

Data in Motion

Marketing & Insights



June 20, 2024

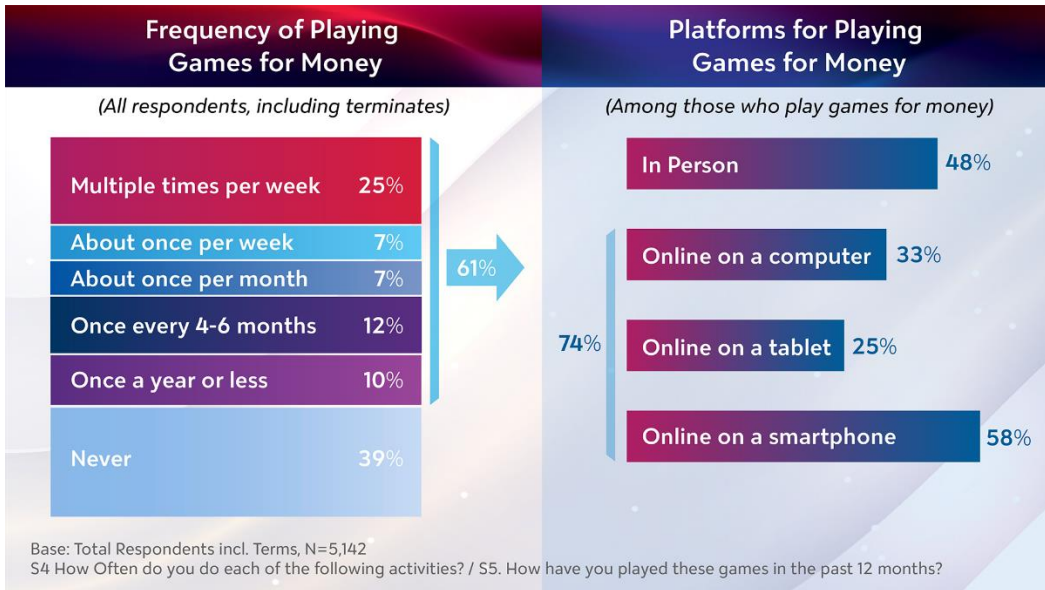
Today's Digital Gaming Consumer

In 2023 Scientific Games expanded our *ONE Segmentation* research to better understand consumer experiences and perceptions of online gambling. The survey included topics such as consumer needs and expectations, motivations for playing, and purchase behaviors within the gambling category. In this edition of Data in Motion, we address some of the initial steps in understanding these critical consumers – quantifying their frequency of play, preferred platform(s) for playing and types of digital games most often played.

Methodology & Usage

A total of 4,000 adult respondents participated in the survey which was U.S. census-balanced for age, gender, and geographic region. To qualify, participants had to either have played online games for money at some point in the past or be open to playing in the future (Top 3 Box).

Preliminary questions focused on play frequency and platforms preferred for online games for money. The results reflected that 61% of respondents have played games for the chance to win money and, of that group, 74% played through at least one digital channel¹.



¹Note – 74% digital play reflects the incidents of respondents who selected at least one of the above online channels.

While almost half (48%) report playing games for money in person, the shift to digital platforms can't be ignored, with smartphone play rising to 58%.

A breakdown of specific games that respondents report they have played in the past 12 months reflects ample room for growth within the lottery space. While it is reasonable to assume limited engagement is, in part, attributable to only a handful of lotteries currently offering digital games, only 8% of those surveyed report playing instant-win digital or eInstants, and traditional draw-style games all come in at or below a meager 6%.



Final Word

While only a limited number of states have begun to tap into the potential of offering online lottery game options, others, for a variety of reasons, are still working to launch iLottery. Whatever your stage of development, data suggests that the place to “start” is with a robust, engaging iLottery solution that is easily accessible on a smartphone. Therefore, it is critical to continue to develop offerings such as iLottery and instant win digital games to encourage fast and lasting adoption rates before other forms of play solidify dominance within the digital gaming market.

We look forward to sharing additional learnings from our Digital *ONE Segmentation* Study in future editions of Data in Motion.

**Data in Motion will be on vacation over the Independence Day holiday.
Keep your eyes peeled for our next edition on July 17th.**

Source: Scientific Games, Digital Gaming *ONE™ Segmentation* Report (October 2023)
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