

# Data in Motion

Marketing & Insights



September 6, 2022

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

Our April 5th edition of Data in Motion covered the surprising number of new players that started buying lottery products over the past two years. It's not often that an established industry such as ours experiences such an influx of new entrants so we thought it was a topic worth revisiting. In this issue of Data in Motion, we dig deeper into who these New Players are, what their purchase behaviors tend to be, and where to find them.

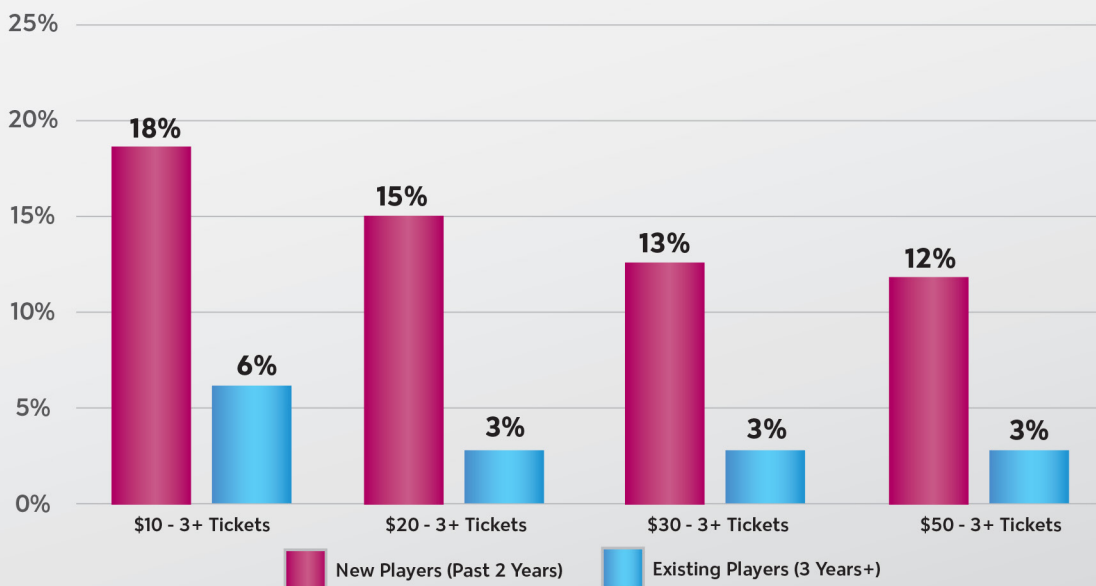
### Who Are These New Players?

As our April 5th edition noted, many New Players (defined as having played lottery for the first time in the past two years) are younger (18 – 39) and more likely than Existing Players (defined as having played lottery for 3+ years) to purchase higher price point scratch games. And they can afford it: 29% of New Players have a household income of \$100,000 or more compared to 22% of Existing Players. New Players tended to have a history of gaming activity with 57% indicating that they started visiting casinos 3+ years ago. 68% of those players played slot machines. New Players were also more likely to play table games (Blackjack, craps, etc.) than Existing Players (35% vs. 24%).

### What Are They Buying?

When we looked at the purchase behaviors of New Players, some interesting data points floated to the top. 24% of New Players purchase lottery games online, which is three times more than the percentage of Existing Players (8%). Fighting the conventional wisdom that those new to the lottery tend to buy \$1 and \$2 games, our research indicates that New Players are more likely than Existing Players to buy across all price points. Even more interesting is that this difference becomes more pronounced as you move up the price point ladder with New Players far more likely to purchase multiple tickets at higher price points.

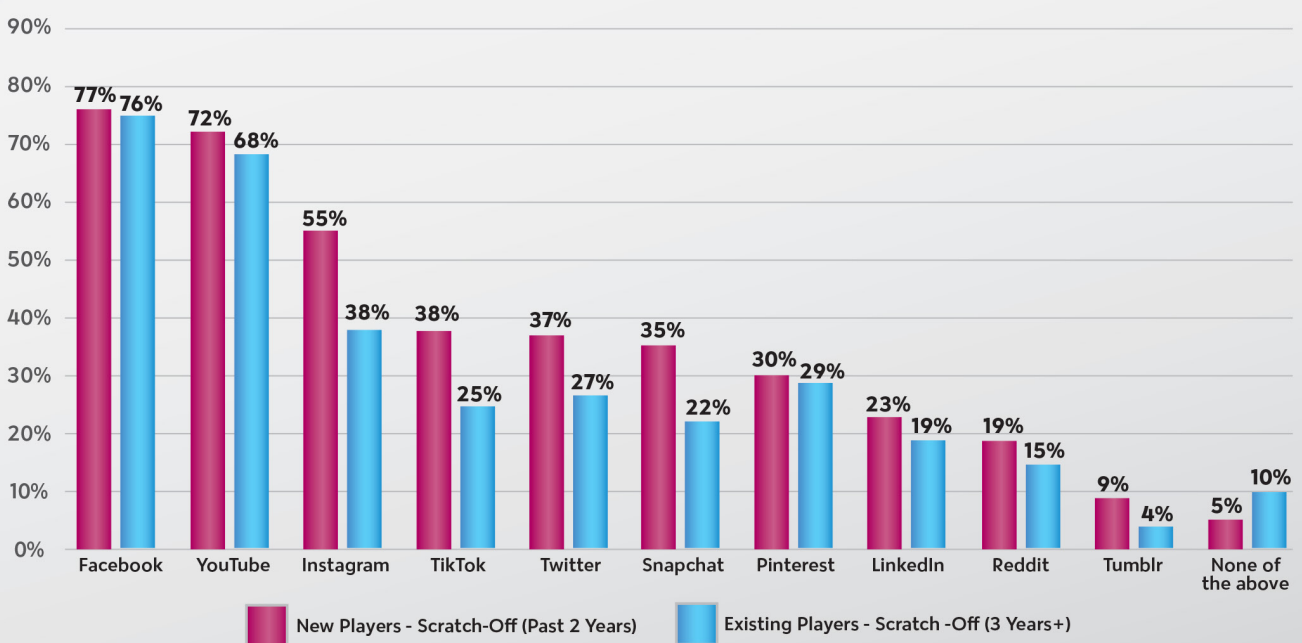
### Percent of respondents who indicated that they purchase 3 or more tickets when buying at the higher price points:



### Social Media Consumption

Since so many New Players tend to be younger, it should come as no surprise that they are far more likely to be engaged with social media platforms such as YouTube, Instagram, TikTok, Twitter, Snapchat, Reddit, and Tumblr.

### Which of the following social media sites/apps do you actively use or visit? Select all that apply.



New Players are also more than twice as likely as Existing Players to participate in lottery rewards programs. This is especially interesting because Existing Players are participating in rewards programs overall, just not lottery rewards programs. So increasing awareness and communicating the value of these programs to Existing Players is a real opportunity for our industry. Along these same lines, New Players tend to use their lottery's website for a wide range of activities – to check winning numbers, to visit scratch and draw game pages, to play online, to find a retailer, and to engage with the lottery's loyalty program. Existing Players, by contrast, tend to use their lottery's website primarily to check for winning numbers. New Players are also more likely to download their lottery's mobile app.

### Final Thoughts

With a full array of gaming, dining, and entertainment options open once again, it's important that we look for ways to keep our products relevant and appealing to New Players. To this end, Scientific Games continues to uncover actionable data that will enable our industry to keep this important player group engaged. To learn more, come by our booth at the World Lottery Summit this October in beautiful Vancouver, Canada. We hope to see you there!

Source: ONE™ Segmentation, 2nd Generation, December 2021

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**Note:** Data in Motion is moving to Wednesdays!  
Our next issue will hit your inbox on Wednesday, September 21.