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April 11, 2019

To: **Amanda Beitel, Legislative Fiscal Office, and members of the Ways & Means Subcommittee on General Government**

Fr: **Barry Pack, director**

Re: **Follow-up information from Oregon State Lottery April 4, 2019 informational presentation**

This letter and attached materials provide additional information requested at the Joint Ways & Means Subcommittee on General Government informational meeting on Thursday, April 2, 2019. Please let us know if you have additional questions or want more information.

1. **Co-Chair Sen. Wagner asked about the demographics (income, education, etc.) of current Lottery players.**

   Although Lottery play is largely anonymous, Lottery survey data suggests that the demographics of Lottery game players are similar to the demographics of Oregonians generally in terms of age, income, education, etc. See enclosed reports for more information: "FY18 Tracking Study Report Player Demo Slides" and "FY 2018 Final Report: Behavior & Attitude Tracking Study, January 2019."

2. **Co-Chair Sen. Wagner asked whether problem gambling treatment funds can be used to treat the conditions that frequently co-occur in people dealing with problem gambling.**

   The Oregon Health Authority (OHA) administers funding for problem gambling treatment under ORS 413.522, which is a Lottery-funded account dedicated to "programs for the prevention and treatment of gambling addiction and other emotional and behavioral problems related to gambling." OHA can provide more information, but from Lottery's understanding, OHA has recognized that drug and alcohol dependence, other mental health diagnoses, and suicidal ideation frequently co-occur in people dealing with gambling behaviors and therefore OHA has developed best practices for their providers that include screening tools for multiple co-occurring disorders and training for clinicians in other program areas on identifying gambling disorder. This is an integrated model in which clinicians and services are capable of addressing multiple disorders simultaneously, without needing to enroll in other concurrent services. Additionally, most gambling clinicians are dually or triply credentialed in substance use and mental health counseling in addition to gambling counseling. This level of credentialing allows clinicians to work on multiple disorders with a client, and all can be funded through the Problem Gambling Treatment Fund under ORS 413.522. Lastly, OHA has developed billing codes to pay for treatment of co-occurring disorders within problem gambling, including higher rates for integrating treatment of multiple conditions.

That said, when specific substance abuse or mental health treatment is the primary need, private or public health insurance or other funding options are needed because the funds in the Problem Gambling Treatment Fund are a dedicated fund.

3. **Rep. Marsh expressed concern that increased gaming options on a mobile device may increase problem gambling behaviors. Have other states who have gone mobile seen an increase in problem gambling behavior?**

   The short answer is no, but data is limited. Data suggests that mobile and online gaming options do not, in and of themselves, cause problem gambling, but that the 24/7 availability may contribute to problem gambling behavior in the small percentage of the population who have gambling addiction. At the same time, mobile and online options increase the ability for responsible gaming providers to provide responsible gambling tools, education, and treatment resources to players.

   Given the possible risk to some Oregonians, Director Pack does not support high-velocity games like video lottery on personal mobile devices. Current plans for mobile and online offerings are limited to purchasing traditional Lottery products (like Scratch-Its and Powerball tickets) and placing wagers on sporting events.

4. **Rep. Marsh asked if other states who have increased gaming options on mobile devices have seen a negative impact on brick-and-mortar retail sales.**

   We have some evidence that Michigan's mobile purchase options for iLottery offerings (namely online draw game purchases and some digital instant ticket games) have not cannibalized sales from existing retail channels: "It is clear that retail channels have not been negatively affected since the launch of online sales. In fact, a better argument can be made in support of iLottery increasing overall player engagement and driving cross-channel sales." (source: Digital Gaming Group, 2016 - http://www.digitalgaminggroup.com/2016/12/03/the-ilottery-success-story-from-michigan/).

   With regard to sports betting, this is a little trickier due to the limited amount of time regulated wagering has been available outside of Nevada. The highest-level consideration could be made that national demographic trends around sports wagering point to a preponderance of players being younger, educated, affluent males – Not a demographic that is typically seen in dominant proportions as players of current lottery games (Sources: Nielsen Research, Washington Post-Umas-Lowell Sports poll, Gallup news poll). Recent tracking study results show that 12% of adult Oregonians placed a friendly wager on a sports event or placed a bet via a sports book – 77% of this 12% were considered Current Players of Oregon Lottery, implying that there is a group of Oregonians that are not currently customers but will potentially partake in any regulated sports wagering offered in the state and broaden the player base incrementally. Of course, we hope that not only will the expansion of our player base accompany sports wagering but that there will be a greater capture of entertainment wallet that is currently being spent outside of Oregon on sports wagering, legally or otherwise.

5. **Rep. Gomberg noticed that the responsible gaming options on the Oregon State Lottery mobile app are not as prominent as other features.**

   Director Pack has directed Lottery's digital team to ensure the "Play Responsibly" information and responsible gaming tools are prominent and attractive to users. Currently, the information is on the home pages of both the mobile app and Oregon Lottery website.

6. **Rep. Gomberg tested the "live chat" option on the Oregon Problem Gambling Resource website and did not get a response.**

   OHA explained that the helpline hours for texts are 8 am to 9 pm Monday through Friday for text and chat features and the direct phone line is operational 24/7. Operators take a break from 4 to 4:30 pm daily. When no operator is available during a break, it's possible a chat could be missed, but a plan is in place to review chat history when logging back in after a break to ensure no chats are missed in the future.

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BEHAVIOR & ATTITUDE TRACKING STUDY

JANUARY 2019

Methodology Overview

Methodology

20-minute tri-modal interview (Landline, Mobile, and Online)

Quota

n=2700 General Population

- 900 Landline Respondents
- 1100 Mobile Phone Respondents
- 700 Online Respondents

n=50 New Player Oversample

- 50 Online Respondents

- Changes to the survey methodology (specifically the addition of web surveys and a change to the question regarding prior Lottery play) have implications for trend analysis. Detailed information about these changes and their implications is available in the Appendix.
- Trends that may be due in part to methodological changes are called out in boxes like this one throughout the report.

Additional Qualifications

- Reside in Oregon
- Age 18+
- Gender, age, and region quotas set to reflect U.S. Census 2016 population estimates for Oregon

Interview Dates

- Telephone Gen Pop fielding: June 18, 2018 to July 25, 2018
- Online Gen Pop fielding: June 18, 2018 to July 22, 2018
- Online New Player Oversample fielding: July 24, 2018 to August 4, 2018

Analytical Notes

Two changes made to the FY18 study materially affected the analysis and reporting:

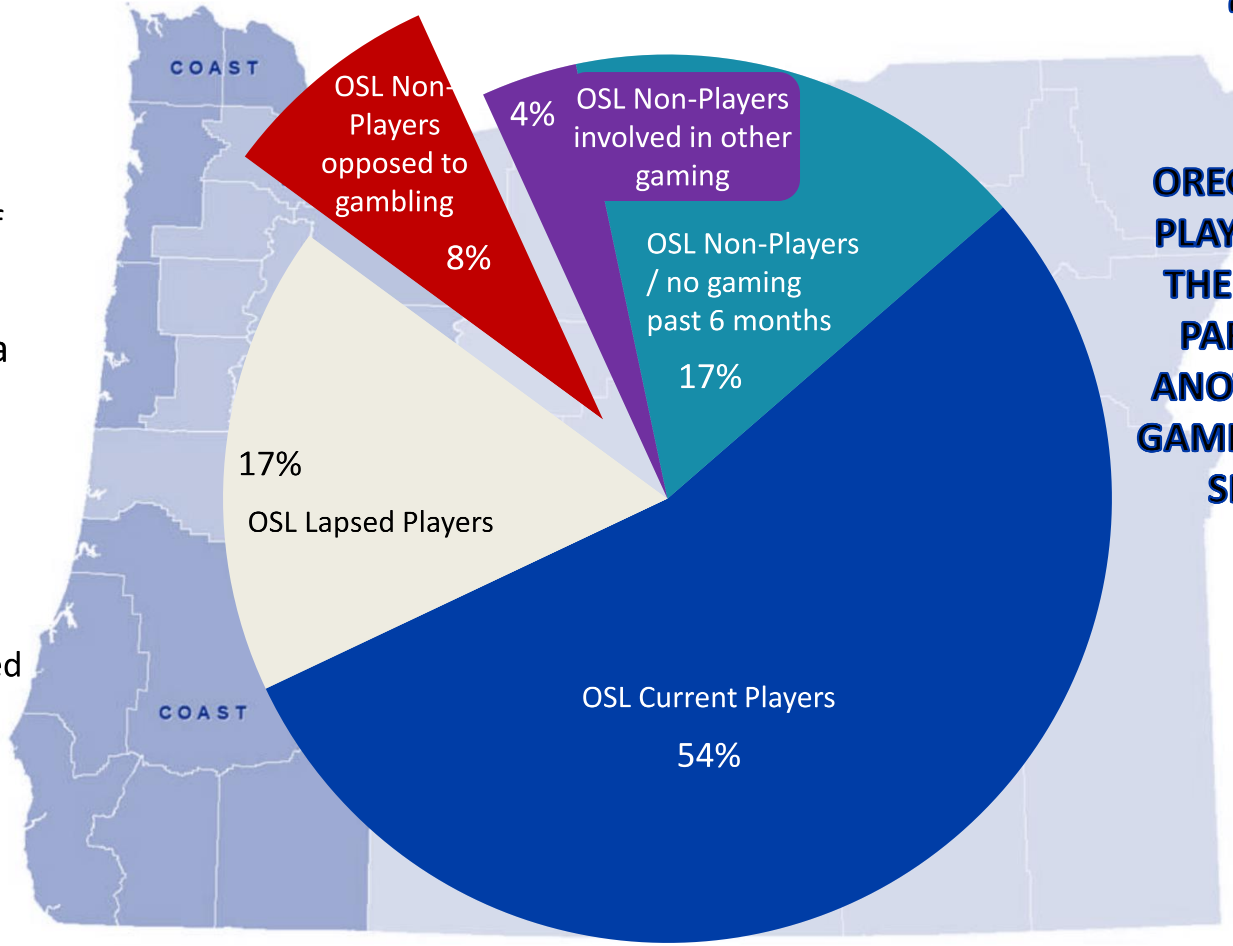
- The tracking study became an annual, rather than biannual survey. In years when two waves of the survey were conducted, results have been combined to allow comparisons based on fiscal year.
- Online responses were incorporated in addition to landline and cell phone. These three populations have distinct differences, but when analyzed as one group, the resulting demographic composition aligns more closely to Census data than any one of these populations independently.

Playership Definitions:

Current Player	Played any Oregon Lottery game within the past 12 months
Core Player *(subset of Current Player)*	Played any Oregon Lottery game within the past 12 months, and plays at least once per month
Regular Player *(subset of Current Player)*	Played any Oregon Lottery game within the past 12 months, and plays less often than once per month
New Player *(subset of Current Player)*	Started playing their first Oregon Lottery game within the past 12 months. New Players are included in the Core and Regular categories depending on frequency of play
Lapsed Player	Played one or more Oregon Lottery games, but not within the past 12 months
Non-Player	Never played an Oregon Lottery game

Lottery Landscape

- Just over half of adult Oregonians are Current Lottery Players.
  - This finding is consistent with Oregon Lottery and national trends that show year to year about half of adults 18 or older (49%) play Lottery.
- One in five Lapsed or Non-Players (21%) have a history of gaming either with the Lottery or in some other form.
  - In FY18, 9% of adult Oregonians who did not play Lottery games in the past year participated in other gaming activities in the six months prior to the survey. Five percent of these respondents are Lapsed Players and 4% are Non-Players.



75%

OF ADULT OREGONIANS HAVE PLAYED LOTTERY IN THE PAST AND/OR PARTICIPATED IN ANOTHER FORM OF GAMING IN THE PAST SIX MONTHS.

QP3. Have you ever played… ?
QP4. Have you personally played [INSERT GAME] in the past 12 months?
QAT5. Are you morally or philosophically opposed to gambling?
QNL8. In the past six months, have you participated in any of the following gambling activities?
Base: All respondents (n=2,700)

Demographic differences between Current Players and other segments are largely age-related. Players are more likely than Non-Players to be middle-aged, with slightly higher incomes, and children at home.

		Current Players (n=1,467)	Lapsed Players (n=462)	Non-Players (n=771)	New Players (n=123)
Gender Identity	Male	51%	46% ↓	49%	45%
	Female	48%	54% ↑	51%	55%
	Other	1%	0%	1%	0%
Age	18 to 24	9%	11%	15% ↑	31% ↑
	25 to 34	17%	17%	16%	22%
	35 to 54	38%	31% ↓	26% ↓	29% ↓
	55 to 64	15%	15%	12%	8% ↓
	65 or older	21%	26% ↑	31% ↑	10% ↓
	Average	*48*	*50*	*50*	*37*
Generation	Greatest/Silent	9%	12%	17% ↑	4%
	Baby Boomers	29%	33%	28%	18% ↓
	Generation X	29%	23% ↓	18% ↓	18% ↓
	Gen Y / Millennials	27%	25%	25%	37% ↑
	Gen Z / Digital Natives	5%	7%	11% ↑	24% ↑
	Unknown	1%	2%	2%	0%
Marital Status	Married	48%	45%	47%	38% ↓
	Single	24%	29% ↑	30% ↑	44% ↑
	Divorced/Separated	12%	9%	7% ↓	6% ↓
	Co-habitating	10%	7%	5% ↓	10%
	Widowed	6%	9% ↑	10% ↑	2%
Children Under 18 at home	Yes	31%	24% ↓	25% ↓	33%

		Current Players (n=1,467)	Lapsed Players (n=462)	Non-Players (n=771)	New Players (n=123)
Education	Some high school/less	3%	3%	4%	6%
	High school grad/GED	21%	18%	21%	24%
	Some college	44%	36% ↓	32% ↓	40%
	College graduate	20%	25% ↑	22%	17%
	Graduate degree	11%	17% ↑	20% ↑	13%
	Refused	1%	1%	1%	0%
*Employment Status**	Employed	56%	50% ↓	48% ↓	59%
	Retired	25%	29%	34% ↑	7% ↓
	Stay at home	7%	6%	6%	9%
	Unemployed	6%	8%	6%	9%
	Student	4%	4%	5%	13% ↑
	Other	5%	4%	3%	6%
	Refused	<1%	1%	1%	2%
Income	Under $25,000	13%	16%	17% ↑	23% ↑
	$25,000 - $50,000	22%	21%	22%	27%
	$50,000 - $75,000	16%	14%	13%	13%
	$75,000 - $100,000	13%	12%	9% ↓	12%
	$100,000 or More	20%	16%	16% ↓	15%
	Refused/Don't know	16%	21% ↑	24% ↑	11%
	Median**	*$59,000*	*$54,000*	*$50,000*	*$44,000*
Race/Ethnicity	Caucasian only	81%	85%	78%	79%
	Other	17%	13%	15%	20%
	Refused	2%	2%	4% ↑	1%

Note: ↑↓ statistically significant differences compared to Current Players at 95% confidence level

Base: All respondents. New Player demographics include New Player Oversample

* *Multiple response question*

** *"Refused / Don't know" responses excluded from calculation*

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Demographics: Census compared to Lottery Play Categories

Gender	Census*	All Respondents	Current Players	Lapsed Players	Non-Players
Male	49%	50%	51%	46%	49%
Female	51%	50%	48%	54%	51%
Other	N/A	<1%	1%	0%	1%
Age					
18 to 24	11%	11%	9%	11%	15%
25 to 34	18%	17%	17%	17%	16%
35 to 54	33%	34%	38%	31%	26%
55 or older	38%	39%	36%	41%	43%
Income					
Under $25,000	20%	15%	13%	16%	17%
$25,000 - $50,000	22%	22%	22%	21%	22%
$50,000 - $75,000	19%	15%	16%	14%	13%
$75,000 - $100,000	13%	12%	13%	12%	9%
$100,000 or more	26%	18%	20%	16%	16%
Median	*$60K*	*$57K*	*$59K*	*$54K*	*$50K*
Refused / Don't Know	n/a	19%	16%	21%	24%
Education					
Some high school or less	10%	4%	3%	3%	4%
High school	24%	20%	21%	18%	21%
Some college or technical school	35%	29%	44%	36%	32%
College graduate	20%	29%	20%	25%	22%
Graduate degree	11%	15%	11%	17%	20%
Refused	n/a	1%	1%	1%	1%

Region	Census*	All Respondents	Current Players	Lapsed Players	Non-Players
Portland	44%	45%	44%	44%	44%
Valley	27%	25%	28%	28%	25%
East	13%	12%	16%	14%	13%
Coast	16%	17%	13%	15%	19%
Hispanic					
Yes	11%	8%	5%	3%	8%
Ethnicity					
Caucasian or white	91%	86%	87%	89%	81%
African American or black	3%	5%	3%	2%	3%
Asian American or Pacific Islander	6%	3%	4%	4%	4%
Native American	3%	5%	6%	3%	3%
Other	n/a	4%	2%	1%	2%
Refused	n/a	1%	2%	2%	4%

Base: Total Respondents FY18 (n=2700), Current Players (n=1467), Lapsed Players (n=462), Non-Players (n=771)
** Source: 2017 American Community Survey – 1 Year Estimates (Oregon population age 18 or older)*
Note: Ethnicity is a multiple response question

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BEHAVIOR & ATTITUDE TRACKING STUDY

JANUARY 2019

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Research Objectives

<u>Objectives</u>

The Oregon Lottery® has conducted the Bi-Annual Behavior and Attitude Tracking Study with Oregonians since 2000. The primary objectives of the research are to measure and track:

- Awareness of Oregon Lottery games
- The incidence of Lottery game play among adult Oregonians overall and by game

The FY18 survey was designed to:

- Monitor trends in game awareness and play behavior (e.g., current play, frequency of play, cross-play, etc.)
- Track changes in the demographic characteristics of Current, Lapsed and Non-Players
- Understand attitudes toward Lottery play and gaming generally (e.g., psychographics)
- Understand non-Lottery gaming and gaming activity
- Gauge interest in playing Lottery games online

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Methodology Overview

Methodology	20-minute tri-modal interview (Landline, Mobile, and Online)
Quota	n=2700 General Population • 900 Landline Respondents • 1100 Mobile Phone Respondents • 700 Online Respondents n=50 New Player Oversample • 50 Online Respondents
Additional Qualifications	• Reside in Oregon • Age 18+ • Gender, age, and region quotas set to reflect U.S. Census 2016 population estimates for Oregon
Interview Dates	• Telephone Gen Pop fielding: June 18, 2018 to July 25, 2018 • Online Gen Pop fielding: June 18, 2018 to July 22, 2018 • Online New Player Oversample fielding: July 24, 2018 to August 4, 2018
Analytical Notes	Two changes made to the FY18 study materially affected the analysis and reporting: • The tracking study became an annual, rather than biannual survey. In years when two waves of the survey were conducted, results have been combined to allow comparisons based on fiscal year. • Online responses were incorporated in addition to landline and cell phone. These three populations have distinct differences, but when analyzed as one group, the resulting demographic composition aligns more closely to Census data than any one of these populations independently.

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Executive Summary

Lottery Landscape

- Just over half of adult Oregonians are Current Lottery Players.
  - This finding is consistent with Oregon Lottery and national trends that show year to year about half of adults 18 or older (49%) play Lottery.
- One in five Lapsed or Non-Players (21%) have a history of gaming either with the Lottery or in some other form.
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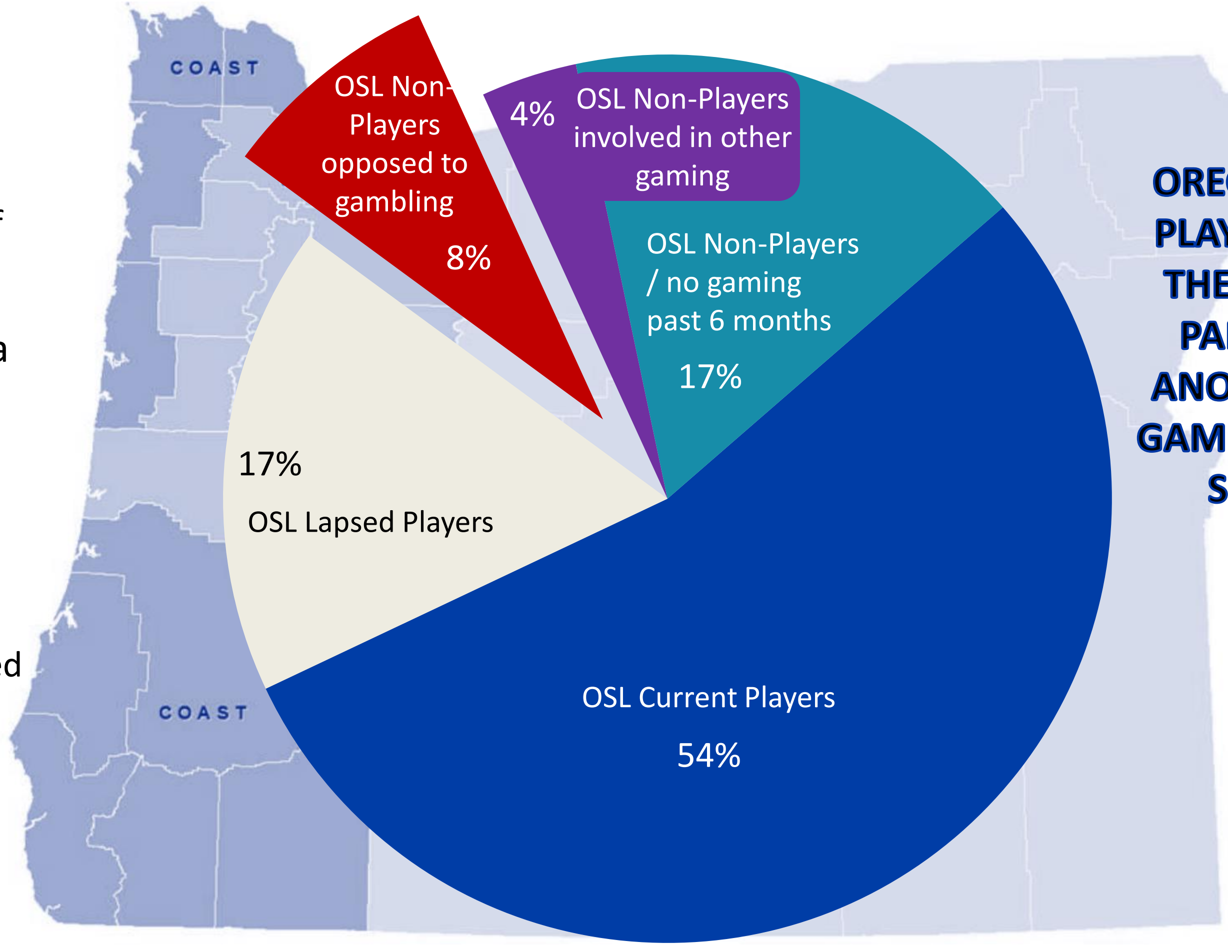

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QNL8. In the past six months, have you participated in any of the following gambling activities?
Base: All respondents (n=2,700)

Summary

Playership Trends

- Lottery playership and the demographics of players are consistent with national trends and track with the strong economy and with Oregon Lottery sales– as discretionary income becomes more available, Lottery play increases.
  - All of the core games in the Traditional product portfolio experienced significant playership increases compared to FY17. However, the five-year trend for each game is relatively flat. Playership spikes for Traditional Lottery games are correlated with large draw game jackpots. Lottery data shows draw game sales begin to climb rapidly starting at about $375 million. Powerball and Mega Millions both experienced jackpots greater than $400M in FY18.
  - Video Lottery play reached its highest level since at least 2010 (16%). Increases in Video Lottery play were influenced by a strong economy, completing the conversion to G2S which allowed new games to be launched quickly, and continued strategic VLT placement based on retailer performance.
- Lottery's current games portfolio continues to attract New Players at a rate of 2% to 4% of adult Oregonians per year. New Players most often say they are motivated to start playing draw games because they want to win a big prize. They most commonly report playing Scratch-its and Video Lottery "because it looks like fun." More than half of these New Players play less often than once a month.
- Lapsed players stop playing Lottery games primarily because they don't have enough winning experiences, they lose interest, or they cannot afford to play. Fewer than one percent stop playing because the games are confusing or difficult to understand. Many Lapsed players have not played Lottery for at least five years. When they did play, they most often played Scratch-its or Powerball.
- Cross-play among the three jackpot games (Powerball, Megabucks, and Mega Millions) and with Scratch-its continues to be strong. Current Players play 3 Lottery games on average.

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Summary

The FY18 Tracking Study reconfirms what we have known for some time:

- FY18 Current Players are equally divided by gender, are 48 years old on average, are predominantly Caucasian, employed and have a median income of $56,000. The demographic profile of Current Players has not changed significantly in several years.
  - New Players tend to be younger than Current players (average age is 37). They are more likely than other players to be single, have lower incomes, are more likely to be students, and less likely to be retired.
  - Demographic differences between Non-Players and Current Players are largely related to age. Players are more likely than Lapsed and Non-Players to be middle-ages, have slightly higher incomes, and have children at home.
- Current Players are more aware of Lottery games than Lapsed or Non-Players. Current Players are 2-3 times more likely than Lapsed/Non-Players to mention individual Lottery games.

New Learnings from the FY18 Tracking Study include:

- Lottery play is highest in the three generations in the “career years” (Gen X, Millennials and Baby Boomers) and shows some signs of growing in Gen Z.
  - Scratch-its is the preferred game among Gen Z and Millennial respondents. Gen X members are equally drawn to Scratch-its and Powerball. Baby Boomers and the Greatest/Silent generations prefer draw games.
- A preference for skill-based games is the strongest differentiator between Current and Non-players. These segments share similar preferences across most other play drivers.
- More than one-third of Current Scratch-its Players (35%) buy most of their tickets during the winter holidays. About half of these Players report gifting the majority of their tickets compared to just 8% of those that buy Scratch-its year-round.

Summary

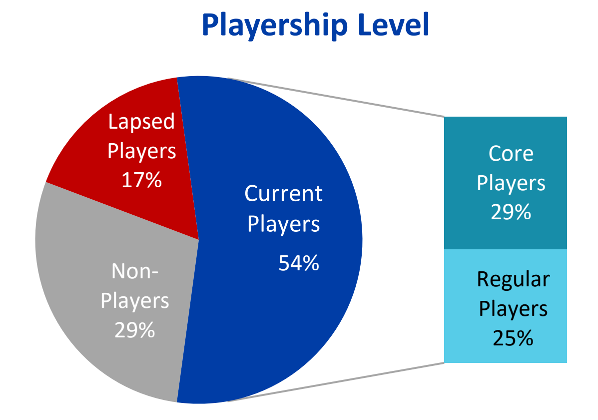
- Slightly more than half of all Video Lottery players spend $20 or less per play session.
- Nearly four in ten adult Oregonians (37%) participated in some form of non-Lottery gambling in the past six months. Current Lottery players are two to three times as likely as Lapsed and Non-Players to report participating in non-Lottery gaming activities.
  - One in four adult Oregonians reported gambling at a casino in the past six months – 83% of these are Current Lottery Players.
    - Among all casino gamblers, slots is the most popular game. Those who prefer skill-based games are significantly more likely than those who prefer games based on luck to play table games and live poker.
  - 12% of adult Oregonians bet on sports in a friendly/social wager and/or through a sports book (77% of these are Current Lottery Players).
    - Sports Bettors are more likely than the average Lottery Player to have a higher median income, be male, and college-educated. More than one in three Sports Bettors is younger than 35.
    - Sports Bettors prefer skill-based games over games based on luck, and are more likely than average to prefer a competitive gaming environment.
- Approximately one in three adult Oregonians (32%) expressed interest in playing games using a mobile device if Lottery were to offer a completely digital play experience. Eight in ten of these respondents are Current Lottery players.
  - Interest in specific games was highest for digital versions of games Lottery already offers (jackpot games, Scratch-its, Video Slots and Video Poker). Ten percent of adult Oregonians are interested in using a mobile device to bet on REAL sports and 6% expressed interest in betting on VIRTUAL sports.

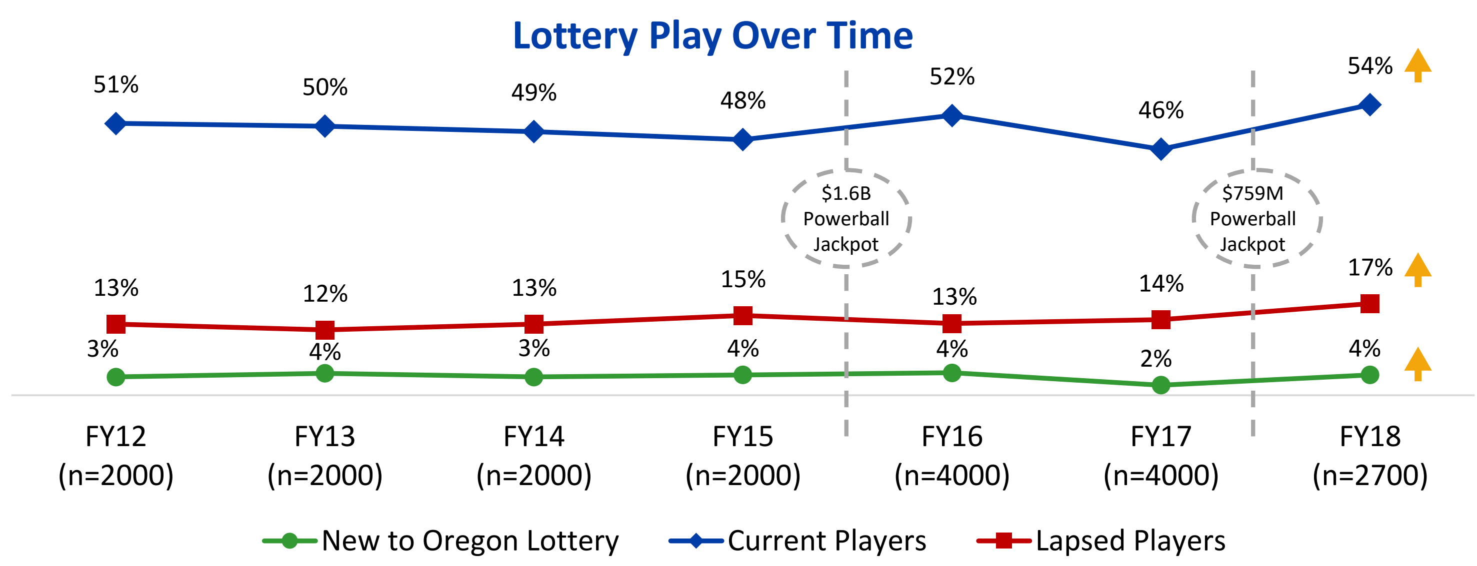
Detailed Findings

Playership Trends

Playership increased significantly between FY17 and FY18. Trend data is consistent year over year with roughly half of adult Oregonians playing Lottery games.

- In FY18 just over half of adult Oregonians were Current Lottery players (54%); a significant increase over FY17.
  - This finding is consistent with national trends. A 2017 Gallup poll found 49% of U.S. adults reported buying Lottery tickets.[1] Additionally, Bureau of Economic Analysis data shows that personal expenditures on gambling have increased steadily since the recession ended in 2009.[2]
  - Lottery research and analyses have found the strongest contributors to increased sales between FY17 and FY18 are a strong economy and larger draw game jackpots.
- Sharper increases in the percentage of Current Players correspond with major jackpots (Powerball jackpots of $1.6B in January 2016 and $759M in August 2017).





- The addition of online responses to the FY18 survey likely explains some of the increase in Current Players. A comparison of FY18 phone responses to FY17 survey data shows a smaller, but still significant change in Current Players from FY17 to FY18 (from 46% to 52%).
- The change in the percentage of Lapsed Players may be partially due to a change in survey design. Before FY18, respondents were asked one general question about prior play of Lottery games. In FY18 respondents were asked about prior play of each game.

[1] https://money.cnn.com/2018/01/06/news/powerball-mega-millions-who-buys/index.html
2 https://fred.stlouisfed.org/series/DGAMRC1A027NBEA
QP3. Have you ever played… ? (Base: All respondents)
QP4. Have you personally played [INSERT GAME] in the past 12 months?
QP6. On average, how often would you say you play [INSERT GAME]?
Base: All respondents.

Note: ▲▼ show significant increases or decreases since the last wave at 95% confidence.

Lottery play is highest in the three generations in their “career” years: Gen X, Millennials and Baby Boomers

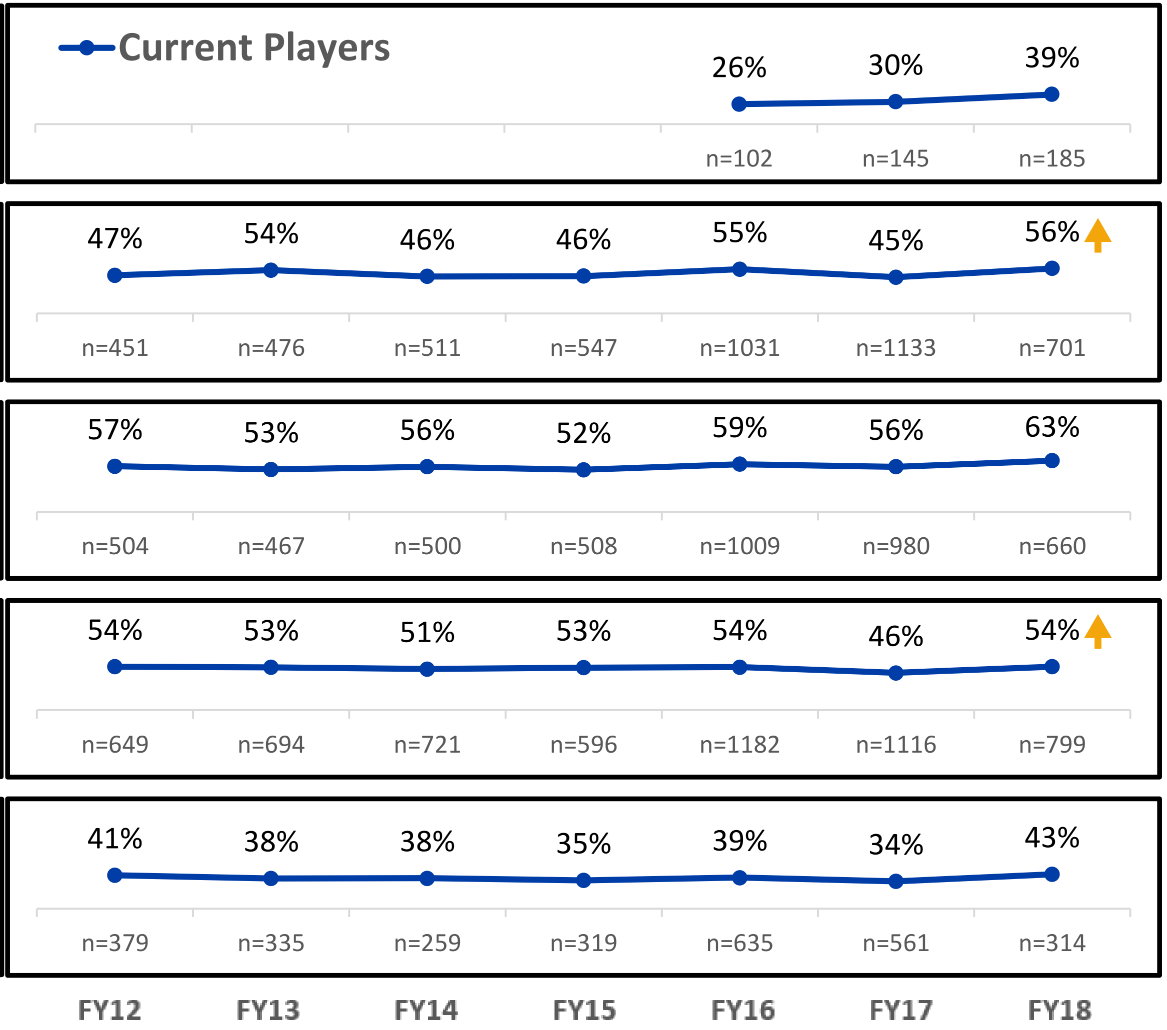
Gen Z
1997-

Millennials
1981-1996

Gen X
1965-1980

Baby Boomers
1946-1964

Greatest/ Silent
Before 1946



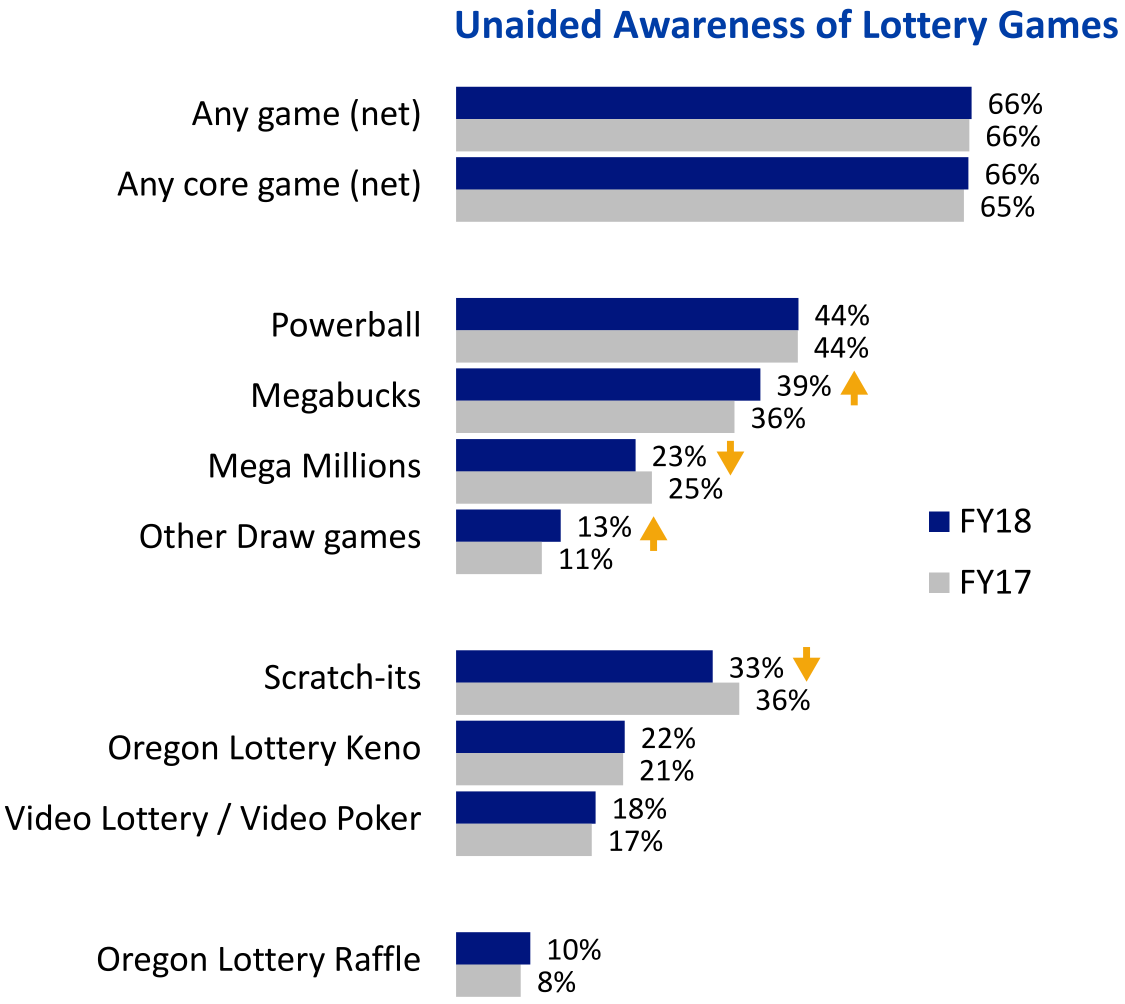
- Millennial Lottery play is as high or higher than observed in preceding generations.
- It will be interesting to see if Gen Z playership continues trending upward as more of this generation comes of age.

Note: ↑↓ show significant increases or decreases since the last fiscal year at 95% confidence.
QD4. In what year were you born? Generations defined by PEW Research Center http://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/

QP4. When was the last time you personally played [INSERT GAME]? Was it…
Base: All respondents (n=2700).

Game Awareness

Unaided mentions of Lottery games were mostly stable from FY17 to FY18. Current Players are much more likely than Lapsed and Non-Players to mention individual Lottery games.



- Top-of-mind awareness for Lottery games (any game and core games) held steady from FY17 to FY18.
  - Unaided mentions of draw games is consistent with Lottery sales data. Historically, Mega Millions sales have been about one-half of Powerball sales even when jackpot sizes were comparable.
- Game recall is highest among Current players (mention 2.91 games on average) and lowest among Non-Players (mention 0.84 games on average).
- Unaided mentions of individual Lottery games is much higher among Current players than Lapsed/Non-Players:
  - Powerball (56% vs. 29% Lapsed/Non-Players)
  - Scratch-its (44% vs. 21% Lapsed/Non-Players)
  - Megabucks (53% vs. 22% Lapsed/Non-Players)
  - Mega Millions (33% vs. 11% Lapsed/Non-Players)
  - Video Lottery (25% vs. 9% Lapsed/Non-Players)

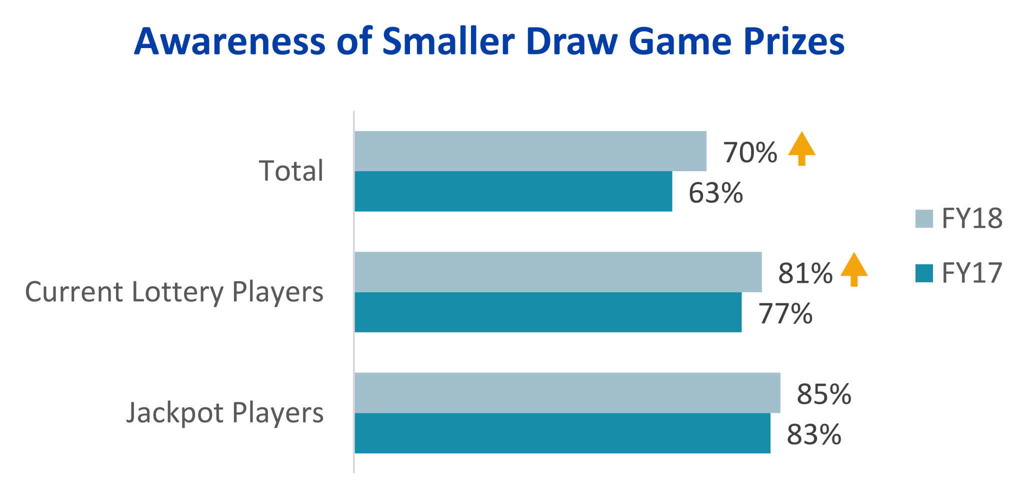
Note: ↑↓ show significant increases or decreases since the last fiscal year at 95% confidence.

QP1. Which Oregon Lottery games, if any, are you aware of?

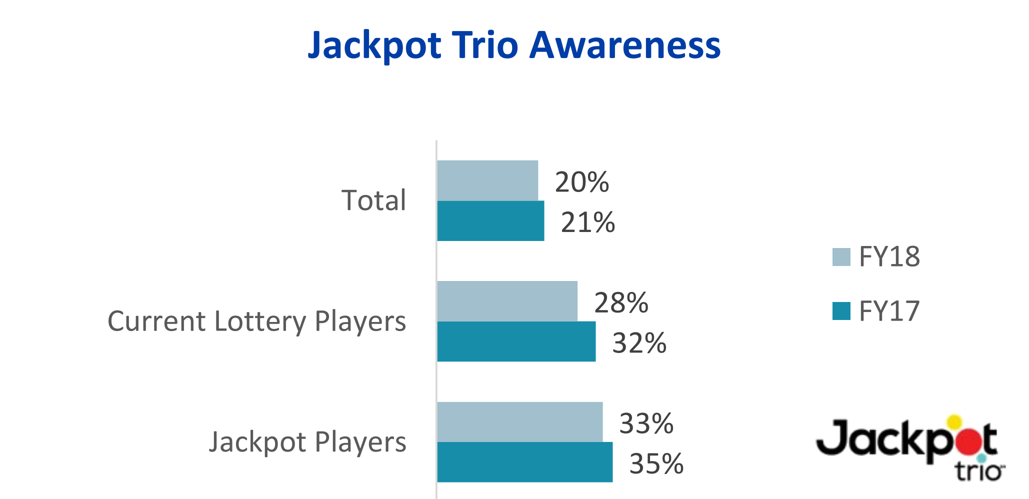
Base: All respondents FY17 n=4000, FY18 n=2700

Awareness that jackpot games offer smaller prizes in addition to the grand prize is relatively high and growing. Awareness of Jackpot Trio is fairly low and unchanged from FY17.

- Awareness of smaller draw game prizes for Powerball and Mega Millions increased significantly from 63% in FY17 to 70% this year.



- Overall awareness of Jackpot Trio is consistent with last year.
  - Jackpot game players continue to have greater awareness of Trio than Current players generally or adult Oregonians overall.
  - Year over year Trio sales increased (+19%) while awareness among Jackpot game players was relatively stable.
  - Lottery has not done any significant marketing/messaging about Trio in the past year.



Note: show significant increases or decreases since the last fiscal year at 95% confidence.

QDG1. Were you aware before taking this survey that Powerball and Mega Millions offer prizes ranging from $1 to as much as $1,000,000 as well as the jackpot prize?

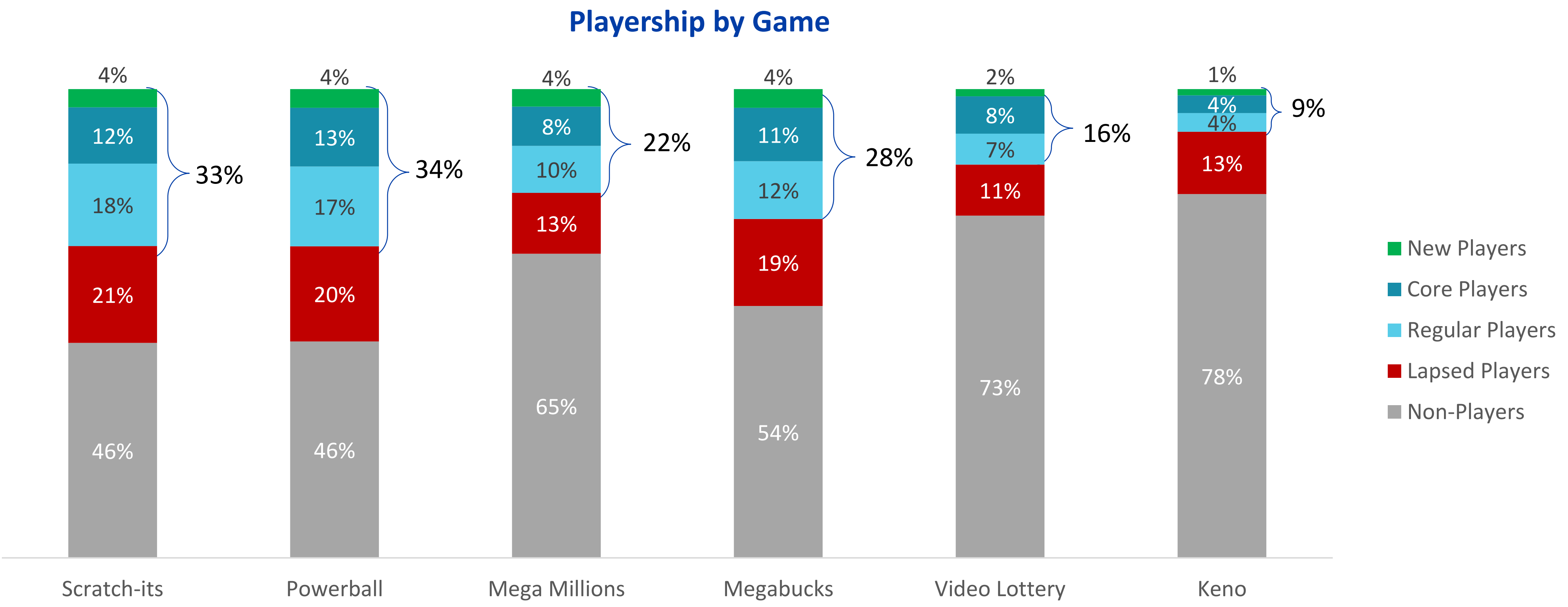
QDG2. Have you ever heard of Oregon Lottery's Jackpot Trio? When you buy a Jackpot Trio for $5, you get a ticket for Powerball, one for Mega Millions and one for Megabucks in a single purchase. Have you heard of Jackpot Trio before today?

Base: All respondents (FY17 n=4000, FY18 n=2700), Current Players (FY17 n=1838, FY18 n=1467), Jackpot Game Players (FY17 n=1334, FY18 n=1108)

Individual Lottery Game Play

Powerball and Scratch-its continue to be the most popular games among Current Lottery players.

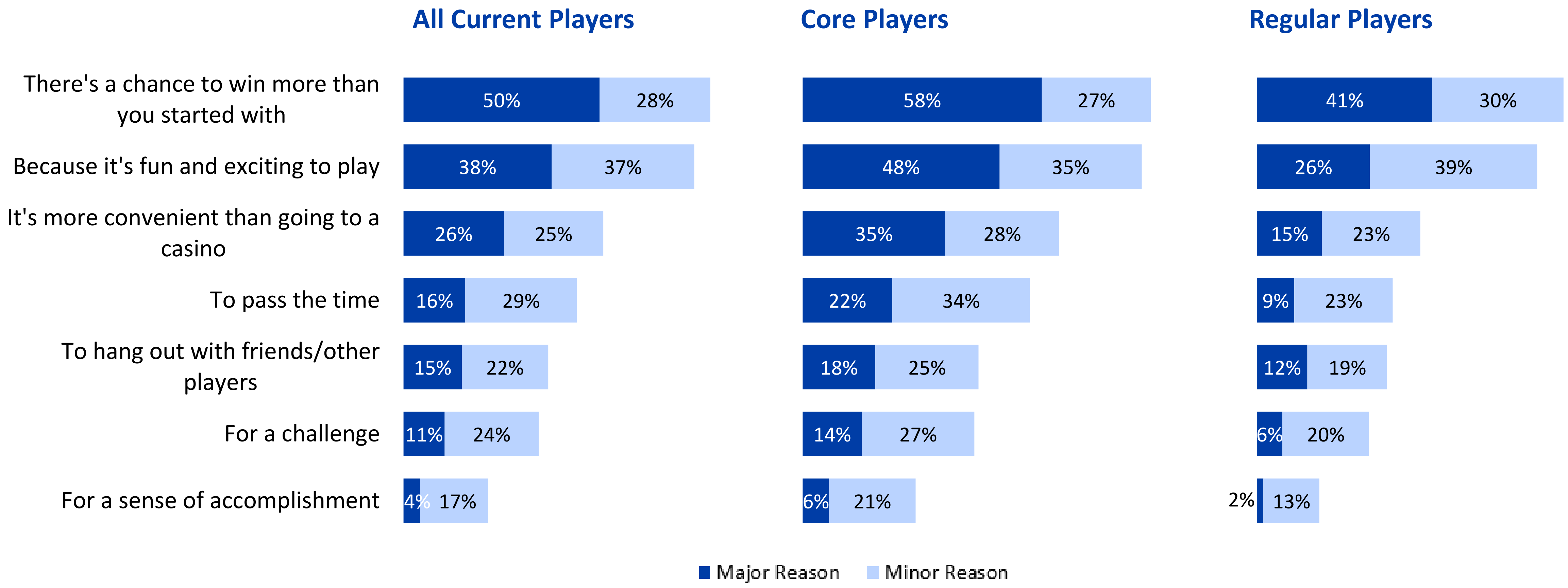
Overall playership is at 54%. All core Lottery games showed significant increases in play compared to FY17.



Note: Playership numbers may not sum to total shown due to rounding.
QP3. Have you ever played… ? (Base: All respondents)
QP4. Have you personally played [INSERT GAME] in the past 12 months?
QP6. On average, how often would you say you play [INSERT GAME]?
Base: All respondents (n=2700).

Major reasons for playing Lottery are the chance to win and because it is fun and exciting to play. Core Players also say it is more convenient to play Lottery than to go to a casino.

Core players are more likely than Regular players to rate all of the reasons listed below as a “major” reason to play Lottery. They are at least twice as likely as Regular players to count convenience (vs. going to a casino), playing to pass the time, and playing for a challenge as major reasons to play Lottery games.

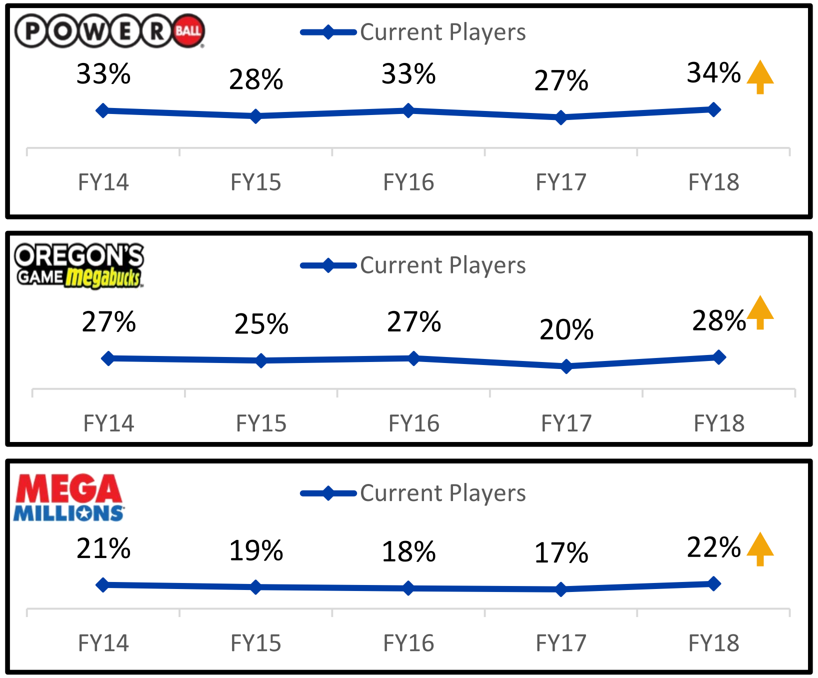


QPSY1. For each of the following, please tell me if it is a major reason, a minor reason or not a reason for why you choose to play Oregon Lottery games.
Base: Current Players (n=1467), Core Players (n=792), Regular Players (n=675)

Playership of Jackpot games increased compared to FY17. Casual players are more likely to jump in when jackpots are high.

- Changes in draw game play are related to jackpot size.
- Lottery weekly sales data indicates that large Powerball jackpots have a significant impact on sales of other draw games.
  - Powerball had three jackpots greater than $400M in FY18 ($759M in August 2017, $560M in January 2018 and $457M in March 2018)
  - Mega Millions had jackpots of $450M in January 2018 and $521M in March 2018
  - Megabucks had a $9M jackpots in Oct 2017 and March 2018
- In FY18, Powerball and Mega Millions saw shifts in the percentage of Core and Regular players (proportionately more Regular players); confirming that casual players are more likely to jump in when jackpots are high.

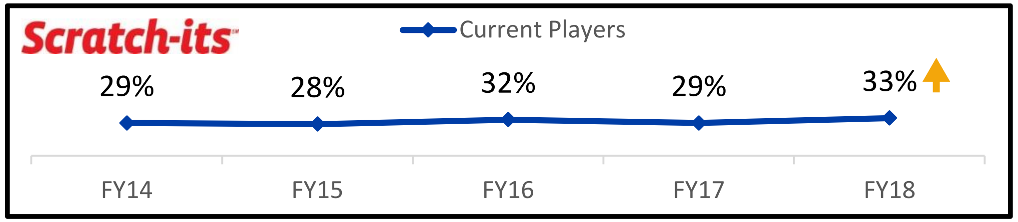
Jackpot Draw Game Play Over Time



Note: ↑↓ show significant increases or decreases since the last fiscal year at 95% confidence.
QP3. Have you ever PLAYED any of the following Oregon Lottery games?
QP4. When was the last time you personally played [INSERT GAME]? Was it…
Base: All respondents (FY14 n=2000, FY15 n=2000, FY16 n=4000, FY17 n=4000, FY18 n=2700)

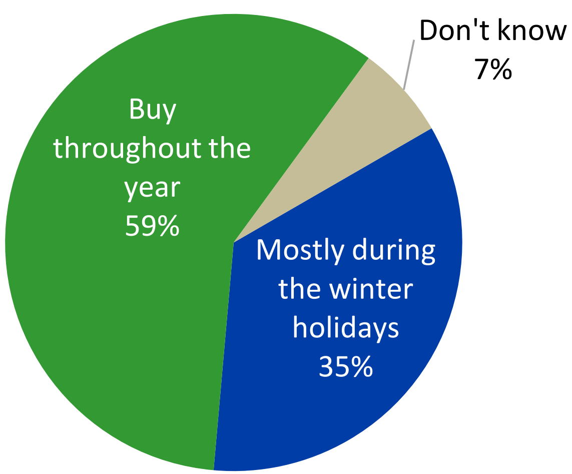
Scratch-its playership increased over FY17, however the 5-year trend is relatively flat. One in three Scratch-its players reports buying most tickets during the winter holidays, primarily to give as gifts.

Scratch-its Play Over Time

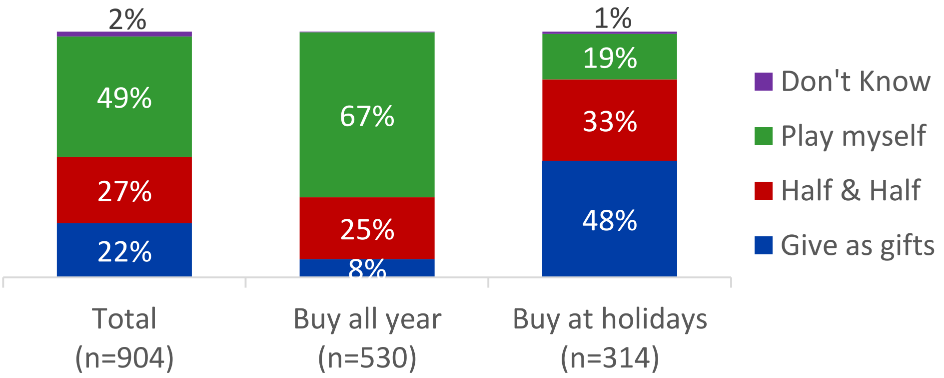


- About one-third of adult Oregonians play ***Scratch-its***. The increase in play since FY17 is primarily due to new Scratch-its players.
  - New Scratch-its players most commonly say they started playing because it looked like fun and/or someone gave them a ticket.
- Scratch-its sales are highest during the holiday period, consistent with the finding that 35% of Scratch-its Players buy mostly during the winter holidays.
- About half of the Players that buy most of the Scratch-its during the holidays report giving most of their tickets away compared to just 8% of those that buy Scratch-its year-round.

When do you buy Scratch-its?



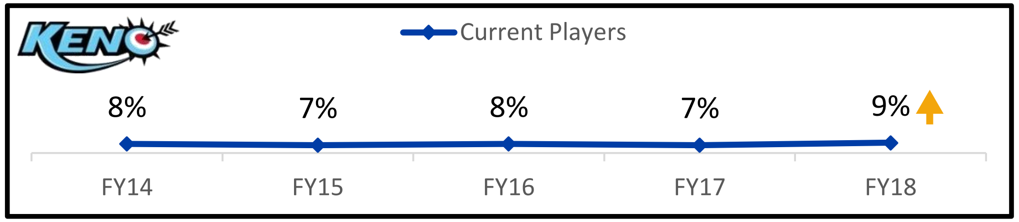
What do you do with most of the Scratch-its you buy?



Note: ↑↓ show significant increases or decreases since the last fiscal year at 95% confidence.
QP3. Have you ever PLAYED any of the following Oregon Lottery games?
QP4. When was the last time you personally played [INSERT GAME]? Was it…
Base: All respondents (FY14 n=2000, FY15 n=2000, FY16 n=4000, FY17 n=4000, FY18 n=2700)
QPSI_4. Do you buy most of your Scratch-its tickets during the winter holiday season or do you buy throughout the year?
QPSI_5. Are most of the Scratch-its tickets you buy to play yourself or to give as gifts to family and friends?
Base: Current Scratch-its Players (n=904)

Keno playership increased over FY17 to its highest level in five years, but is still less than 10% of adult Oregonians.

Keno Play Over Time



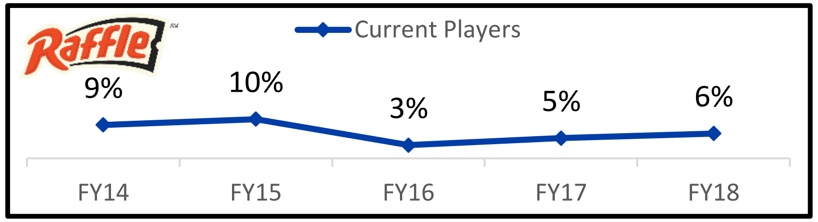
Keno playership has been relatively flat for the past several years despite efforts to refresh the game with new features and updated “how to play” information and play slips.

Lottery will continue to monitor this game to see if the higher level of play continues into FY19.

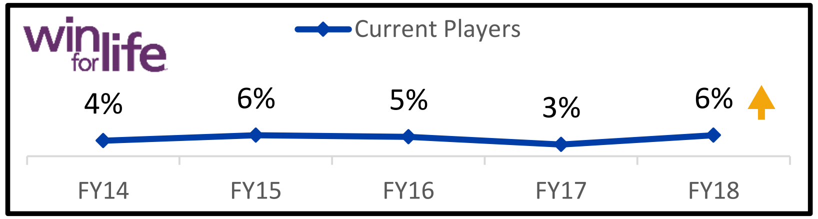
Note: show significant increases or decreases since the last fiscal year at 95% confidence.
QP3. Have you ever PLAYED any of the following Oregon Lottery games?
QP4. When was the last time you personally played [INSERT GAME]? Was it…
Base: All respondents (FY14 n=2000, FY15 n=2000, FY16 n=4000, FY17 n=4000, FY18 n=2700)

Playership of non-core draw games is generally stable and continues to be relatively low.

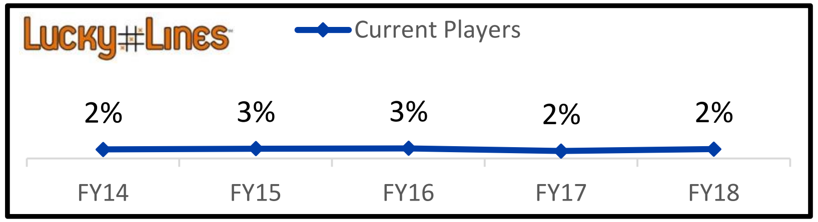
Lottery Game Play Over Time

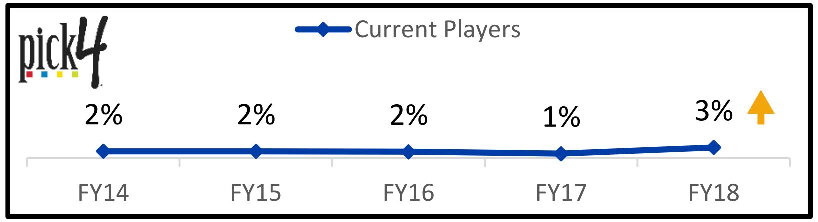


Before November 2014, Lottery offered multiple Raffles per year. The decision to offer one annual Raffle explains the decrease in playership for this product after FY15.



Win for Life playership is consistent with Lottery sales data which shows an increase from 2017 to 2018.



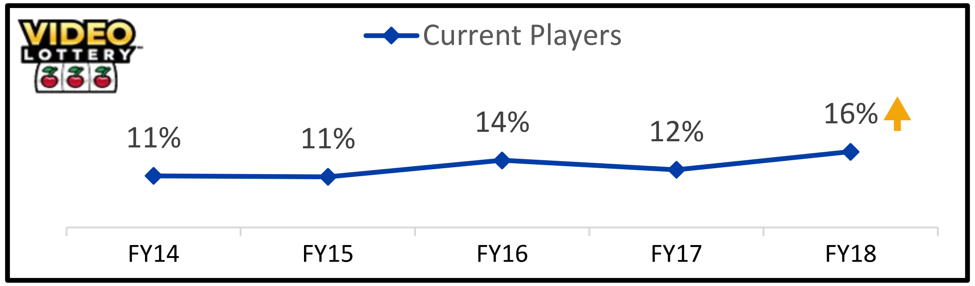


Pick 4 playership mirrors the sales trend from 2010 to 2018.

Note: show significant increases or decreases since the last wave at 95% confidence.
QP3. Have you ever PLAYED any of the following Oregon Lottery games?
QP4. When was the last time you personally played [INSERT GAME]? Was it…
Base: All respondents (FY14 n=2000, FY15 n=2000, FY16 n=4000, FY17 n=4000, FY18 n=2700)

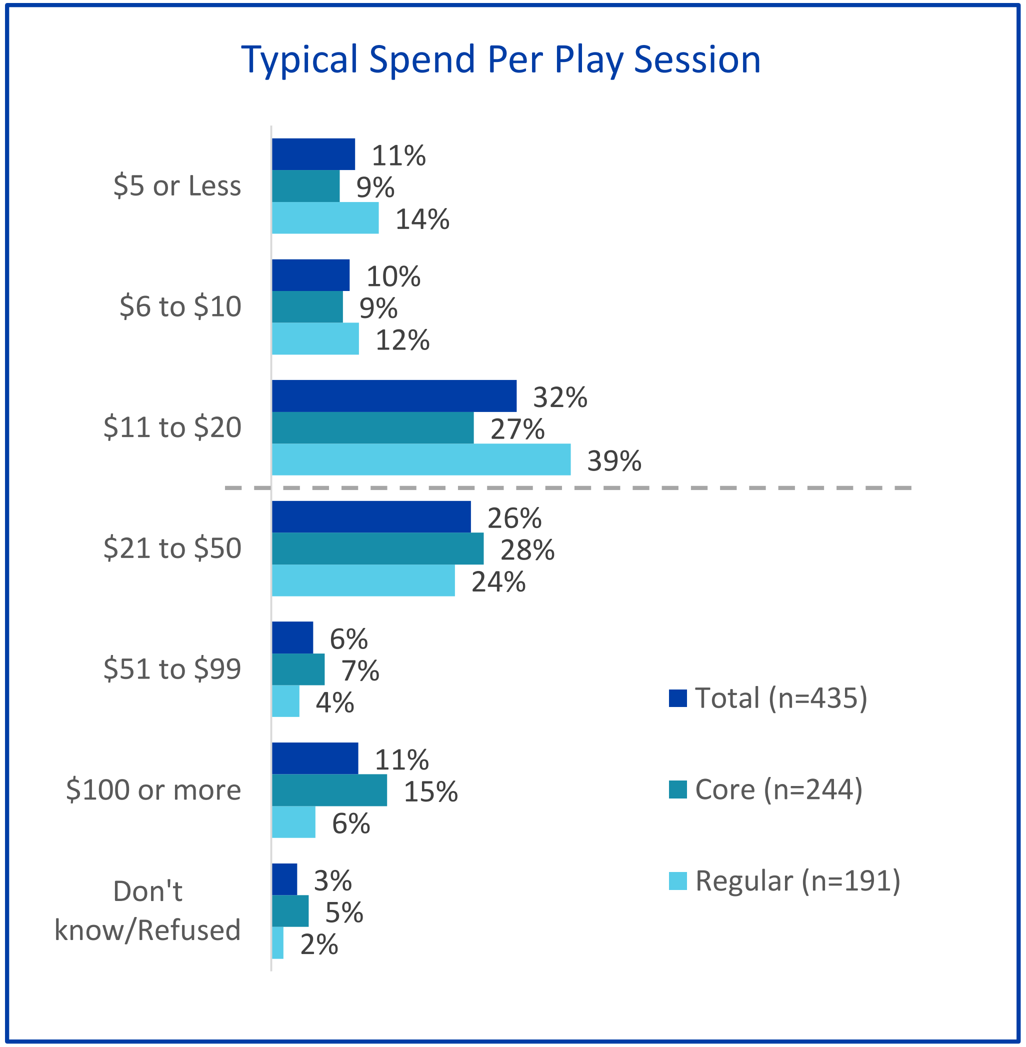
Video Lottery play reached its highest level since at least 2010. Slightly more than half of all Video Lottery players spend $20 or less per play session.

Video Lottery Play Over Time



- Factors that influenced the increase in Video Lottery sales (and by extension playership) include:
  - Strong economy
  - Completing conversion to G2S which allowed new games like Great Zeus and Golden Jungle to be launched quickly
  - Continued strategic Video Lottery Terminal placement based on retailer performance
- New Video Lottery players most commonly said they started playing because it “looked like fun.”

Including online responses had a minor impact on Video Lottery playership; explaining about 1% of the increase in Current Players.



Note: show significant increases or decreases since the last fiscal year at 95% confidence.
QP3. Have you ever PLAYED any of the following Oregon Lottery games?
QP4. When was the last time you personally played [INSERT GAME]? Was it…
Base: All respondents (FY14 n=2000, FY15 n=2000, FY16 n=4000, FY17 n=4000, FY18 n=2700)
QPVL_1. How much money do you typically spend playing Oregon Video Lottery during a single Video Lottery play session?
Base: Current Video Lottery players (n=435)

Lottery Game Cross-Play

Cross-play – especially across jackpot games and with Scratch-its – continues to be strong. Current Players play three Lottery games on average.

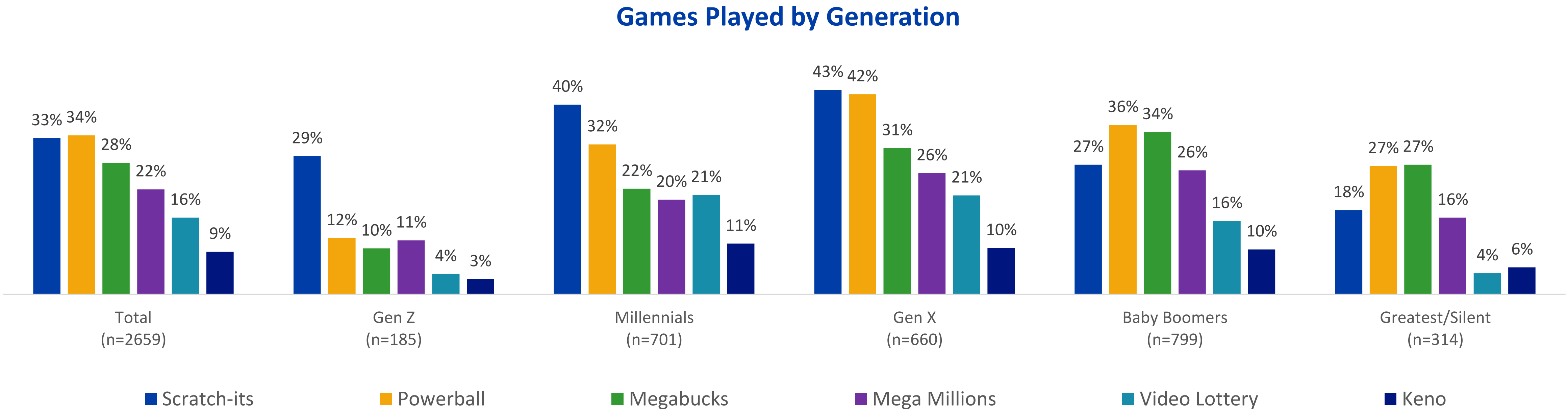
Adult Oregonians Who Play… / Also play…	Scratch-its (33%)	Powerball (34%)	Oregon's Game Megabucks (28%)	Mega Millions (22%)	Video Lottery (16%)	Keno (9%)
75% or More			Powerball	Powerball	Scratch-its	Scratch-its
50% to 74%	Powerball	Oregon's Game Megabucks, Scratch-its, Mega Millions	Mega Millions, Scratch-its	Oregon's Game Megabucks, Scratch-its	Powerball, Oregon's Game Megabucks	Powerball, Oregon's Game Megabucks, Mega Millions, Video Lottery
25% to 49%	Oregon's Game Megabucks, Mega Millions, Video Lottery	Video Lottery	Video Lottery	Video Lottery	Mega Millions, Keno	
1% to 24%	Keno	Keno	Keno	Keno		

Current Players play about three Lottery games on average. Respondents that play Lottery every week play 4-5 games on average while those that play less than once a month are Current Players of two games.

QP3. Have you ever PLAYED any of the following Oregon Lottery games?
QP4. When was the last time you personally played [INSERT GAME]? Was it…
Base: All respondents (n=2700)

While all generations play all Lottery games, each generation has its favorites.

- Gen Z and Millennials prefer Scratch-its
- Gen X members are equally drawn to Scratch-its and Powerball
- Baby Boomers and the Greatest/Silent generations tend to prefer draw games.



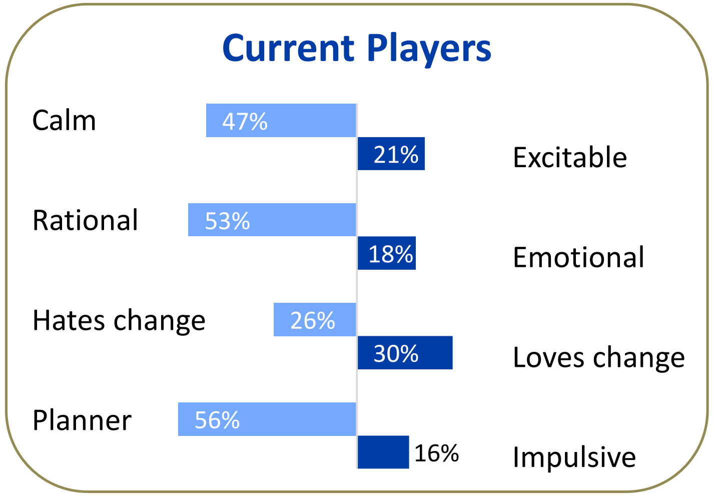
QP3. Have you ever PLAYED any of the following Oregon Lottery games?
QP4. When was the last time you personally played [INSERT GAME]? Was it…
QD4. In what year were you born? Generations defined by PEW Research Center: http://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/
Base: Percent of segment that played each game within the past year.

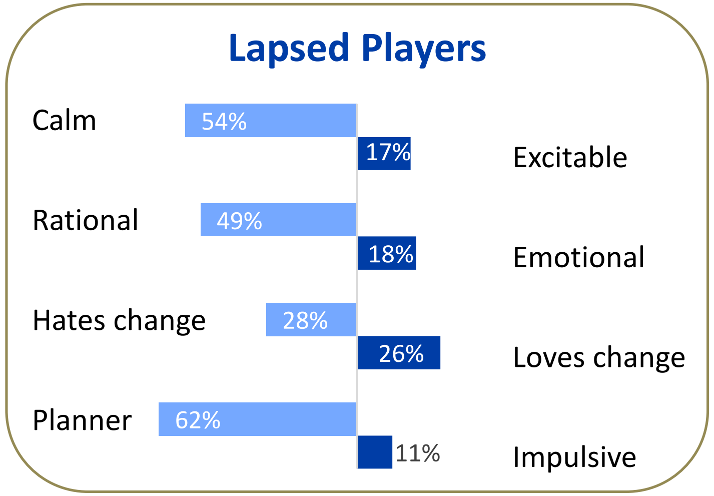
Similarities & Differences Across Playership Segments

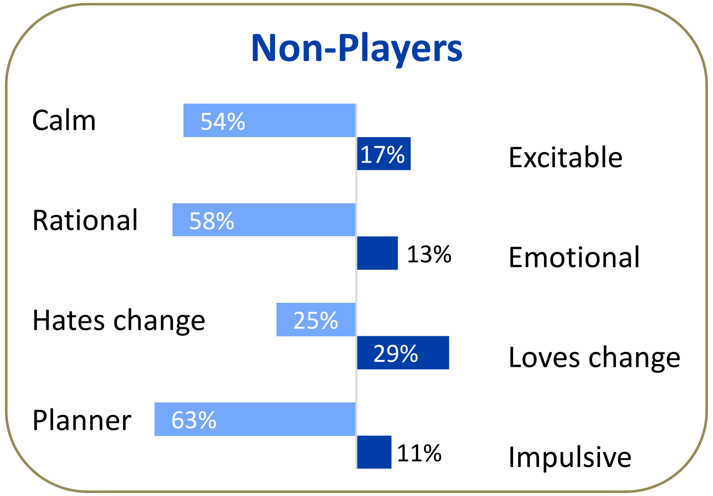
When it comes to their approach to life in general, Current, Lapsed, and Non-players are very similar. Respondents in all three segments tend to self-identify as calm, rational planners.

- A higher percentage of Current Players (and especially those new to Oregon Lottery) are more likely than either Lapsed or Non-Players to see themselves as being impulsive, emotional, and excitable.

Approach to Life in General



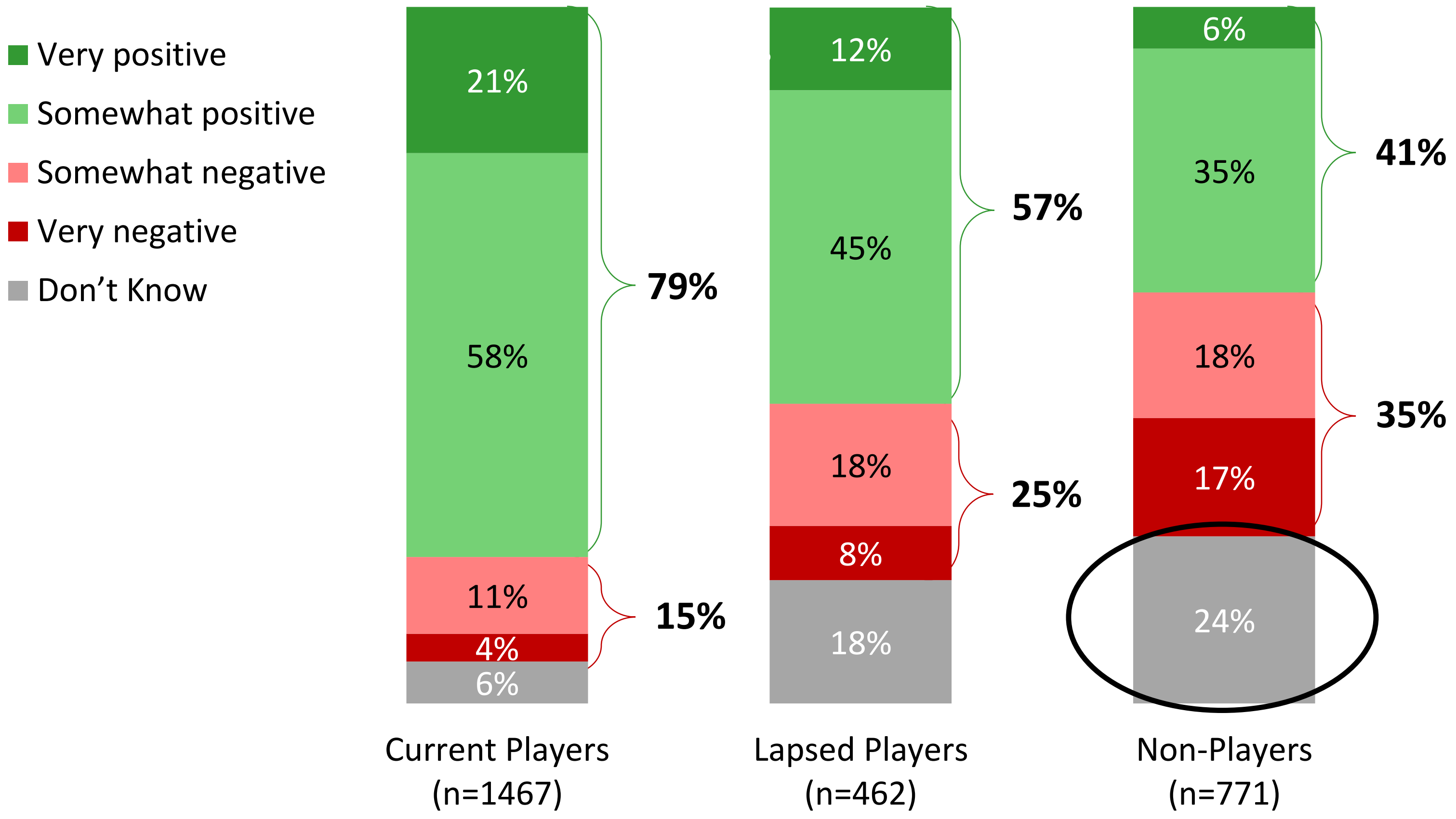




QPSY4. When it comes to your approach to life in general, would you say you are… 1 [READ OPTION 1], or a 5 [READ OPTION 2] or some number in between?
Base: All respondents. Current Players (n=1467), Lapsed Players (n=462), Non-Players (n=771)

Current Players tend to have a positive opinion of Oregon Lottery and believe they are giving back to Oregon when they play. Non-Players are more divided, with many having no opinion at all.

Overall Opinion of Oregon Lottery



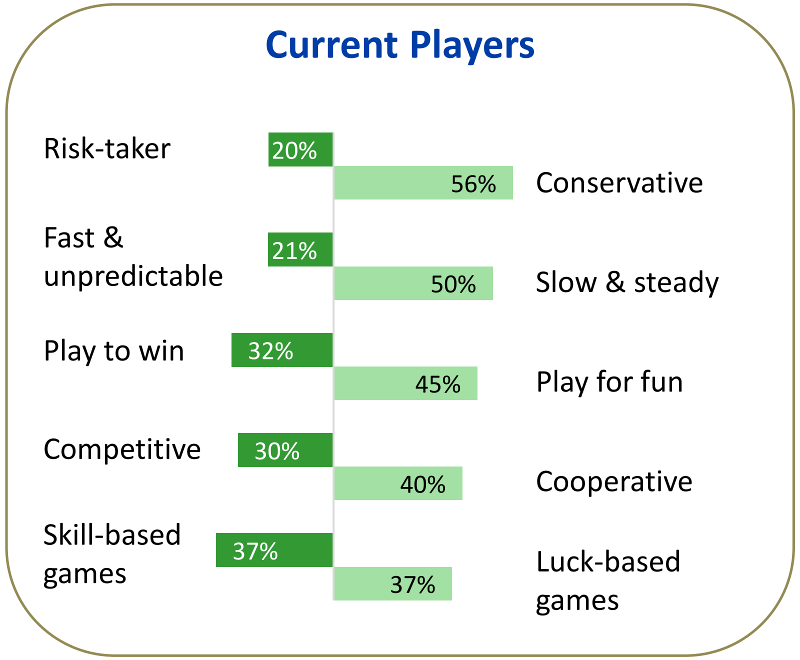
- Overall opinion ratings generally align with findings from Lottery's FY18 Social Responsibility Survey. Differences between studies may be due to:
  - Methodology (Social Responsibility does not include online responses)
  - Questionnaire content and question placement.

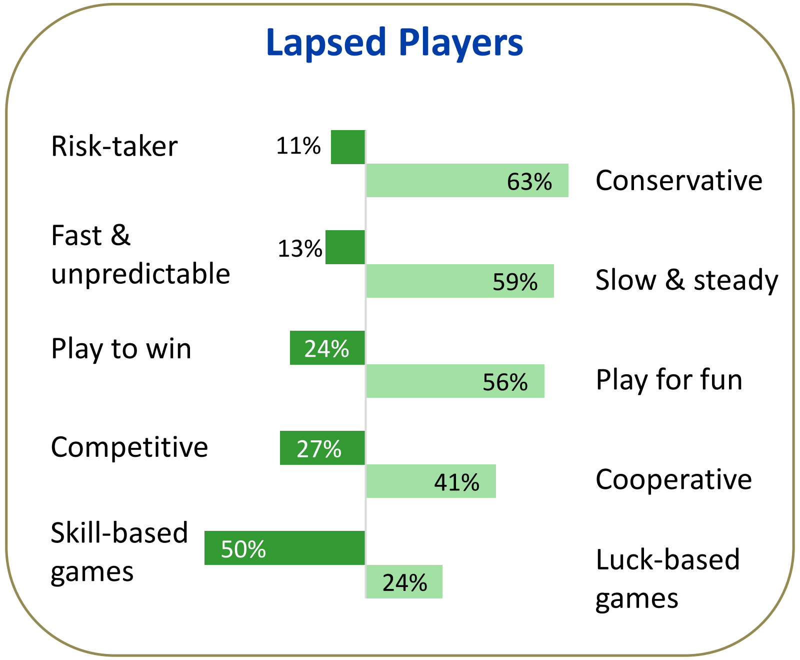
QAT4. How would you describe your overall opinion of the Oregon Lottery? Would you say it is…?
QP4. When was the last time you personally played [INSERT GAME]? Was it…
Base: All respondents (n=2700)

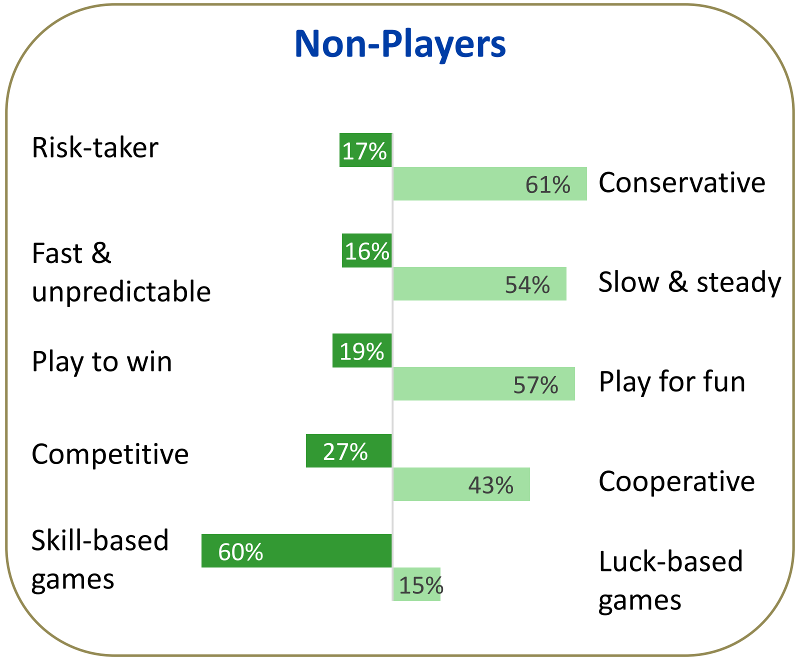
A preference for skill-based games is the strongest differentiator between Current and Non-players. These segments share similar preferences across most other play drivers.

- Lapsed Players are more similar to Non-Players when it comes to their gaming preferences.
- New Players' preferences are similar to those of Current Players except New Players are more likely to prefer skill-based games (51%)
- The 23% of adult Oregonians who gambled at a casino in the six months preceding the survey have similar play preferences to Lottery players (more than three-quarters of casino gamblers also play Lottery)
- Sports bettors (12% of adult Oregonians) are more likely than Current Players to prefer skill-based games (51%) and a competitive gaming environment (46%)

Key Play Drivers







QPSY2. Regardless of how much or often you gamble, please think about your ideal gaming or gambling environment. Please indicate where you fall in terms of your preference for gaming including which games to play and choosing where to play them. Would you say you are a 1 [READ OPTION 1], or a 5 [READ OPTION 2] or some number in between?
Base: All respondents. Current Players (n=1467), Lapsed Players (n=462), Non-Players (n=771)

Demographic differences between Current Players and other segments are largely age-related. Players are more likely than Non-Players to be middle-aged, with slightly higher incomes, and children at home.

		Current Players (n=1,467)	Lapsed Players (n=462)	Non-Players (n=771)	New Players (n=123)
Gender Identity	Male	51%	46% ↓	49%	45%
	Female	48%	54% ↑	51%	55%
	Other	1%	0%	1%	0%
Age	18 to 24	9%	11%	15% ↑	31% ↑
	25 to 34	17%	17%	16%	22%
	35 to 54	38%	31% ↓	26% ↓	29% ↓
	55 to 64	15%	15%	12%	8% ↓
	65 or older	21%	26% ↑	31% ↑	10% ↓
	Average	*48*	*50*	*50*	*37*
Generation	Greatest/Silent	9%	12%	17% ↑	4%
	Baby Boomers	29%	33%	28%	18% ↓
	Generation X	29%	23% ↓	18% ↓	18% ↓
	Gen Y / Millennials	27%	25%	25%	37% ↑
	Gen Z / Digital Natives	5%	7%	11% ↑	24% ↑
	Unknown	1%	2%	2%	0%
Marital Status	Married	48%	45%	47%	38% ↓
	Single	24%	29% ↑	30% ↑	44% ↑
	Divorced/Separated	12%	9%	7% ↓	6% ↓
	Co-habitating	10%	7%	5% ↓	10%
	Widowed	6%	9% ↑	10% ↑	2%
Children Under 18 at home	Yes	31%	24% ↓	25% ↓	33%

		Current Players (n=1,467)	Lapsed Players (n=462)	Non-Players (n=771)	New Players (n=123)
Education	Some high school/less	3%	3%	4%	6%
	High school grad/GED	21%	18%	21%	24%
	Some college	44%	36% ↓	32% ↓	40%
	College graduate	20%	25% ↑	22%	17%
	Graduate degree	11%	17% ↑	20% ↑	13%
	Refused	1%	1%	1%	0%
*Employment Status**	Employed	56%	50% ↓	48% ↓	59%
	Retired	25%	29%	34% ↑	7% ↓
	Stay at home	7%	6%	6%	9%
	Unemployed	6%	8%	6%	9%
	Student	4%	4%	5%	13% ↑
	Other	5%	4%	3%	6%
	Refused	<1%	1%	1%	2%
Income	Under $25,000	13%	16%	17% ↑	23% ↑
	$25,000 - $50,000	22%	21%	22%	27%
	$50,000 - $75,000	16%	14%	13%	13%
	$75,000 - $100,000	13%	12%	9% ↓	12%
	$100,000 or More	20%	16%	16% ↓	15%
	Refused/Don't know	16%	21% ↑	24% ↑	11%
	Median**	*$59,000*	*$54,000*	*$50,000*	*$44,000*
Race/Ethnicity	Caucasian only	81%	85%	78%	79%
	Other	17%	13%	15%	20%
	Refused	2%	2%	4% ↑	1%

Note: ↑↓ statistically significant differences compared to Current Players at 95% confidence level
Base: All respondents. New Player demographics include New Player Oversample

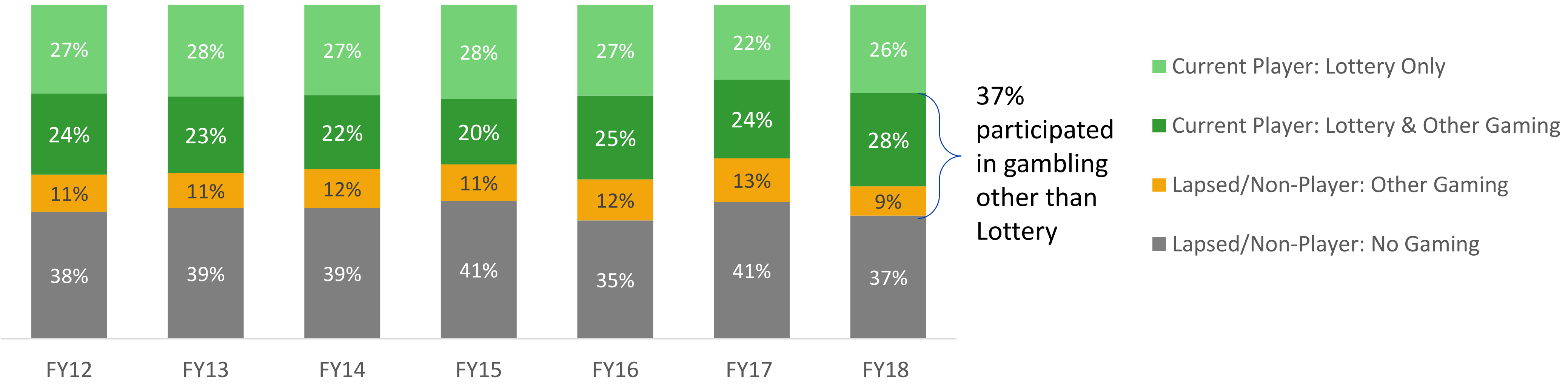
* *Multiple response question*
** *"Refused / Don't know" responses excluded from calculation*

Non-Lottery Gaming Activity

In any given year, 9% to 13% of adult Oregonians report they do not play Lottery, but do engage in other gaming activities.

- In FY18, 37% of adult Oregonians participated in non-Lottery gaming activities in the six months preceding the survey. Most of these respondents are Current Lottery Players.
- 9% of adult Oregonians did not participate in non-Lottery gaming activities in the six months preceding the survey and say they are opposed to gambling in any form.

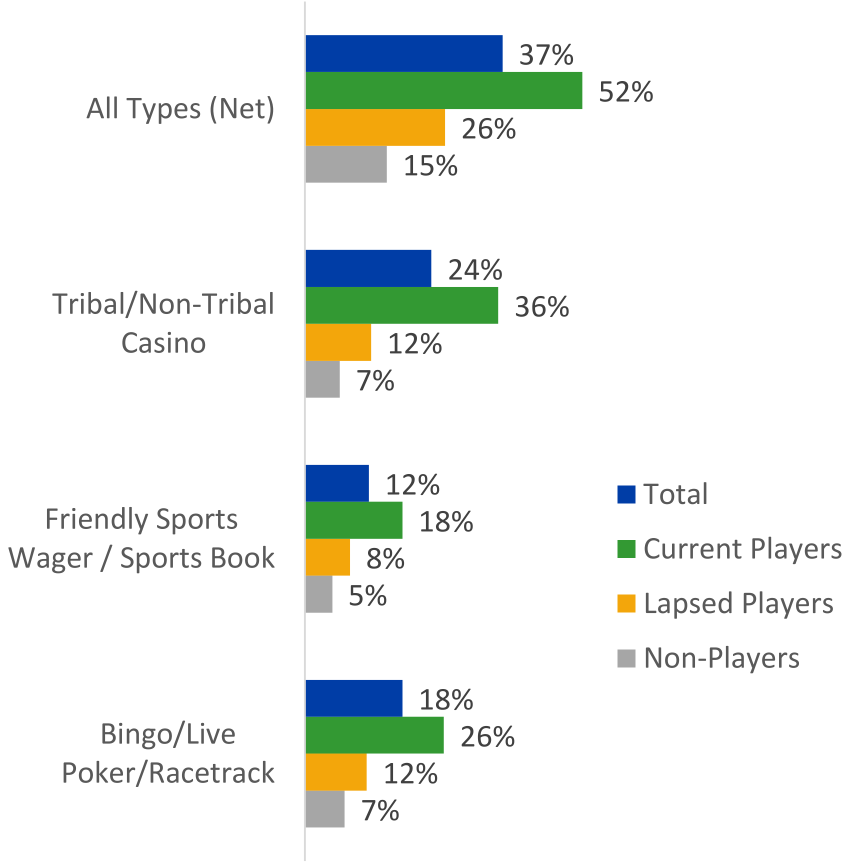
Lottery and Gaming Participation Past 6 – 12 Months



QP3 Have you ever played… ?
QP4 Have you personally played [INSERT GAME] in the past 12 months?
QNL8. In the past six months, have you participated in any of the following gambling activities?
Base: Total respondents (FY12 – FY15 n=2000 per year, FY16 – FY17 n=4,000 per year, FY18 n=2700)

Current Players are twice as likely as Lapsed Players and more than three times as likely as Non-Players to report participating in Non-Lottery gaming activities.

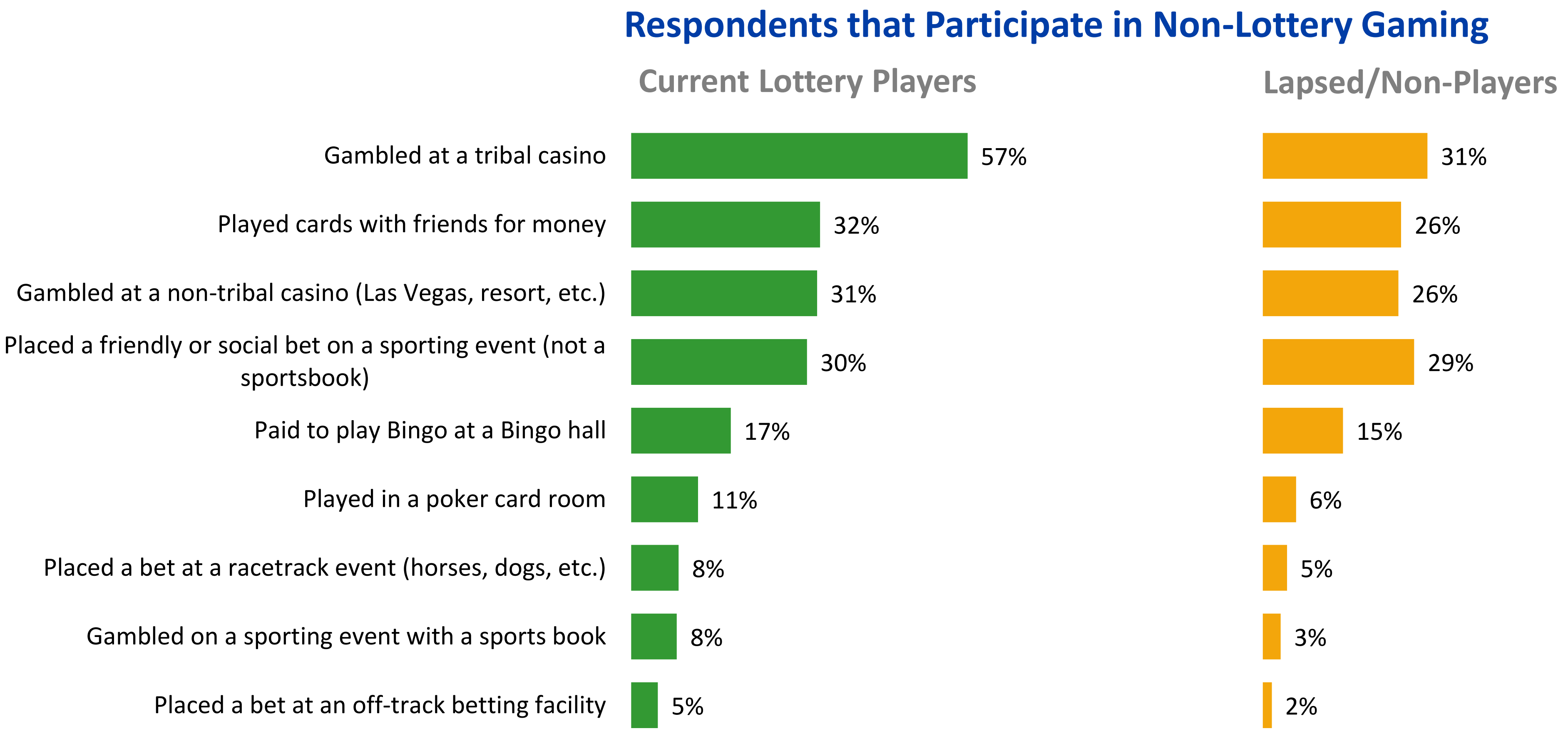
Non-Lottery Gaming Participation in the Past Six Months



- Going to a casino is the most popular non-Lottery gaming activity (24%).
  - 83% of casino gamblers surveyed are Current Oregon Lottery Players. Consequently, the demographic profiles of both groups are very similar.
- 12% of adult Oregonians have placed a friendly bet on a sporting event or wagered through a sports book.
  - 77% of sports bettors are Current Oregon Lottery Players
  - Compared to the average Lottery Player, Sports Bettors are more likely to be male, college-educated, and have a higher median income. More than one in three Sports Bettors is younger than 35.

QP3 Have you ever played… ?
QP4 Have you personally played [INSERT GAME] in the past 12 months?
QNL8. In the past six months, have you participated in any of the following gambling activities?
Base: All respondents (n=2700), Current Players (n=1467), Lapsed Players (n=462), Non-Players (n=771)

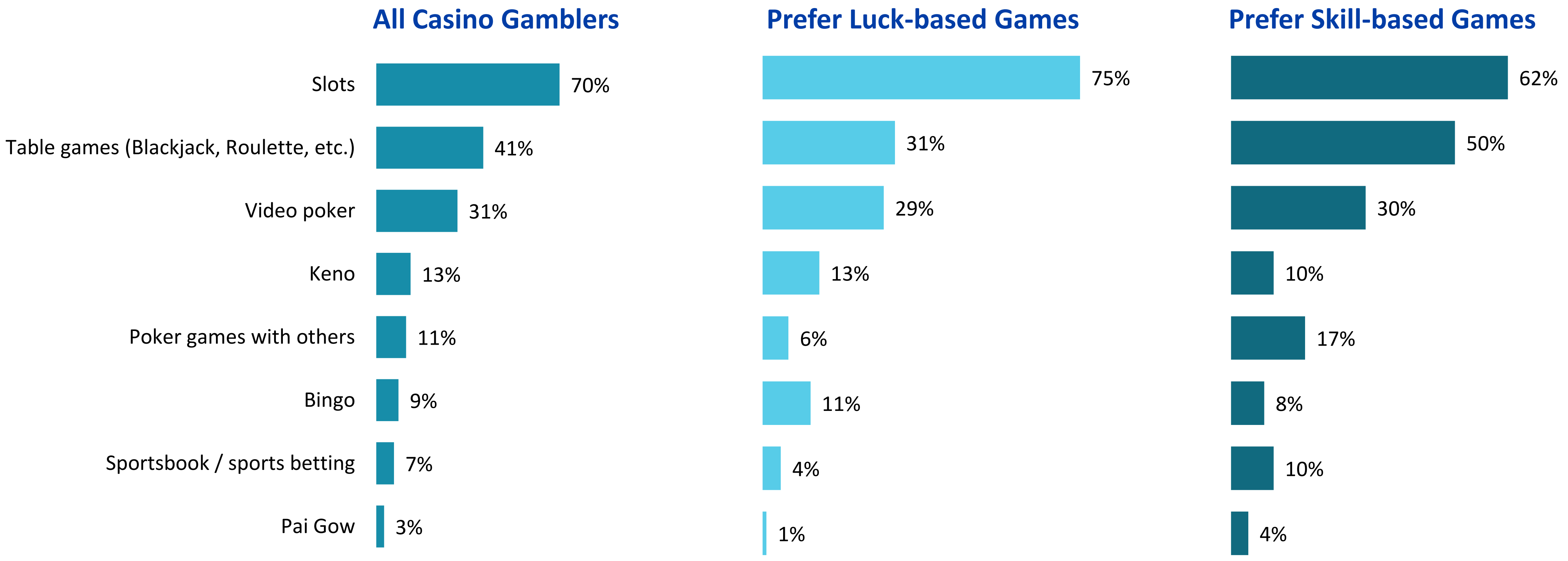
Oregonians that participate in non-Lottery gaming are most likely to visit a casino (often tribal), play card games with friends, and/or place a friendly wager on a sporting event.



QNL8. In the past six months, have you participated in any of the following gambling activities?
Base: Current Players that participate in Non-Lottery gaming (n=755), Lapsed & Non-Players that participate in Non-Lottery gaming (n=237)

Among casino gamblers, slots is the most popular game. Gamblers that prefer skill-based games are significantly more likely than those who prefer games based on luck to play table games and live poker.

24% of adult Oregonians reported visiting a casino in the six months prior to the survey.



QNL10. Which of the following games do you play when you go to a casino?
Base: Respondents that gambled at a tribal and/or non-tribal casino in the six months preceding the survey: All Casino Gamblers (n=634), Prefer luck-based games (n=231), Prefer skill-based games (n=228)

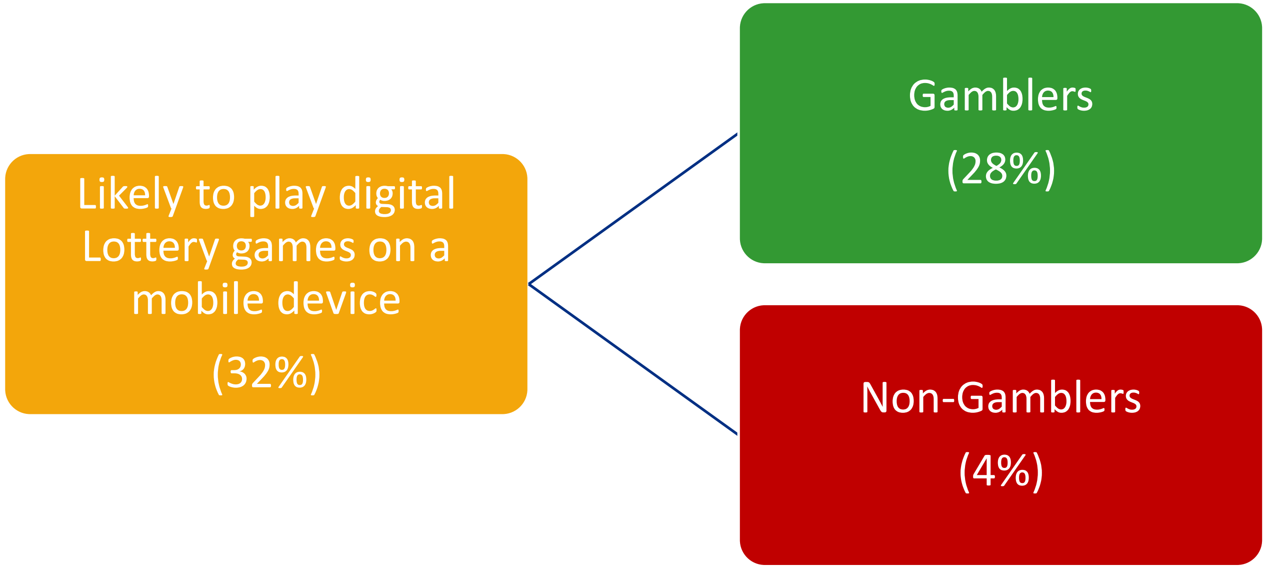
Interest in Digital Play of Lottery Games

32% of adult Oregonians expressed interest in playing one or more Lottery games on a mobile device. Most are Current Lottery Players (81%) and an additional 7% participate in other forms of gaming.

- Respondents that currently play any type of game on a mobile device are twice as likely to express interest in a digital Lottery play experience (44% and 21% respectively)

New questions were added to the FY18 survey to help Lottery understand playership potential associated with offering a digital play on a mobile device.

Percentage of Adult Oregonians who are…



Adult Oregonians Who Expressed Interest in Playing Each Game

Draw Games (21%)

Digital Scratch-its (16%)

Video Slots (12%)

Video Poker (11%)

Bet on **REAL** Sports (10%)

Keno (10%)

Bet on **VIRTUAL** Sports (6%)

QNL3_3. In the past six months, have you played any games on a mobile device such as a smartphone or tablet, a laptop or personal computer, a gaming console such as Xbox, Playstation or Nintendo…?
QNL8. In the past six months, have you participated in any of the following gambling activities?
QT13. In the future, adult Oregonians may be able to use their smartphones or tablets to purchase and play Oregon Lottery games and redeem prizes. If the Lottery were able to offer a completely digital play experience, how likely would you be to…
Bases: All respondents (n=2700).

Appendix

Demographics: Census compared to Lottery Play Categories

Gender	Census*	All Respondents	Current Players	Lapsed Players	Non-Players
Male	49%	50%	51%	46%	49%
Female	51%	50%	48%	54%	51%
Other	N/A	<1%	1%	0%	1%
Age					
18 to 24	11%	11%	9%	11%	15%
25 to 34	18%	17%	17%	17%	16%
35 to 54	33%	34%	38%	31%	26%
55 or older	38%	39%	36%	41%	43%
Income					
Under $25,000	20%	15%	13%	16%	17%
$25,000 - $50,000	22%	22%	22%	21%	22%
$50,000 - $75,000	19%	15%	16%	14%	13%
$75,000 - $100,000	13%	12%	13%	12%	9%
$100,000 or more	26%	18%	20%	16%	16%
Median	*$60K*	*$57K*	*$59K*	*$54K*	*$50K*
Refused / Don't Know	n/a	19%	16%	21%	24%
Education					
Some high school or less	10%	4%	3%	3%	4%
High school	24%	20%	21%	18%	21%
Some college or technical school	35%	29%	44%	36%	32%
College graduate	20%	29%	20%	25%	22%
Graduate degree	11%	15%	11%	17%	20%
Refused	n/a	1%	1%	1%	1%

Region	Census*	All Respondents	Current Players	Lapsed Players	Non-Players
Portland	44%	45%	44%	44%	44%
Valley	27%	25%	28%	28%	25%
East	13%	12%	16%	14%	13%
Coast	16%	17%	13%	15%	19%
Hispanic					
Yes	11%	8%	5%	3%	8%
Ethnicity					
Caucasian or white	91%	86%	87%	89%	81%
African American or black	3%	5%	3%	2%	3%
Asian American or Pacific Islander	6%	3%	4%	4%	4%
Native American	3%	5%	6%	3%	3%
Other	n/a	4%	2%	1%	2%
Refused	n/a	1%	2%	2%	4%

Base: Total Respondents FY18 (n=2700), Current Players (n=1467), Lapsed Players (n=462), Non-Players (n=771)
** Source: 2017 American Community Survey – 1 Year Estimates (Oregon population age 18 or older)*
Note: Ethnicity is a multiple response question

Detailed Methodology

Telephone Methodology

- As with the FY17 wave of the tracker, telephone interviews were conducted using a dual sampling frame comprised of RDD-landline (45%) and cell phone numbers (55%). Sampling for the FY17 and FY18 waves were pulled proportionately to state population distribution. For waves prior to FY17, sampling was pulled proportionately to region.

Online Methodology

- The online interviews used a blend of online panel sample provided by Research Now / SSI and river sample provided by Research for Good to ensure the online population would be well-balanced. This approach ensures representation of those who opt in to be panel members, as well as those who are less frequent survey takers and are not panel members (i.e., river sample). Sourcing of the sample excluded sites/apps that are gaming/casino related. Final online composition was as follows:
    - Online panel sample: 90%
    - River sample: 10%
- All online survey respondents were screened to eliminate respondents who had already taken the phone study.

Changes from FY17

- The FY18 Behavior and Attitude Tracking Study underwent significant revisions to refocus the research instrument back to game awareness and playership trends. Key changes to the instrument include the following:
    - For the phone study, gender was asked rather than recorded by observation, and included an “Other” option in addition to Male and Female.
    - The race and ethnicity questions, which were previously asked independently, were combined into one question with a new follow up question regarding the primary language spoken at home.
    - Household income response categories were updated to reflect changes in the economy.

Detailed Methodology

Changes from FY17 (Continued)

- Employment was changed from single select to multi-select and additional choices were added (Employed Full Time, Employed Part Time, Student Full Time, and Student Part Time) to get a more accurate read on Oregonian employment. Employed Full Time was set as the primary employment for respondents who selected Employed Full Time and Employed Part Time, Retired, or Homemaker.
- In previous surveys, respondents were asked a general Yes/No question; "Have you ever played an Oregon Lottery game? This would include Oregon's Megabucks, Powerball, Mega Millions, Scratch-its, Video Lottery, Oregon Lottery Keno, Win for Life, Pic 4, Lucky lines, Oregon Lottery Raffle games or past games like Sports Action, Scoreboard or Breakopens". In FY18, respondents were asked about prior play of each game individually. "Have you ever played any of the following Oregon Lottery games? Please answer yes or no after I read each one."
- The Lottery's 2017 Video Lottery Segmentation study typing tool questions were added to assign current Video Lottery Players into appropriate segments.
- Questions related to gaming and gambling, including the propensity to play Lottery games online, were expanded to provide Lottery a more holistic perspective of respondents' gaming/gambling behavior and the ways Lottery games fit into their consideration set.

Implications for Tri-Modal Trending Analysis

- There are distinct demographic differences when comparing the three populations (Landline, Cell, and Online) to each other and to Census data – especially for age, gender, education and household income. However, when analyzed as one group, the resulting demographic composition aligns more closely to Census data than any one of the individual populations. In terms of Lottery play, the online study found a higher incidence of Lottery players than in the general population telephone – both overall and by individual games.
- Moving forward, Lottery should continue to employ a tri-modal data collection methodology as it provides the most accurate gauge of Oregonians and their playership of the Lottery. However, it is important to consider that some of the changes observed in FY18 were influenced by the addition of the online methodology.