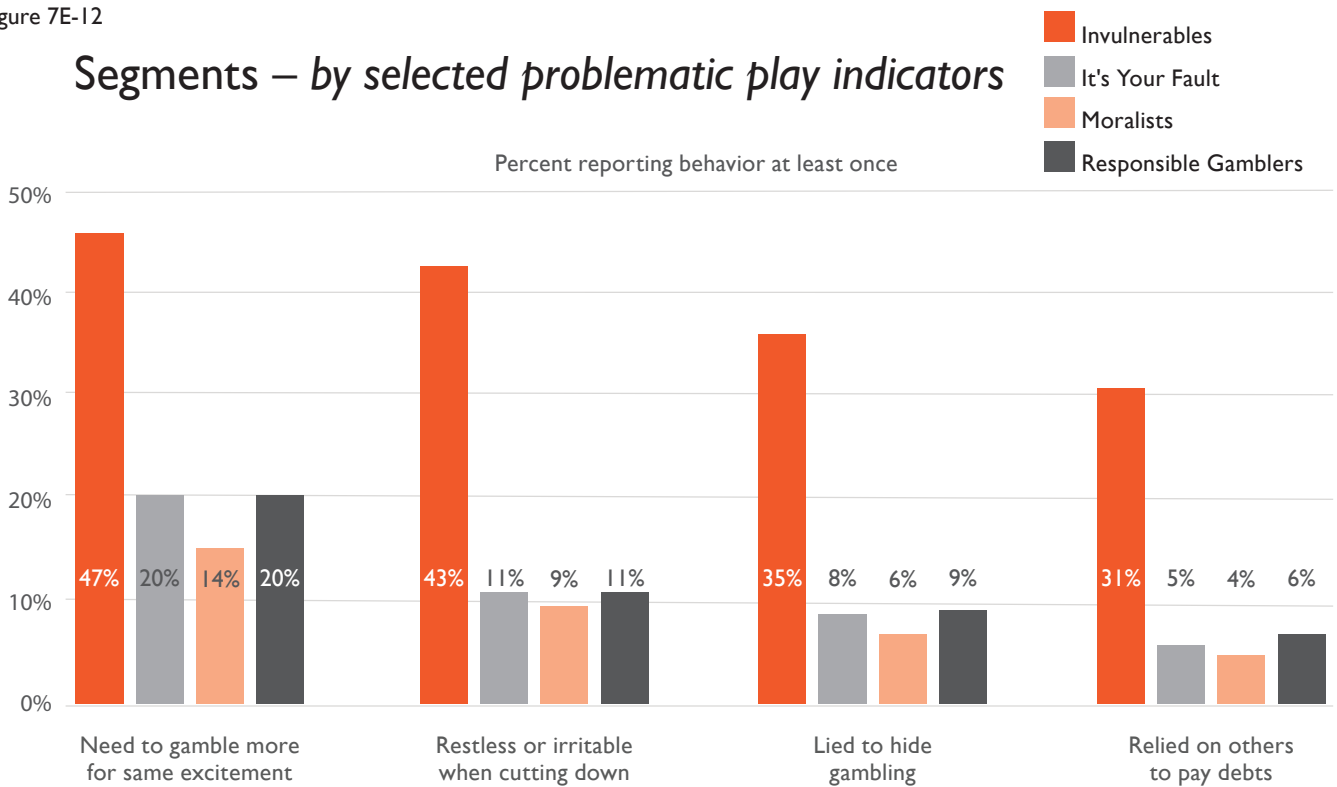


Figure 7E-13

### Segments – by morality and religion

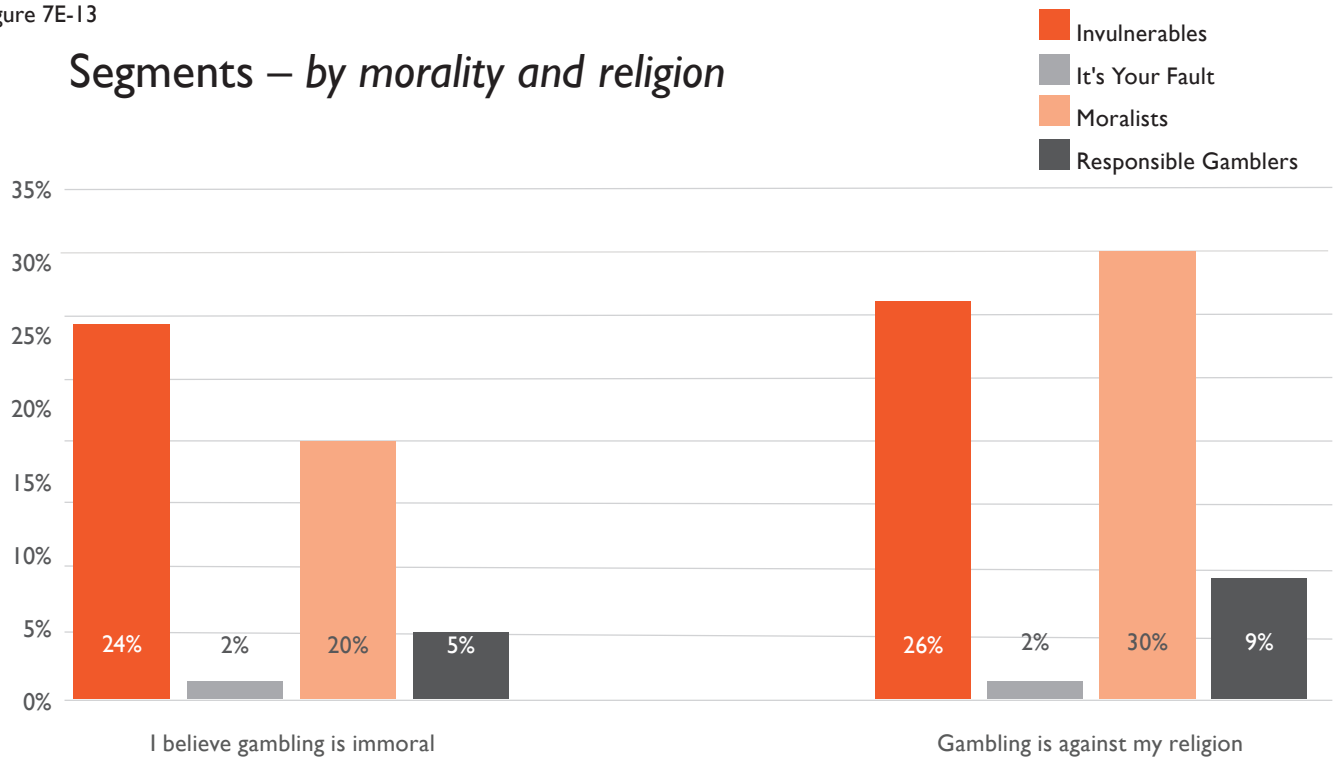


Figure 7E-14

### Segments – by help-seeking behaviors

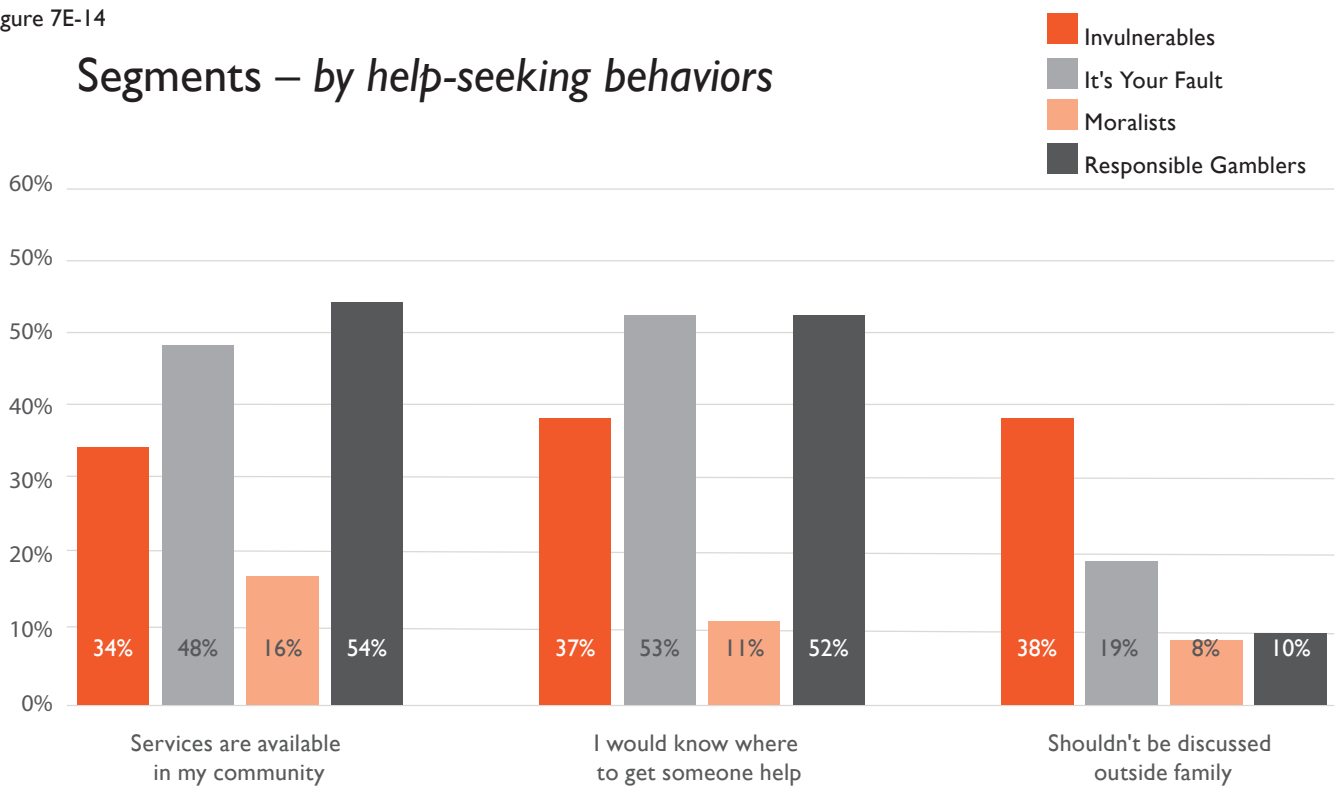


Figure 7E-15

Segments – by attitudes toward stigma

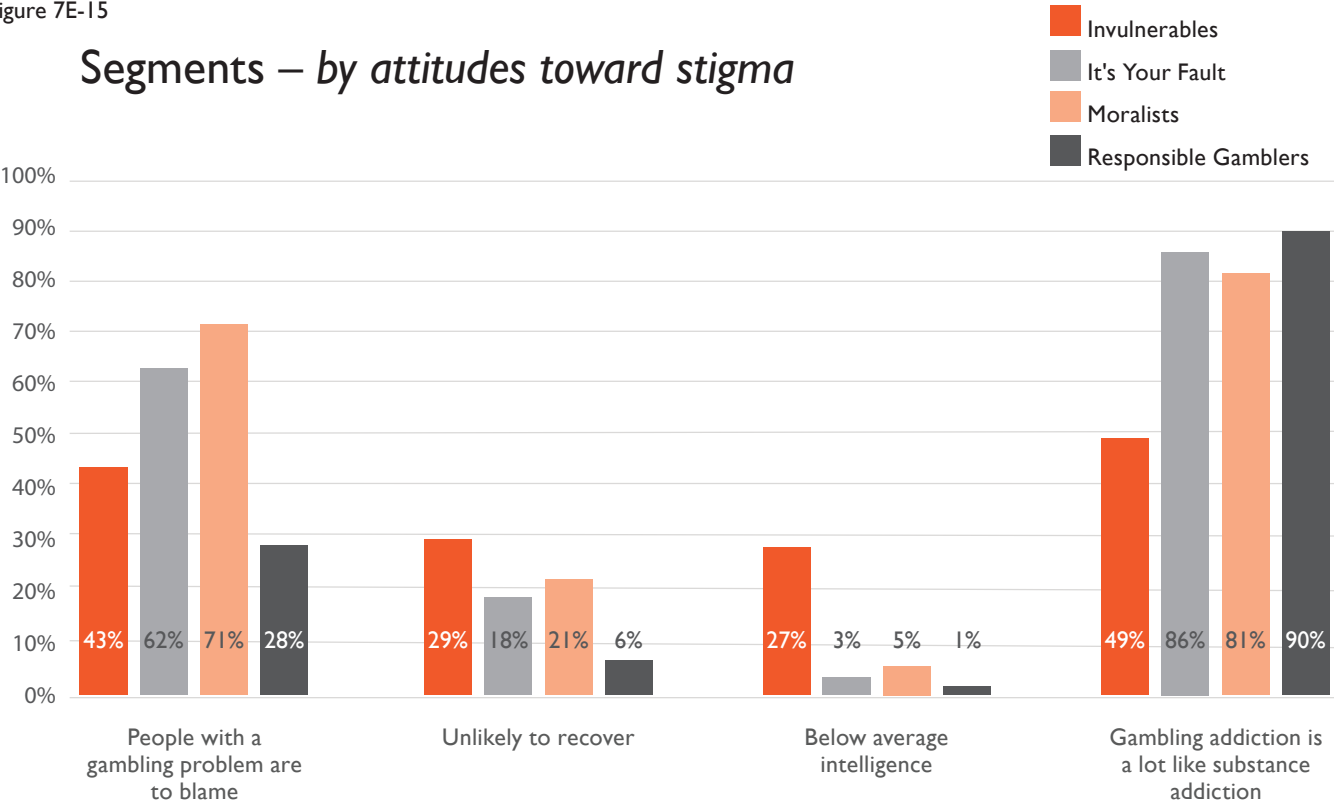


Figure 7E-16

Segments – by public policy

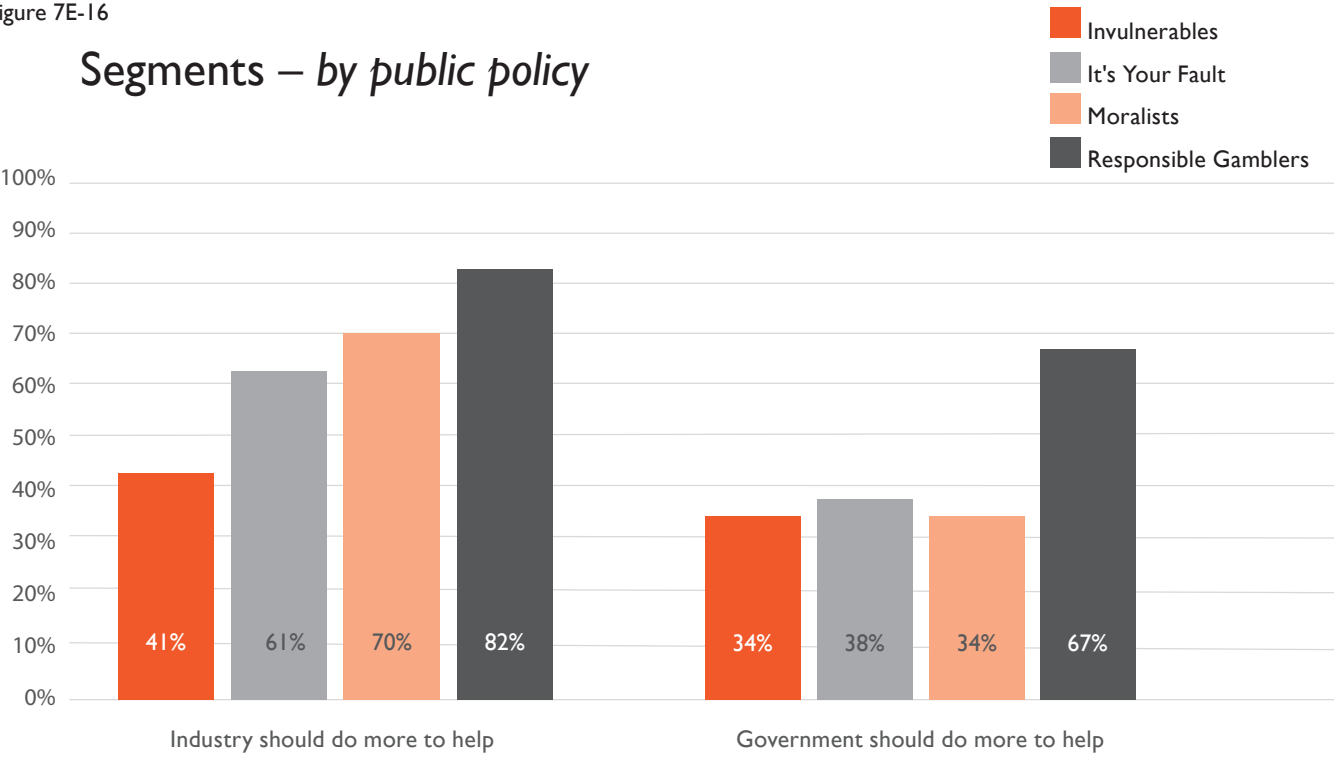


Figure 7E-17

**Segments – by selected public opinion indicators – cause of problem gambling**

