2016

**Prepared for: Vermont Lottery Commission**

**Prepared by: The Center for Research & Public Policy**

**8/16/2016**

Market and Demographic Study

Home

Statement of Confidentiality and Ownership

All of the analyses, findings, data, and recommendations contained within this report are the exclusive property of the Vermont Lottery Commission with offices located in Berlin, Vermont.

As required by the Code of Ethics of the National Council on Public Polls and the United States Privacy Act of 1974, The Center for Research and Public Policy maintains the anonymity of respondents to surveys the firm conducts. No information will be released that might, in any way, reveal the identity of the respondent.

Moreover, no information regarding these findings will be released without the written consent of an authorized representative of the Vermont Lottery Commission.

**TABLE OF CONTENTS**

**1**

**SECTION**

Introduction Page 3

**2**

**SECTION**

Methodology Page 4

**3**

**SECTION**

Highlights Page 6

**4**

**SECTION**

Summary of Findings Page 9

*Quality of Life 9*

*Awareness / Knowledge 18*

*Casinos 21*

*Player History 22*

*Internet Game Playing 9*

*Technology 18*

*The Market 21*

*Sources for Information 25*

*Demographics 25*

**5**

**SECTION**

Appendix Page 26

*Cross tabulations*

*Survey Instrument*

*Composite Aggregate Data*

**INTRODUCTION**

**1**

The Center for Research & Public Policy (CRPP) is pleased to present the results to *Market and Demographic Research* conducted on behalf of the Vermont Lottery Commission.

CRPP was commissioned by the Vermont Lottery Commission to study issues surrounding quality of life, awareness of lotteries/lottery games, casino visits, history of playing Vermont Lottery, technology used and the market for new or expanding Vermont Lottery game playing.

The research included a comprehensive online survey of 798 Vermont adult residents. The 798 surveys consisted of 58.6% who played Vermont Lottery games (N=468) and 41.4% who did not (N=330).

CRPP, working together with Vermont Lottery and Intralot, designed the survey instrument to be used among residents of Vermont.

This report summarizes information collected from surveys conducted August 5 – 15, 2016.

The survey instrument employed in the 2016 Market and Demographic Researchincluded the following areas for investigation:

* Impressions of personal quality of life and current standard of living;
* Awareness and knowledge of lotteries and lottery games in general;
* Awareness of aspects of Vermont Lottery such as the Vermont Education Fund;
* Travel to casinos and game playing when there;
* History of Vermont Lottery game playing;
* Frequency of internet game playing in general and habits when playing;
* Use of technology such as smart phones or tablets;
* The market for new or increased Vermont Lottery game playing;
* Sources for information; and
* Demographics

Section II of this report discusses the Methodology used in the study, while Section III includes Highlights derived from an analysis of the quantitative research. Section IV is a Summary of Findings for the online and telephone surveys - a narrative account of the data.

Section V is an Appendix to the report containing a cross tabulation table, composite aggregate data and a copy of the survey instrument.

**METHODOLOGY**

**2**

The Center for Research & Public Policy utilized a quantitative research design to collect information from Vermont Lottery residents statewide. All surveys were conducted August 5 – 15, 2016.

Survey input was provided by the Vermont Lottery and Intralot.

Survey design at CRPP is a careful, deliberative process to ensure fair, objective and balanced surveys. Staff members, with years of survey design experience, edit out any bias. Further, all scales used by CRPP (either numeric, such as one through ten, or wording such as strongly agree, somewhat agree, somewhat disagree, or strongly disagree) are balanced evenly. And, placement of questions is carefully accomplished so that order has minimal impact.

One survey instrument was used to elicit information from all Vermont respondents. Respondents qualified for the survey if they confirmed they were at least 18 years of age, and were current residents of Vermont.

These 798 interviews were completed online among Vermont online panel membership. On a composite basis, 58.6% (60.4% in 2015 research) reported currently playing Vermont Lottery games while 41.4% (39.6% in 2015 research) suggested they did not.

All facets of the study were managed by CRPP’s senior staff. These aspects include: survey design, pre-test, computer programming, broadcasting online surveys to panel members, coding, editing, data entry, verification, validation and logic checks, computer analysis, analysis, and report writing.

Statistically, a sample of 798 Vermont residents represents a margin for error of +/-3.5% at 95% confidence levels.

In theory, a sample of Vermont residents will differ no more than +/-3.5% than if all Vermont residents were contacted and included in the survey. That is, if random probability sampling procedures were reiterated over and over again, sample results may be expected to approximate the large population values within plus or minus +/3.5% -- 95 out of 100 times.

Readers of this report should note that any survey is analogous to a snapshot in time and results are only reflective of the time period in which the survey was undertaken. Should concerted public relations or information campaigns be undertaken during or shortly after the fielding of the survey, the results contained herein may be expected to change and should be, therefore, carefully interpreted and extrapolated.

Furthermore, it is important to note that all surveys contain some component of “sampling error”. Error that is attributable to systematic bias has been significantly reduced by utilizing strict random probability procedures. This sample was strictly random in that selection of each potential respondent was an independent event, based on known probabilities.

Each qualified panel member within Vermont had an equal chance for participating in the study. Statistical random error, however, can never be eliminated but may be significantly reduced by increasing sample size.

**Panel sample**: Online respondents to this survey are members of an online panel. Each was randomly invited to participate. These Vermont residents elected to become members of one or more panels. Once you agree to become a member of a firm’s panel, you are asked a sizable list of questions including your demographic background. By the very nature of the panel, these members are likely more computer savvy/proficient, likely accomplish more online than the general population of residents and have a greater comfort level with online activity. These panel members may have a somewhat elevated level of income and education levels.

**HIGHLIGHTS**

**3**

**The following observations are made on a composite basis – a review of all 798 online respondent results.**

**On Quality of Life**

**A large majority of Vermont respondents, 91.6%, described their current quality of life in the state as very good (42.1%) or good (49.5%). Another 7.2% described their quality of life as poor (5.6%) or very poor (1.6%).**

**Compared to three years ago, respondents were asked if their own standard of living was better, the same and good, worse or the same and poor. Just over three quarters, 78.7%, indicated their standard of living was better (27.2%) or the same and good (51.5%). Another 20.7% suggested their standard of living was worse (16.8%) or the same and poor (3.9%).**

**On Awareness and Knowledge**

**In response to an open-end question, the most frequently recalled lotteries, lottery games or games of chance included: Powerball, Megabucks, and scratch tickets.**

**Among all Vermont residents surveyed, awareness (very and somewhat aware) was strongest for Lottery games such as Megabucks, Powerball, Mega Millions (94.2%). This set of Lottery games was followed in strength of awareness by Lottery instant games such as scratch tickets and Fast Play Pro (86.3%), Commercial Bingo Halls (53.9%), game play in bars/cafes, clubs or at home (42.0%), and internet games (41.5%).**

**Awareness of characteristics of Vermont Lottery was measured. A large majority, 89.3%, reported being very or somewhat aware of the Vermont Lottery tagline: “Please play responsibly”. This was followed by 72.8% who reported being very or somewhat aware that the Vermont Education Fund receives 100% of Lottery profits and 58.5% who were very or somewhat aware of Vermont Lottery’s 2nd Chance program.**

**On Casino Visits**

**Nearly two-fifths, 39.1%, of all survey respondents made one or more trips to casinos over the past two years. The percentage is higher among Vermont Lottery players (52.0%) than non-players (20.9%).**

**Vermonters traveling to casinos in other states spend an average of $454.20 excluding lodging, meals or entertainment. The average is higher among Vermont Lottery players ($555.70) than non-players ($92.28).**

**The most popular games at casinos when visiting included (in declining order) slots, Blackjack, Roulette, video slots, and video poker. Least popular were Casino Wars, Dice and KENO.**

**On Player History**

**Over one-half, 58.6%, of all survey respondents indicated they do play Vermont Lottery games while 41.4% suggested they did not. In 2015, Vermont Lottery research indicated 60.4% played while 39.6% did not.**

**Among Vermont Lottery players, 81.6%, reported they play Powerball or Mega Millions followed by instant tickets (77.8%), Tri-State Lottery terminal games (69.0%), Lucky for Life (23.7%) and Fast Play Pro (22.0%).**

**Across all the Vermont Lottery games played, the average number of times played each week was 2.643 times. The average amount spend on all games played in that given week was $32.41.**

**All survey respondents were asked if they traveled to Maine, Massachusetts, New York or New Hampshire to play Lottery games in these states. Overall, 32.3% indicated they did. Among Vermont Lottery players, the percentage was higher at 47.6% while among non-players, the percentage was 10.6%.**

**Favorite purchases when traveling to neighboring states included (in declining order): Powerball (47.9%), instant scratch games (46.7%), Mega Millions (35.9%), and Megabucks (27.8%).**

**Those who did play Lottery in other states, overall, spent an average of $33.86 each time they stopped to purchase. The average among Vermont Lottery players was higher at $35.40 compared to non-players at $25.14.**

**Favorite venues, among Vermont Lottery players, for Lottery purchases or for chance games included (in declining order): convenience stores/supermarkets/drug stores (85.0%), casinos (27.0%), bars/taverns (13.7%), at home (7.9%), internet websites (6.9%), street vendors (6.0%), and fraternal organizations (5.8%).**

**On Internet Game Playing**

**While 71.9% of all respondents indicated they do not play internet games, 23.1% suggested they played very frequently (4.5%), often (7.8%) or occasionally (11.8%).**

**The favorite types of games played included Solitaire-style (61.1%), games with levels (58.0%), casino-style games (52.8%), and fantasy sports (49.2%).**

**While 44.6% of those who play internet games play just free games, some just purchase games (10.9%). Others, 41.5%, do play both – free and purchased. Vermont Lottery players are significantly more likely to just purchase games than non-players – 12.6% and 2.9% respectively. Vermont Lottery players are also more likely to play both purchased and free games than non-players – 45.9% and 20.6%, respectively.**

**On average, those purchasing games they play, spend $86.74 in a given month. The average spent is higher among Vermont Lottery players ($127.62) than non-players ($41.25).**

**On Technology**

**Nearly all online survey respondents, 96.2%, reported having internet access at home, work or both. Large percentages had smart phones/pads or tablets (87.7%) as well as used social media such as Facebook (86.3%). Nearly three-quarters, 71.7%, indicated they use a service to stream TV or music while 57.5% have digital TV/radio. Fewer, 26.8%, use an online gaming service.**

**On The Market**

**In an effort to learn if characteristics of Vermont Lottery would encourage players to play more frequently and non-players to play, several conditions were tested. These results are displayed here.**

**If self-service vending machines were available in social establishments**

**Players: 57.3% very or somewhat likely to play more**

**Non-players: 22.1% very or somewhat likely to play**

**If you knew that 100% of Vermont Lottery profits go to the VT Education Fund**

**Players: 79.9% very or somewhat more likely to play more**

**Non-players: 41.2% very or somewhat likely to play**

**If the economy improved**

**Players: 83.1% very or somewhat likely to play more**

**Non-players: 10.6% very or somewhat likely to play**

**If Vermont Lottery Games were offered on the internet**

**Players: 53.6% very or somewhat likely to play more**

**Non-players: 19.2% very or somewhat likely to play**

**If gas prices remain near $2 per gallon**

**Players: 79.9% very or somewhat likely to play more**

**Non-Players: 30.6% very or somewhat likely to play**

**Favorite places or venues to have Lottery or games of chance available, according to all respondents, included: convenience stores (73.3%), supermarkets (55.3%), vending machines (33.3%) and Vermont Lottery website (33.1%).**

**Nearly two-fifths, 39.2%, of all respondents would be very or somewhat likely to purchase scratch tickets if they were available online. This was followed by bingo, slot machines, poker, sports betting, and Roulette – 32.5%, 29.9%, 22.8%, 21.4%, and 17.9%, respectively. The percentages were nearly three times higher among Vermont Lottery players than non-players.**

**On Sources for Information**

**Vermont Lottery players used a number of sources for information about the Lottery. Those named most frequently included: internet/websites (47.9%), VT Lottery website (43.8%), TV news (33.1%), Powerball/Mega Millions website (21.6%) and TV advertising (20.7%).**

**A large percentage, 78.8%, of Vermont Lottery players reported visiting the Vermont Lottery website. The primary reasons for visits included: winning number information (73.4%), 2nd Chance information (36.6%), drawing information (36.3%), general information (25.2%) and information on games (21.2%).**

**The average overall positive rating score for the Vermont Lottery website across six different characteristics such as having the information needed and maneuverability was 67.06.**

**Summary of Findings**

**4**

Readers are reminded that the following section summarizes statistics collected from online surveys of 798 Vermont residents.

**Quality of Life**

Respondents were asked to describe their quality of life in Vermont. A large percentage, 91.6% described their own quality of life as very good (42.1%) or good (49.5%). Another 7.2% described their own quality of life as poor (5.6%) or very poor (1.6%).

Results are displayed in the following graph.

Compared to three years ago, respondents were asked if their own standard of living was better, the same and good, worse or the same and poor. Just over three quarters, 78.7%, indicated their standard of living was better (27.2%) or the same and good (51.5%). Another 20.7% suggested their standard of living was worse (16.8%) or the same and poor (3.9%). A few, 0.6%, were unsure.

Results are shown in the following graph.

**Awareness and Knowledge**

In an open-end format question, respondents were asked to name the lotteries, lottery games, or games of chance that come to mind.

The most frequently named included: Powerball (31.0%), Megabucks (18.0%), scratch tickets (18.0%), fun (4.0%), none (3.0%) and games (3.0%). Others, 23.0% named a number of miscellaneous games.

A number of lottery games were presented to respondents. Each was asked if they were very aware, somewhat aware, somewhat unaware or not at all aware of each. The cumulative totals for those indicating very or somewhat aware are presented in the following table on a composite basis, among just Vermont Lottery players and among non-Vermont Lottery players.

|  |  |  |  |
| --- | --- | --- | --- |
| **Awareness of Lotteries, Lottery Games, or Games of Chance** | **Composite** | **Players** | **Non-Players** |
| Vermont Lottery games such as Megabucks, Powerball, Mega Millions | 94.2 | 99.6 | 86.7 |
| Lottery instant games such as scratch tickets and Fast Play Pro | 86.3 | 93.6 | 76.1 |
| Internet games | 41.5 | 48.3 | 31.8 |
| Game play in bars/cafes, clubs or at home | 42.0 | 49.6 | 31.2 |
| Commercial Bingo Halls | 53.9 | 60.5 | 44.5 |

Each respondent was asked to indicate how aware they were of each of the following related to **the Vermont Lottery prior to receiving the online survey**. Each was asked to indicate if they were very aware, somewhat aware, somewhat unaware or not at all aware.

The cumulative totals for those indicating very or somewhat aware are presented in the following table on a composite basis, among just Vermont Lottery players and among non-Vermont Lottery players.

|  |  |  |  |
| --- | --- | --- | --- |
| **Characteristic of Vermont Lottery** | **Composite** | **Players** | **Non-Players** |
| The Vermont Lottery tagline: “Please play responsibly” | 89.3 | 96.2 | 79.7 |
| The Vermont Education Fund receives 100% of Lottery profits | 72.8 | 79.7 | 63.0 |
| The Vermont Lottery’s 2nd Chance program | 58.5 | 72.6 | 38.5 |

**Casino Visits**

Respondents were asked if they have traveled to casinos in other states over the past two years. If so, they were asked to report the number of times.

Results are displayed in the following table on a composite basis as well as among just Vermont Lottery players and non-players.

|  |  |  |  |
| --- | --- | --- | --- |
| **Traveling to Casinos** | **Composite** | **Players** | **Non-Players** |
| Yes, once | 16.3 | 19.4 | 11.8 |
| Yes, twice to less than six trips | 17.4 | 24.6 | 7.3 |
| Yes, six to less than 12 trips | 3.5 | 5.6 | 0.6 |
| Yes, 12 or more trips | 1.9 | 2.4 | 1.2 |
| TOTAL: Yes, one or more trips | 39.1 | 52.0 | 20.9 |
| No | 60.8 | 48.0 | 78.8 |

Not including lodging, meals or other entertainment, those traveling to casinos were asked how much they would typically spend on casino games during a single trip. The averages are presented in the following graph. Vermont Lottery players typically spend significantly more than non-Vermont Lottery players when visiting casinos.

Respondents who did travel out of state to casinos were asked to indicate their favorite games when visiting. The following table presents the results as collected and in declining order. Multiple responses were accepted.

|  |  |
| --- | --- |
| **Favorite Games when Visiting Casinos** | **Percentage Playing** |
| Slots | 70.2 |
| Blackjack | 43.3 |
| Roulette | 27.2 |
| Video Slots | 26.0 |
| Poker Slots | 19.9 |
| Video Poker | 17.9 |
| Card Games | 16.7 |
| Stud Poker | 9.0 |
| Keno | 7.7 |
| Dice | 6.1 |
| Casino Wars | 2.6 |
| Other | 2.2 |
| Unsure/Don’t Recall | 1.9 |

**Player History**

All respondents were asked if they played any of the variety of games offered by Vermont Lottery. Just over one-half, 58.6%, indicated they did play Vermont Lottery games as shown in the following graph.

Players, only, were asked which Vermont Lottery games they played, the average number of times each week they played and the average amount they spent on each game, each week. Results are displayed in the following table.

|  |  |  |  |
| --- | --- | --- | --- |
| **Which Games You Play?** | **Yes, Play** | **Average number of times you play each week?** | **Average $ Amount** |
| Tri-State Lottery terminal games such as Megabucks or Gimme 5 Play | 69.0 | 2.33 | $31.63 |
| Fast Play Pro | 22.0 | 3.13 | $50.67 |
| Instant Tickets | 77.8 | 3.29 | $23.33 |
| Lucky for Life | 23.7 | 2.41 | $40.00 |
| Powerball or Mega Millions | 81.6 | 2.05 | $16.40 |

All respondents were asked if they traveled to Maine, Massachusetts, New York, or New Hampshire to play Lottery Games. Results are shown in the following table.

|  |  |  |  |
| --- | --- | --- | --- |
| **Traveling to Surrounding States to Play Lottery?** | **Composite** | **Players** | **Non-Players** |
| Yes, Maine | 6.8 | 9.4 | 3.0 |
| Yes, Massachusetts | 8.6 | 13.2 | 2.1 |
| Yes, New York | 17.5 | 25.4 | 6.4 |
| Yes, New Hampshire | 15.7 | 23.1 | 5.2 |
| No | 66.4 | 50.9 | 88.5 |
| Unsure | 1.3 | 1.5 | 0.9 |

Out-of-state Lottery players were asked to report their favorite games when purchasing tickets in surrounding states. Multiple responses were accepted. Results are shown in declining order.

|  |  |
| --- | --- |
| **Favorite Games when Traveling to Other States to Play Lottery** | **Percentage Playing** |
| Powerball | 47.9 |
| Instant Scratch Games | 46.7 |
| Mega Millions | 35.9 |
| Megabucks | 27.8 |
| Lucky for Life | 10.4 |
| Lotto | 7.7 |
| Fast Play | 7.3 |
| Pick 3 | 6.9 |
| Hot Lotto | 6.2 |
| Pick 4 | 6.2 |
| Unsure | 4.2 |
| Win 4 | 3.5 |
| Quick Draw | 3.1 |
| Keno | 3.1 |
| Take 5 | 2.3 |
| Megabucks Doubler | 2.3 |
| Other | 1.9 |
| Mass Cash | 1.2 |
| Pick 10 | 0.8 |
| All or Nothing | 0.8 |
| The Numbers Game | 0.8 |
| Daily Race Game | 0.4 |

Those traveling to other states to play lottery were asked, on average, how much they would spend each time they stopped to purchase in the states they identified. The following graph presents the results collected. Results are shown on a composite basis, among Vermont Lottery players and non-players.

Each Vermont Lottery player was asked to indicate all the places they purchase or play lottery or chance games. Multiple responses were accepted and results are displayed in declining order.

|  |  |
| --- | --- |
| **Venues or Places Lottery Played** | **Percent** |
| Convenience Stores/Supermarkets/ Drug Stores | 85.0 |
| Casinos | 27.0 |
| Bars/taverns | 13.7 |
| At home | 7.9 |
| Internet websites | 6.9 |
| Street vendors | 6.0 |
| Fraternal organizations | 5.8 |

**Internet Game Playing**

Reminded that there are a growing number of games available online today, all respondents were asked how frequently they play these games, if at all.

About one-quarter, 23.1%, suggested they play online games either very frequently (4.5%), often (7.8%), or occasionally (11.8%). Nearly three-quarters, 71.9%, suggested they never play these online games. Results are shown in the following graph.

Those who reported playing internet games were asked to indicate which they played. Multiple responses were accepted. Results are shown on a composite basis, by Vermont Lottery players and non-players.

|  |  |  |  |
| --- | --- | --- | --- |
| **Types of Games Played** | **Composite** | **Players** | **Non-Players** |
| Solitaire-style games | 61.1 | 64.2 | 47.1 |
| Games with levels to attain such as Candy Crush | 58.0 | 58.5 | 55.9 |
| Casino-style games such as Poker or dice games | 52.8 | 57.2 | 32.4 |
| Fantasy sports or sports games using service providers such as Draft Kings or Fan Duel | 49.2 | 53.5 | 29.4 |
| Puzzle games such as Sudoku | 48.2 | 50.9 | 35.3 |
| Arcade games such as Frogger or Pac-Man | 46.1 | 47.8 | 38.2 |
| War simulation games such as Call of Duty | 42.0 | 47.2 | 17.6 |
| Multi-player role-playing games such as World of Warcraft | 42.0 | 45.9 | 23.5 |
| Sports-themed games such as Fantasy League | 41.5 | 45.3 | 23.5 |
| Social games such as Minecraft | 38.9 | 40.9 | 29.4 |

When playing online games, respondents were asked if they generally play free games, games that require a purchase or both. Results are shown in the following table on a composite basis, by Vermont Lottery players and non-players.

|  |  |  |  |
| --- | --- | --- | --- |
| **Types of Online Games Played** | **Composite** | **Players** | **Non-Players** |
| Free games | 44.6 | 40.9 | 61.8 |
| Purchase required | 10.9 | 12.6 | 2.9 |
| Both free and purchased | 41.5 | 45.9 | 20.6 |
| Unsure | 3.1 | 0.6 | 14.7 |

On average, online game players spent $86.74 in a given month. Results are shown in the following graph.

**Technology**

Respondents were asked to indicate the technology they use. Results are displayed on a composite basis, by Vermont Lottery players and among non-players.

|  |  |  |  |
| --- | --- | --- | --- |
| **Technology Used** | **Composite** | **Players** | **Non-Players** |
| Internet access at home, work or both | 96.2 | 96.4 | 96.1 |
| A Smart Phone, Pad or Tablet. | 87.7 | 90.6 | 83.6 |
| Social media such as Facebook, LinkedIn, Twitter, or My Space | 86.3 | 85.7 | 87.3 |
| TV or music streaming service | 71.7 | 74.6 | 67.6 |
| Digital TV / Radio | 57.5 | 65.0 | 47.0 |
| Online gaming service | 26.8 | 36.3 | 13.3 |

**The Market**

All respondents, Vermont Lottery players and non-players, were asked to indicate if they would be very likely, somewhat likely, somewhat unlikely or not at all likely to play the Vermont Lottery or play Vermont Lottery more frequently if certain conditions existed. The cumulative totals for very and somewhat likely are presented here. Results are shown in the following table on a composite basis, by Vermont Lottery players and non-players.

|  |  |  |  |
| --- | --- | --- | --- |
| **How likely to play if…** | **Composite** | **Players** | **Non-Players** |
| the economy improved | 65.5 | 83.1 | 10.6 |
| you knew that 100% of Vermont Lottery ticket profits go to the Vermont Education Fund | 63.9 | 79.9 | 41.2 |
| gas prices remain near $2.00 per gallon | 59.5 | 79.9 | 30.6 |
| self-service vending machines were available in social establishments such as bars, pubs, or taverns | 42.7 | 57.3 | 22.1 |
| Vermont Lottery Games were offered on the internet | 39.3 | 53.6 | 19.1 |

All respondents were asked to indicate the places they would like to be able to play lottery or games of chance. Each was asked to indicate all that apply. Results are show in declining composite order. Composite results are displayed alongside Vermont Lottery players and non-players.

|  |  |  |  |
| --- | --- | --- | --- |
| **Venues or Places Where You Would Like to Have Lottery or Games of Chance Available** | **Composite** | **Players** | **Non-Players** |
| Convenience stores | 73.3 | 80.6 | 63.0 |
| Supermarkets | 55.3 | 63.9 | 43.0 |
| Vending Machines | 33.3 | 40.2 | 23.6 |
| Vermont Lottery Website | 33.1 | 34.2 | 31.5 |
| Discount Stores such as Dollar Stores or Job Lots | 20.3 | 23.5 | 15.8 |
| Cafes / Bars | 16.2 | 16.9 | 15.2 |
| Restaurants | 12.7 | 16.7 | 7.0 |
| Post offices / Stationary Shops | 7.9 | 10.7 | 3.9 |
| Fraternal Clubs | 5.1 | 5.8 | 4.2 |

The survey held a number of types of internet or online betting or gaming opportunities. Each respondent was asked to indicate how likely they were to play each as they become available. Results are displayed in the following table. The largest group expressed likelihood for internet scratch tickets. The lowest level of likelihood was recorded for internet roulette.

The following table depicts the cumulative totals for very and somewhat likely on a composite basis, among Vermont Lottery players and non-players. Results are displayed in declining order by composite results.

|  |  |  |  |
| --- | --- | --- | --- |
| **Types of Internet or Online Betting Games** | **Composite** | **Players** | **Non-Players** |
| Internet scratch tickets | 39.2 | 53.4 | 19.1 |
| Internet bingo | 32.5 | 45.5 | 13.9 |
| Internet slot machines | 29.9 | 42.1 | 12.7 |
| Internet poker | 22.8 | 33.5 | 7.6 |
| Internet sports betting | 21.4 | 31.0 | 7.9 |
| Internet Roulette | 17.9 | 27.8 | 3.9 |

**Sources for Information**

Vermont Lottery players were asked to indicate where they go for ticket information, games, updates and general information and communication about the Lottery. The following table presents the results as collected. Multiple responses were accepted and the table is displayed in declining order by mentions.

The largest sources for information include internet/websites, the Vermont Lottery website and TV news.

|  |  |
| --- | --- |
| **Sources for VT Lottery Information** | **Percent** |
| Internet / websites | 47.9 |
| VT Lottery website | 43.8 |
| TV news | 33.1 |
| Powerball/Mega Millions website | 21.6 |
| TV advertising | 20.7 |
| Friends/neighbors/relatives | 15.2 |
| Radio advertising | 12.4 |
| Radio news | 11.3 |
| Social media | 11.1 |
| Email | 10.3 |
| Co-workers | 8.8 |
| Newspaper stories | 6.6 |
| Newspaper ads | 5.6 |
| Newspaper inserts | 3.6 |
| Brochures | 2.8 |
| Employer/school | 2.1 |
| Other | 1.5 |
| Government agency | 1.1 |

Over three-quarters of all Vermont Lottery players have visited the Vermont Lottery website as shown in the following graph.

Reasons for the visit were recorded. Multiple responses were accepted. Results are presented in declining order by frequency of mention.

The most frequent reasons included winning number, 2nd Chance, and drawing information.

|  |  |
| --- | --- |
| **Reasons for Visiting the VT Lottery Website** | **Percent** |
| Winning number information | 73.4 |
| 2nd Chance information | 36.6 |
| Drawing information | 36.3 |
| General information | 25.2 |
| Information on games | 21.1 |
| Ticket sale locations | 12.2 |
| Office locations | 7.0 |
| Phone numbers | 5.4 |
| Problem gambling information | 1.9 |
| Unsure | 0.8 |

Those who reported visiting the website were asked to provide ratings on six different characteristics using a scale of one to ten where one was very good and ten was very poor. The cumulative totals for ratings of one through four (positive ratings) are presented here.

|  |  |
| --- | --- |
| **Rating Characteristics** | **Positive Ratings (1-4)** |
| On having the information or content you needed | 70.5 |
| On having winning information and processes you needed | 68.8 |
| Ease of navigation/maneuverability | 68.0 |
| On having draw game content and game information you needed | 66.1 |
| Graphically appealing | 64.8 |
| On having Instant ticket content and game information you needed | 64.2 |
| **AVERAGE** | **67.06** |

**Demographics**

|  |  |  |  |
| --- | --- | --- | --- |
| **Do You Play Poker or Other Card Games?** | **Composite Yes** | **Players** | **Non-Players** |
| Yes, poker | 11.0 | 14.1 | 6.7 |
| Yes, other card games | 18.3 | 17.7 | 19.1 |
| Yes, both poker and card games | 19.8 | 25.6 | 11.5 |
| TOTAL poker and / or games | 49.1 | 57.4 | 37.3 |
| No | 49.7 | 41.0 | 62.1 |
| Unsure | 1.1 | 1.5 | 0.6 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Average Respondent Age** | **Composite** | **Players** | **Non-Players** |
| Average: 2016 | 42..77 | 42.47 | 43.18 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Average Length of Residency** | **Composite** | **Players** | **Non-Players** |
| Average | 26.19 | 26.79 | 25.33 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Education** | **2016** | **Players** | **Non-Players** |
| Eighth grade or less | 0.1 | 0.2 | --- |
| Some high school | 1.8 | 1.7 | 1.8 |
| High school graduate | 16.7 | 18.4 | 14.2 |
| Some technical school | 2.3 | 1.5 | 3.3 |
| Technical school graduate | 3.1 | 3.2 | 3.0 |
| Some college | 22.7 | 25.9 | 18.2 |
| College graduate | 37.6 | 36.8 | 38.8 |
| Post-graduate degree | 15.4 | 12.4 | 19.7 |
| RF | --- | --- | --- |
| DK/Unsure | 0.4 | --- | 0.9 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Total family income before taxes** | **Composite** | **Players** | **Non-Players** |
| Under $29,999 | 18.7 | 15.2 | 23.6 |
| $30,000 to less than $45,000 | 14.2 | 13.7 | 14.8 |
| $45,000 to less than $60,000 | 14.4 | 15.4 | 13.0 |
| $60,000 to less than $75,000.00 | 11.8 | 13.0 | 10.0 |
| $75,000 to less than $80,000 | 8.5 | 10.9 | 5.2 |
| $80,000 to less than $90,000 | 7.5 | 9.0 | 5.5 |
| $90,000 or more | 20.1 | 20.3 | 19.7 |
| DK | 4.9 | 2.6 | 8.2 |
| RF | --- | --- | --- |

|  |  |  |  |
| --- | --- | --- | --- |
| **Gender** | **Composite** | **Players** | **Non-Players** |
| Male | 36.5 | 41.9 | 28.8 |
| Female | 63.5 | 58.1 | 71.2 |

APPENDIX

**5**

**INTERPRETATION OF AGGREGATE RESULTS**

The computer processed data for this survey is presented in the following frequency distributions. It is important to note that the wordings of the variable labels and value labels in the computer-processed data are largely abbreviated descriptions of the Questionnaire items and available response categories.

The frequency distributions include the category or response for the question items. Responses deemed not appropriate for classification have been grouped together under the “Other” code.

The “NA” category label refers to “No Answer” or “Not Applicable.” This code is also used to classify ambiguous responses. In addition, the “DK/RF” category includes those respondents who did not know their answer to a question or declined to answer it. In many of the tables, a group of responses may be tagged as “Missing” – occasionally, certain individual’s responses may not be required to specific questions and, thus, are excluded. Although, when this category of response is used, the computations of percentages are presented in two (2) ways in the frequency distributions: 1) with their inclusion (as a proportion of the total sample), and 2) their exclusion (as a proportion of a sample sub-group).

Each frequency distribution includes the absolute observed occurrence of each response (i.e. the total number of cases in each category). Immediately adjacent to the right of the column of absolute frequencies is the column of relative frequencies. These are the percentages of cases falling in each category response, including those cases designated as missing data. To the right of the relative frequency column is the adjusted frequency distribution column that contains the relative frequencies based on the legitimate (i.e. non-missing) cases. That is, the total base for the adjusted frequency distribution excludes the missing data. For many Questionnaire items, the relative frequencies and the adjusted frequencies will be nearly the same. However, some items that elicit a sizable number of missing data will produce quite substantial percentage differences between the two columns of frequencies. The meticulous analyst will cautiously consider both distributions.

The last column of data within the frequency distribution is the cumulative frequency distribution (Cum Freq.). This column is simply an adjusted frequency distribution of the sum of all previous categories of response and the current category of response. Its primary usefulness is to gauge some ordered or ranked meaning.