

2018

Market Research Study



Prepared for:

Vermont Lottery Commission

Prepared by:

The Center for Research & Public Policy

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

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1 INTRODUCTION

The Center for Research & Public Policy (CRPP) is pleased to present the results to *Market 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 800 Vermont adult residents. The 800 surveys consisted of 43.3% who played Vermont Lottery games (N=346) and 56.7% who did not (N=454).

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 July 13-27, 2018.

The survey instrument employed in the 2018 Market Research included the following areas for investigation:

- Impressions of personal quality of life and current standard of living;
- Awareness and knowledge of lotteries and lottery games, taglines, internet games;
- Awareness of aspects of Vermont Lottery such as the Vermont Education Fund;
- Awareness and recognition of the Vermont Lottery logo;
- Familiarity with KENO;
- Familiarity with lottery break-open/pull tab tickets;
- History of Vermont Lottery game playing;
- Internet/interactive lottery playing;
- Vermont Lottery playing and player history;
- Use of technology such as smart phones or tablets;
- The market for new or increased Vermont Lottery game playing;
- Problem gambling awareness and perceptions;
- 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

The Center for Research & Public Policy utilized a quantitative research design to collect information from Vermont Lottery residents statewide. All surveys were conducted July 13-27, 2018.

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 800 interviews were completed online among Vermont online panel membership.

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 800 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

ON QUALITY OF LIFE

A large majority of survey respondents, 89.8%, reported their quality of life in Vermont as very good (30.8%) or good (59.0%). Some, 9.1%, indicated their quality of life was poor (8.0%) or very poor (1.1%). Statistically, 89.8% is unchanged from 91.6% reported in 2016.

Three-quarters (75.9%) compared to three years ago, noted their standard of living in 2018 was better (25.8%) or the same and good (50.1%). Another 22.6% suggested their current standard of living was worse (16.8%) or the same and poor (5.8%). In 2016, those reporting better or the same and good was recorded at 78.7%.

ON AWARENESS AND KNOWLEDGE

Awareness of Vermont Lottery games was strong – 89.6% (94.2% in 2016) reported being very or somewhat aware of Vermont Lottery games such as Megabucks, Powerball, Mega Millions. Another 83.5% (86.3% in 2016) indicated they were very or somewhat aware of Vermont Lottery instant games such as scratch tickets and Fast Play Pro.

There also exists strong awareness (very and somewhat aware) of several Vermont Lottery characteristics...

- The Vermont Lottery tagline “Please play responsibly” – 86.3% (89.3% in 2016)
- The Vermont Education Fund receives 100% of Lottery profits – 63.4% (72.8% in 2016)
- The Vermont Lottery’s 2nd Chance program – 57.1% (58.5% in 2016)

Awareness (very and somewhat aware) of other types of games not specific to Vermont Lottery was also recorded.

- Internet games – 63.0% (up significantly from 41.5% in 2016)
- Games played in bars/cafes or at home – 51.3% (up significantly from 42.0% in 2016)
- Commercial bingo halls – 55.3% (up slightly from 53.9% in 2016)

Nearly two-thirds, 62.5%, of all respondents suggested they have seen the Vermont Lottery logo (as displayed in the survey) frequently or somewhat frequently.

ON KENO

Just over one-third of all statewide respondents, 35.4% (46.5% among Vermont Lottery players) were very or somewhat aware of the game Keno.

Of this group, 10.3% indicated they do play Keno (14.4% among Vermont Lottery players).

Those that play Keno noted they travel to New Hampshire, New York and to out-of-state casinos to do so – 37.8%, 20.0% and 51.1%, respectively.

After an introduction to the game Keno, 40.9% of all respondents noted they were very or somewhat likely to play Keno if it was available from Vermont Lottery (58.1% among Vermont Lottery players).

Likelihood (very or somewhat likely) of playing Keno if offered by Vermont Lottery, under several different scenarios, was recorded...

- If the profits were designated for college financial aid – 48.1%
- If the profits were designated to Pre-K programs in Vermont – 52.0%
- If the profits went to the Vermont Student Assistance Corporation – 46.3%
- If the profits either lowered state taxes or moderated increases – 56.4%

ON LOTTERY BREAK-OPEN/PULL TAB TICKETS

One-half of all respondents, 49.4% reported being aware of pull tab or break-open lottery tickets (63.9% among Vermont Lottery Players).

One-fifth, 20.1% of all respondents noted they do play pull tab or break-open tickets (34.1% of Vermont Lottery players).

Following an introduction to pull tab or break-open tickets, 41.6% of all respondents noted they were very or somewhat likely to play pull tab or break-open tickets (59.0% among Vermont Lottery players).

Likelihood (very or somewhat likely) of playing pull tab tickets if offered by Vermont Lottery, under several different scenarios, was recorded...

- If the profits were designated for college financial aid – 46.6%
- If the profits were designate to Pre-K programs in Vermont – 49.0%
- If the profits went to the Vermont Student Assistance Corporation – 43.9%
- If the profits either lowered state states or moderated increases – 52.0%

ON INTERNET / INTERACTIVE PLAYING

Over two-fifths of all respondents (42.9%) are playing a growing number of online games either very frequently, often or occasionally.

The most popular online games included Solitaire-style games, games with levels, puzzle games, casino-style games and arcade games.

Interestingly, those playing free games jumped to 67.3% in 2018 from 44.6% in 2016.

The average amount spent on paid games per month was recorded at \$28.68. Among Vermont Lottery players the average amount paid on free games was higher at \$33.64.

ON PLAYER HISTORY

In a section for Vermont Lottery players only, respondents noted they purchase their tickets/games near their homes, near work, near shopping, a combination or near gym/fitness – 83.8%, 28.9%, 28.3%, 14.7% and 4.0%, respectively.

Just over one-half (50.3%) of all Vermont Lottery players indicated they were very (21.4%) or somewhat likely (28.9%) to use a Vermont Lottery app on their respective phones or devices.

Purchase locations for tickets/games were reported to be convenience stores, bars/taverns, at home, casinos, internet websites, fraternal organizations, street vendors – 91.0%, 14.5%, 14.5%, 11.6%, 6.9%, 5.5%, and 2.9%, respectively.

ON TECHNOLOGY USE

There exists strong use of different technologies among Vermont residents surveyed...

- Internet access – 95.5%
- A smart phone, pad or tablet – 91.0%
- Social media – 87.8%
- TV or music streaming – 76.0%

More moderate use was recorded for...

- Digital TV / Radio – 57.1%
- Online gaming service – 25.9%
- An app for playing lottery/chance games – 16.8%

ON 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 leading motivating factors included (very & somewhat likely):

- If the economy continues to improve – 55.5%
- You knew 100% of the profits go to the Vermont Education Fund – 55.1%
- You could begin buying tickets in checkouts as one transaction – 45.6%
- An app was available for 2nd Chance – 43.9%
- You could use debit/credit cards to purchase tickets – 43.6%

Other motivating factors included with less frequency of mention (very & somewhat likely):

- Self-service vending machines were available in social establishments – 37.5%
- Vermont Lottery games were offered on the internet – 35.6%
- You could purchase tickets online – 32.9%
- An app was available for purchase / payment – 32.1%
- Tickets were available at bars/taverns – 28.1%
- If gas prices remain near \$3.00 per gallon – 26.4%

ON PROBLEM GAMBLING

Just 15.6% of all respondents (21.1% among Vermont Lottery players) indicated they follow the issue of problem gambling very or somewhat closely.

Nearly one-fifth, 16.3%, of all respondents (19.7% among Vermont Lottery players) indicated they or someone they know does have a problem with possible gambling addiction.

One-third of all respondents, 34.1%, suggest that problem gambling is more common today than it was five years ago. Another 9.0% suggest the problem is less common while 31.3% noted the problem is as common as it was five years ago.

Interestingly, 26.0% of all respondents indicated that problem gambling will increase significantly if new Vermont Lottery playing opportunities become available at bars/taverns as well as at new sales points. Others, 26.1% see problem gambling increasing only modestly while 11.0% see no increase and 21.4% suggest there will be only a minor, if any, increase.

ON SOURCES FOR INFORMATION

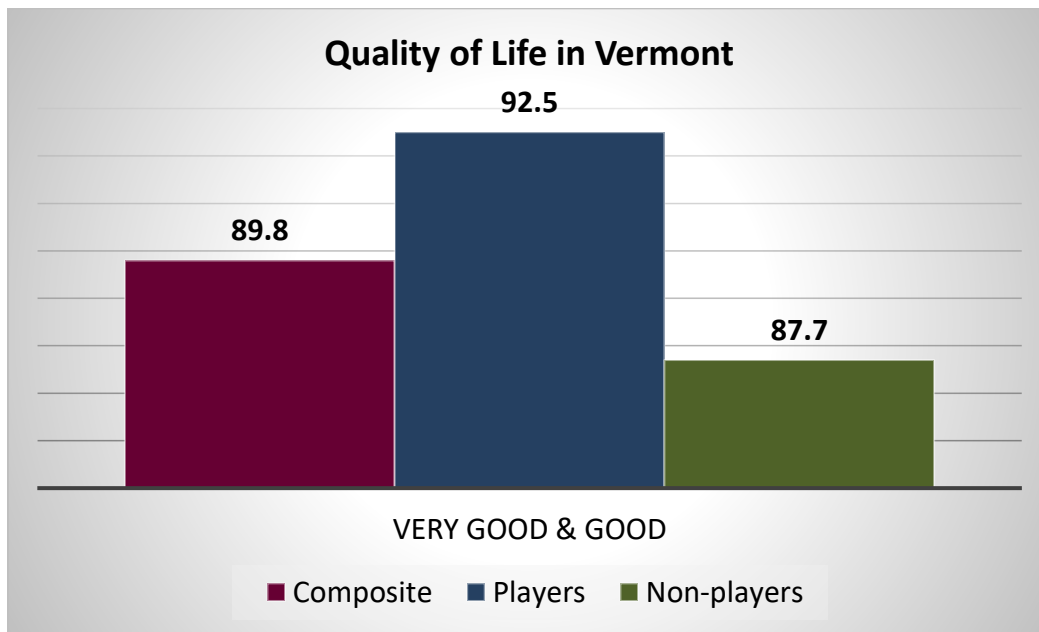
Impressively, over the years the Vermont Lottery website has increased in access and use as a source for information and communication about the Lottery. Today, it's the leading source for Vermont Lottery information (up to 48.3% from 43.8% in 2016) among 17 sources measured.

Summary of Findings

Readers are reminded that the following section summarizes statistics collected from online surveys of 800 Vermont residents. Throughout this section, many tables and graphs depict results among all 800 respondents (composite) as well as among Vermont Lottery players as well as non-players. Narrative throughout discusses the composite (800) data unless otherwise described.

QUALITY OF LIFE

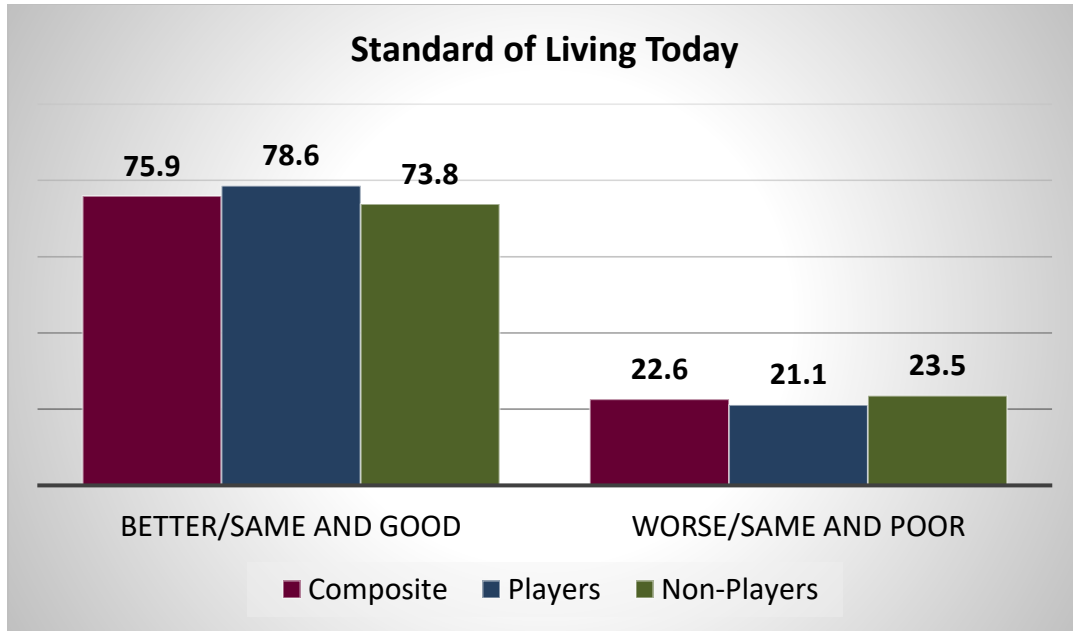
In 2018, all respondents were asked to describe their overall quality of life in Vermont. A large majority, 89.8%, reported their quality of life was very good (30.8%) or good (59.0%) as displayed in the following graph. Some, 9.1 reported their quality of life as poor (8.0%) or very poor (1.1%).



In 2016, a significant percentage, 91.6% described their own quality of life as very good (42.1%) or good (49.5%).

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. Three-quarters, 75.9%, reported their standard of living as better (25.8%) or the same and good (50.1%). Nearly one-quarter, 22.6%, reported their standard of living as worse (16.8%) or the same and poor (5.8%).

Results are shown in the following graph.



In 2016, 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.

AWARENESS AND KNOWLEDGE

Several Vermont 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	89.6	98.0	83.3
Vermont Lottery instant games such as scratch tickets and Fast Play Pro	83.5	93.6	75.8

Results from 2016 are displayed here.

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

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	Composite	Players	Non-Players
The Vermont Lottery tagline: "Please play responsibly"	86.3	94.5	80.0
The Vermont Education Fund receives 100% of Lottery profits	63.4	73.1	55.9
The Vermont Lottery's 2nd Chance program	57.1	74.3	44.1

Results from 2016 are displayed [here](#).

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

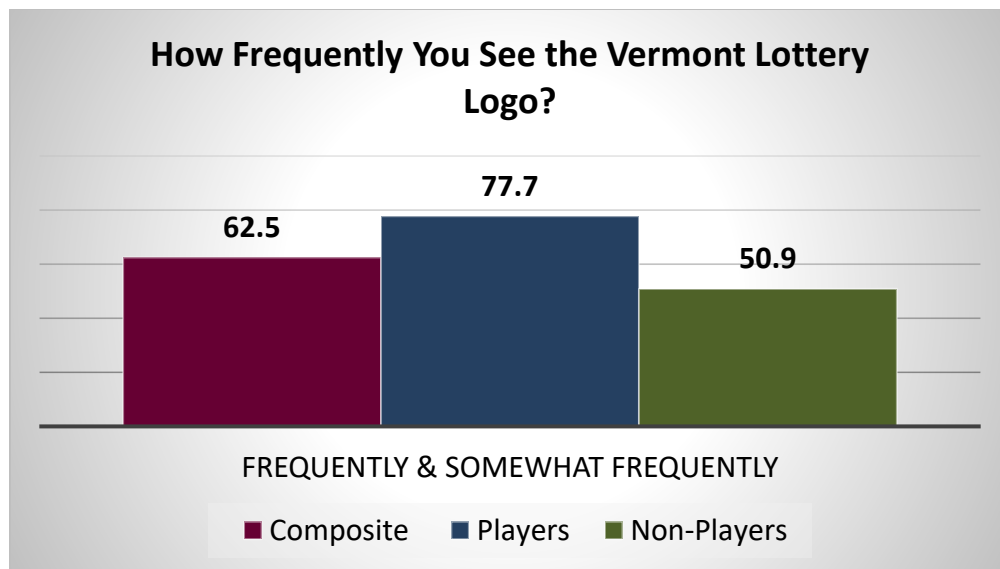
Respondents were asked how aware they were of several games that were not specific to Vermont Lottery. Results are displayed [here](#).

Awareness of Lotteries, Lottery Games, or Games of Chance	Composite	Players	Non-Players
Internet games	63.0	65.0	61.5
Games play in bars/cafes, clubs or at home	51.3	58.4	45.8
Commercial bingo halls	55.3	65.6	47.1

Results from 2016 are displayed [here](#).

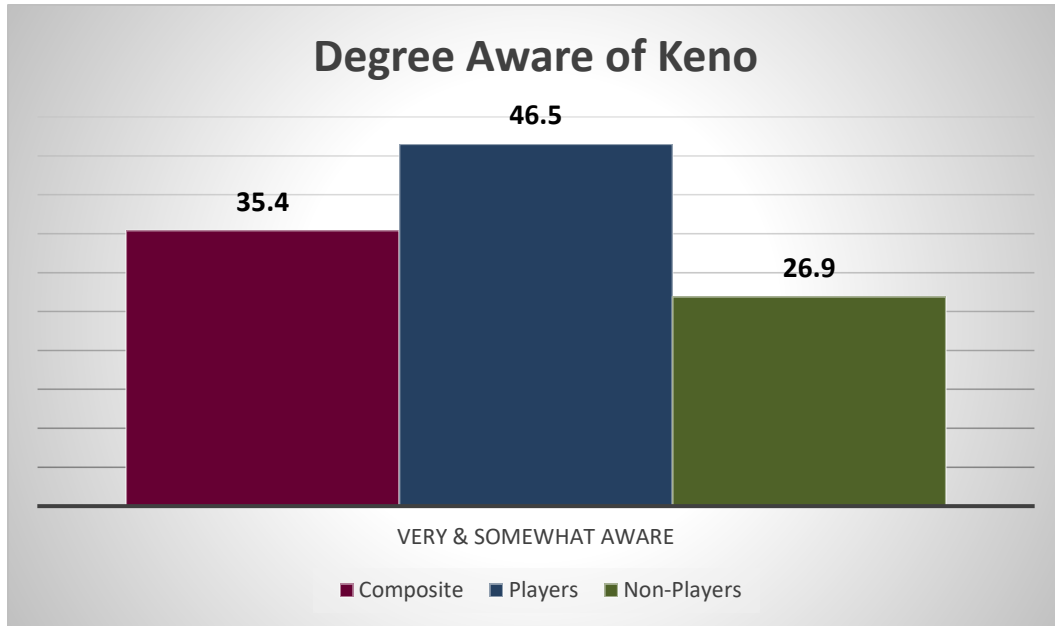
Characteristic	Composite	Players	Non-Players
Internet games	41.5	48.3	31.8
Games play in bars/cafes, clubs or at home	42.0	49.6	31.2
Commercial bingo halls	53.9	60.5	44.5

The Vermont Lottery logo was displayed in the survey. Each respondent was asked how frequently they have seen the logo – whether frequently, somewhat frequently, infrequently, or have not seen the logo before. The results are displayed in the following graph.

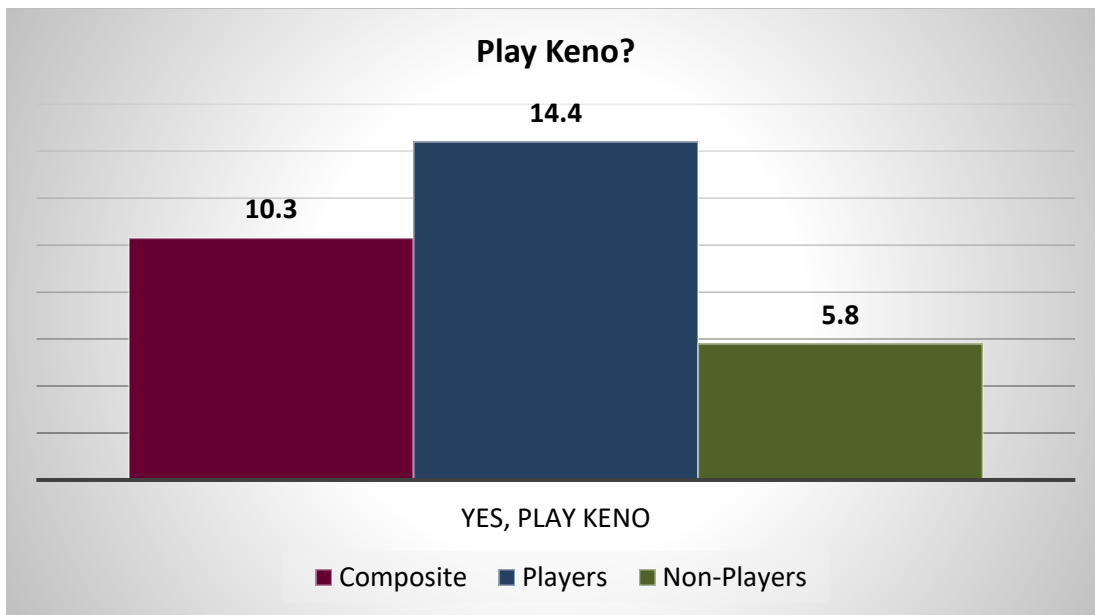


KENO

In a new series of questions in 2018, all respondents were asked how aware they were with the game called Keno. Respondents were asked if they were very aware, somewhat aware, somewhat unaware or not at all aware. Results are displayed here.



Respondents who reported being very aware, somewhat aware or somewhat unaware of Keno were asked if they play the game. Results are displayed here.



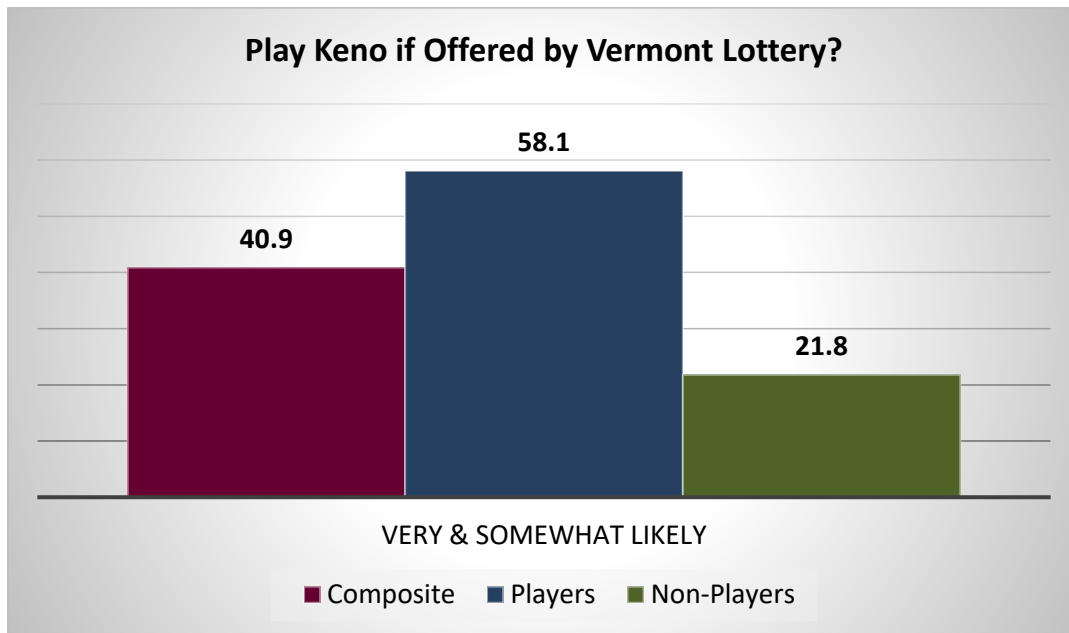
Keno players were asked where they do play the game. Responses are presented within the following table. Multiple responses were accepted.

Where / How You Play Keno	Composite	Players	Non-Players
Travel to New Hampshire to play Keno 603	37.8	42.4	25.0
Travel to New York (for NY Lottery Keno)	20.0	16.2	25.0
At out-of-state casinos	51.1	45.9	50.0

The game of Keno was introduced to survey respondents as follows:

“Keno is a lottery-like gambling game often played at modern casinos and offered as a game in some state lotteries. Players purchase a ticket from a field of 80 numbers and selects a specific amount of numbers. Then, 20 numbers are drawn at random using a ball machine or a random number generator. Winning matches are paid out using Keno “pay tables”.”

All respondents were asked how likely they would be to play Keno if the game was offered from Vermont Lottery. Over one-half, 58.1% of players indicated they would be very or somewhat likely to play. The following graph depicts the results as collected.

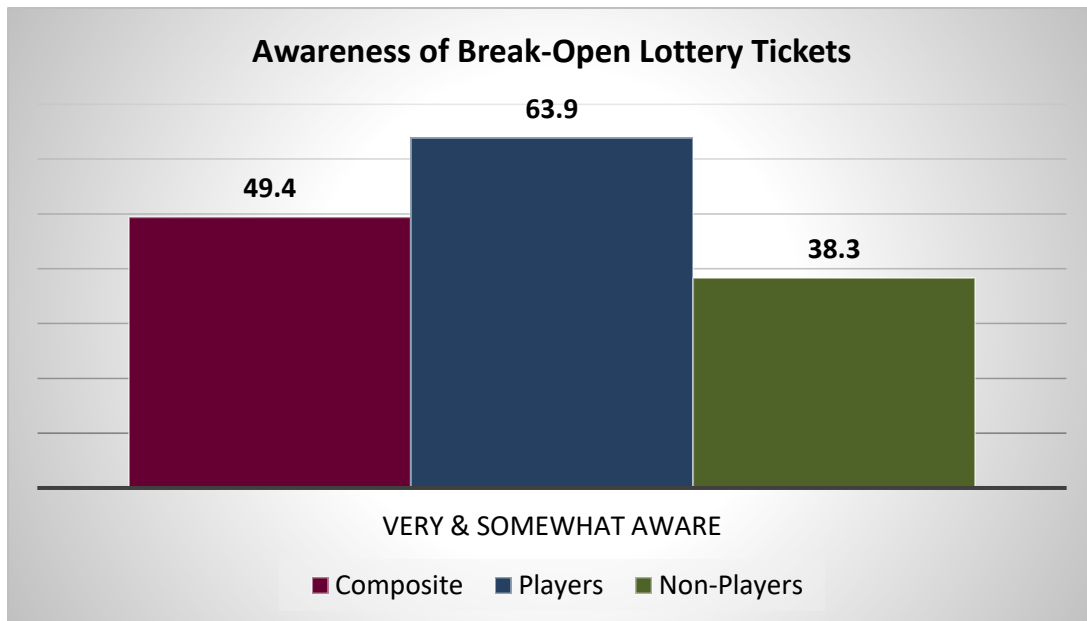


Each respondent was asked how likely they would be to play Keno if offered by Vermont Lottery in the following scenarios:

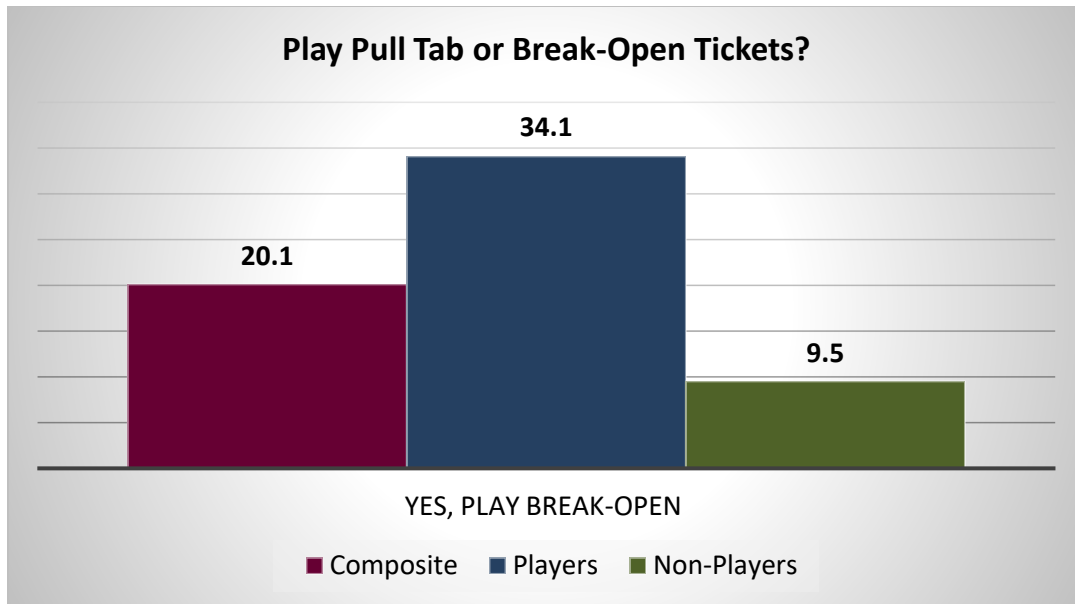
How likely to play if...	Composite	Players	Non-Players
If the profits were designated for college financial aid	48.1	61.8	37.4
If the profits were designated to Pre-K programs in Vermont	52.0	66.2	41.2
If the profits went to the Vermont Student Assistance Corporation	46.3	59.2	36.3
If the profits either lowered state taxes you pay or moderated increases in your taxes	56.4	70.8	45.4

LOTTERY BREAK-OPEN/PULL TAB TICKETS

Respondents were asked how aware they were with pull tab or break-open lottery tickets. On a composite basis, 49.4%, indicated they were aware of the tickets. The following graph displays the cumulative totals for very and somewhat aware.



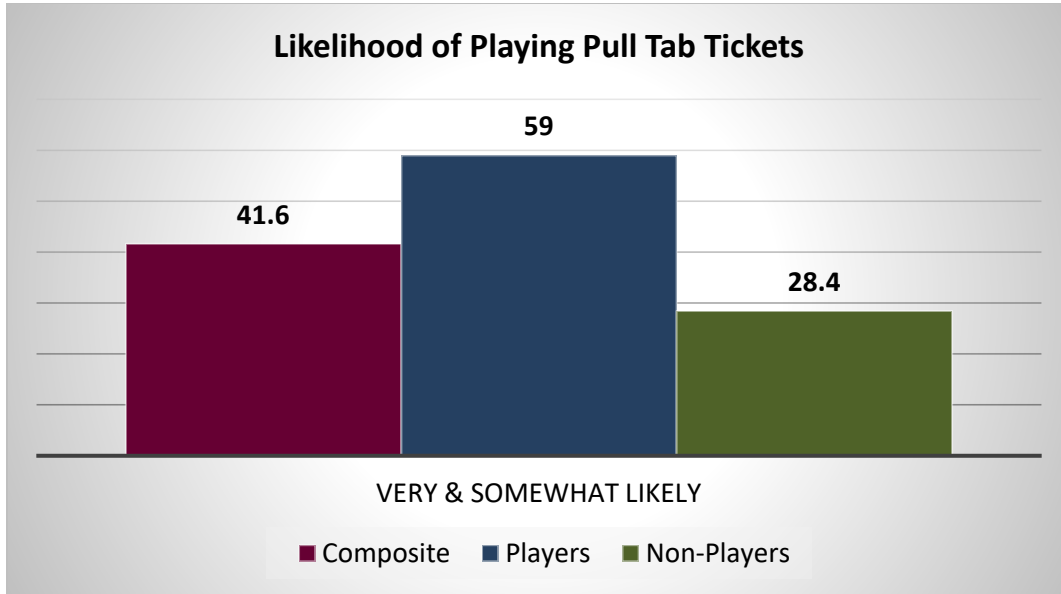
Respondents were asked if they play pull tab or break-open tickets. Results are displayed in the following graph.



Survey participants were introduced to Pull Tab or Break-Open tickets as follows:

“A pull-tab is a gambling ticket. Other common names include Break-Opens, Instant Bingo, or Popp-Opens. The physical pull-tab tickets are usually multi-layered tickets containing symbols hidden behind perforated tabs. You pull the tab to reveal the symbols. The object of the ticket is to open the perforated windows on it and reveal a winning combination. The winning pull-tab ticket is turned in for a prize – typically cash. The pull-tabs games are sold in bars, taverns and at fraternal or social clubs.”

Each respondent was asked how likely they would be to play pull tab tickets if Vermont Lottery provided the pull tab game to bars, taverns, fraternal or social clubs. Each was asked if they would be very likely, somewhat likely, somewhat unlikely or not at all likely. Results are displayed here.



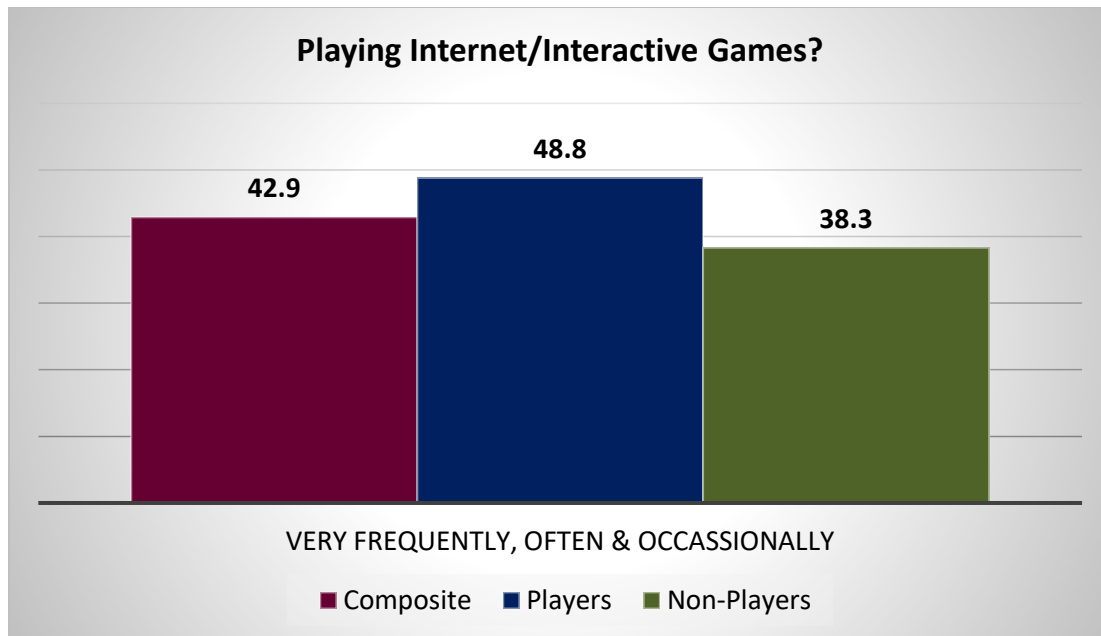
Each respondent was asked how likely they would be to play pull tabs or break-open tickets offered by the Vermont Lottery in the following scenarios...

How likely to play if...	Composite	Players	Non-Players
If the profits were designated for college financial aid	46.6	61.6	35.2
If the profits were designated to Pre-K programs in Vermont	49.0	63.6	37.9
If the profits went to the Vermont Student Assistance Corporation	43.9	57.5	33.5
If the profits either lowered state taxes you pay or moderated increases in your taxes	52.0	67.6	40.1

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.

The following graph displays the cumulative totals for those playing either very frequently, often, or occasionally (42.9%). This is up significantly from 24.1% in 2016.



Those playing online games were asked which types of games they play. The following table holds the results collected. Results are displayed in declining order by composite results.

Types of Games Played	Composite	Players	Non-Players
Solitaire-style games	74.1	75.1	73.0
Games with levels to attain such as Candy Crush	70.0	76.3	63.8
Puzzle games such as Sudoku	57.7	62.1	53.4
Casino-style games such as Poker or dice games	51.0	67.5	35.1
Arcade games such as Frogger or Pac-Man	49.6	58.0	41.4
Social games such as Minecraft	28.9	34.9	23.0
War simulation games such as Call of Duty	23.6	28.4	19.0
Multi-player role-playing games such as World of Warcraft	22.7	27.8	17.8
Sports-themed games such as Fantasy League	13.7	20.1	7.5
Fantasy sports or sports games using service providers such as Draft Kings or Fan Duel	12.8	17.8	8.0

Results in 2016 are displayed here for comparison purposes.

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	67.3	62.7	71.8
Purchase required	2.6	2.4	2.9
Both free and purchased	26.8	32.0	21.8
Unsure	3.2	3.0	3.4

Results in 2016 are displayed here for comparison purposes.

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

Among those who play online games where a purchase is required, the average dollar amount spent monthly is \$28.68, \$33.64, and \$21.83 for composite data, players and non-players, respectively. The move away from paid games comes with an associated drop in the average amount spent monthly (down to \$28.68 from \$86.74 in 2016).

VERMONT LOTTERY PLAYING

All respondents were asked if they played any of the variety of games offered by Vermont Lottery. Just over one-half, 43.3%, indicated they did play Vermont Lottery games while 56.8% suggested they did not.

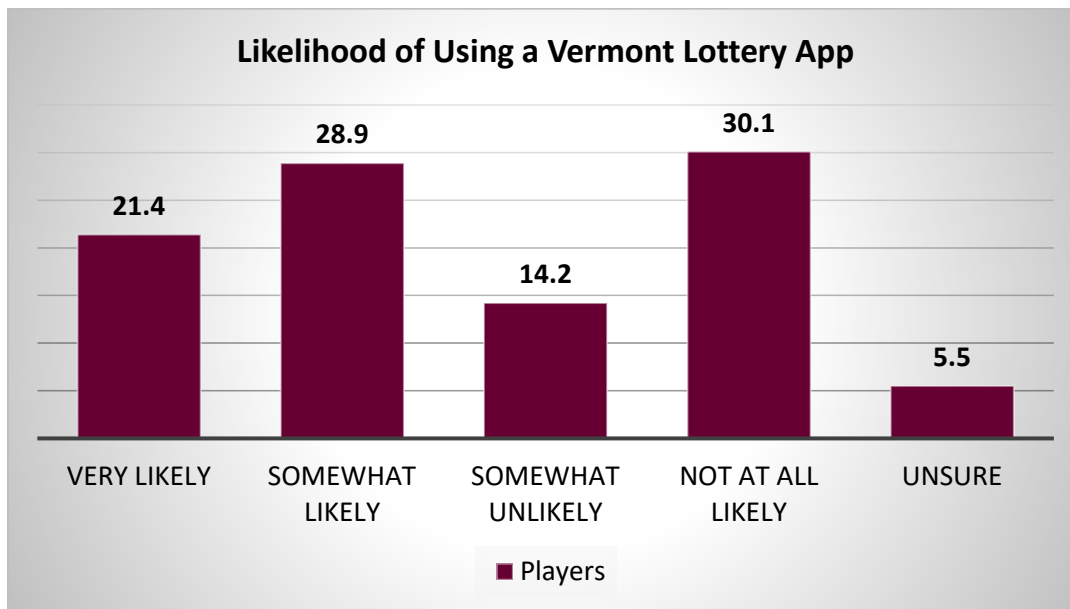
PLAYER HISTORY

Only Vermont Lottery players were presented with a series of questions within this survey section.

Initially, players were asked where they purchased their Vermont Lottery or chance games. Results are displayed in the following table. The table is presented in declining order by frequency of mention.

Venues or Places Lottery Played	Percent
Near home	83.8
Near work	28.9
Near shopping	28.3
Combination	14.7
Near gym/fitness	4.0
Other:	1.4

Just over one-half of all players indicated they were very or somewhat likely to use a Vermont Lottery app on their respective phones or devices. Results are displayed in the following graph.



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

Venues or Places Lottery Played	Percent
Convenience stores/supermarkets/ drug stores	91.0
Bars/taverns	14.5
At home	14.5
Casinos	11.6
Internet websites	6.9
Fraternal organizations	5.5
Street vendors	2.9

TECHNOLOGY

All respondents were asked to report the technology and devices they currently use. Results are displayed in the following table. Results are displayed in declining order.

Technology Used	Composite	Players	Non-Players
Internet access at home, work or both	95.5	96.0	95.2
A Smart Phone, Pad or Tablet.	91.0	90.5	91.4
Social media such as Facebook, LinkedIn, Twitter, or Instagram	87.8	88.2	87.4
TV or music streaming service	76.0	75.4	76.4
Digital TV / Radio	57.1	60.4	54.6
Online gaming service	25.9	30.3	22.5
An app on your phone for playing one or more lottery/chance games (not Vermont Lottery)	16.8	24.3	11.0

Results in 2016 are displayed here for comparison purposes.

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 declining order by composite results.

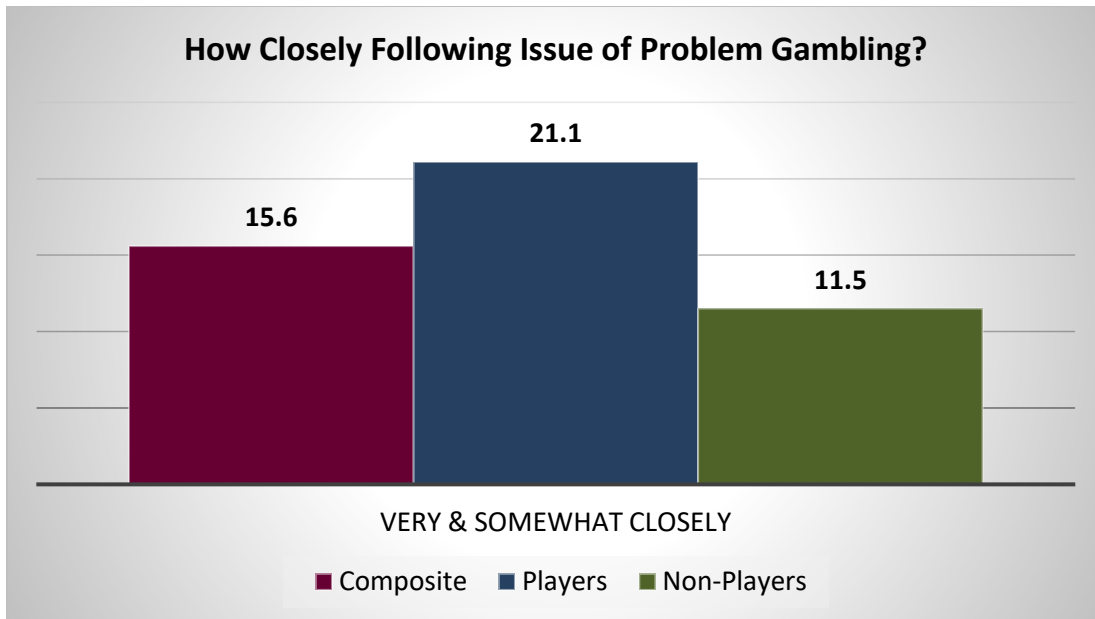
How likely to play if...	Composite	Players	Non-Players
If the economy continues to improve	55.5	78.6	37.9
You knew that 100% of Vermont Lottery ticket profits go to the Vermont Education Fund	53.1	74.0	37.2
You could begin buying tickets in lines such as the grocery checkout as one, single transaction	45.6	66.2	30.0
An app was available for 2 nd Chance ticket entries	43.9	63.0	29.3
You could use debit/credit cards to purchase tickets	43.6	61.6	30.0
Self-service vending machines were available in social establishments such as bars, pubs, or taverns	37.5	52.6	26.0
Vermont Lottery Games were offered on the internet	35.6	48.8	25.6
You could purchase tickets online	32.9	47.1	22.0
An app was available for ticket purchases / payment	32.1	46.2	21.4
Tickets were available at bars or taverns	28.1	39.3	19.6
If gas prices remain near \$3.00 per gallon	26.4	41.0	15.2

Results in 2016 are displayed here for comparison purposes.

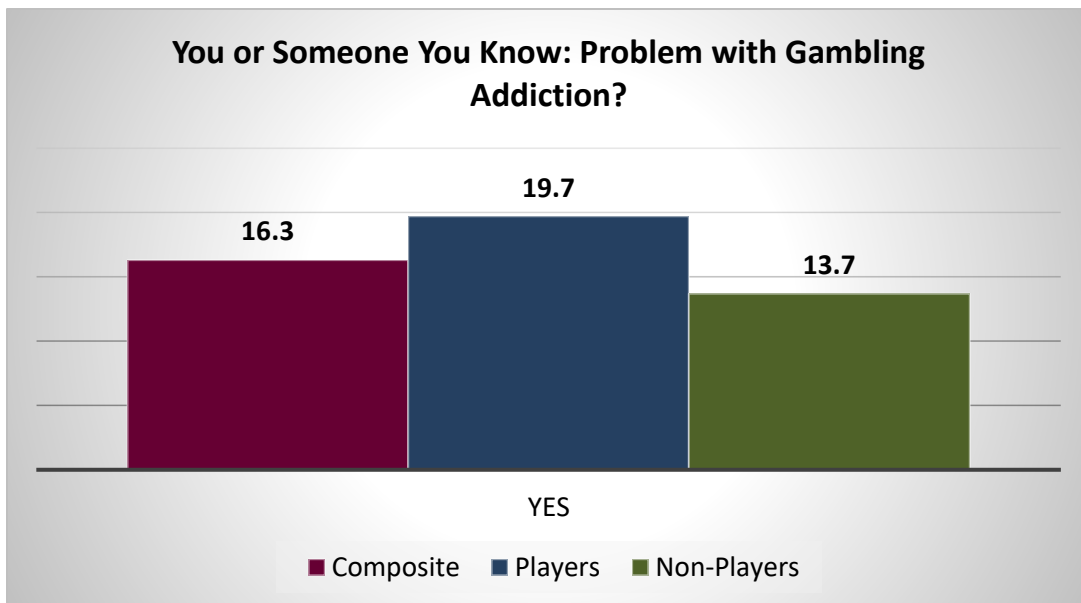
How likely to play if...	Composite	Players	Non-Players
The economy improved	65.5	83.1	10.6
You knew that 100% of Vermont Lottery ticket profits go to the Vermont Education Fund	63.9	79.9	41.2
Gas prices remain near \$2.00 per gallon	59.5	79.9	30.6
Self-service vending machines were available in social 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

PROBLEM GAMBLING

In a series of new questions in 2018, all respondents were asked how closely they follow the issue of problem gambling. Each was asked if they follow the issue very closely, somewhat closely, not very closely or not at all. On a composite, statewide basis, just 15.6% indicate they follow the issue very or somewhat closely. Results are shown in the following graph.



All respondents were asked if they or someone they know has a problem with possible gambling addiction. Results are displayed here.



All respondents were asked if problem gambling today is as common, more common or less common than it was five years ago. Results are displayed in the following table.

Prevalence of Problem Gambling	Composite	Players	Non-Players
More Common	34.1	37.0	31.9
Less Common	9.0	10.7	7.7
As Common	31.3	33.2	29.7
Unsure	25.6	19.1	30.6

The survey included the following question:

“Earlier in this survey, we asked about interest in new Vermont Lottery playing opportunities (such as at bars/taverns) and new sales points or ways to purchase (such as online). If these become reality, how will this impact problem gambling, in your own view? Would you say...”

Results are displayed within the following table.

Access and Problem Gambling	Composite	Players	Non-Players
No increase at all	11.0	12.1	10.1
Minor, if any increase	21.4	25.7	18.1
Will only modestly increase	26.1	25.1	26.9
Will increase significantly	23.0	24.9	26.9
Unsure	15.5	12.1	18.1

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 in 2018.

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

Sources for Vermont Lottery Information among Players	2016 Percent	2018 Percent
VT Lottery website	43.8	48.3
Internet / websites	47.9	38.4
TV news	33.1	24.9
Powerball/Mega Millions website	21.6	20.5
TV advertising	20.7	13.3
Radio news	11.3	11.0
Friends/neighbors/relatives	15.2	10.7
Social media	11.1	10.1
Newspaper stories	6.6	8.4
Radio advertising	12.4	7.8
Co-workers	8.8	6.4
Email	10.3	5.5
Newspaper ads	5.6	5.5
Brochures	2.8	3.8
Newspaper inserts	3.6	3.2
Other	1.5	1.7
Employer/school	2.1	1.2
Government agency	1.1	0.6

DEMOGRAPHICS

Ages in 2018	Composite	Players	Non-Players
18-25	15.8	9.6	20.5
26-35	19.8	21.2	18.8
36-45	16.7	16.8	18.6
46-55	16.0	18.0	14.6
56-65	17.9	21.7	15.0
65+	13.8	12.8	14.6

Average Respondent Age in 2016	Composite	Players	Non-Players
Average: 2016	42.77	42.47	43.18

Average Length of Vermont Residency	Composite	Players	Non-Players
Average in 2016	26.19	26.79	25.33
Average in 2018	28.61	32.29	25.79

Education in 2018	Composite	Players	Non-Players
Eighth grade or less	0.5	0.6	0.4
Some high school	2.1	2.0	2.2
High school graduate	25.1	25.4	24.9
Some technical school	2.0	2.3	1.8
Technical school graduate	2.8	2.6	2.9
Some college	22.6	24.9	20.9
College graduate	32.3	34.1	30.8
Post-graduate degree	11.8	7.8	14.8
RF	0.9	0.3	1.3
DK/Unsure	---	---	---

Education in 2016	Composite	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
DK/Unsure	0.4	---	0.9

Total family income before taxes in 2018	Composite	Players	Non-Players
Under \$29,999	24.5	22.8	25.8
\$30,000 to less than \$45,000	17.3	17.1	17.4
\$45,000 to less than \$60,000	11.5	15.9	8.1
\$60,000 to less than \$75,000.00	10.5	11.6	9.7
\$75,000 to less than \$80,000	5.0	3.8	5.9
\$80,000 to less than \$90,000	4.4	5.8	3.3
\$90,000 or more	17.1	17.1	17.2
Unsure	1.6	0.6	2.4
RF	8.1	5.5	10.1

Total family income before taxes in 2016	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
Unsure	4.9	2.6	8.2
RF	---	---	---

Gender	Composite in 2016	Composite in 2018
Male	36.5	42.5
Female	63.5	57.1

Vermont County	Composite
Addison	4.8
Bennington	5.4
Caledonia	5.8
Chittenden	28.4
Essex	1.9
Franklin	7.6
Grande Isle	1.5
Lamoille	3.5
Orange	4.5
Orleans	3.9
Rutland	10.9
Washington	8.4
Windham	4.8
Windsor	8.1
Unsure	0.8

5 APPENDIX

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.