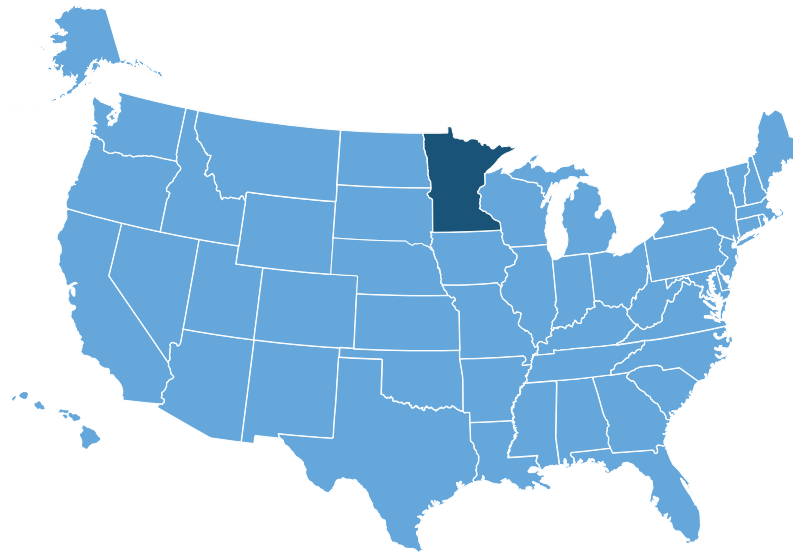




Minnesota Detailed Report

National Survey on Gambling Attitudes and Gambling Experiences I.0



www.ncpgsurvey.org



NATIONAL SURVEY on GAMBLING ATTITUDES and GAMBLING EXPERIENCES

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This project could not have been completed without the assistance of Ipsos, and in particular the leadership of Ipsos Vice President Scott Morasch and Senior Vice President Paul Lauzon.

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National Survey on Gambling Attitudes and Gambling Experience (NGAGE)

DETAILED REPORT

MINNESOTA

May, 2019



NCPG

National Council on Problem Gambling



About the National Survey on Gambling Attitudes and Gambling Experience (NGAGE)

- NGAGE is a national survey commissioned by the National Council on Problem Gambling and conducted in November, 2018
 - The survey was taken online by IPSOS, one of the world's largest public opinion companies
- The survey covered a wide range of topics relating to gambling and problem gambling

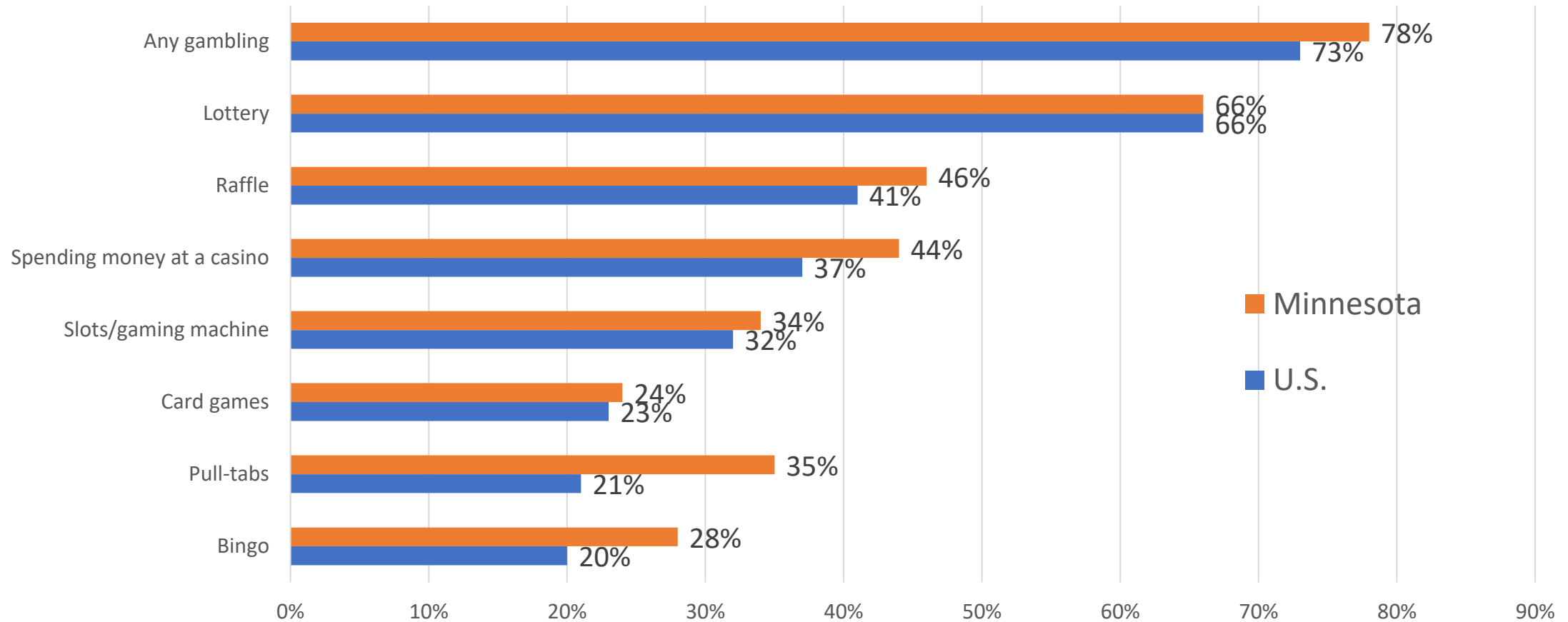
About NGAGE (cont.)

- 501 adults were sampled in Minnesota
 - Additional sports bettors were interviewed for a total sample of 202 for sports betting questions
- **A sample of this size has a “credibility interval” of +/- 5%**
 - A credibility interval is the equivalent of a confidence interval, but adapted for online panels as used in this survey.
- **All data presented in this report are for Minnesota unless otherwise noted.**

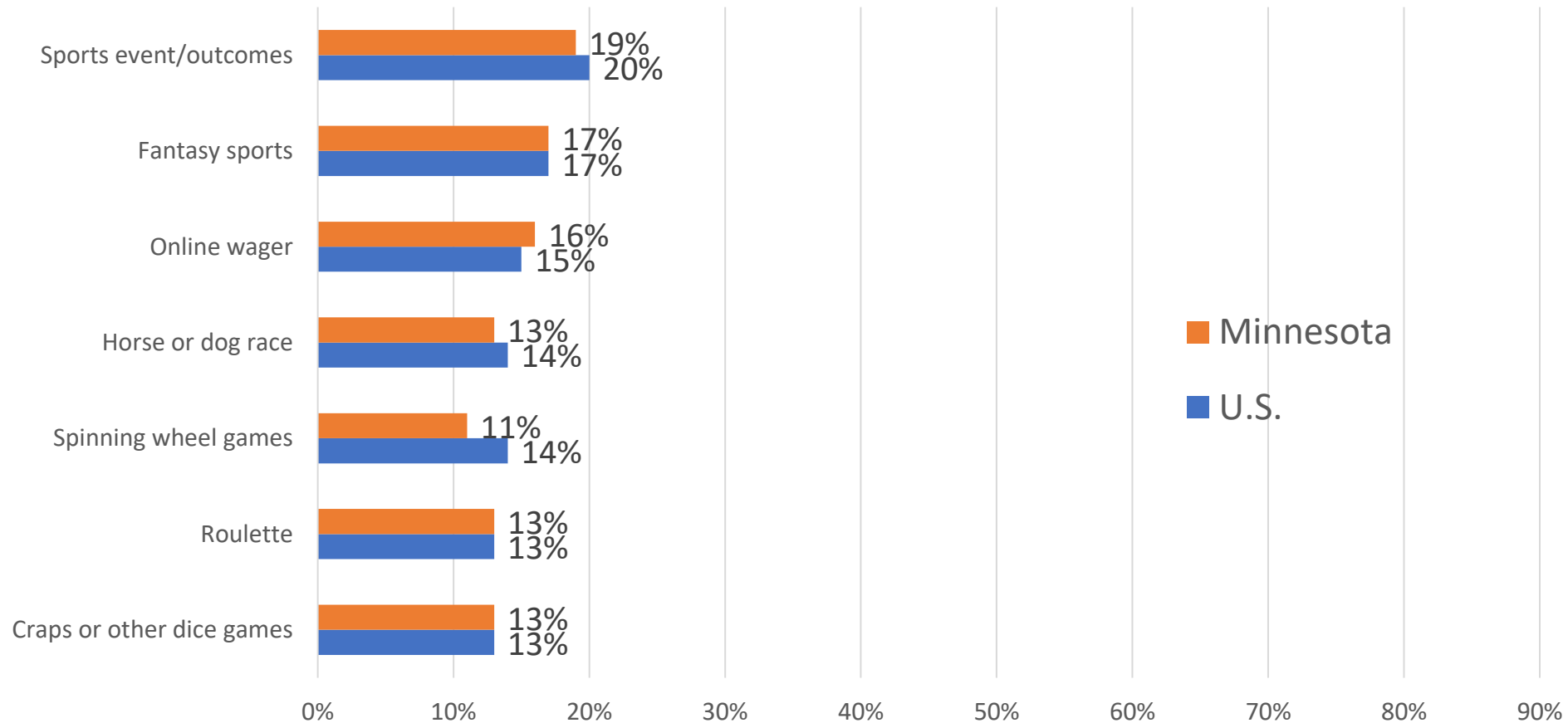
Highlights

1. Minnesotans like to gamble
 - 78% of Minnesota adults reported making a bet in the past year
2. And they bet on many things
 - The average Minnesota gambler bet on 4 activities in the year before the survey. 1 in 4 wagered on 7 or more.
3. The lottery is the most popular form of gambling in Minnesota
 - 66% of Minnesota adults reported a past year lottery purchase
 - Minnesota is among the states where residents are most likely to play bingo or buy a pull-tab
4. Sports betting is relatively uncommon
 - 19% of Minnesotans reported betting on a sports event
5. Most gamble for fun
 - 81% of past year gamblers believe that gambling is not a good way to make money
6. Many Minnesotans misunderstand problem gambling
 - 77% believe that a lack of willpower is a cause of problem gambling

Past year gambling



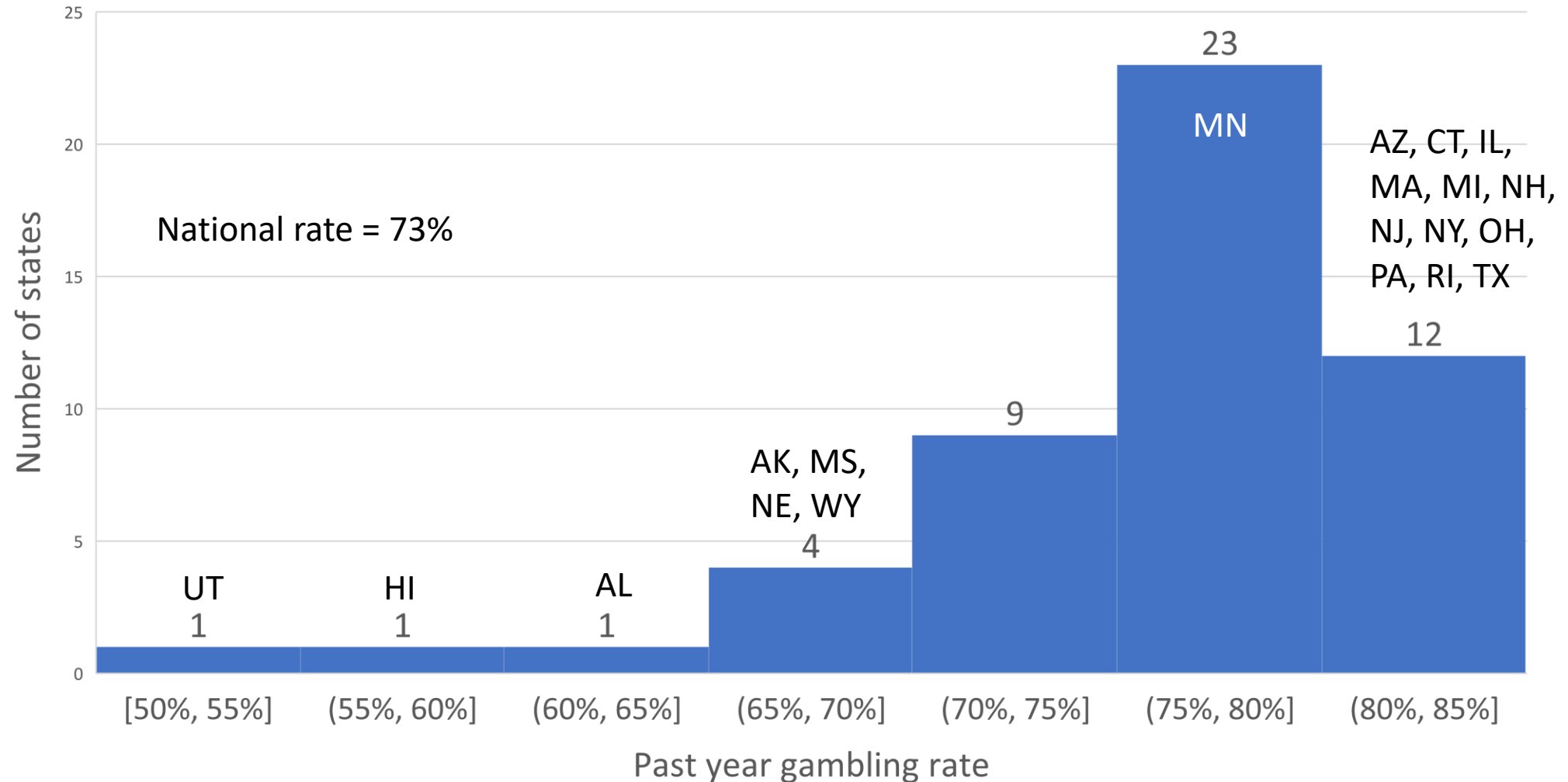
Past year gambling (continued)



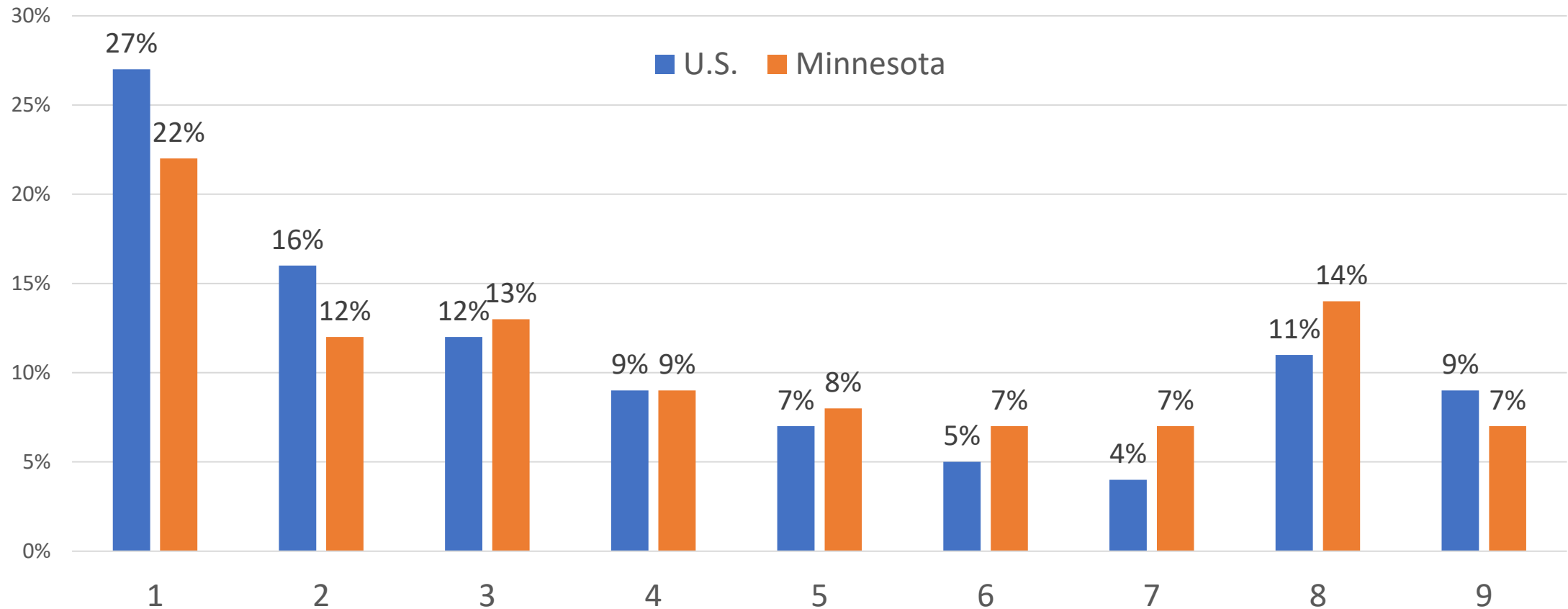
A note on histograms

- Histograms are a standard statistical graphic used to group numbers (such as the gambling participation rates in each of the 50 states) into ranges. The height of each bar represents the number of states that fall into each range. On the next chart, for example, you can see that only one state (Utah) has a gambling participation rate between 50% and 55%, while four states (Alaska, Mississippi, Nebraska and Wyoming) have rates between 65% and 70%. At the other end of the chart, 12 states have rates of 80% or higher. Almost half the states (23) have rates between 75% and 80%.

Past year gambling participation by state

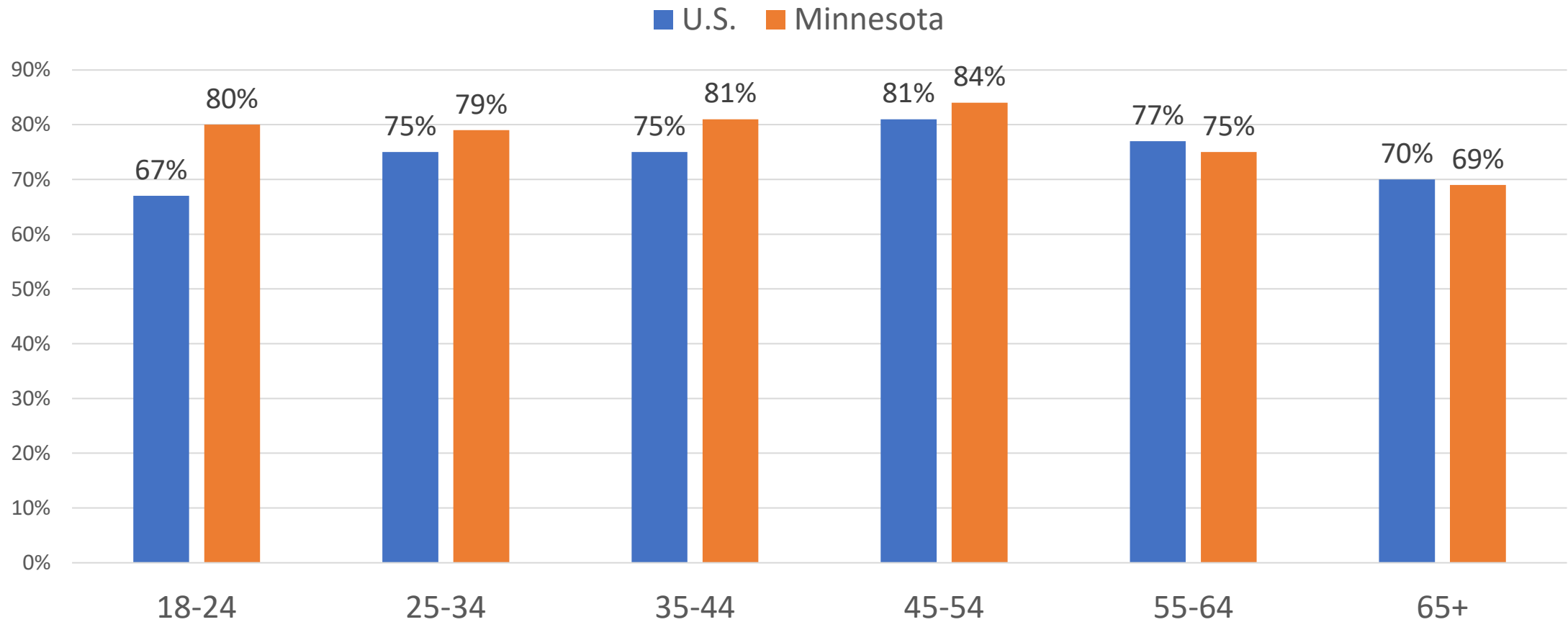


Number of past year gambling activities

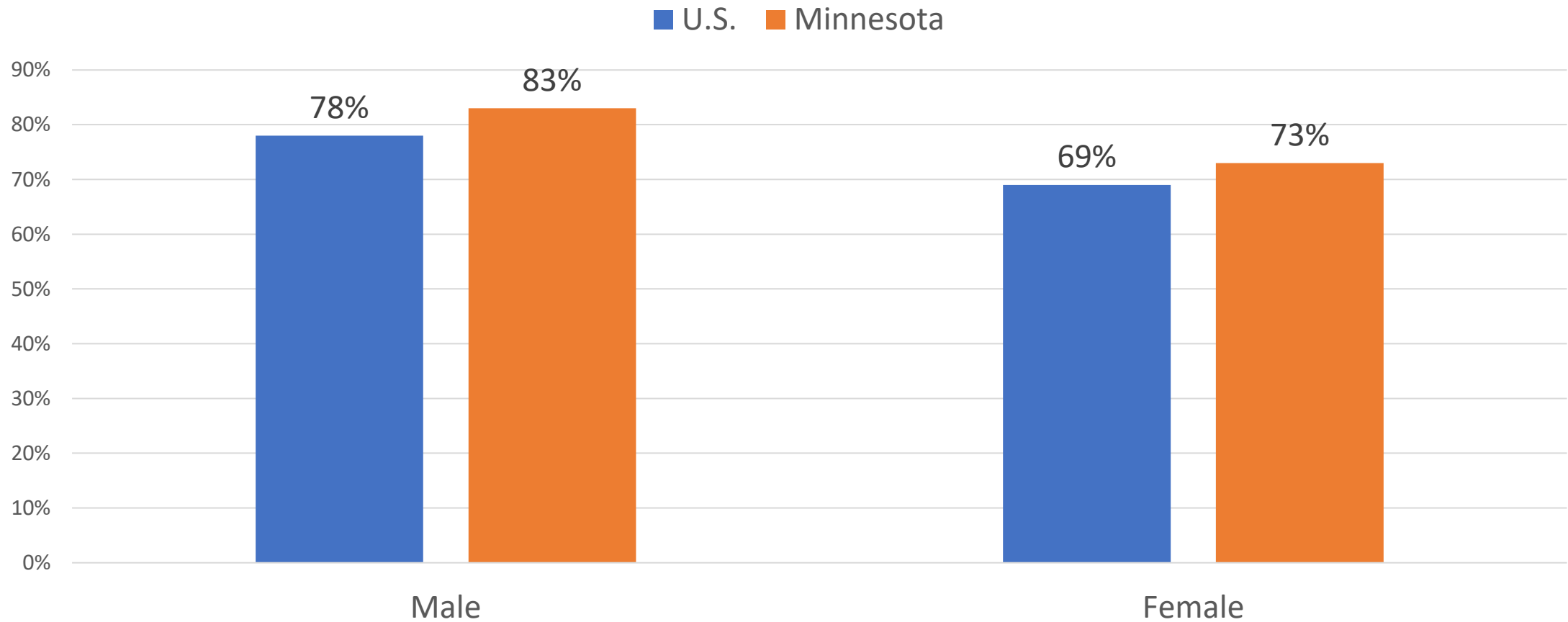


Median (total population) = 3 Median (past year gamblers) = 4

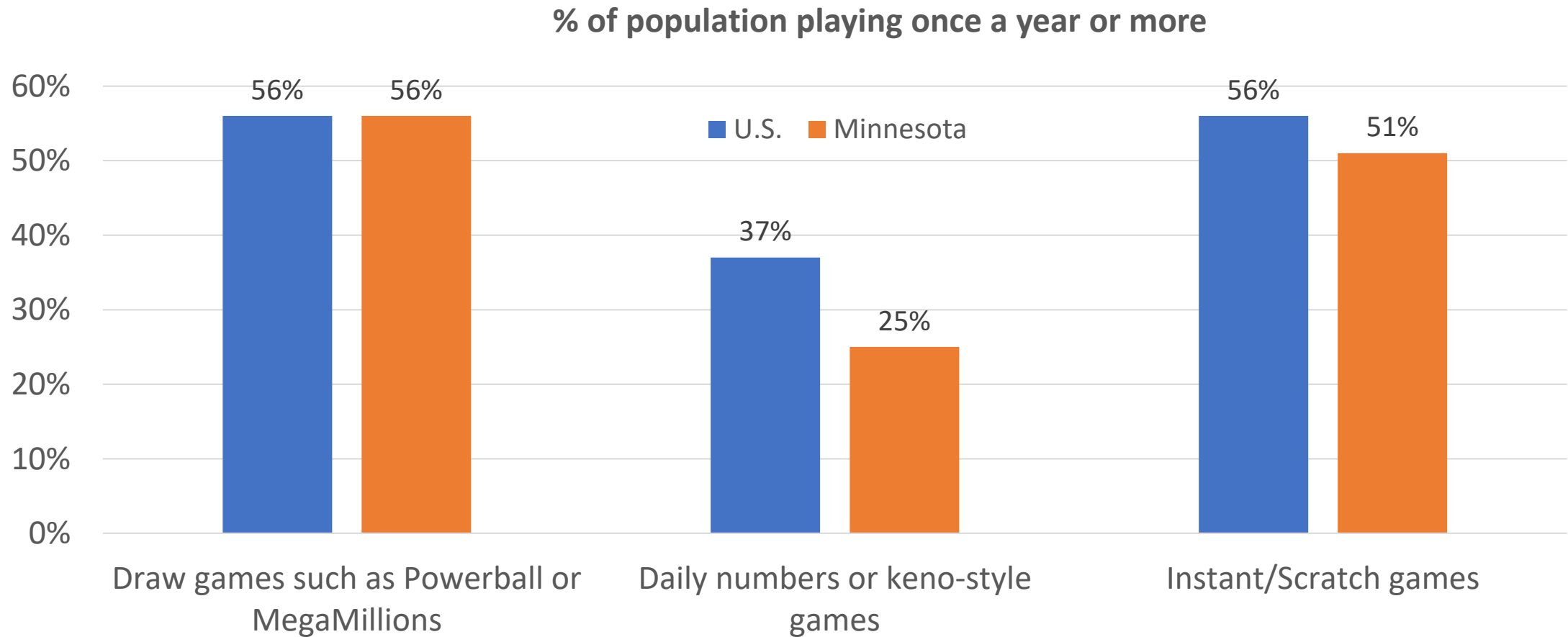
Past year gambling by age



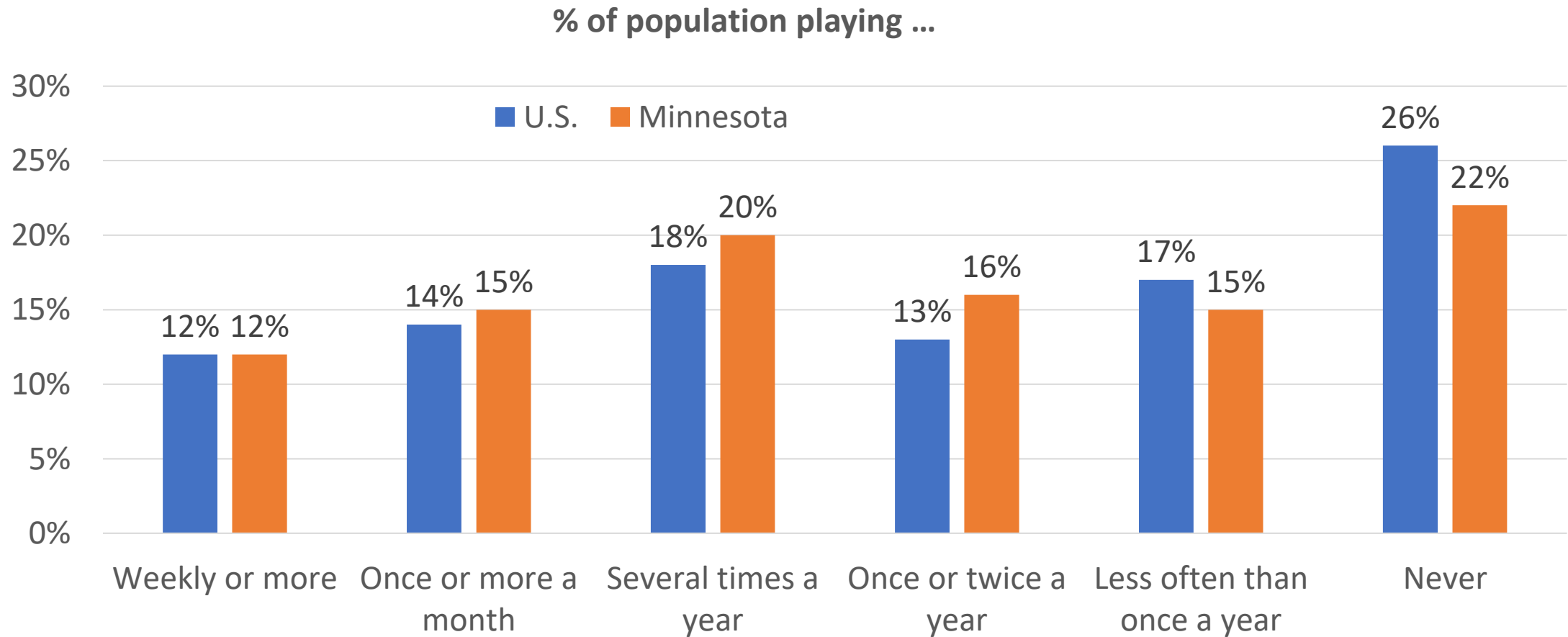
Past year gambling by gender



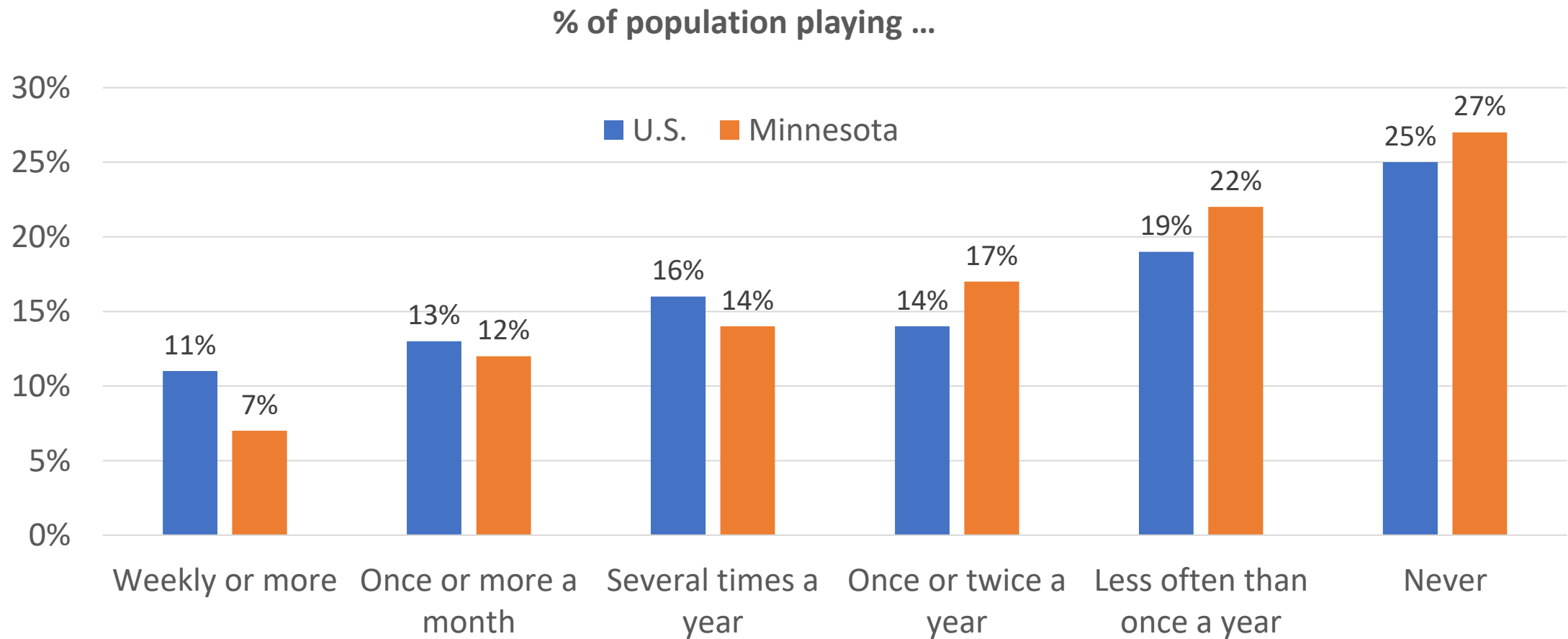
Lottery play



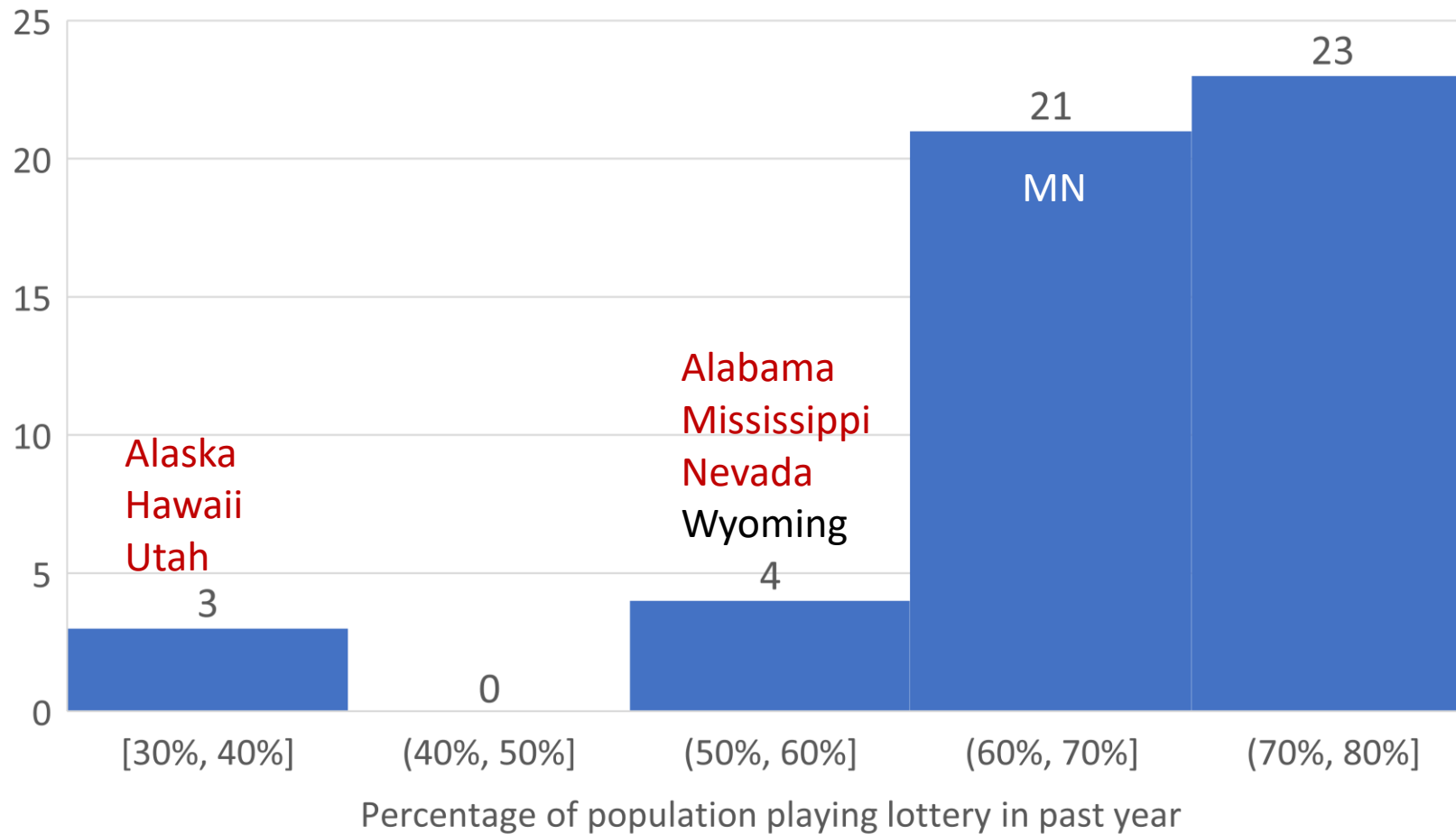
Lottery draw game frequency



Lottery instant/scratch game frequency

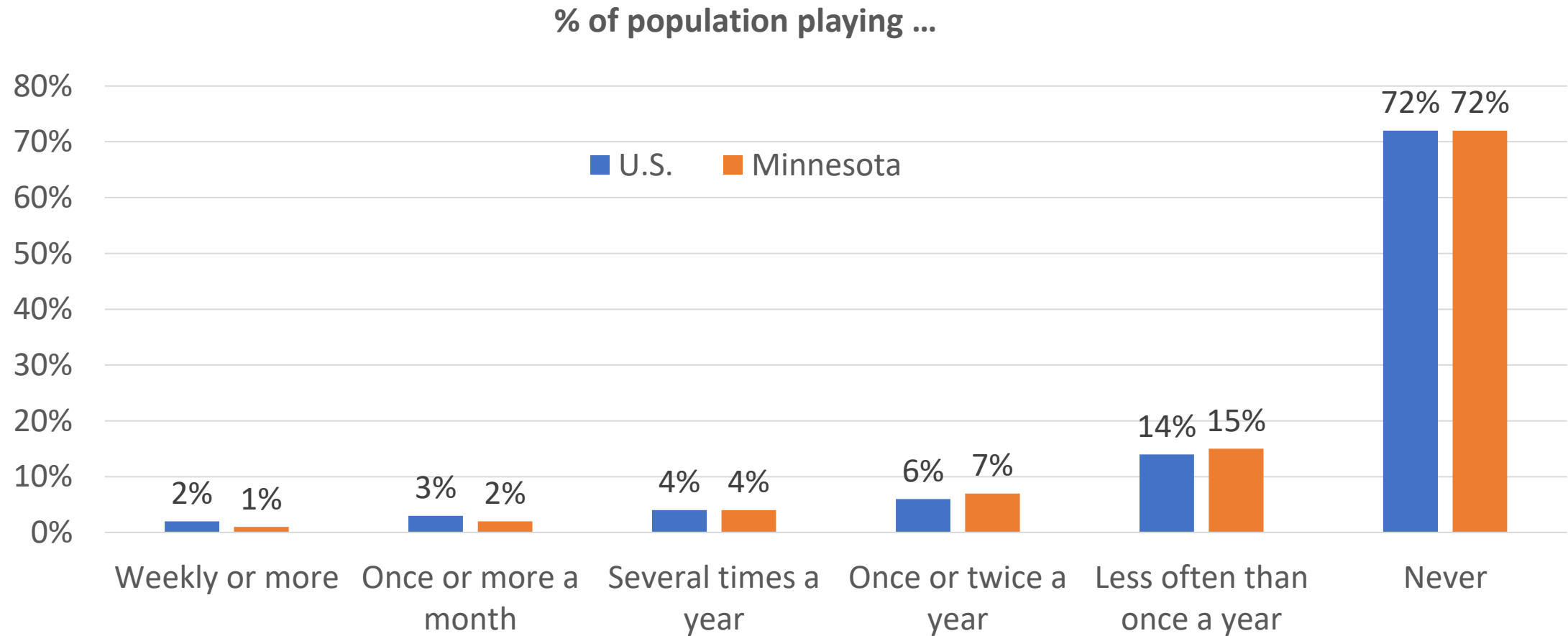


Past year lottery play by state

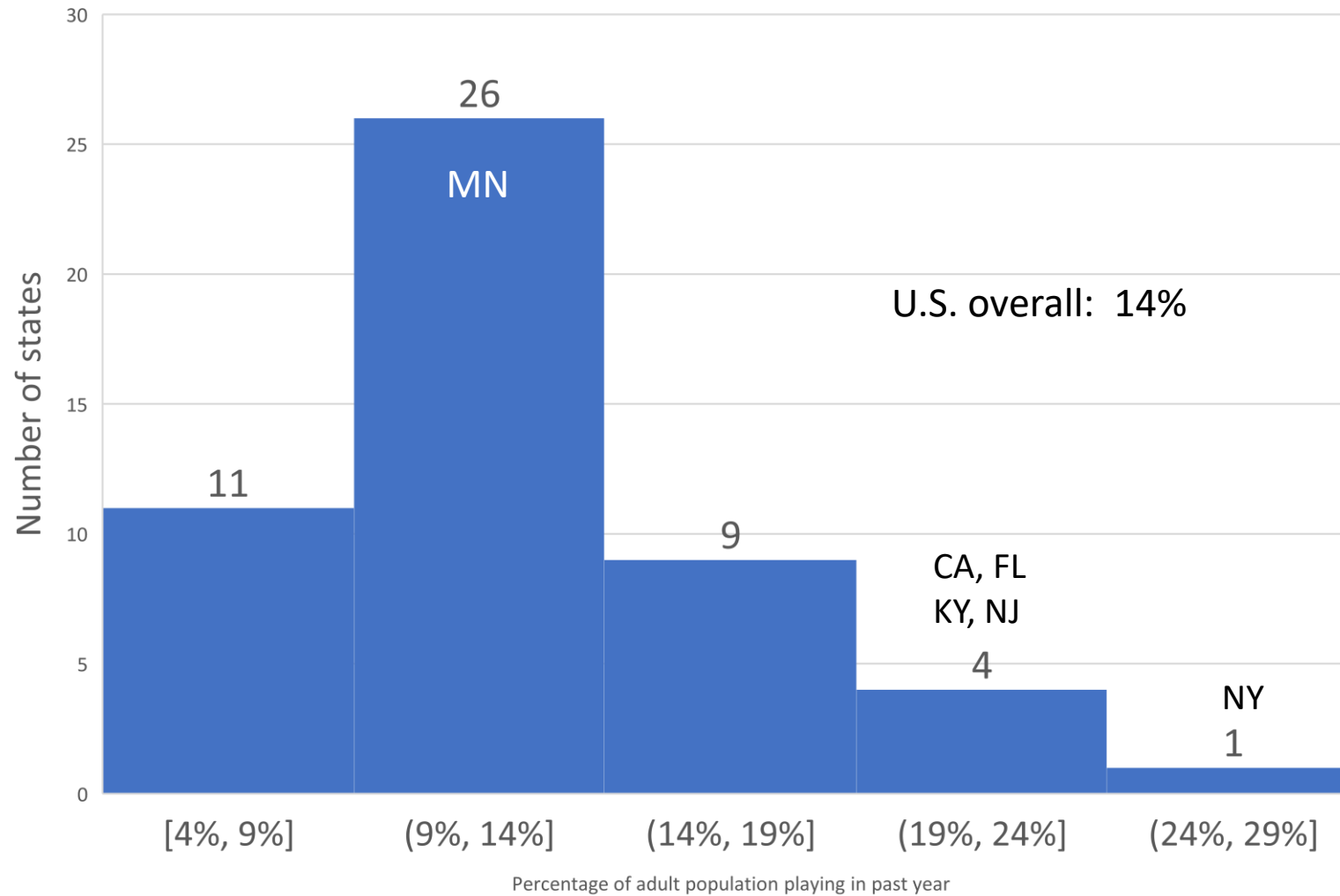


States in red do not currently have lotteries

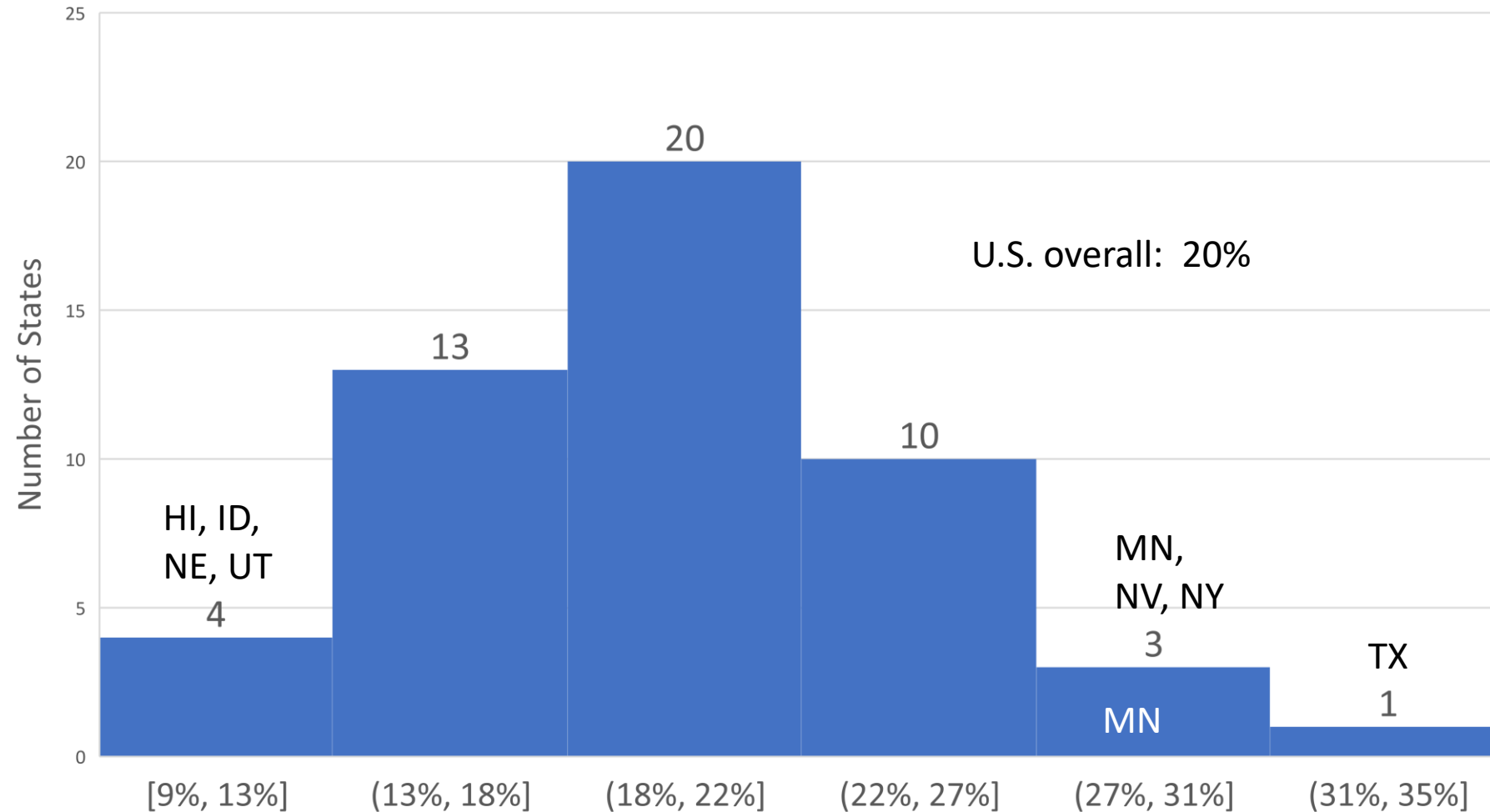
Pari-mutuel racing frequency



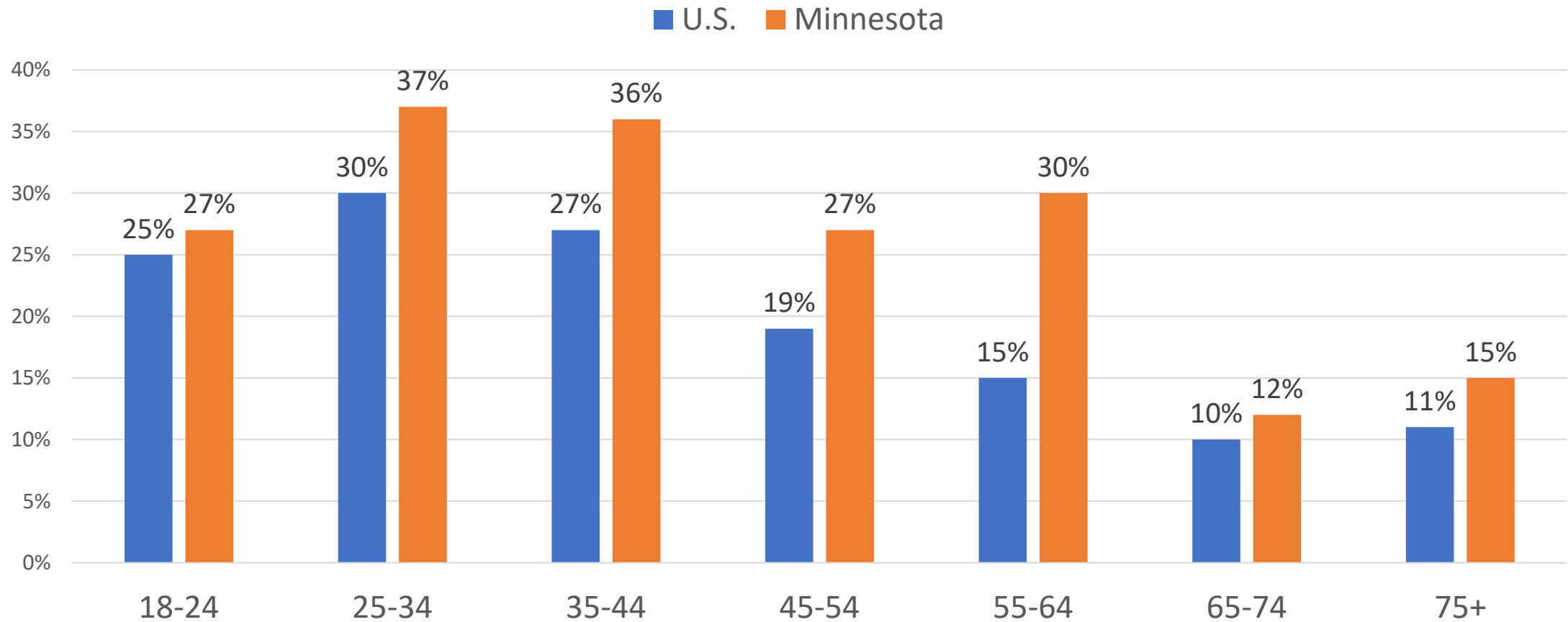
Pari-mutuel racing participation by state



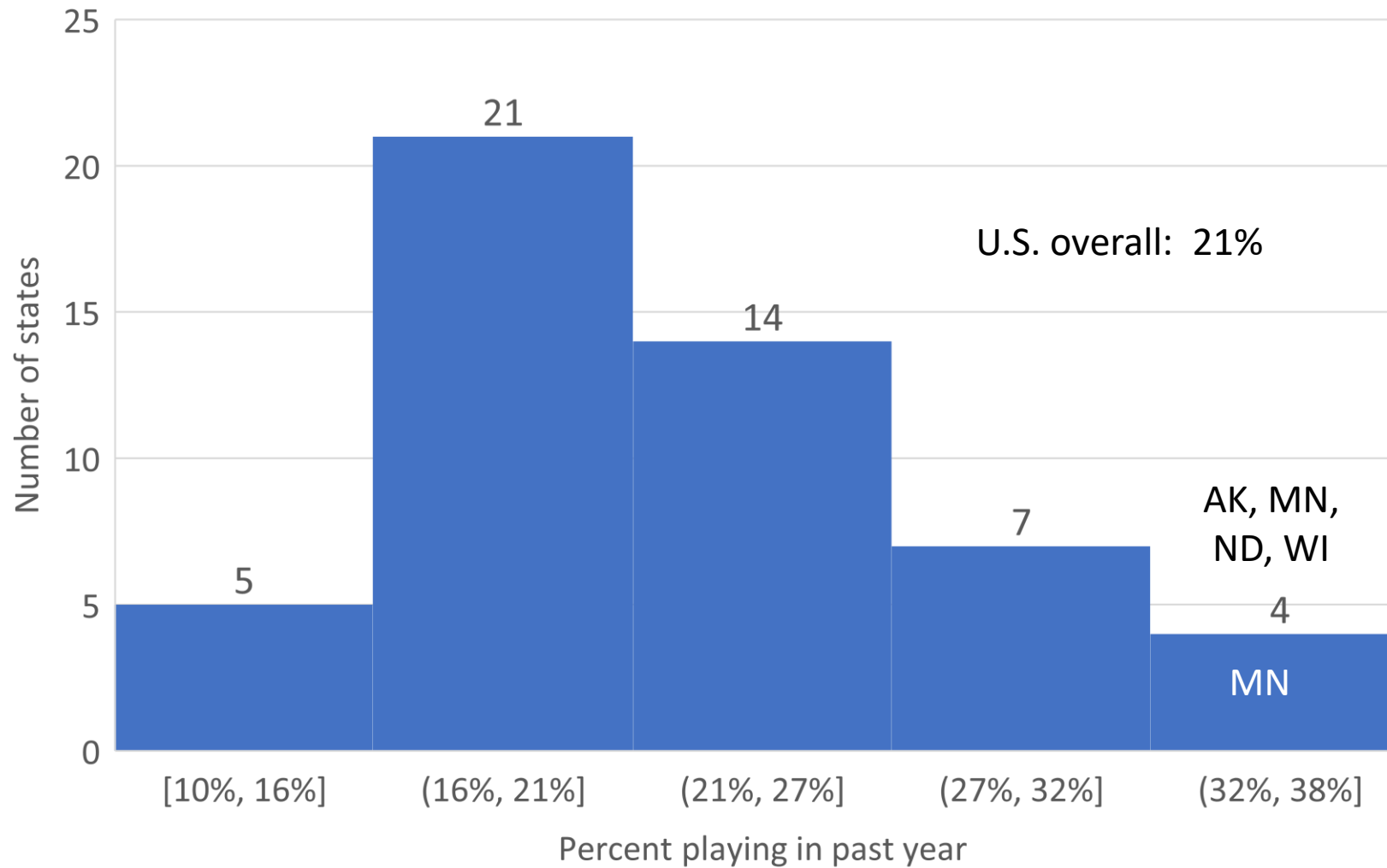
Past year bingo play by state



Past year bingo play by age



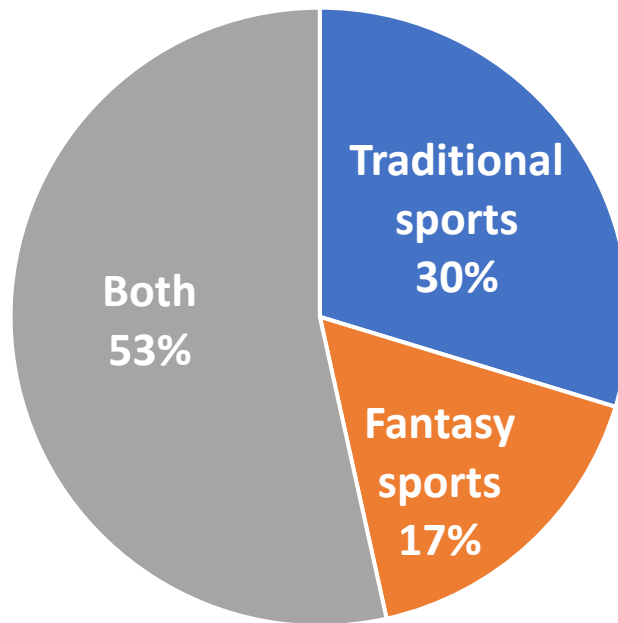
Pull-tabs or break-open tickets by state



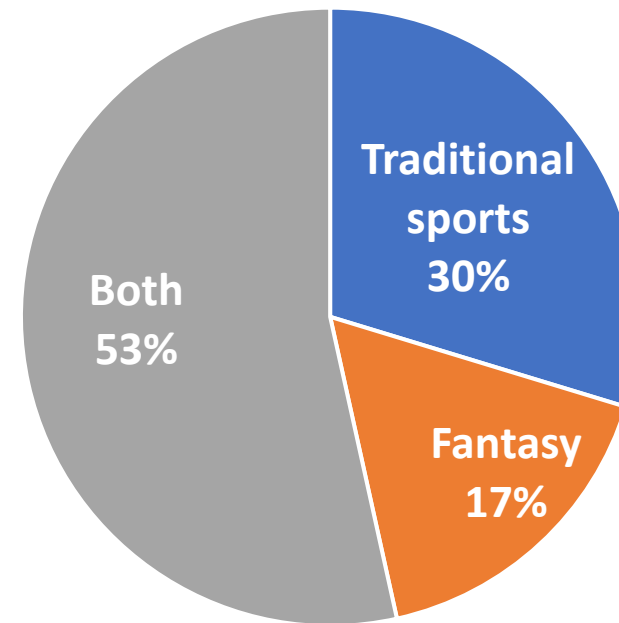
Sports betting

Type of sports betting

Minnesota

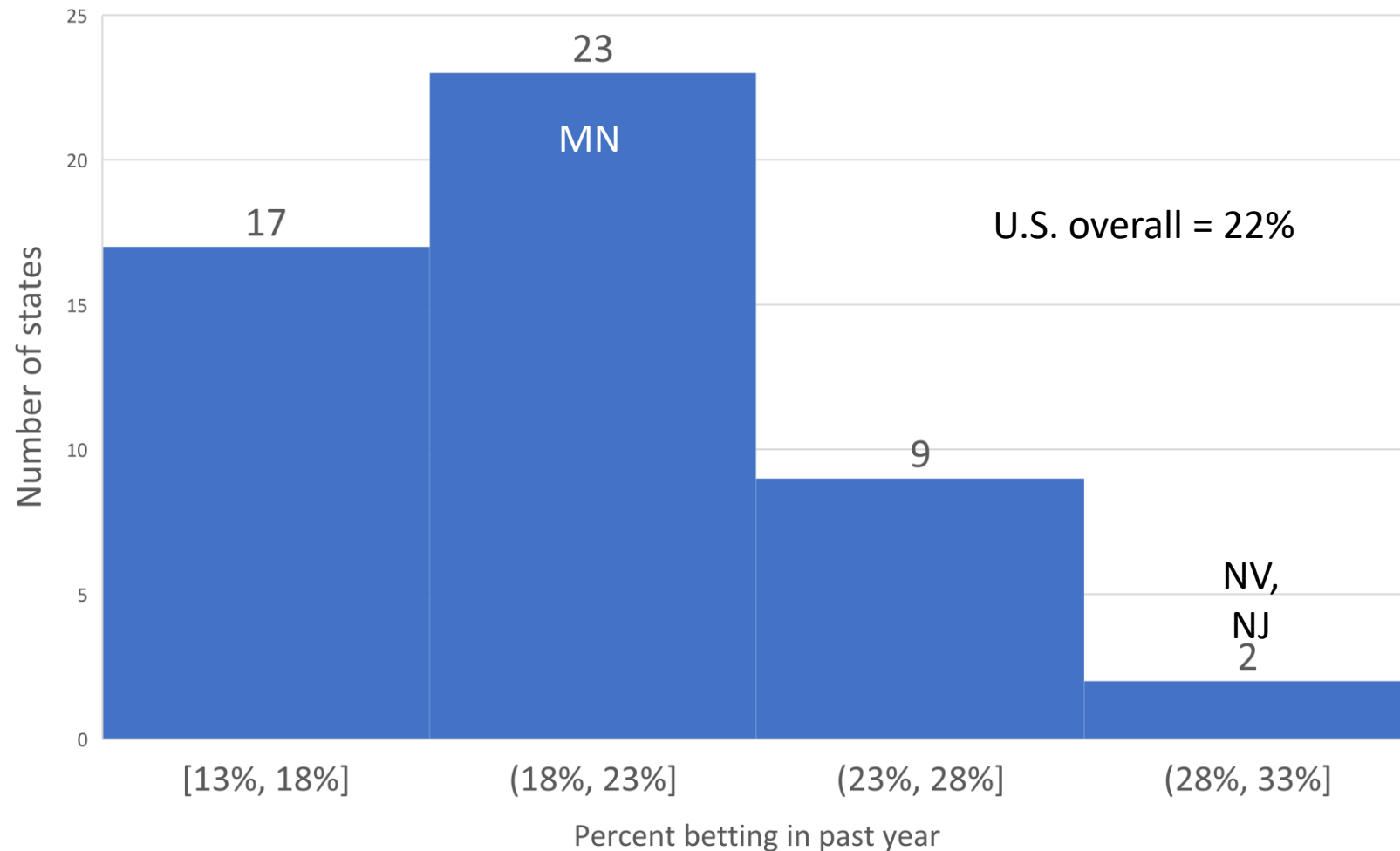


U.S.

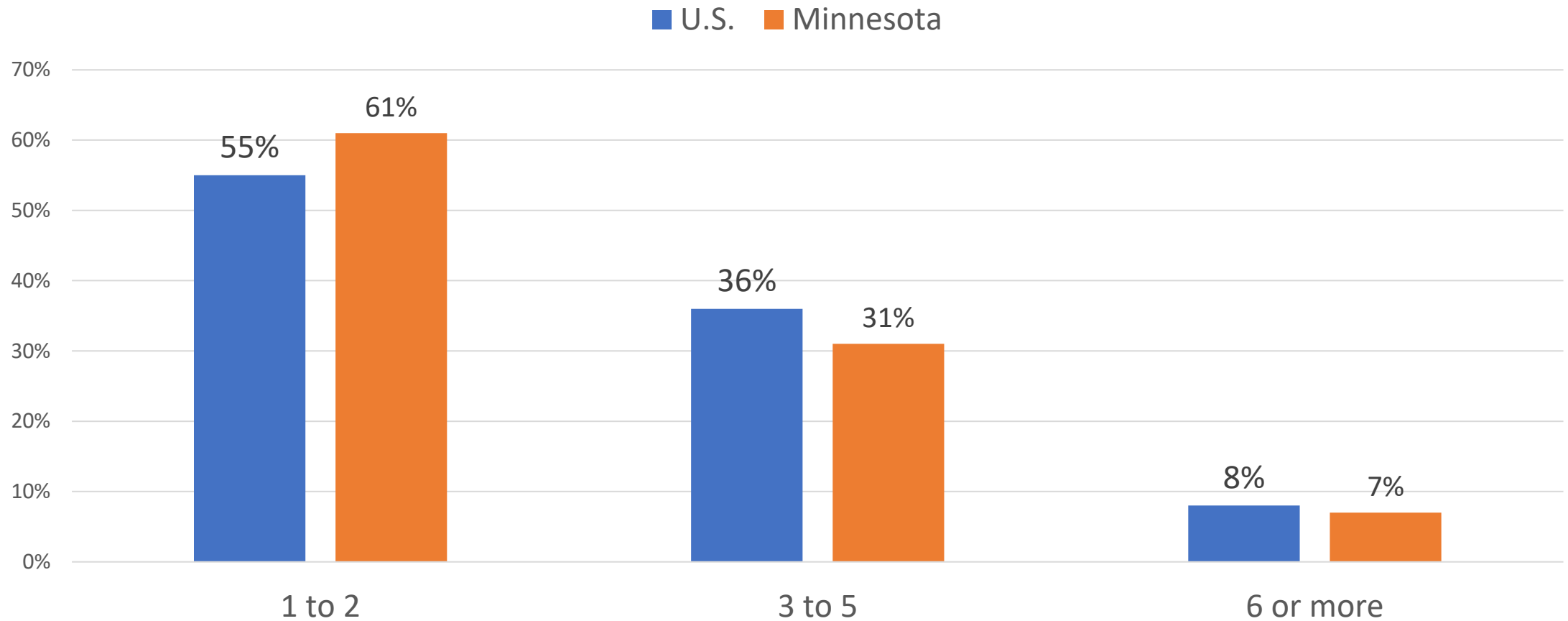


Traditional Sports betting

Past year traditional sports betting by state

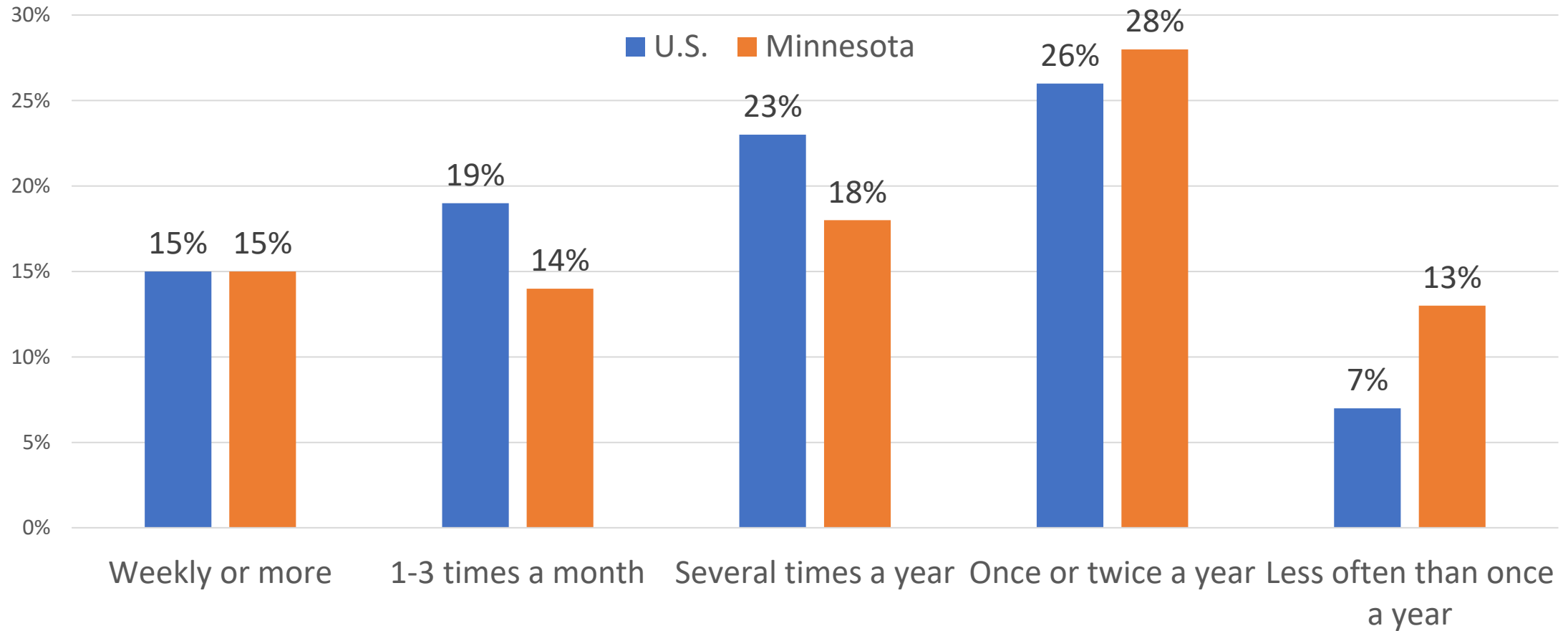


Number of sports bet on

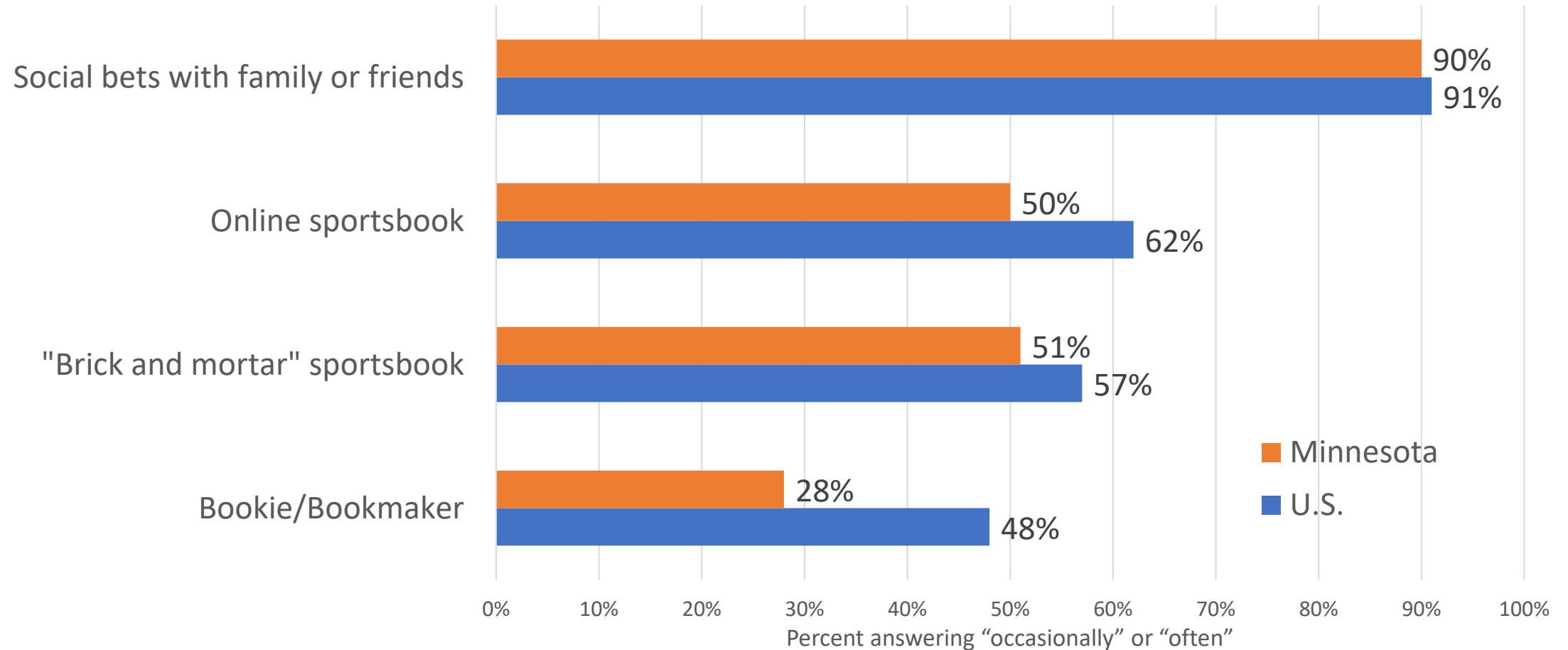


Past year sports bettors only

Frequency of sports bets

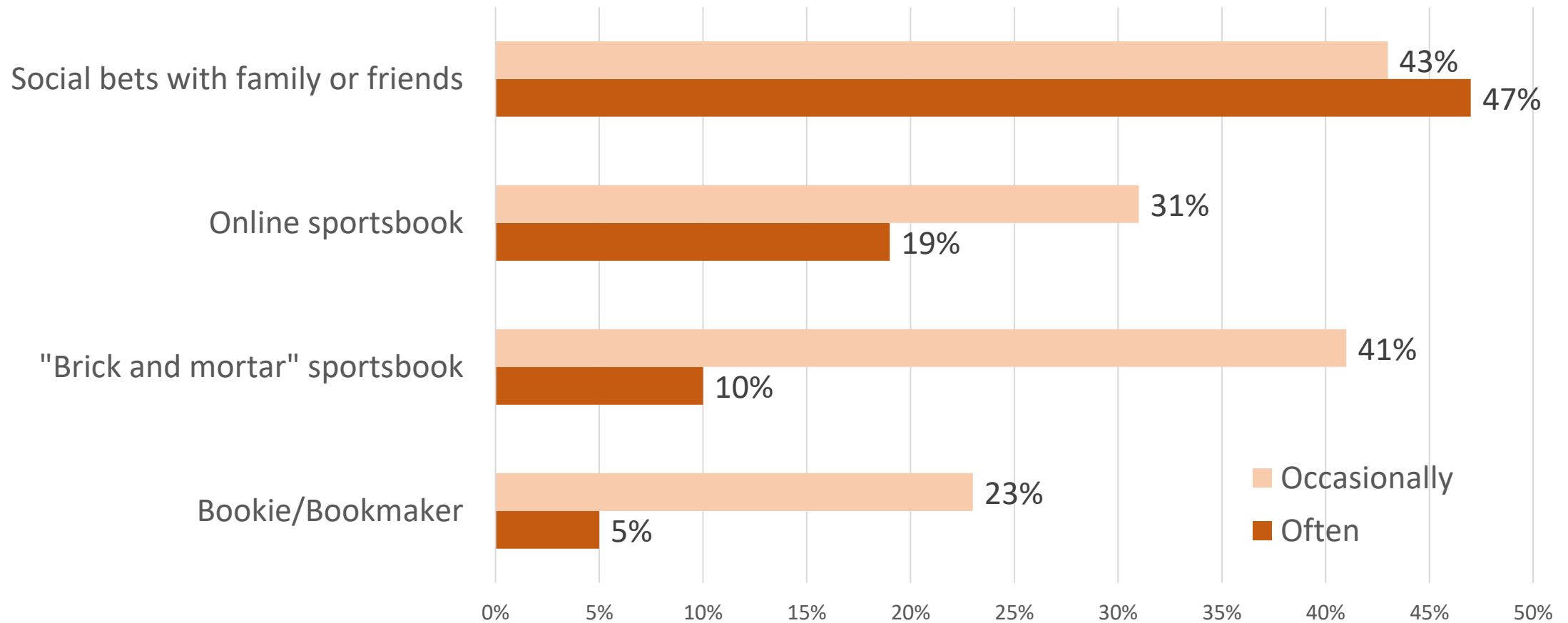


How do you make sports bets?



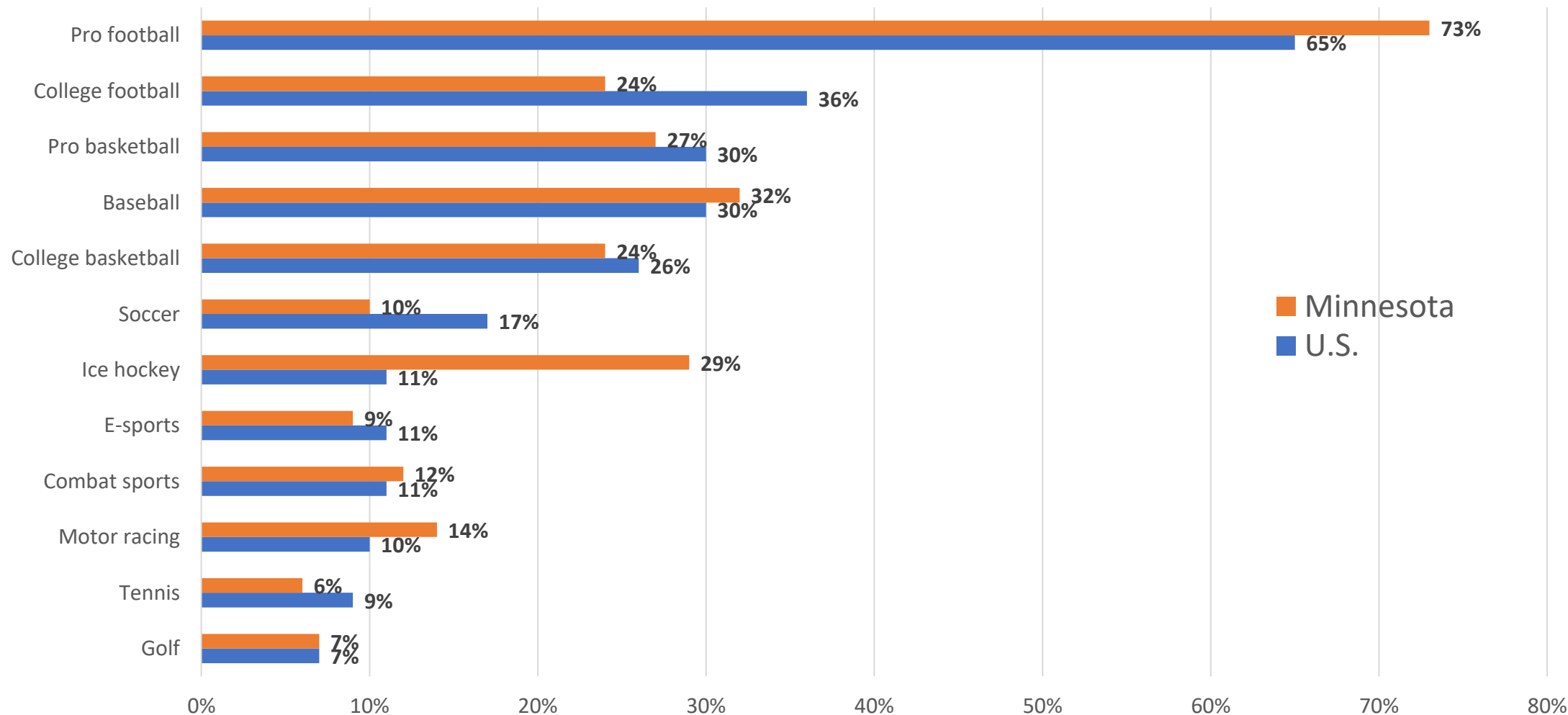
Questions asked of sports bettors only

How do you make sports bets?

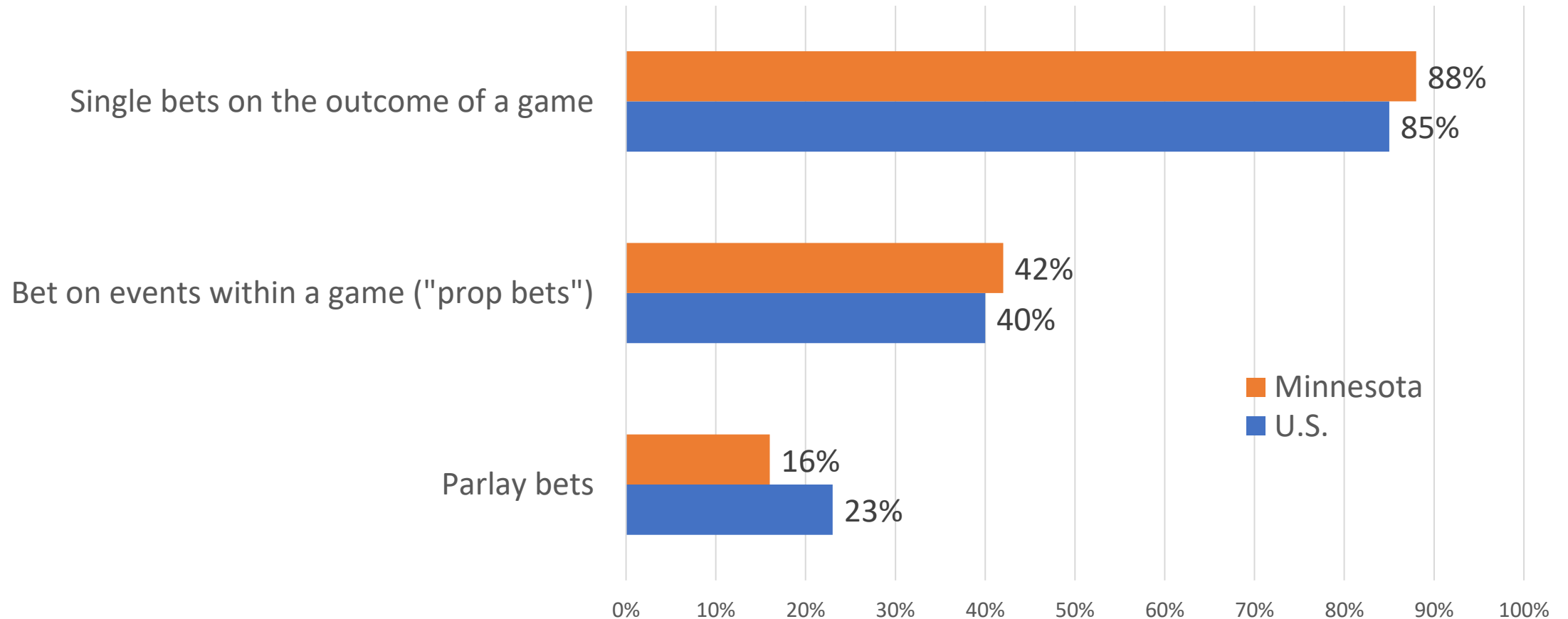


Questions asked of sports bettors only

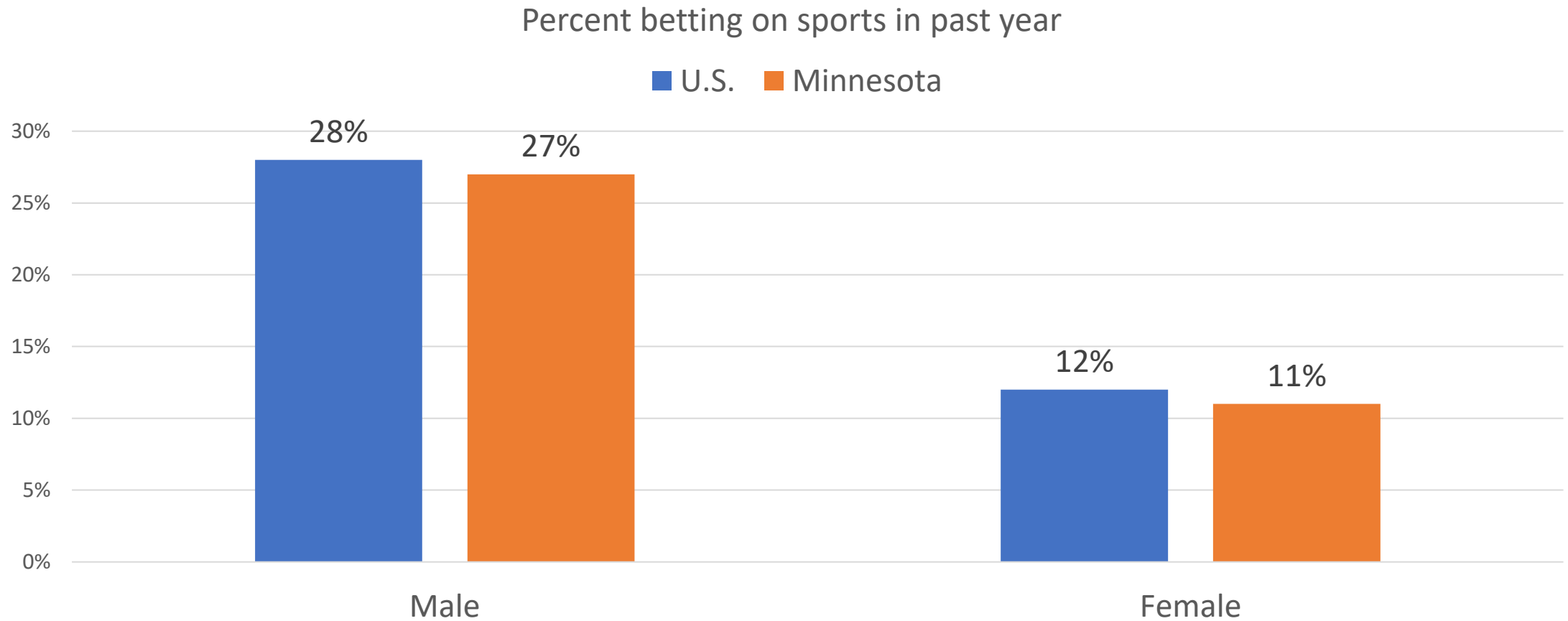
What sports have you bet on in past year for real money (Sports bettors only)



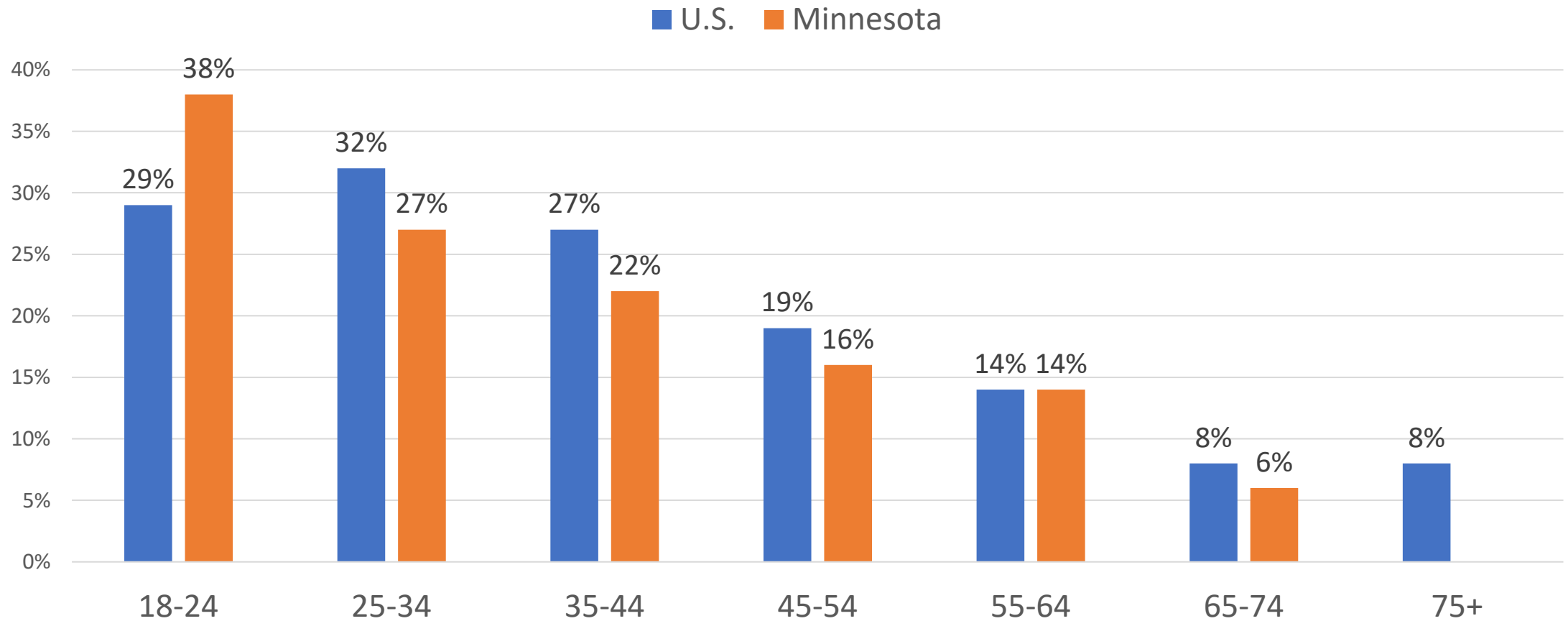
What type of sports bet have you made in the past year?



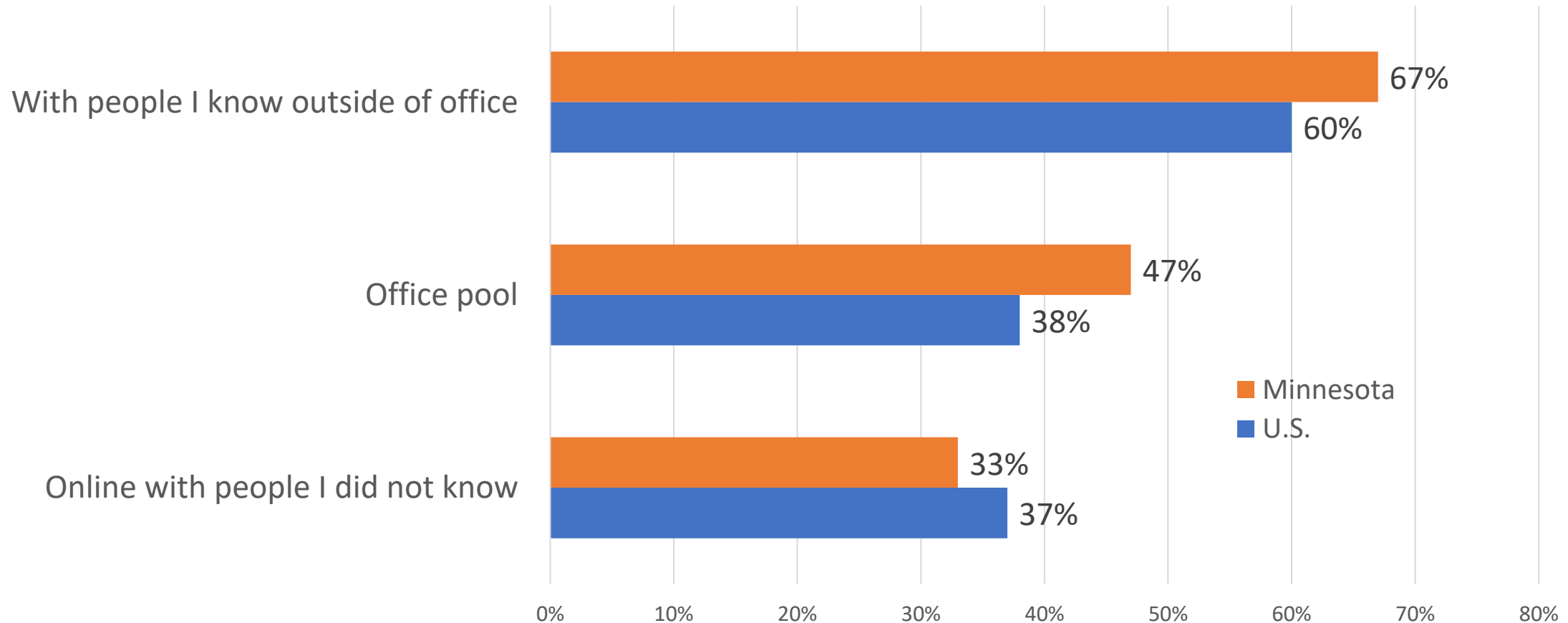
Past year sports betting by gender



Past year sports betting by age



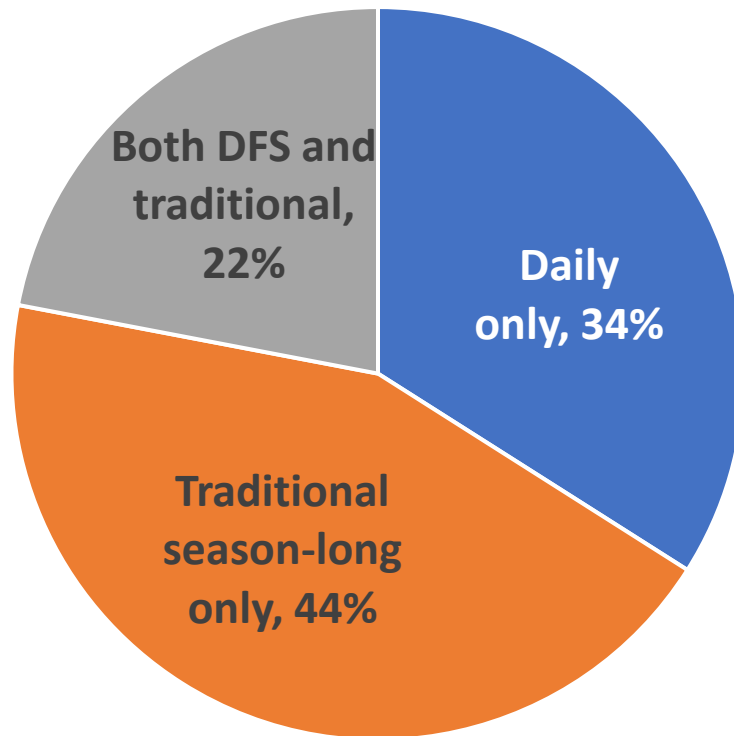
How have you played sports contests in the past year?



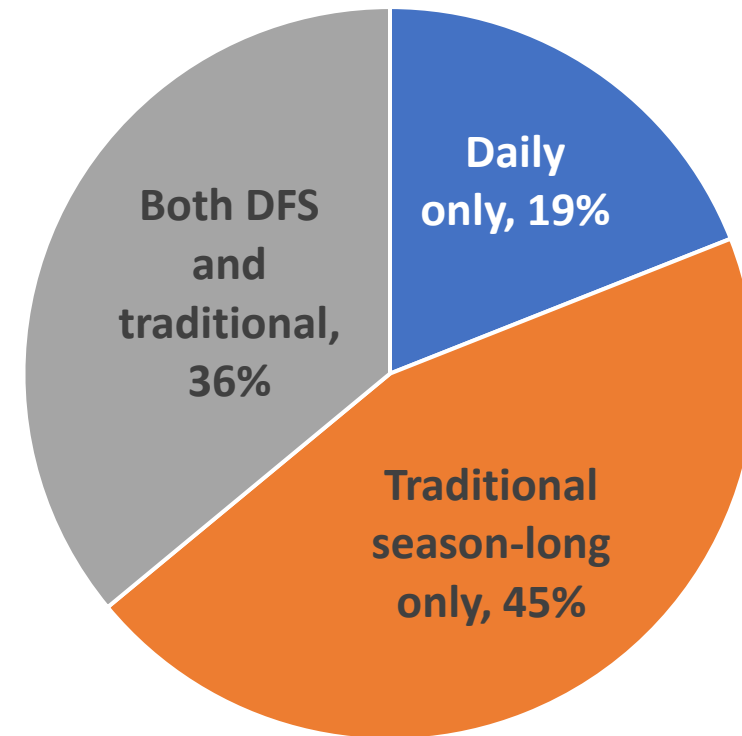
Fantasy sports

Fantasy sports participation

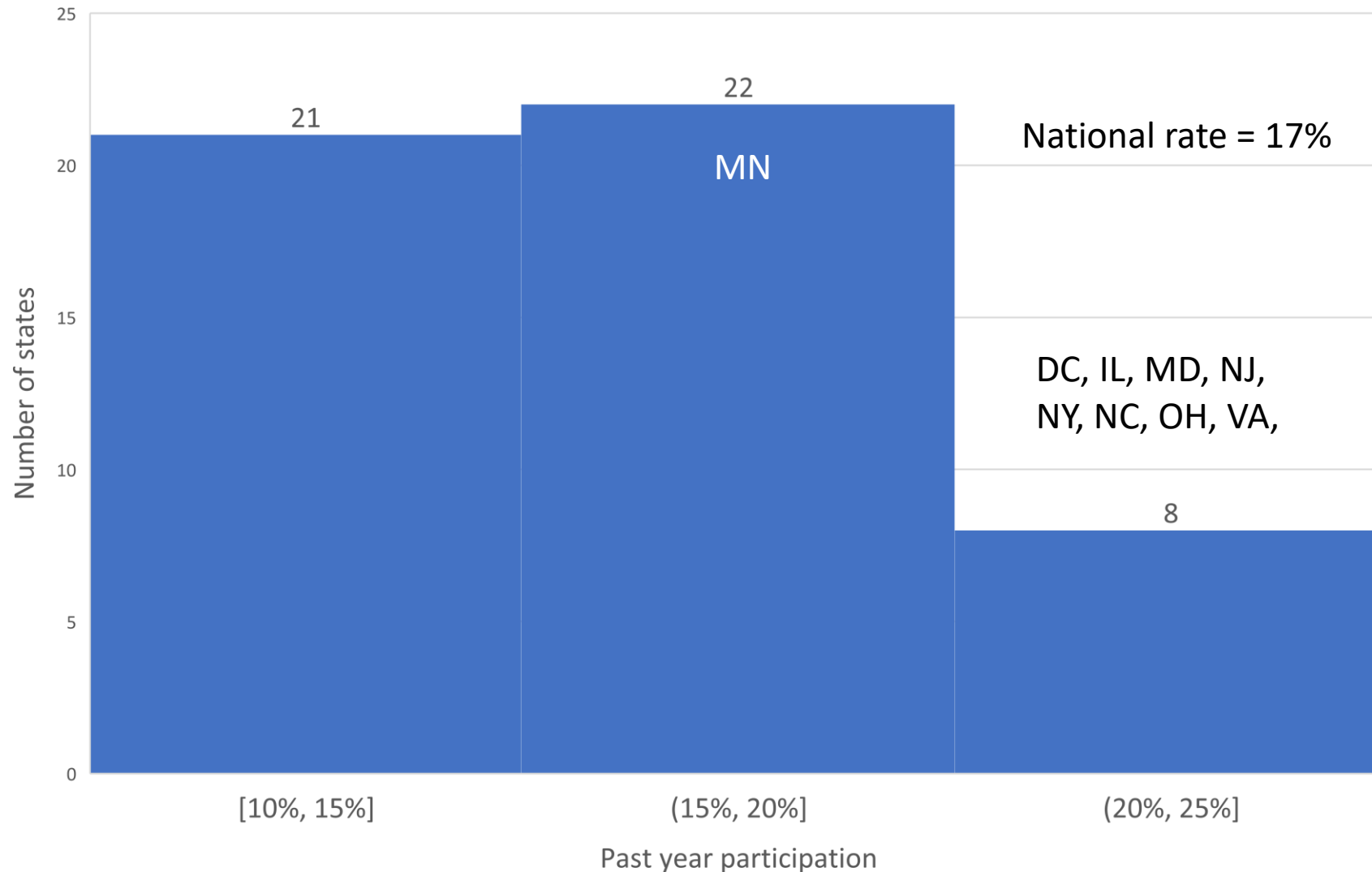
U.S.



Minnesota

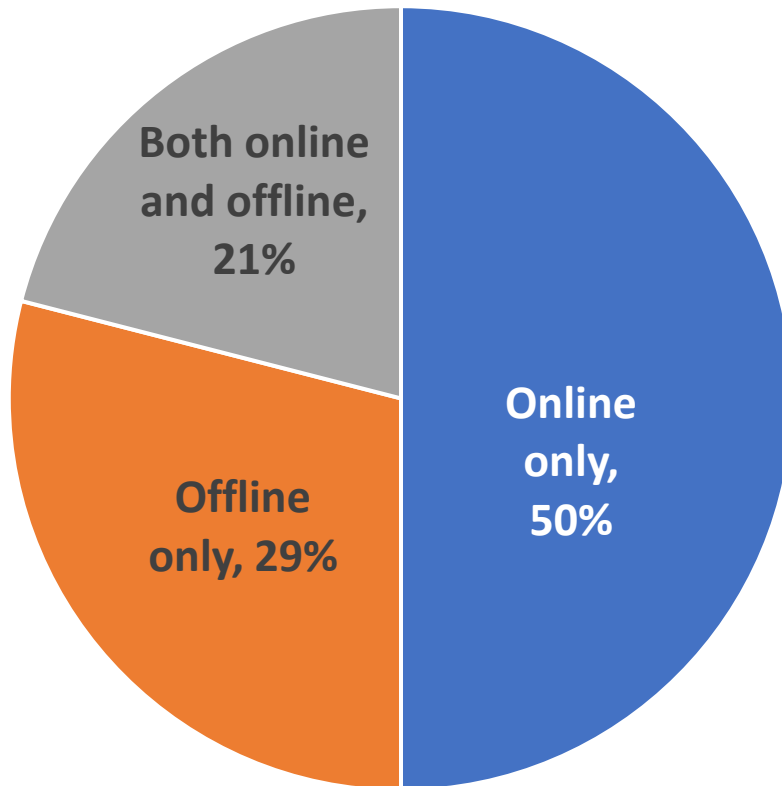


Fantasy sports participation by state

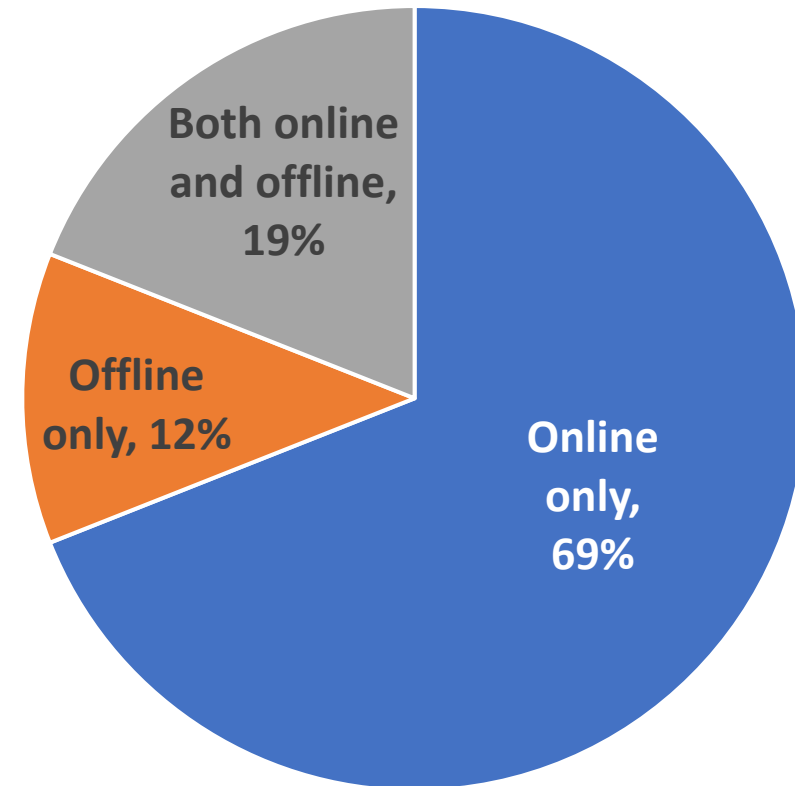


Method of playing traditional fantasy sports leagues

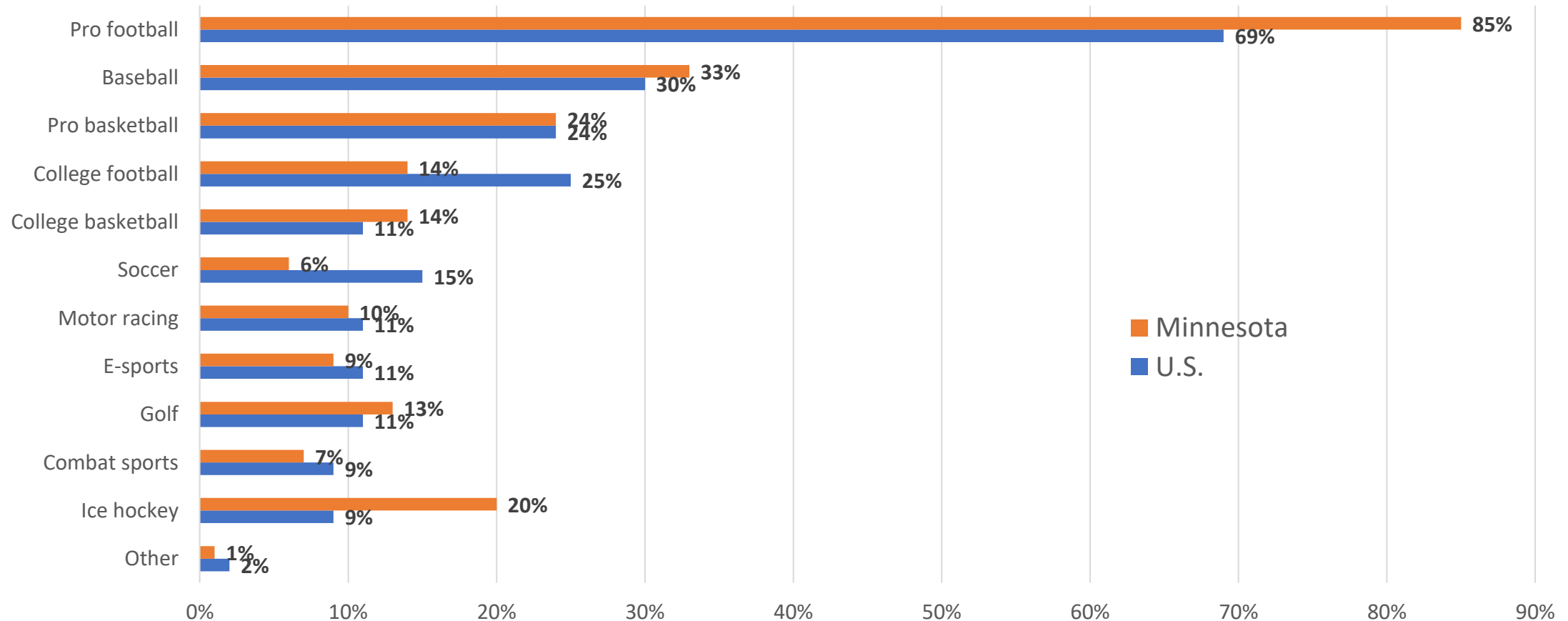
U.S.



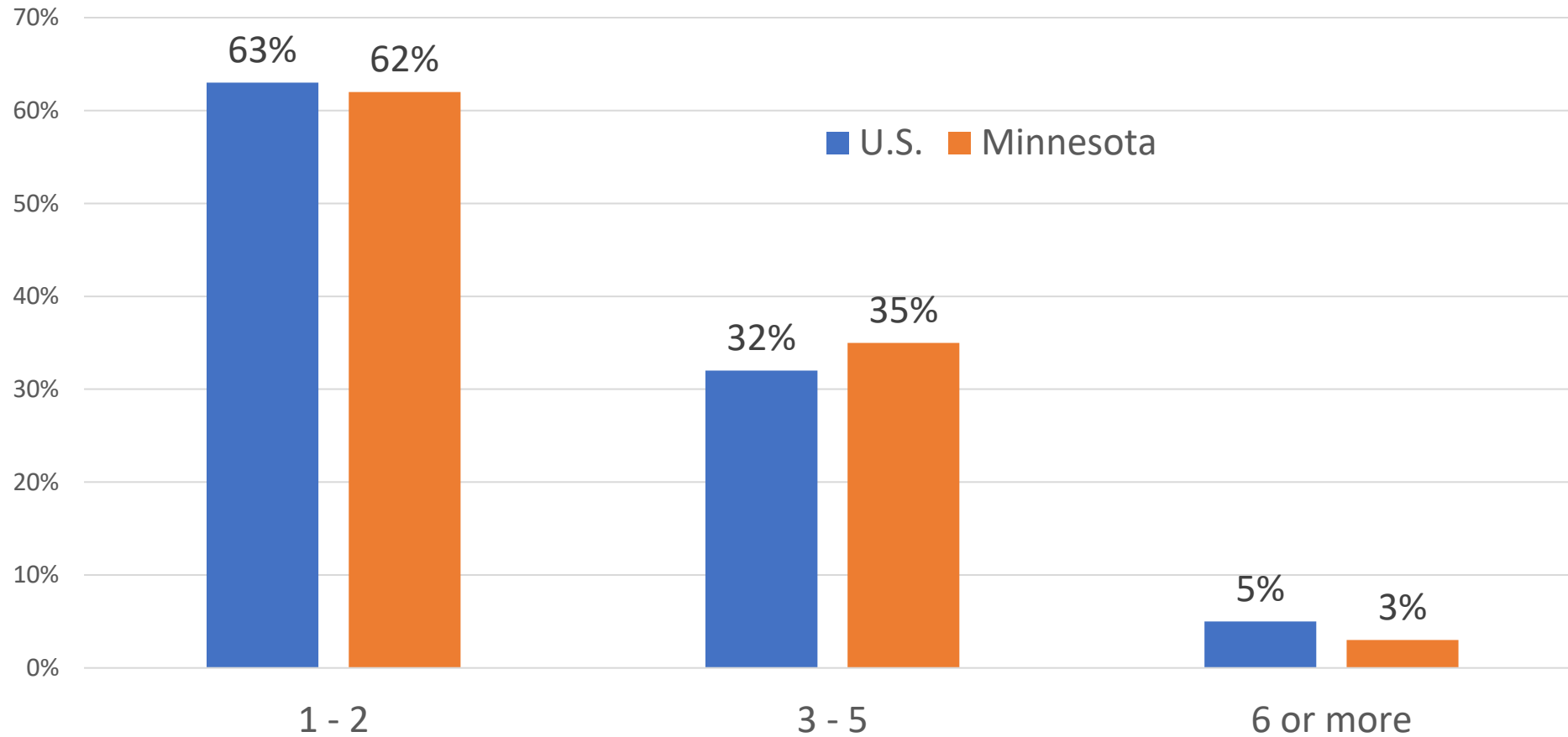
Minnesota



Fantasy sports played in past year



Number of fantasy sports bet on

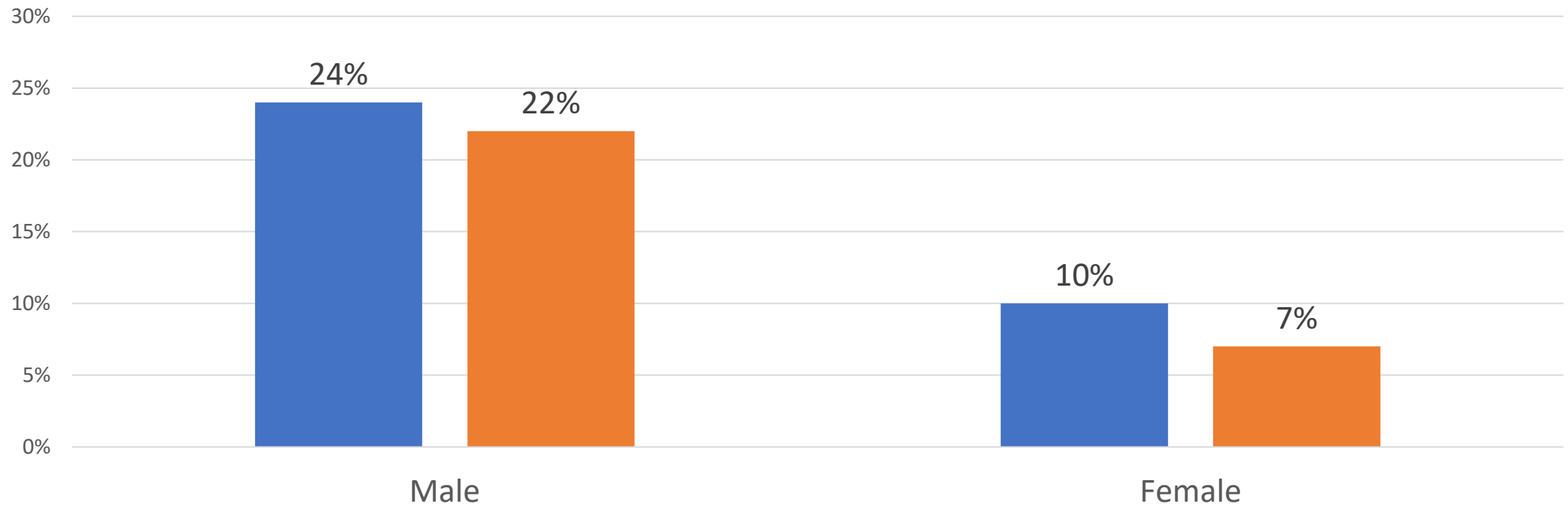


Past year fantasy sports bettors only

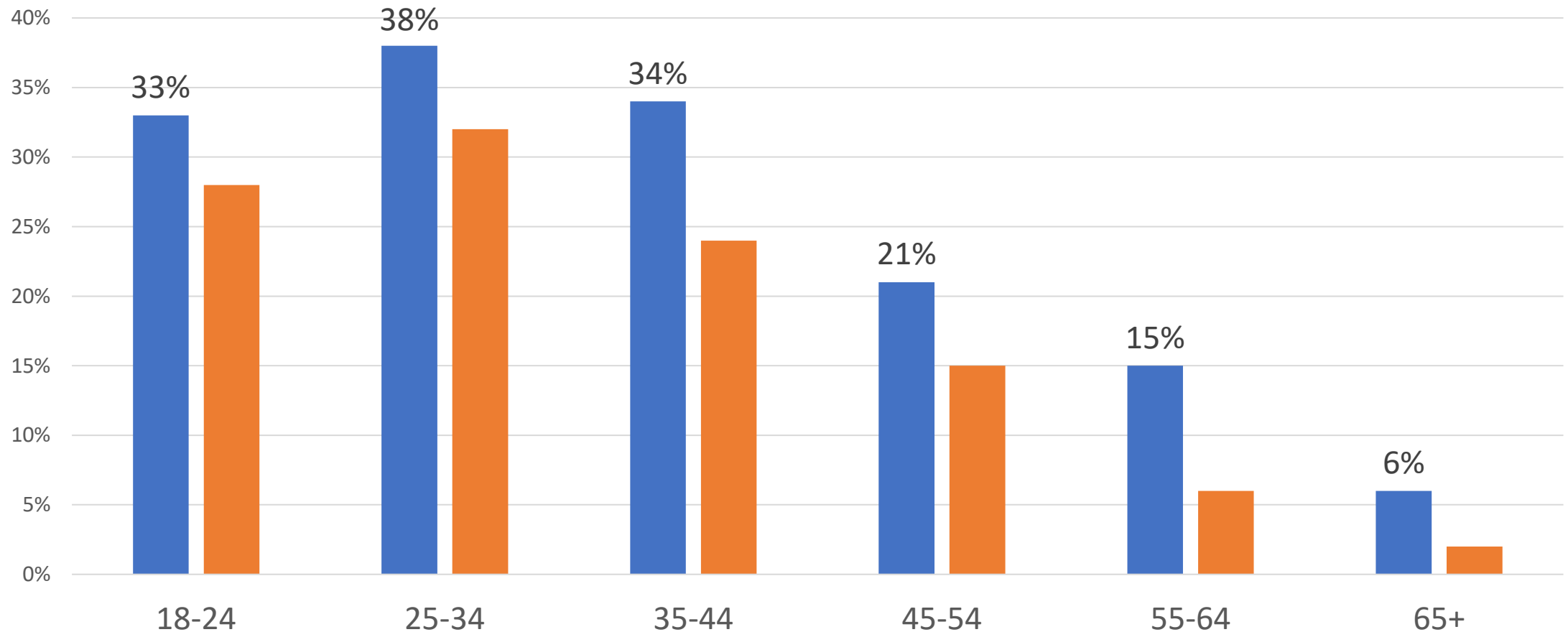
Past year fantasy sports betting by gender

Percent betting on fantasy sports in past year

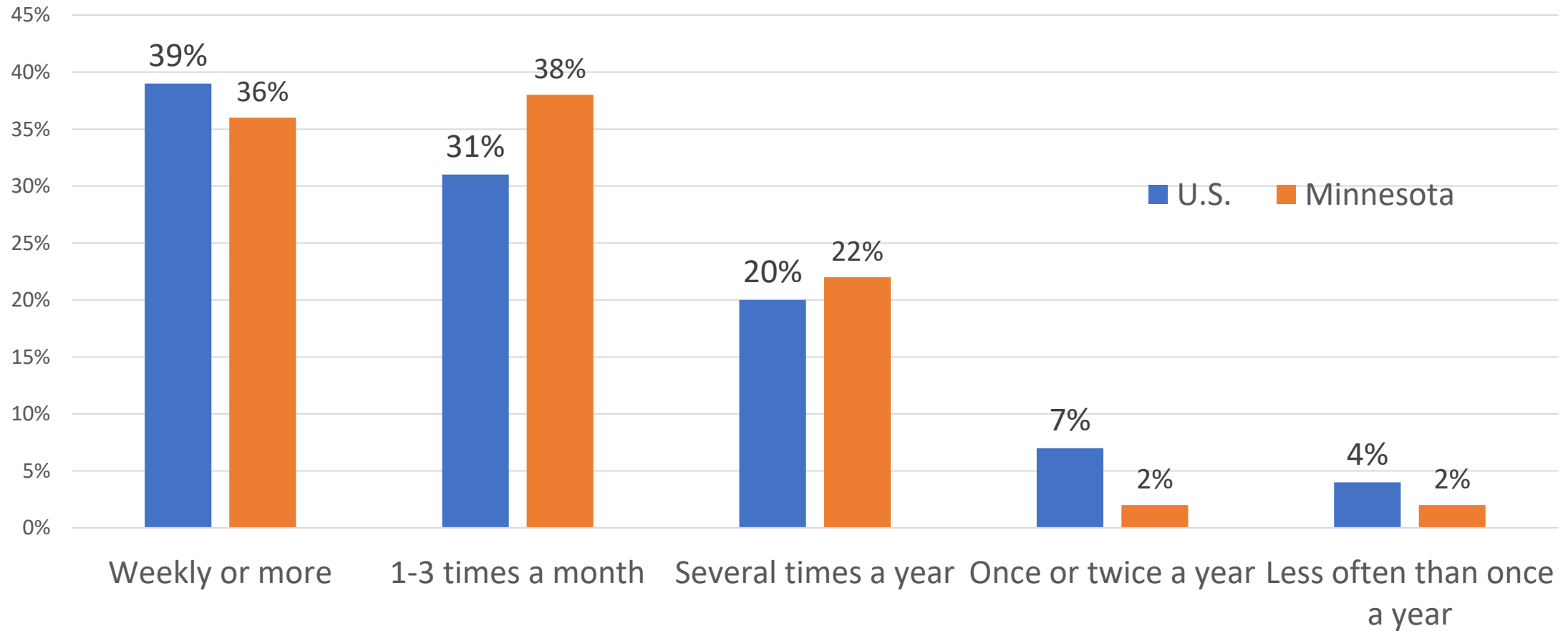
■ U.S. ■ Minnesota



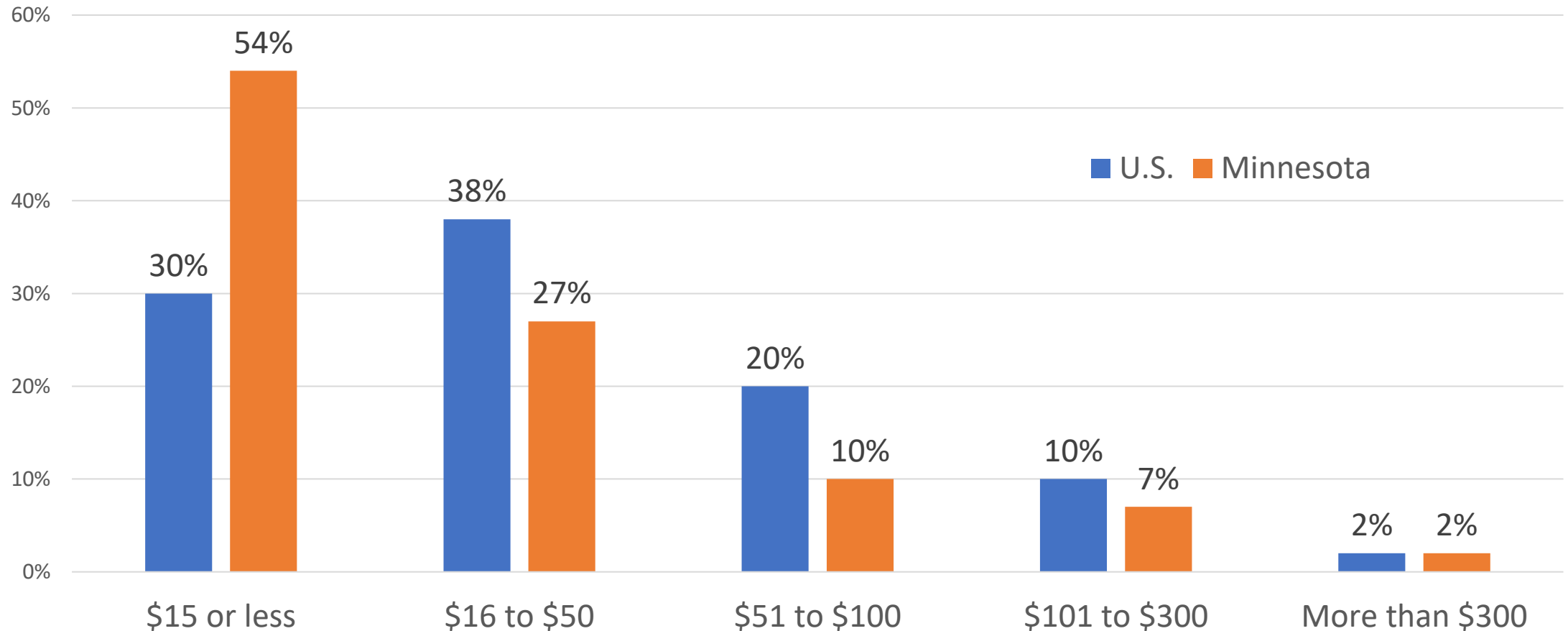
Past year fantasy sports betting by age



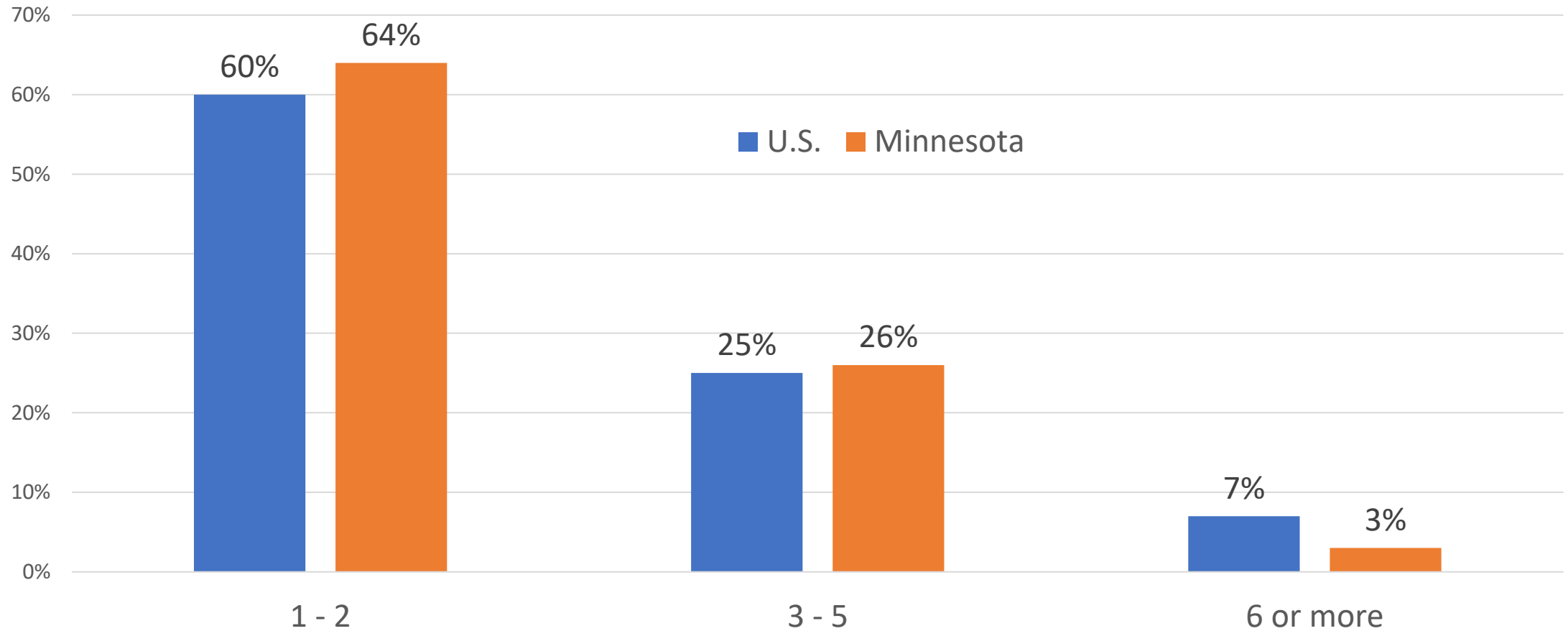
Frequency of daily fantasy sports bets



“On average, how much do you spend to enter a daily fantasy sports contest?”

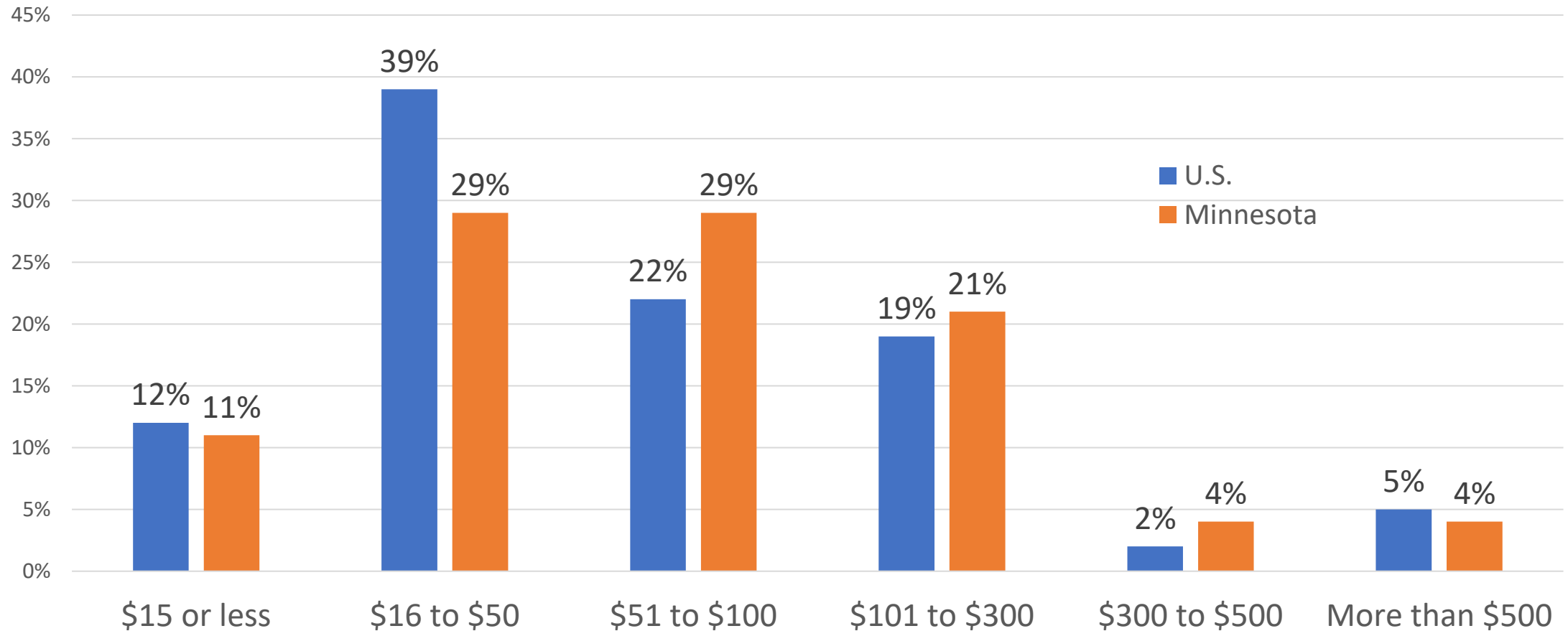


Number of traditional fantasy sports leagues



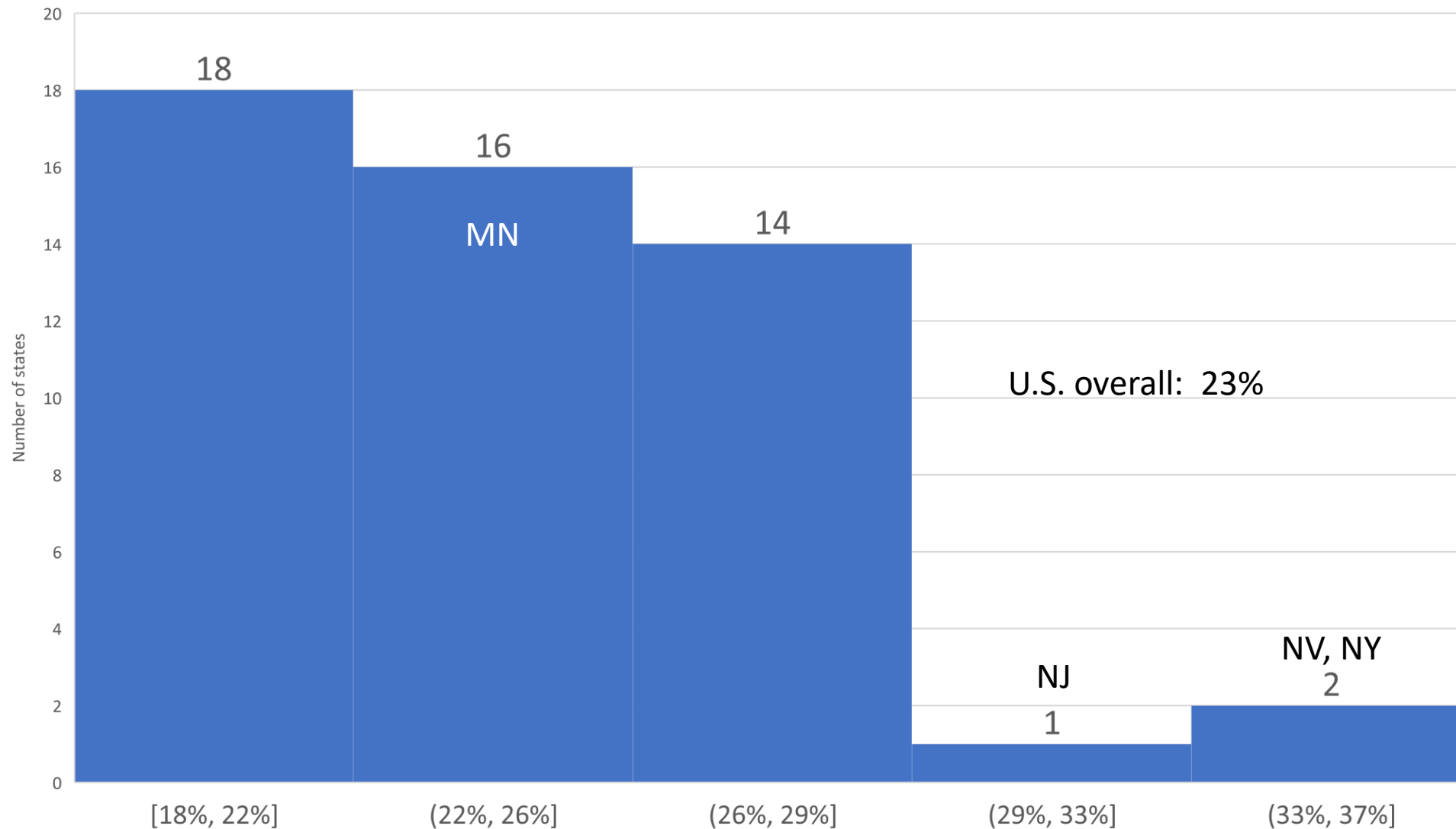
Past year traditional fantasy sports bettors only

“How much does your traditional, season-long fantasy sports league(s) cost to play?”

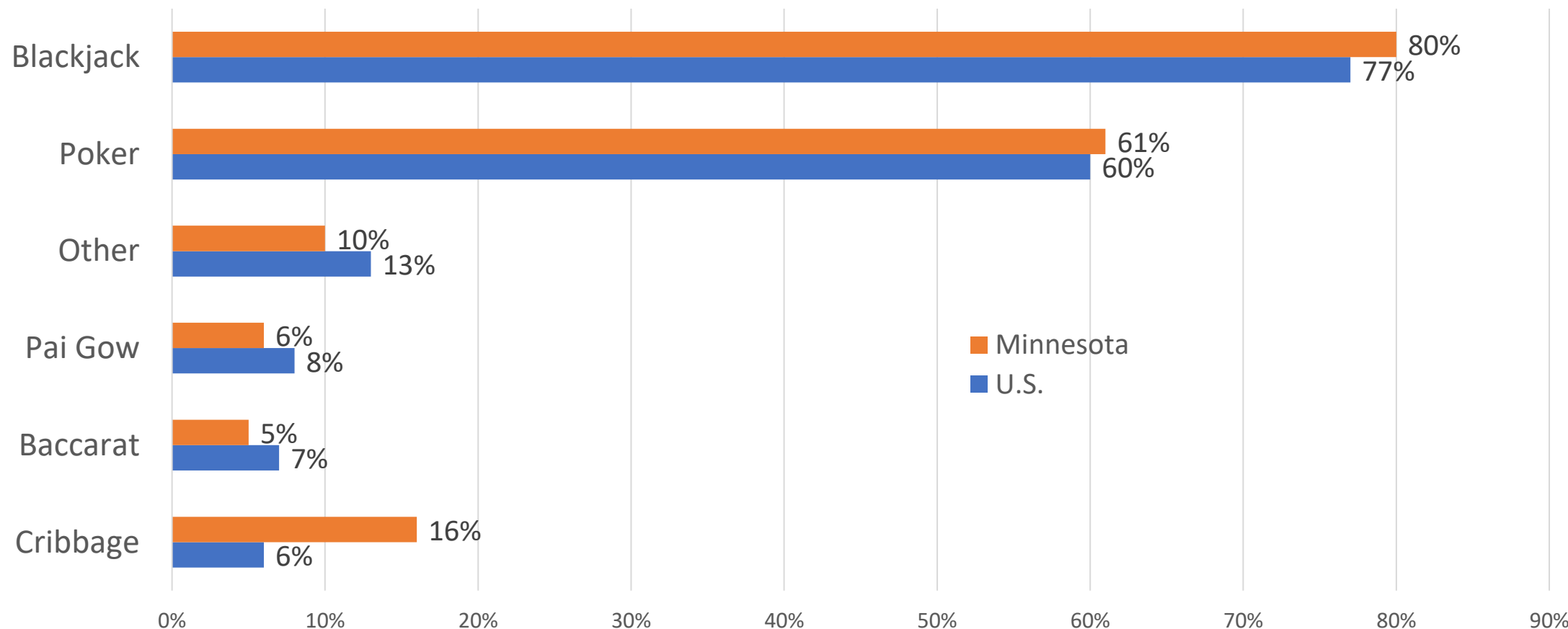


Card games

Card game gambling by state

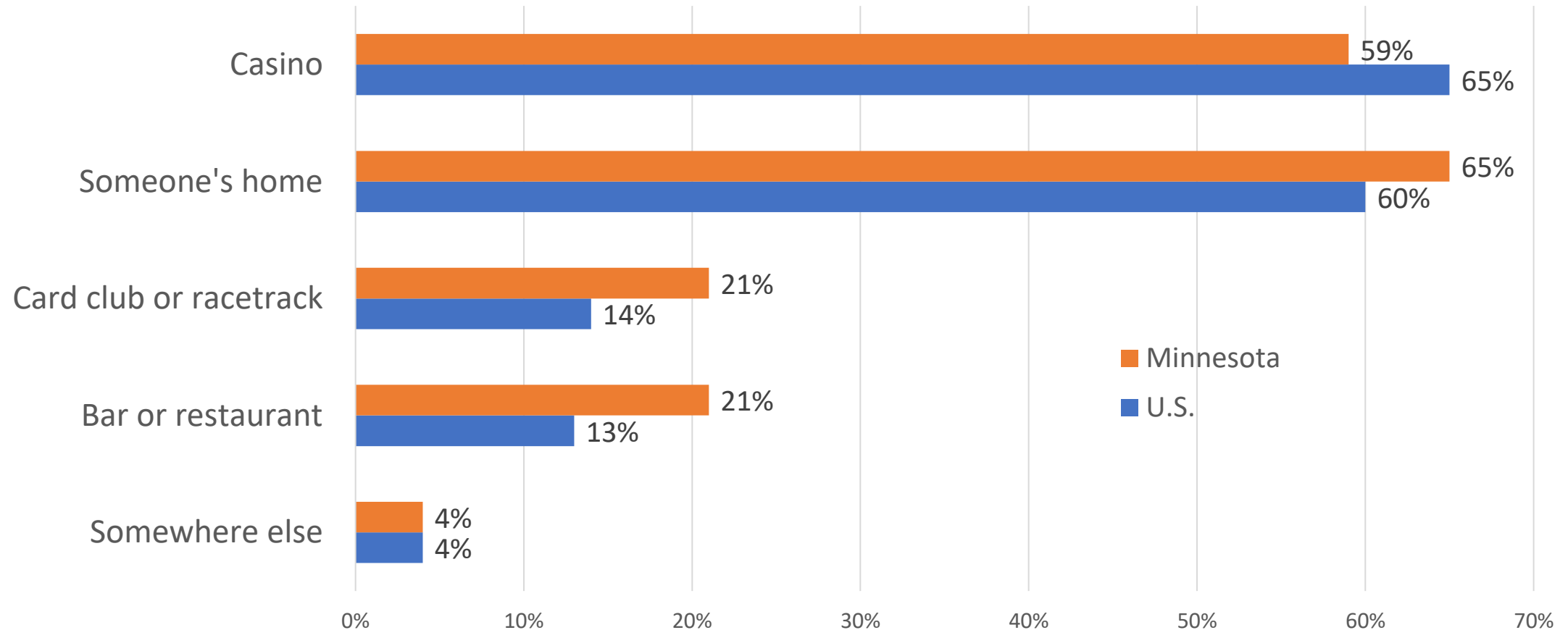


What type of card games have you wagered money on in the past year?



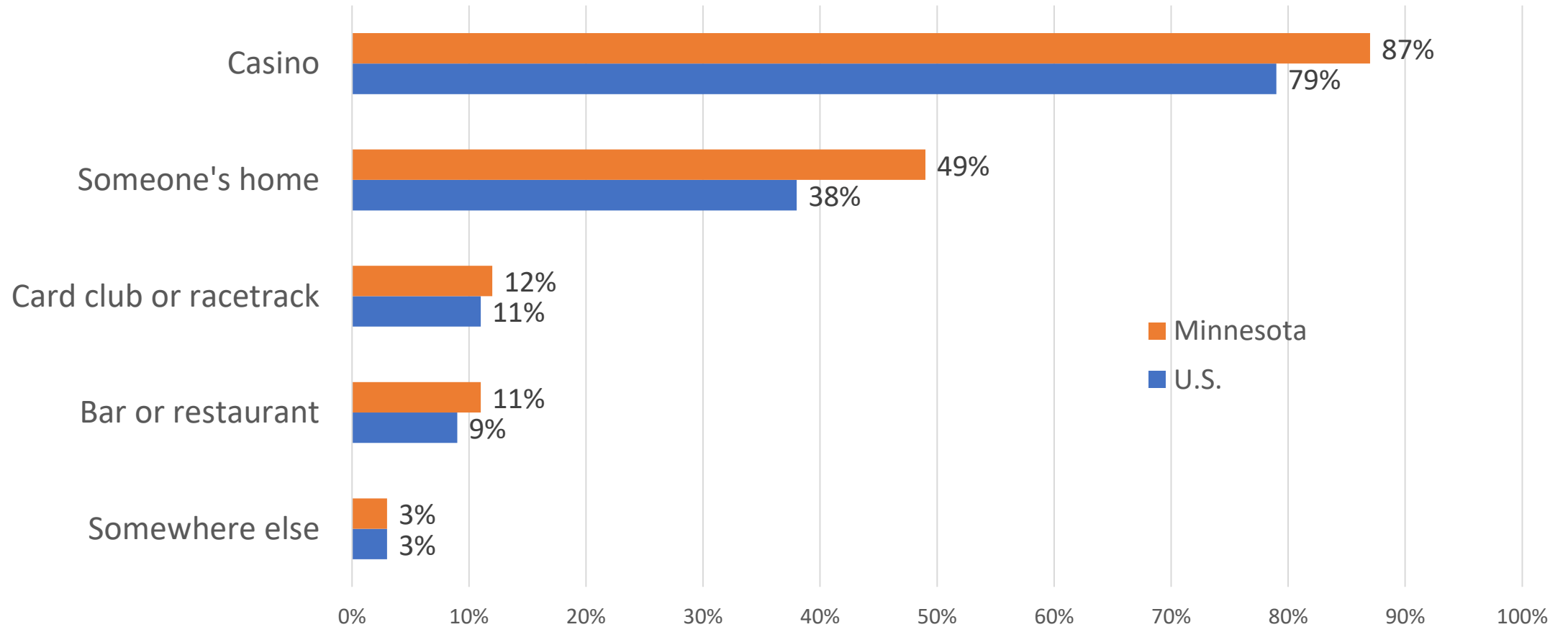
Asked of past year card players only

Where have you played poker?



Asked of past year poker players only

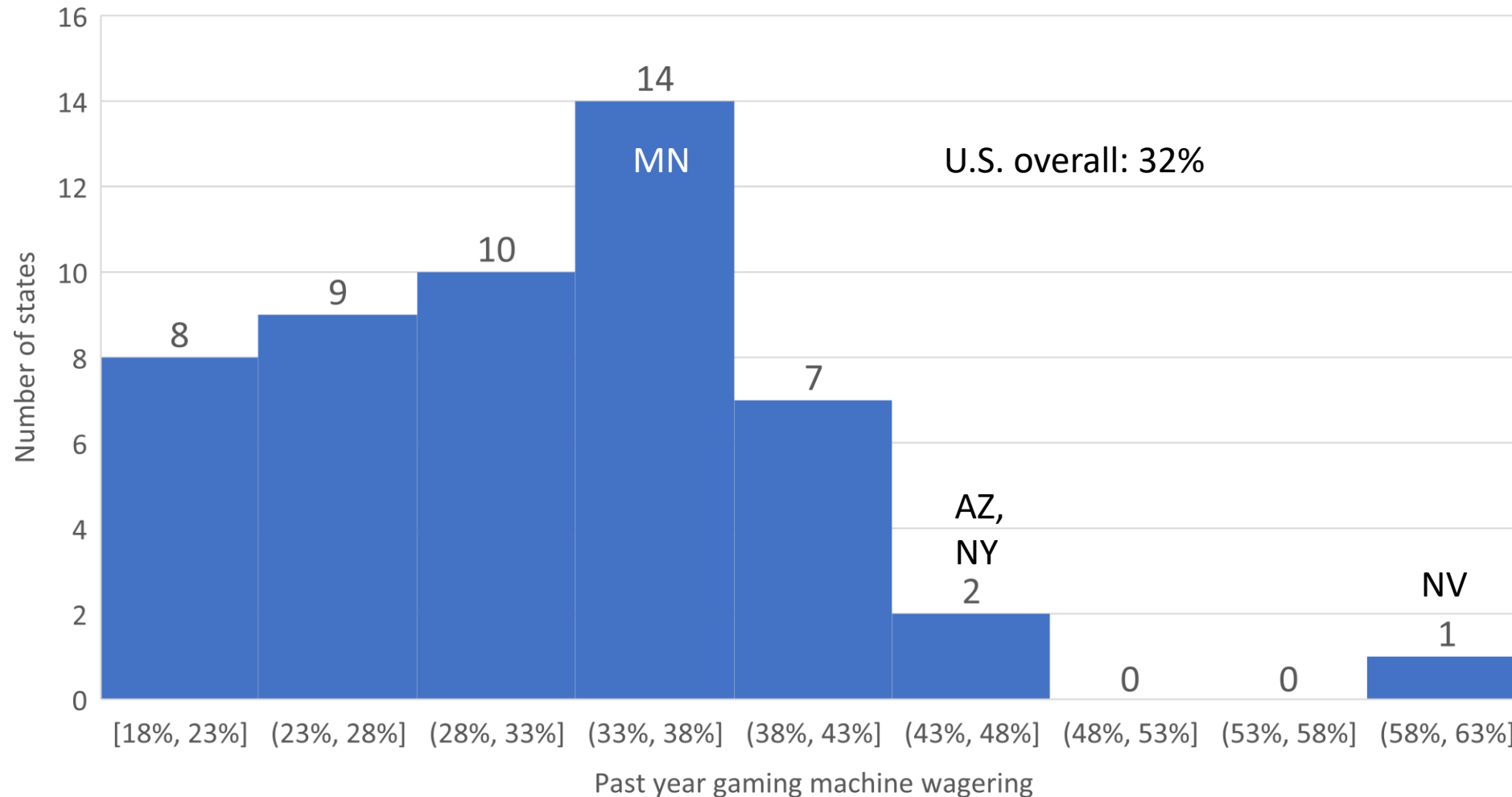
Where have you played blackjack?



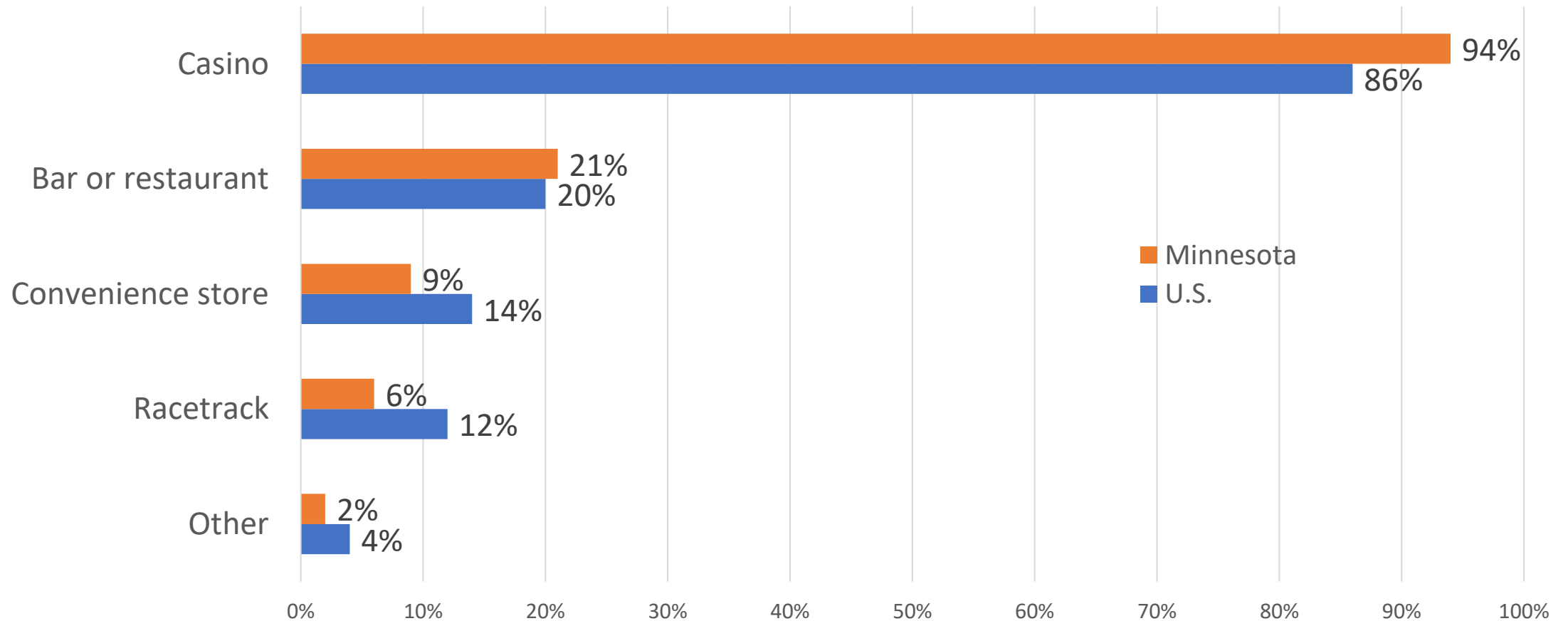
Asked of past year blackjack players only

Gaming machines

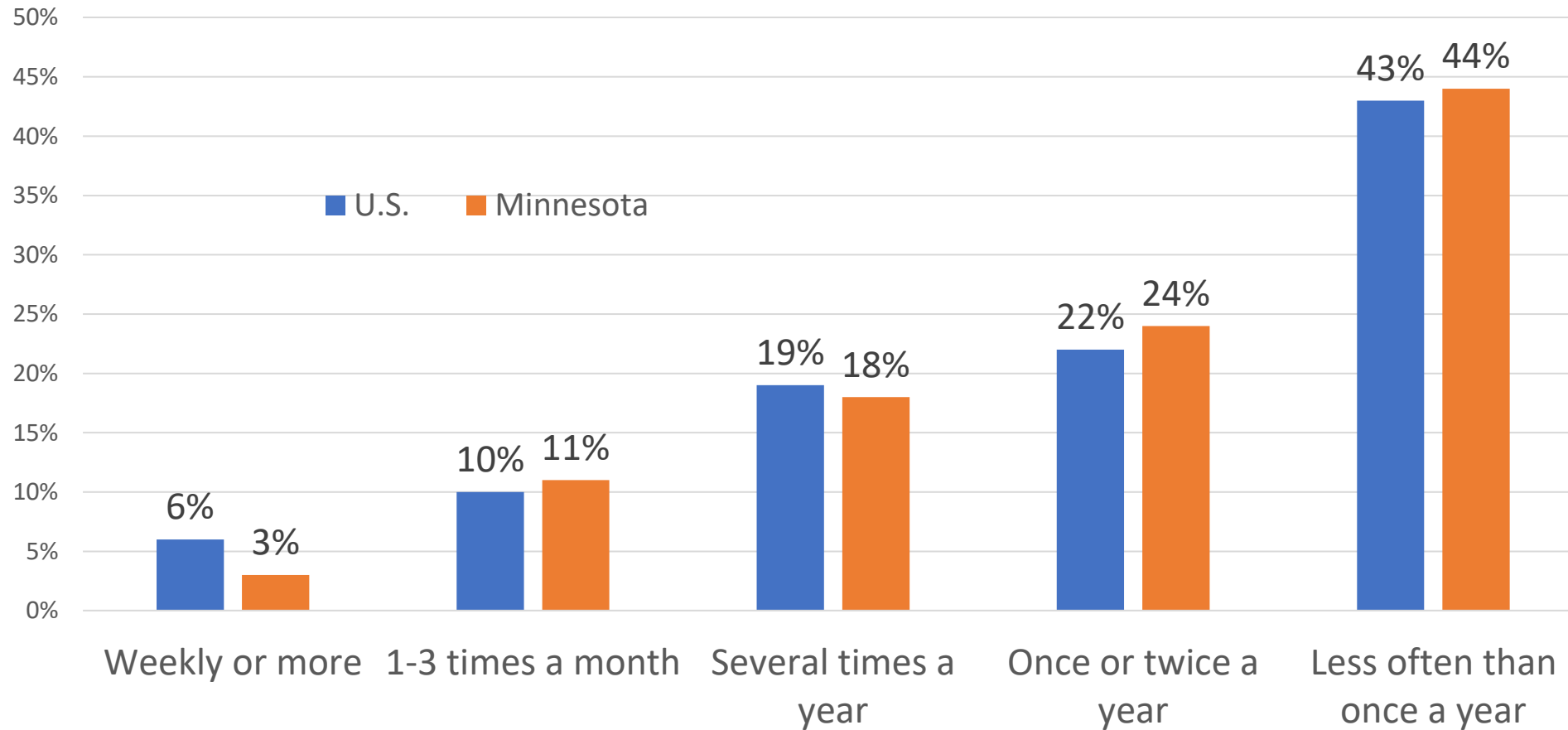
Gaming machine play by state



Where did you play slots, VLTs or other gaming machines in the past year?



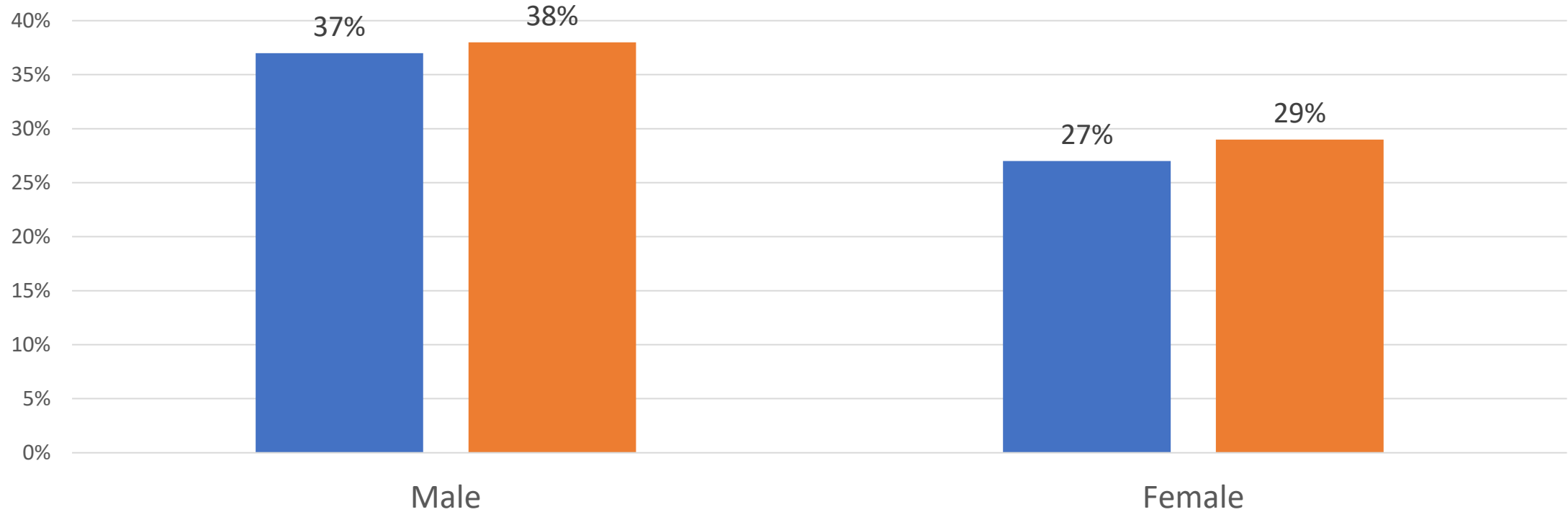
Frequency of gaming machine play



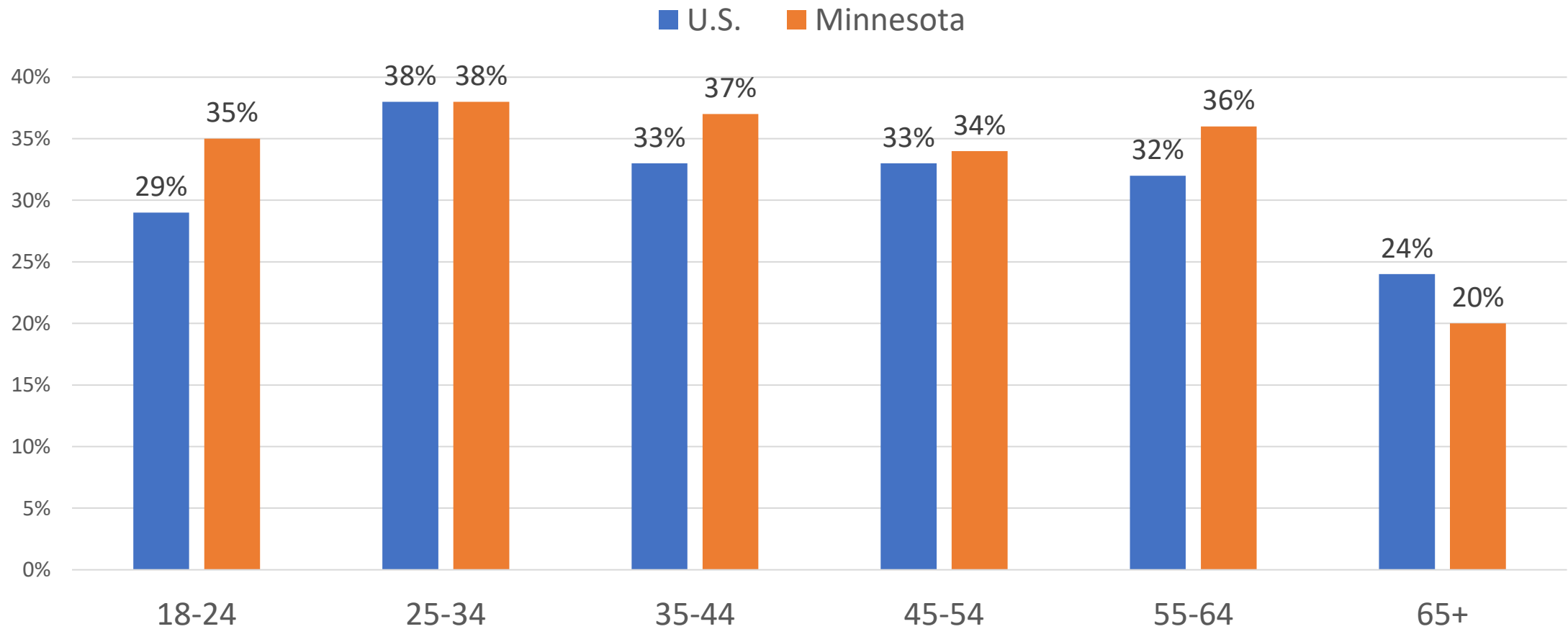
Past year gaming machine betting by gender

Percent playing slots, VLTs or other gaming machines in past year

■ U.S. ■ Minnesota

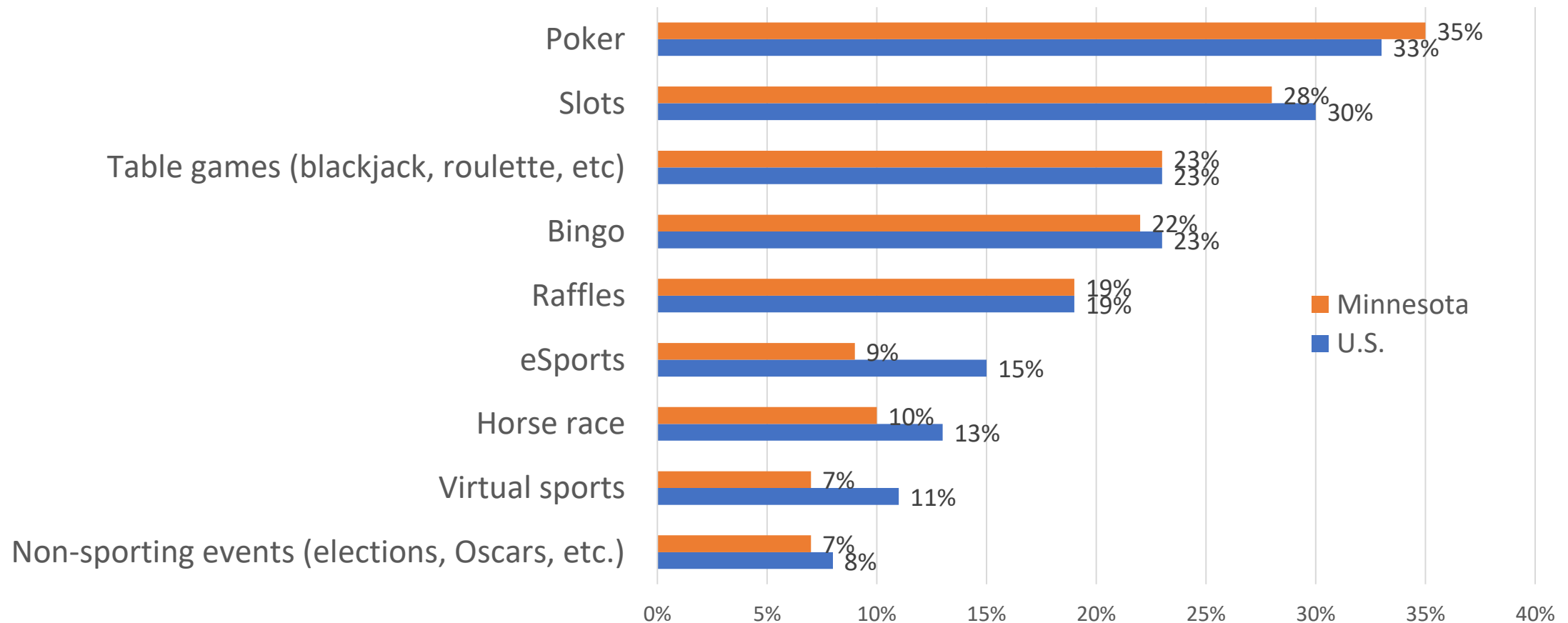


Past year gaming machine betting by age



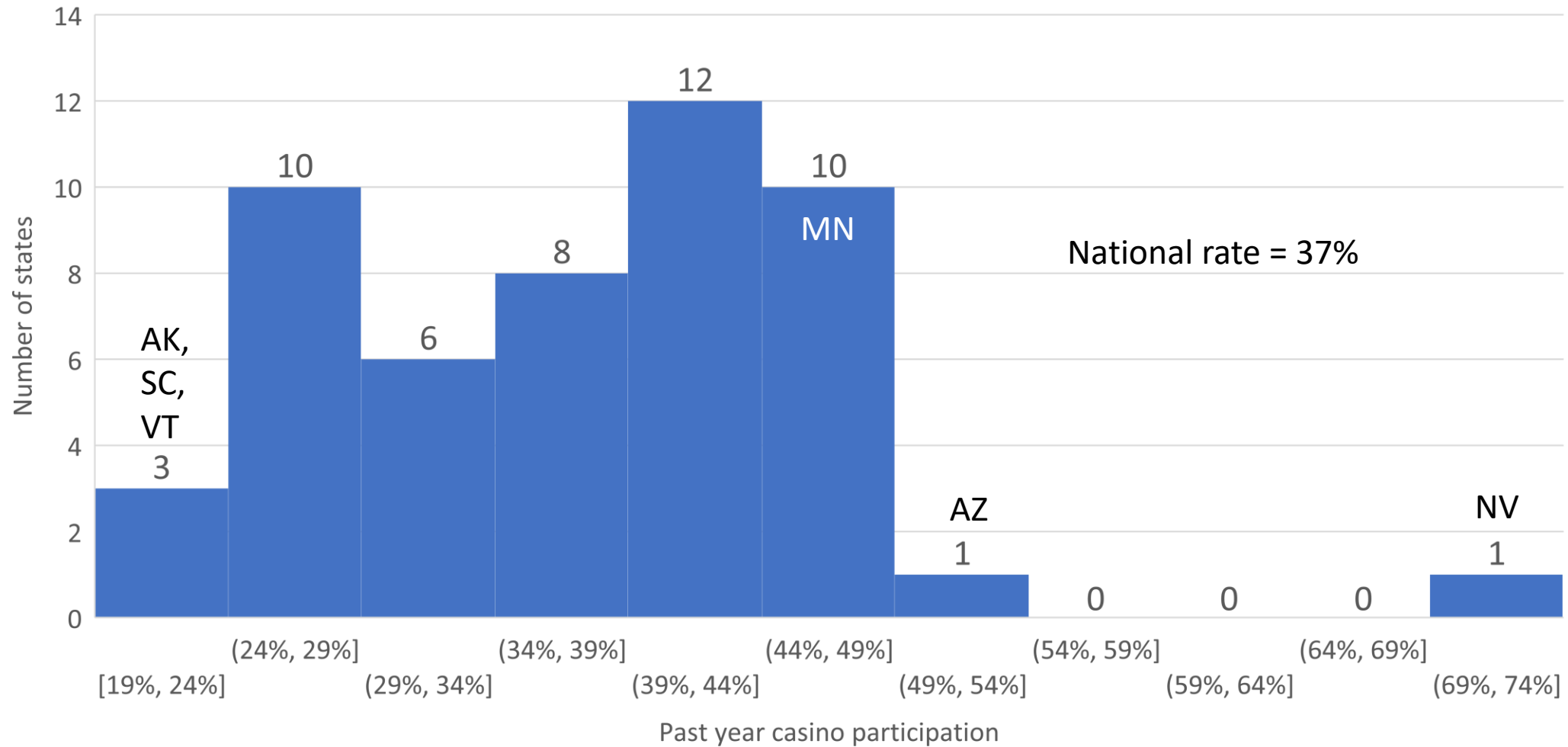
Online gambling

What type of gambling have you done online, on a website, or on a mobile app in the past year?

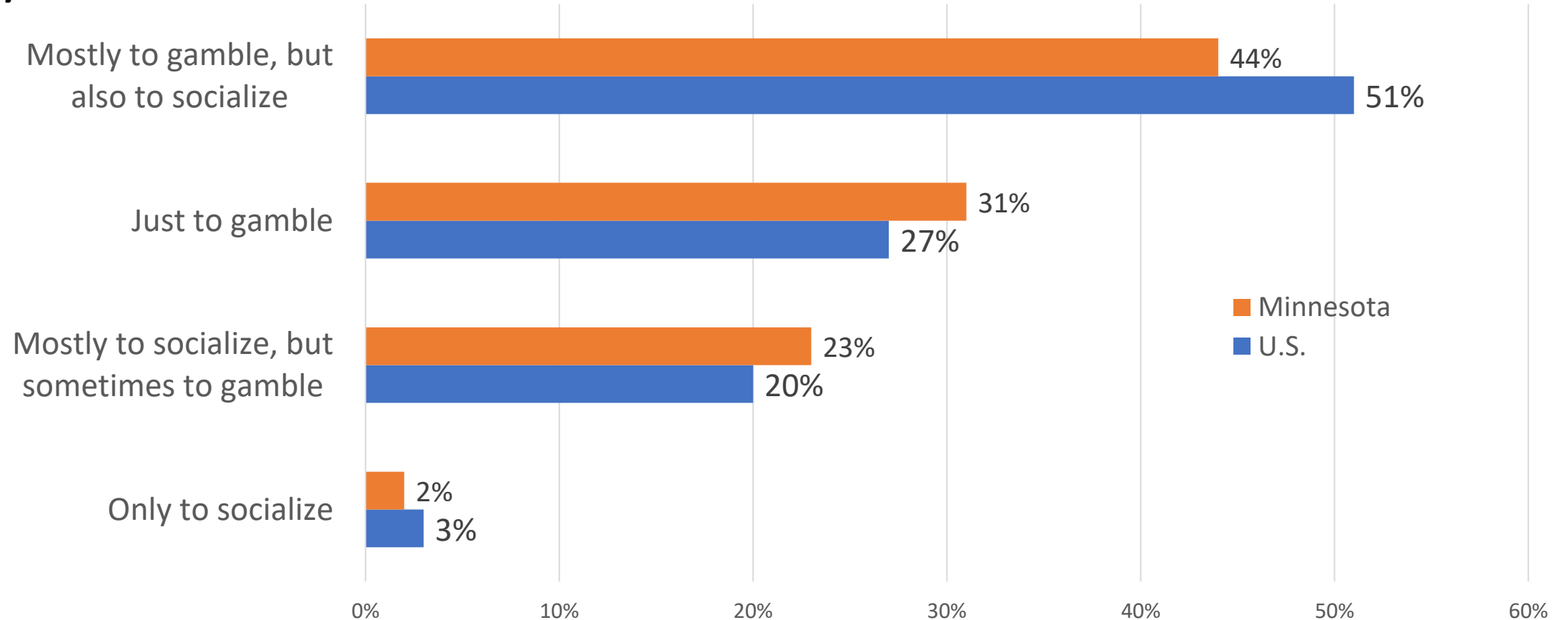


Casinos

Casino betting by state

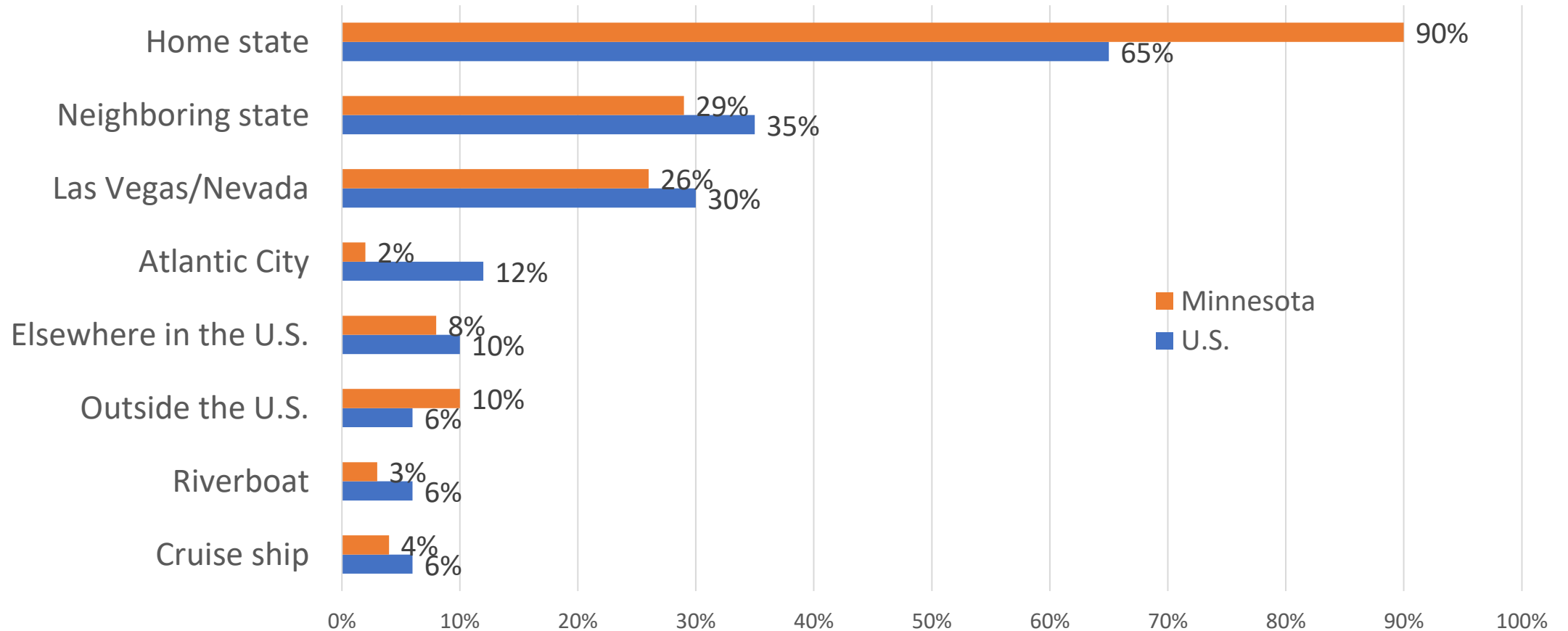


Why have you visited a casino in the past year?



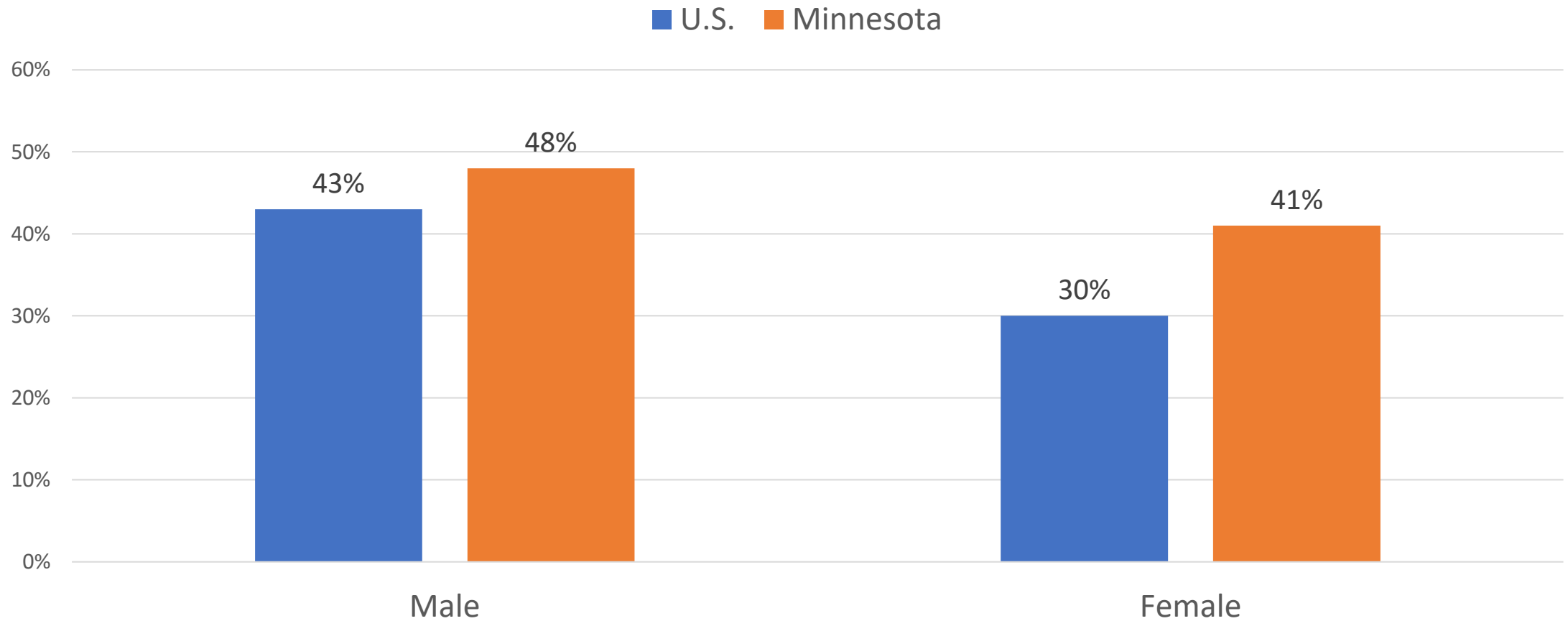
Asked of casino-goers only

What types of casinos have you been to in the past year?

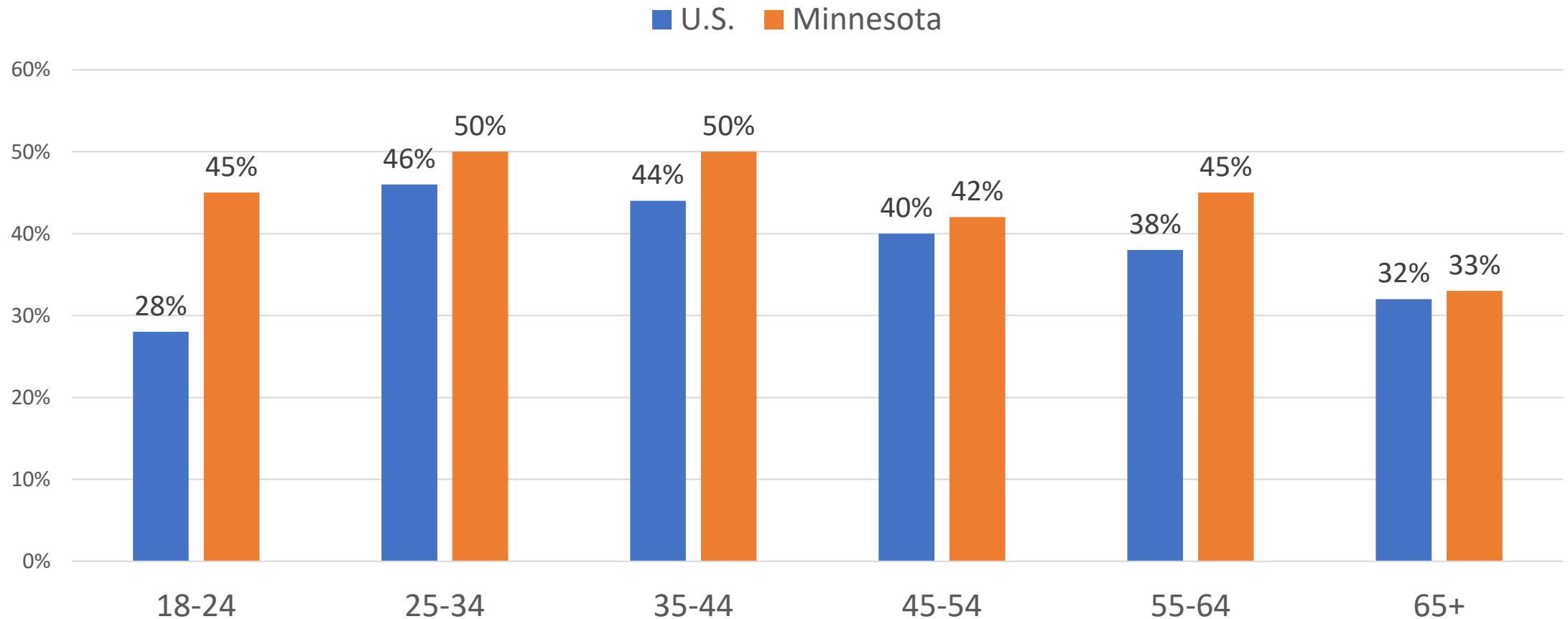


Asked of casino-goers only

Past year casino attendance by gender



Past year casino attendance by age

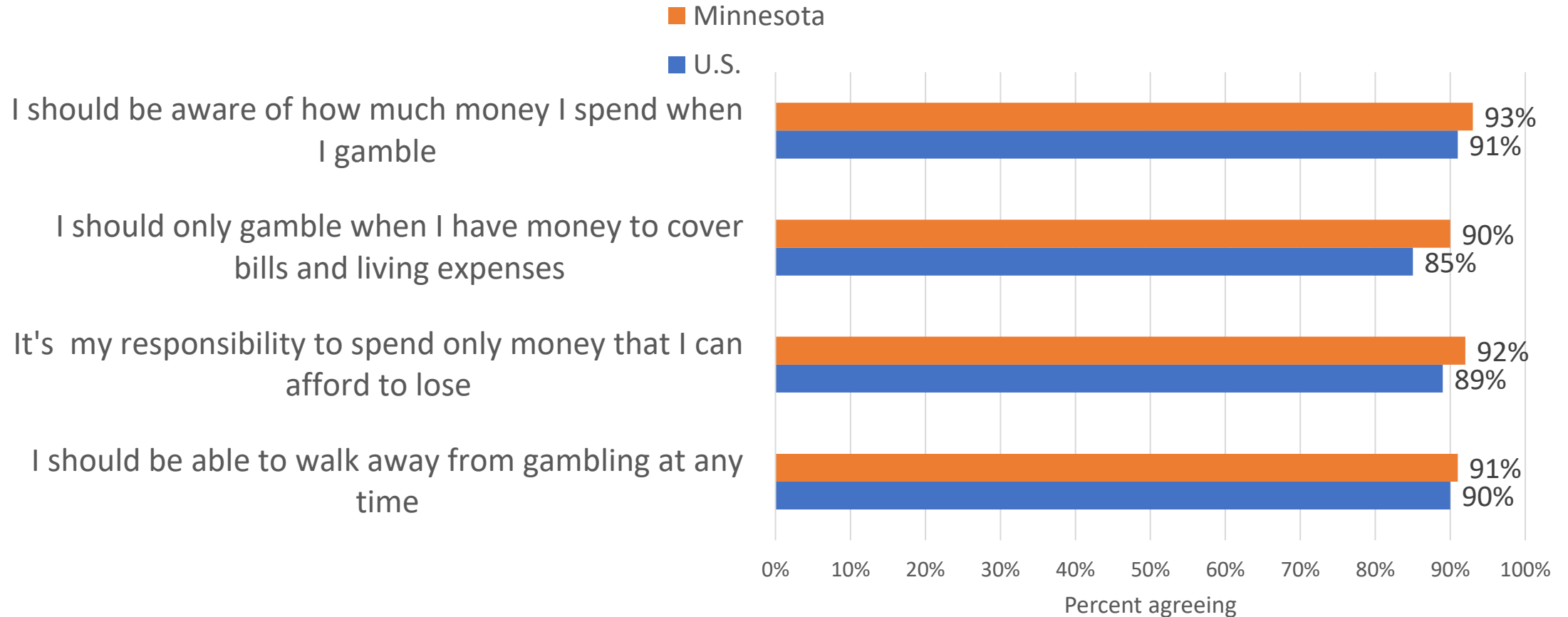


Positive play

What is positive play?

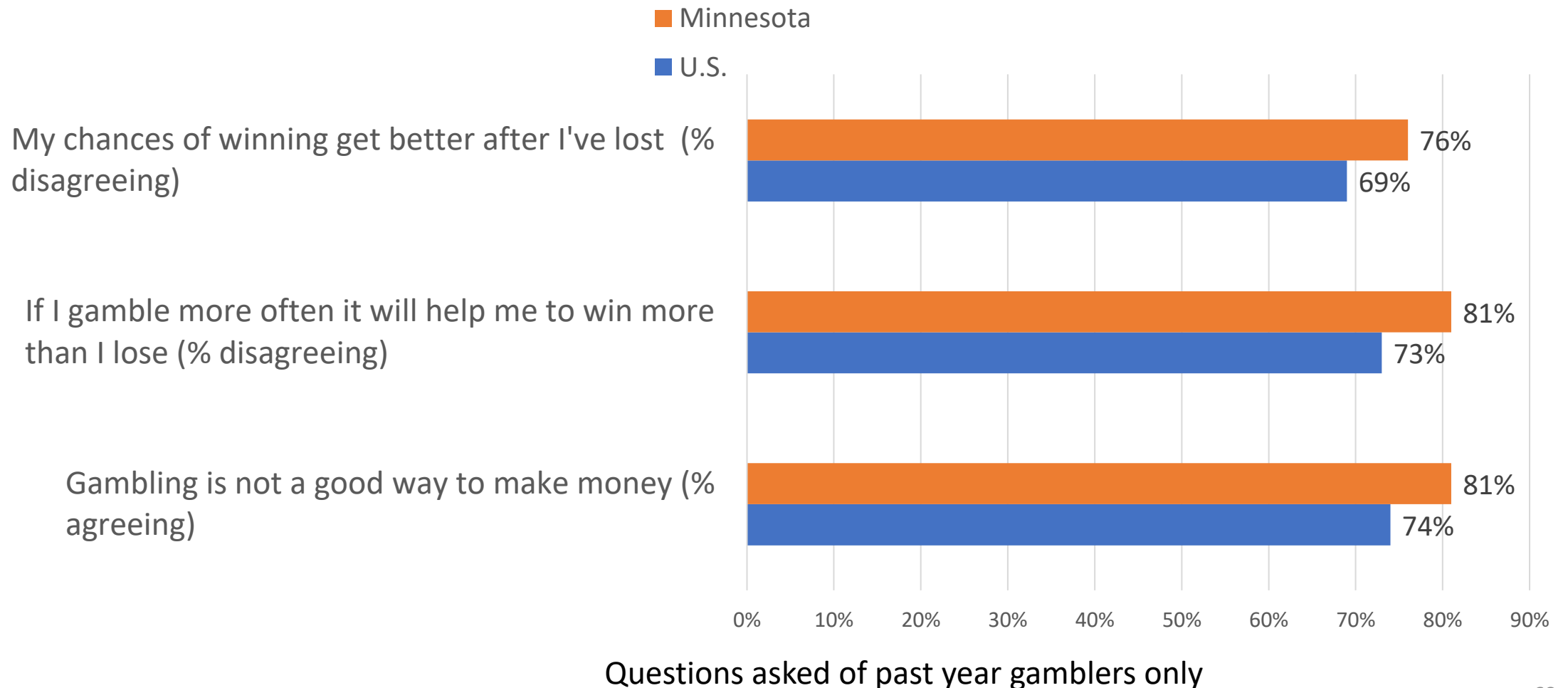
- It's a tool designed to measure responsible gambling beliefs and behavior
 - Developed by Richard Wood, Michael Wohl, Nassim Tabri and Kahlil Philander (2016)
- It emphasizes positive experiences over negative warnings
- The positive play scale measures four dimensions of positive play:
 - Honesty and control
 - Pre-commitment
 - Personal responsibility
 - Positive accurate beliefs about gambling
- The NGAGE study focused on personal responsibility and accurate beliefs

Past year positive play – personal responsibility

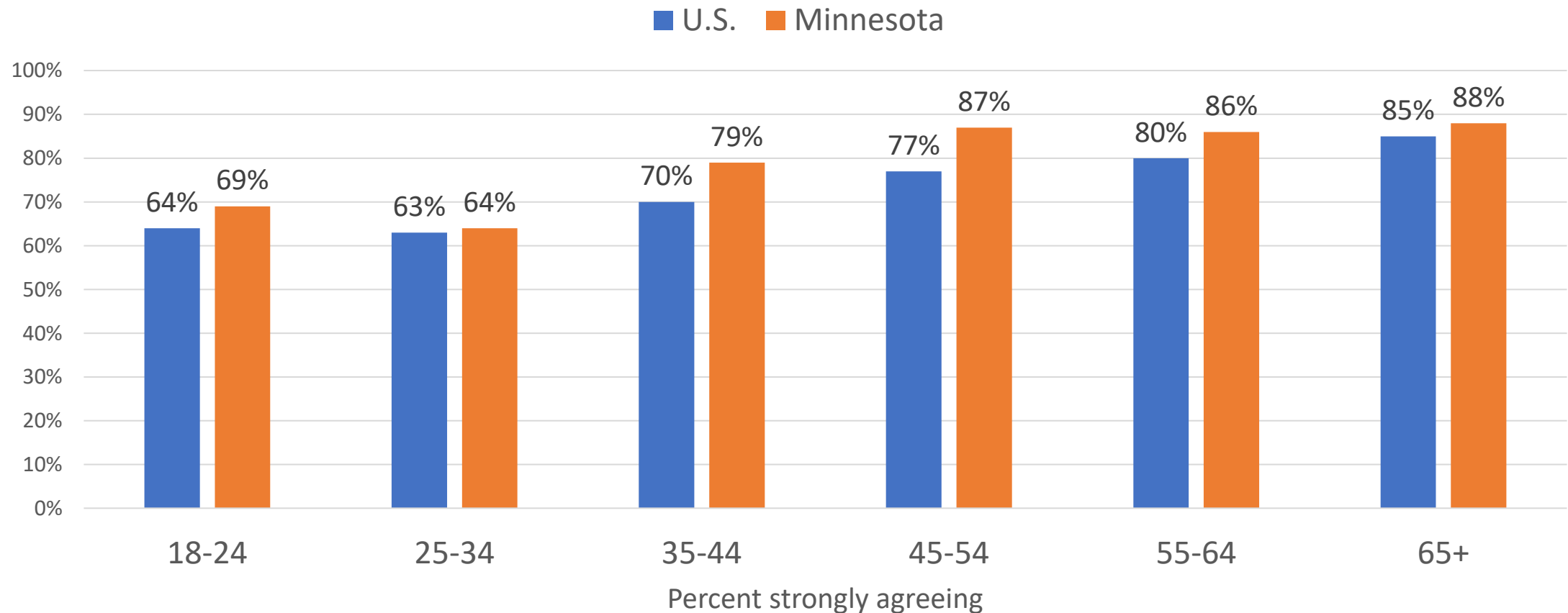


Questions asked of past year gamblers only

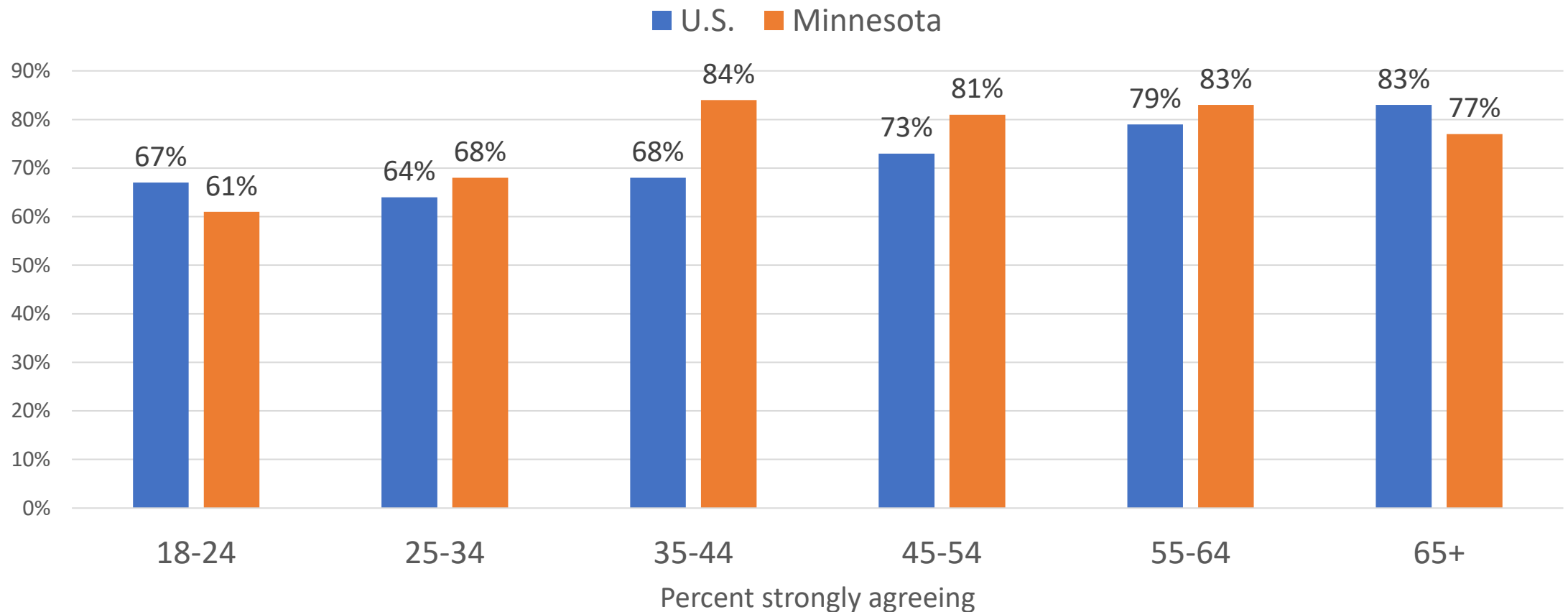
Past year positive play – gambling literacy



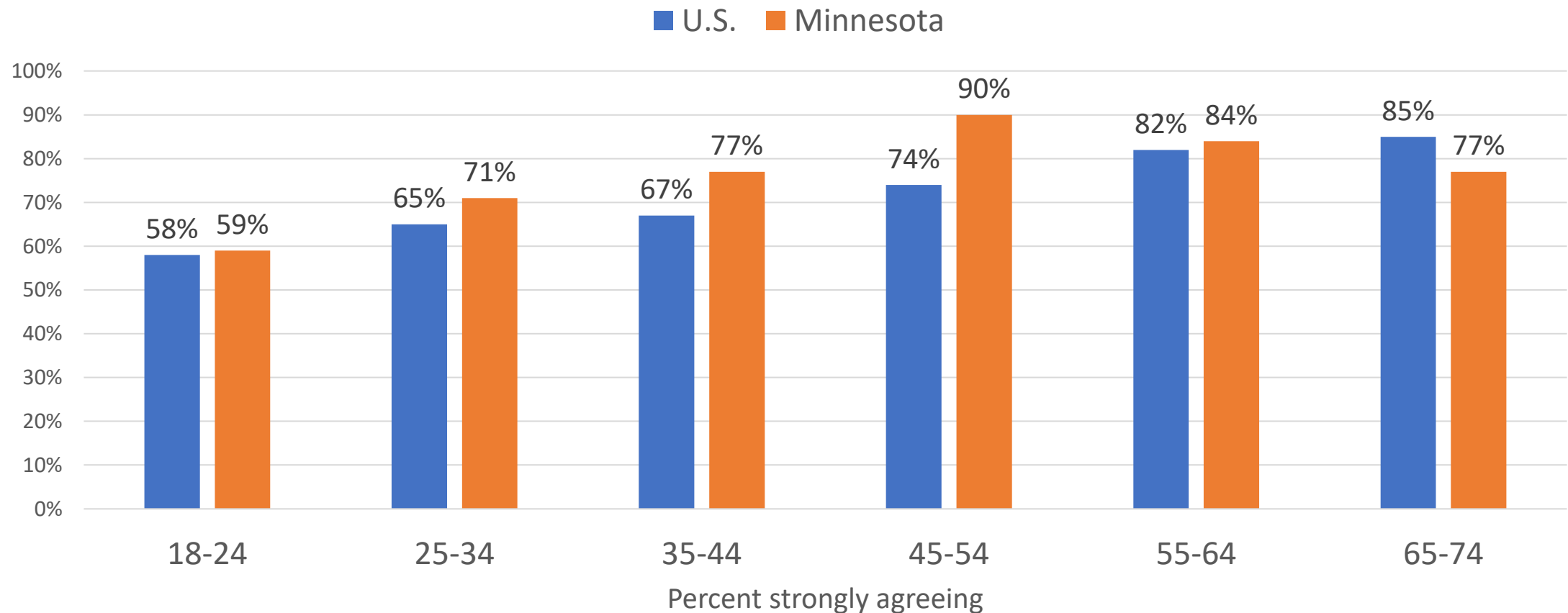
Positive play by age – “I should be able to walk away from gambling at any time”



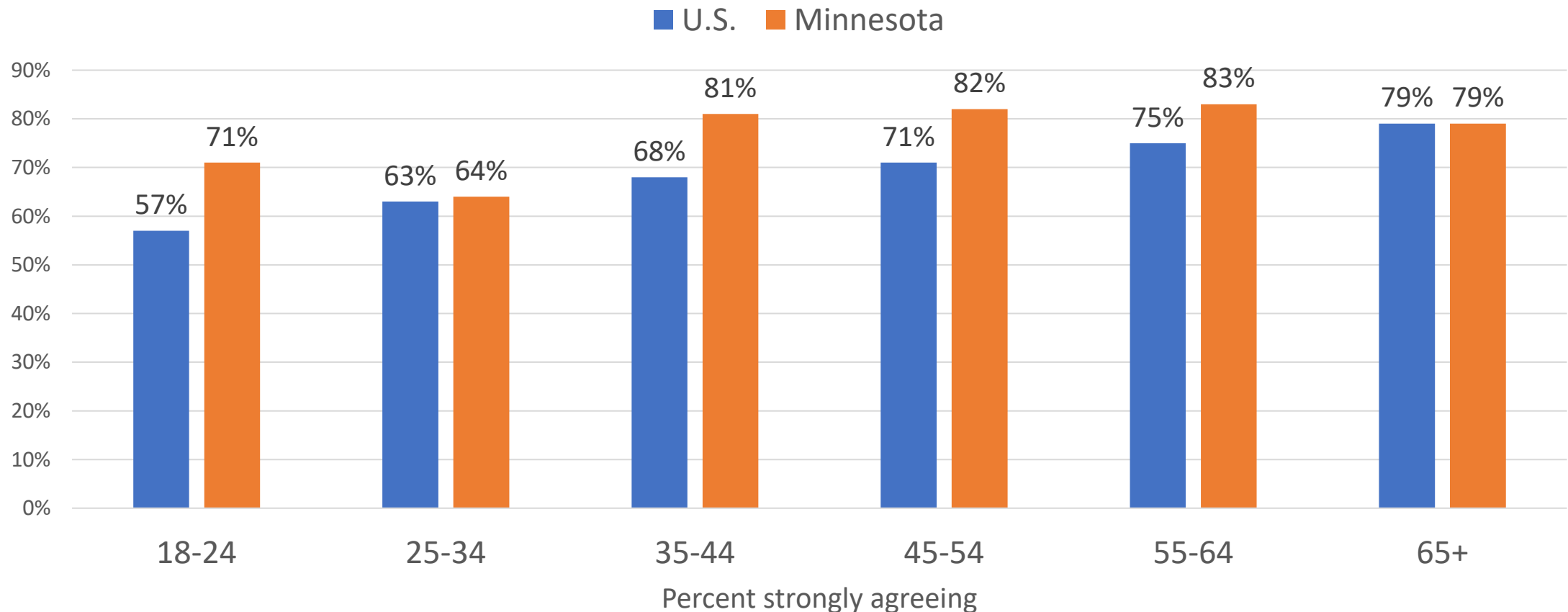
Positive play by age – “I should be aware of how much money I spend when I gamble”



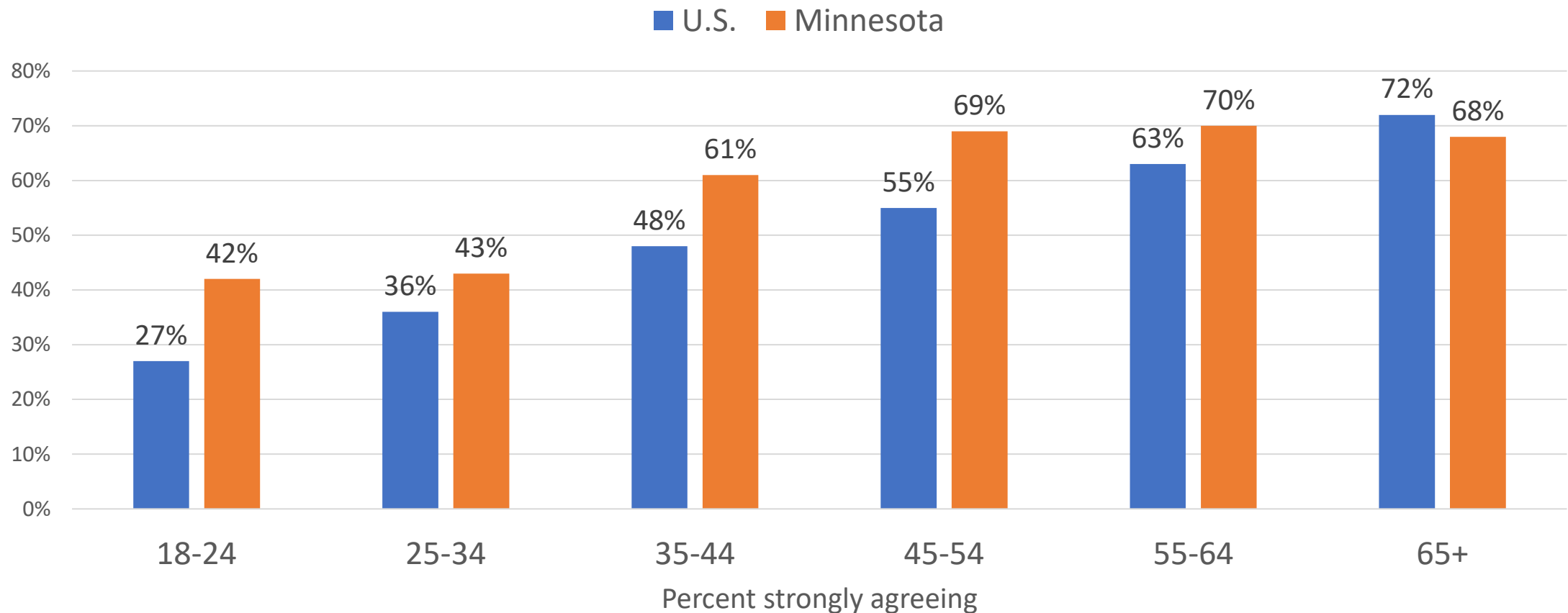
Positive play by age – “It’s my responsibility to spend only money that I can afford to lose”



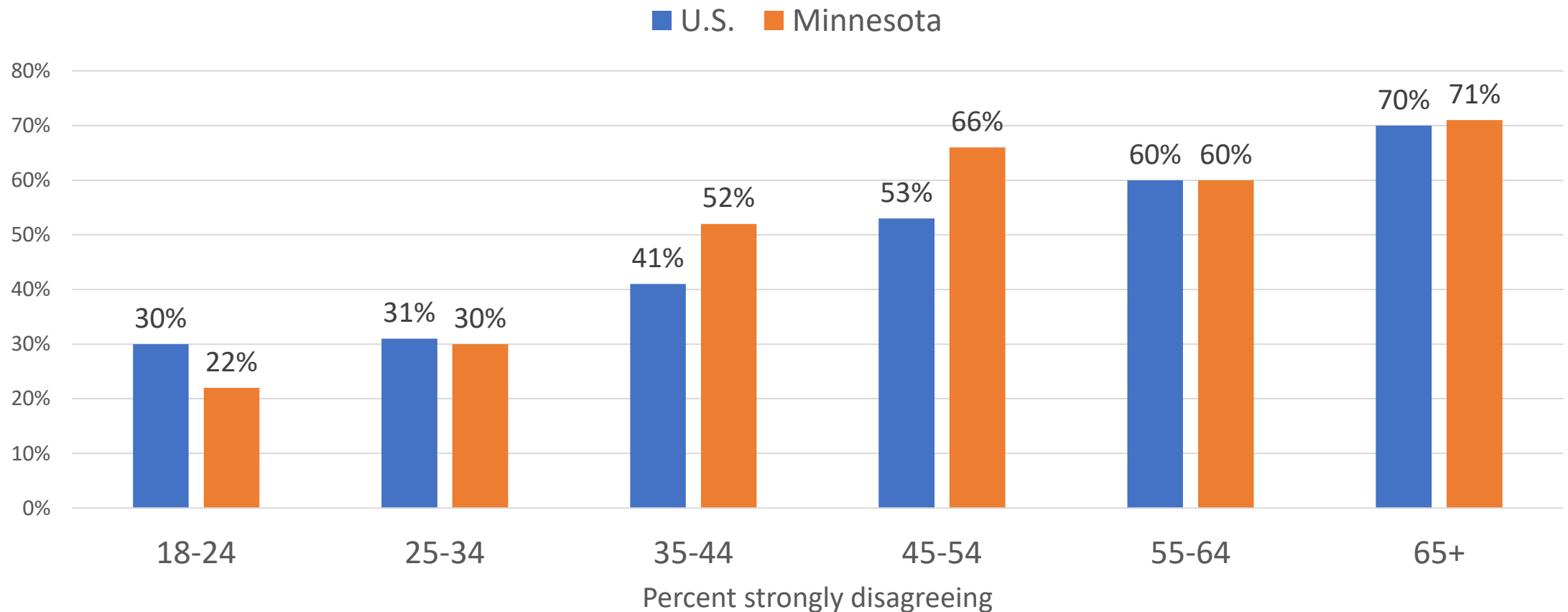
Positive play by age – “I should only gamble when I have money to cover my bills and living expenses”



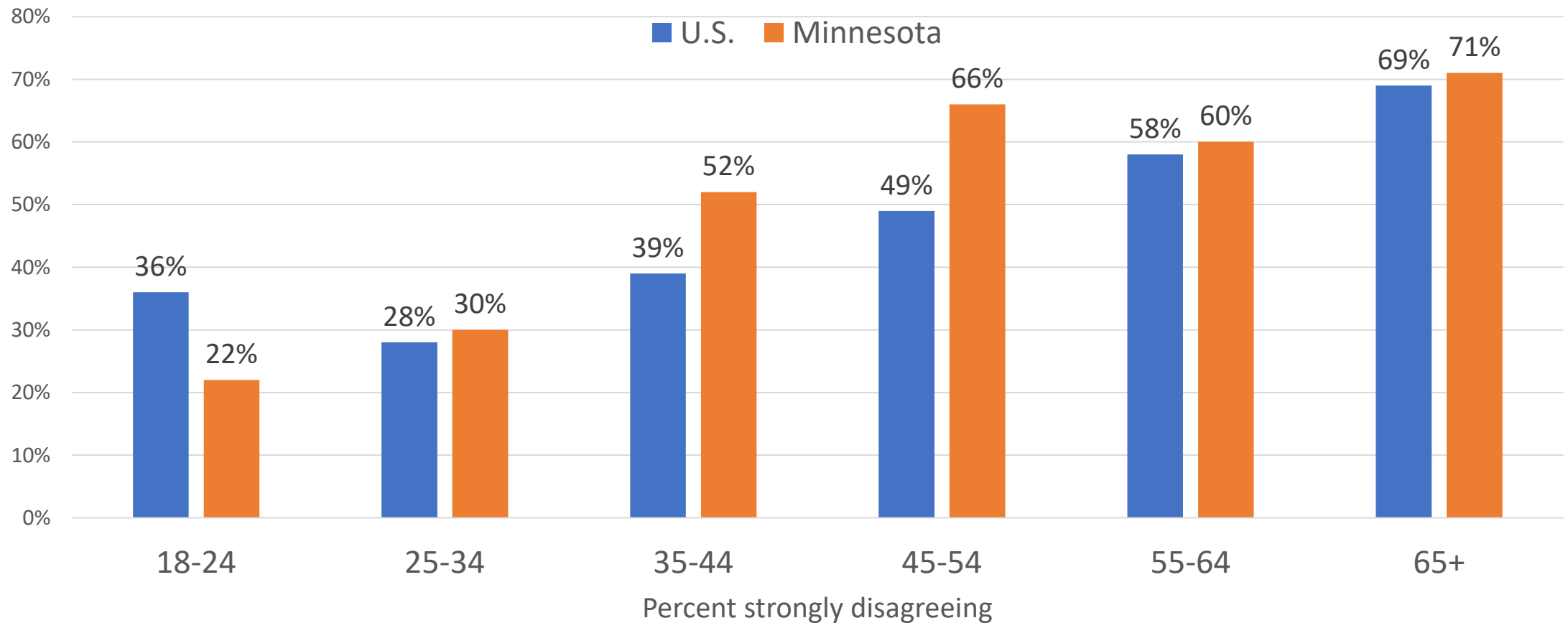
Positive play by age – “Gambling is not a good way to make money”



Positive play by age – “If I gamble more often, it will help me to win more than I lose”

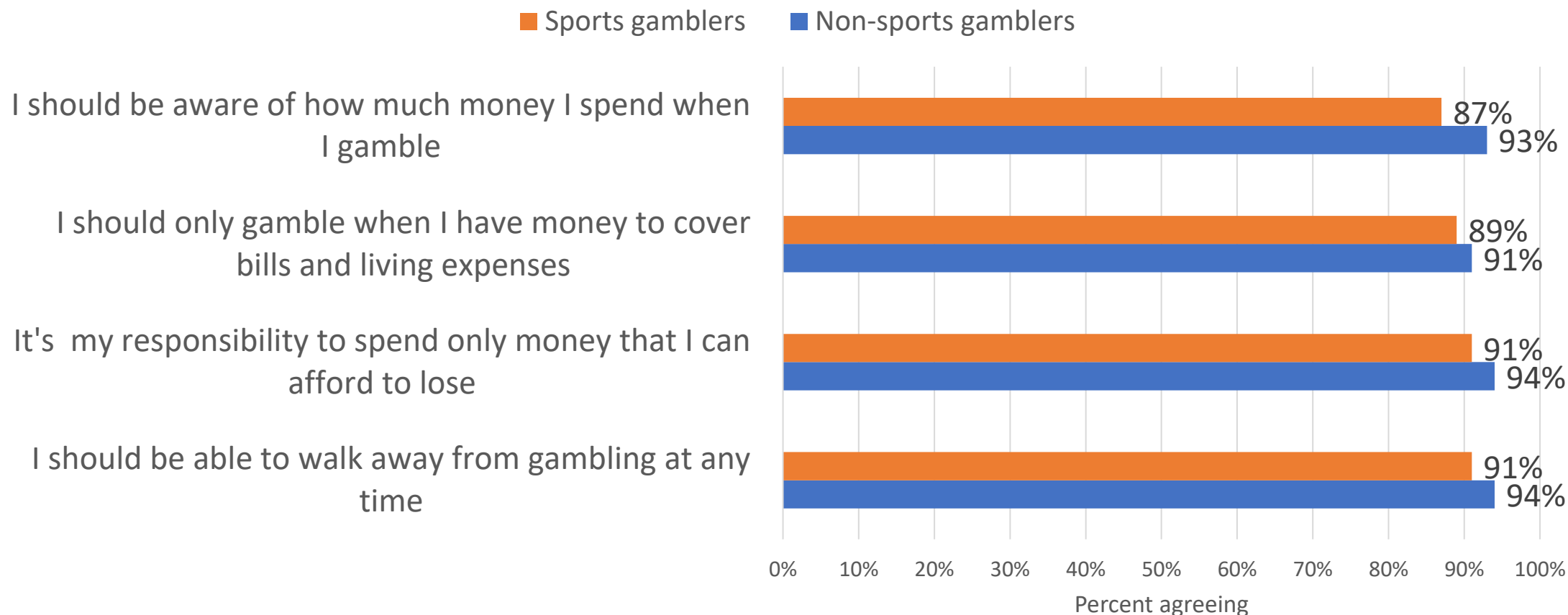


Positive play by age – “My chances of winning get better after I’ve lost”



Sports gamblers vs non-sports gamblers

Past year positive play – personal responsibility

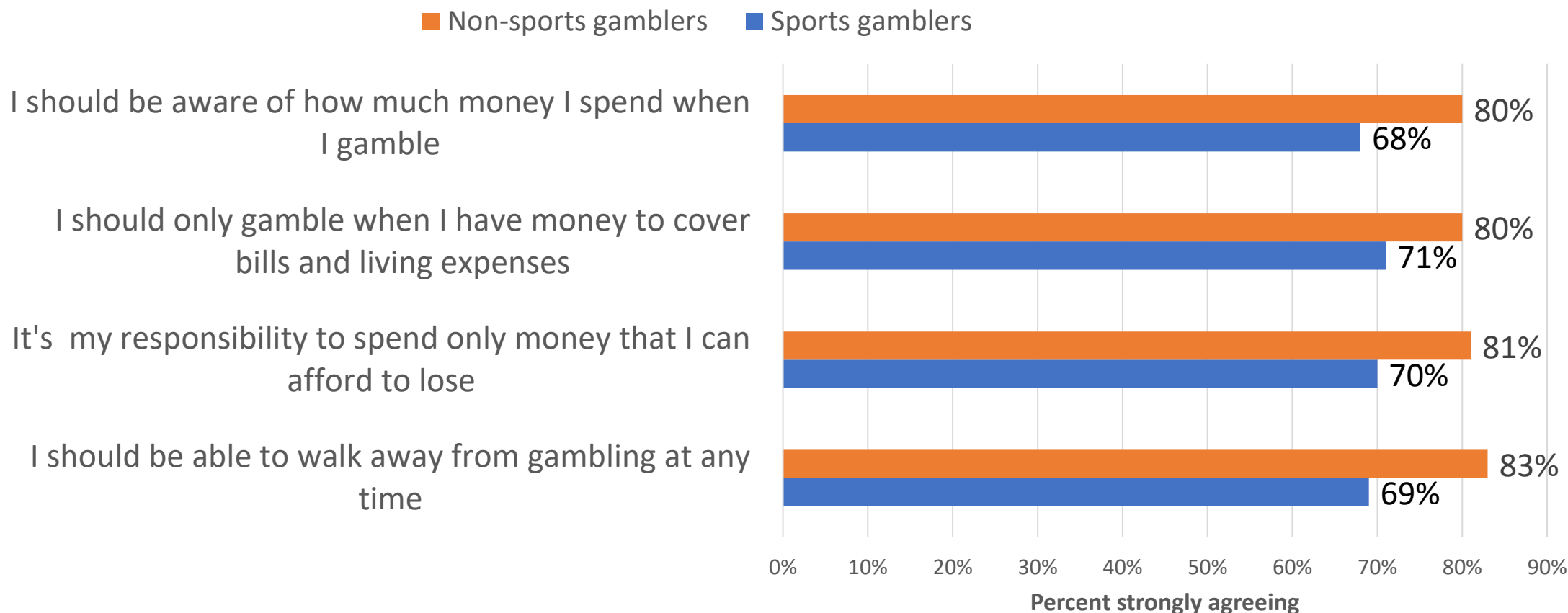


Questions asked of past year gamblers only

Minnesota sports gamblers vs non-sports gamblers

Past year positive play – personal responsibility

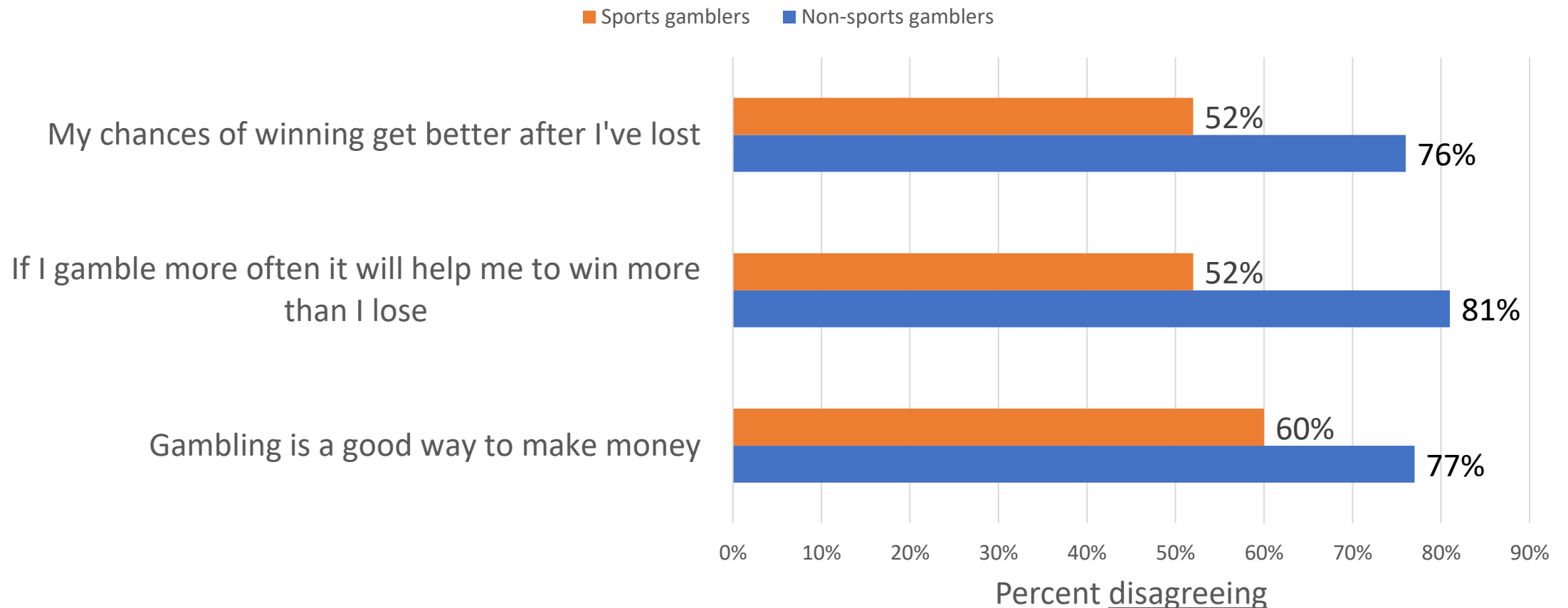
Percent strongly agreeing



Questions asked of past year gamblers only

Minnesota sports gamblers vs non-sports gamblers

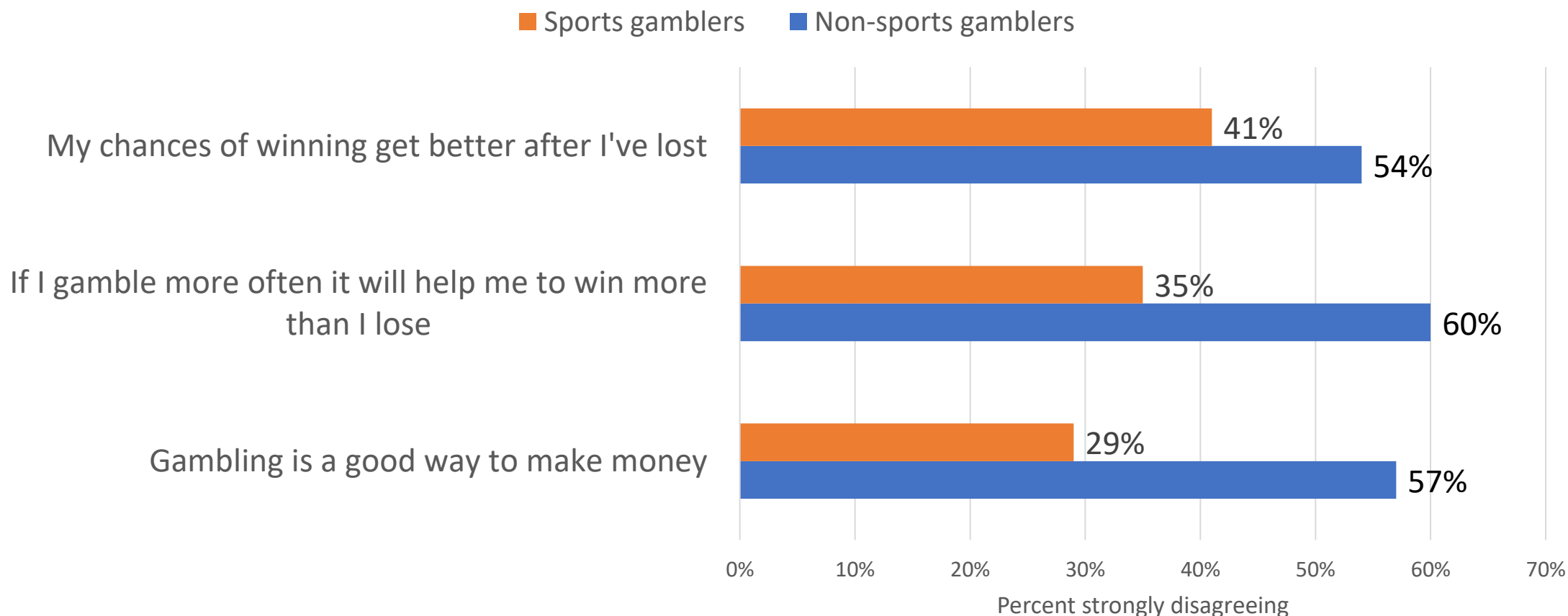
Past year positive play – gambling literacy



Minnesota Sports gamblers vs non-sports gamblers

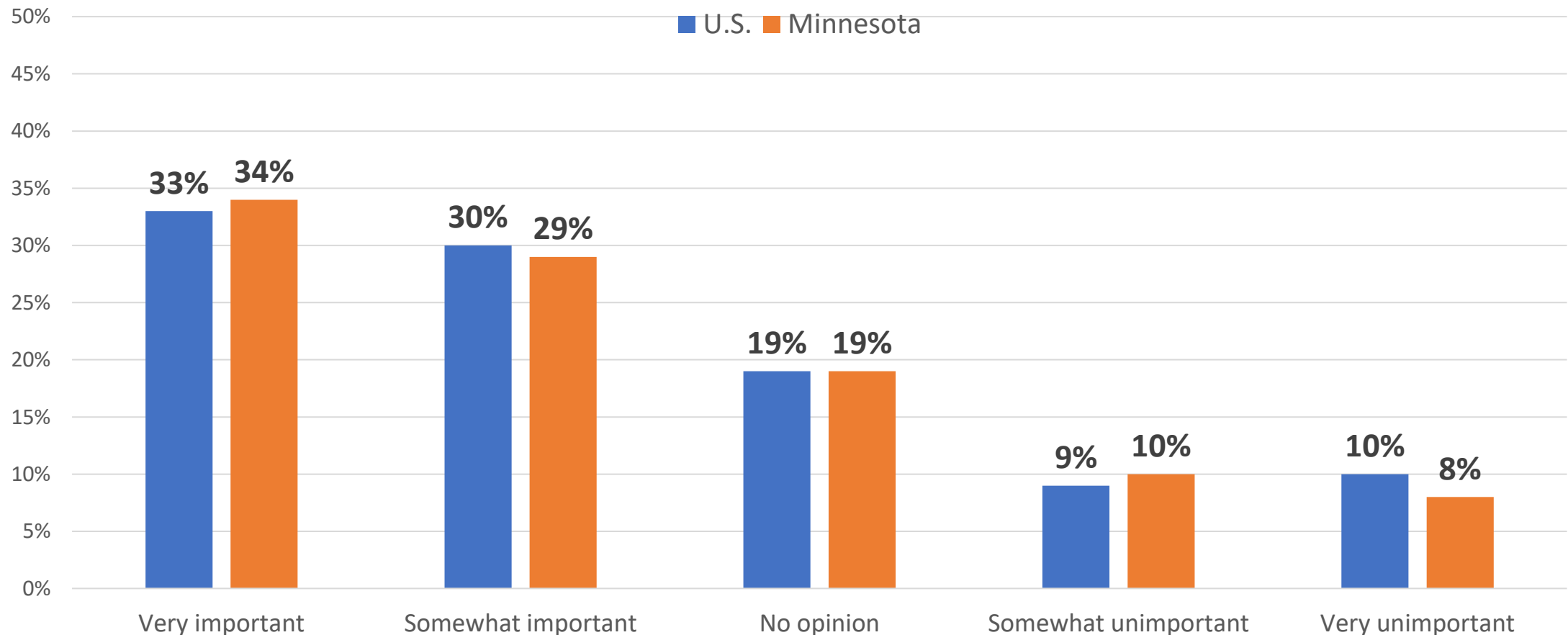
Past year positive play – gambling literacy

% strongly disagreeing

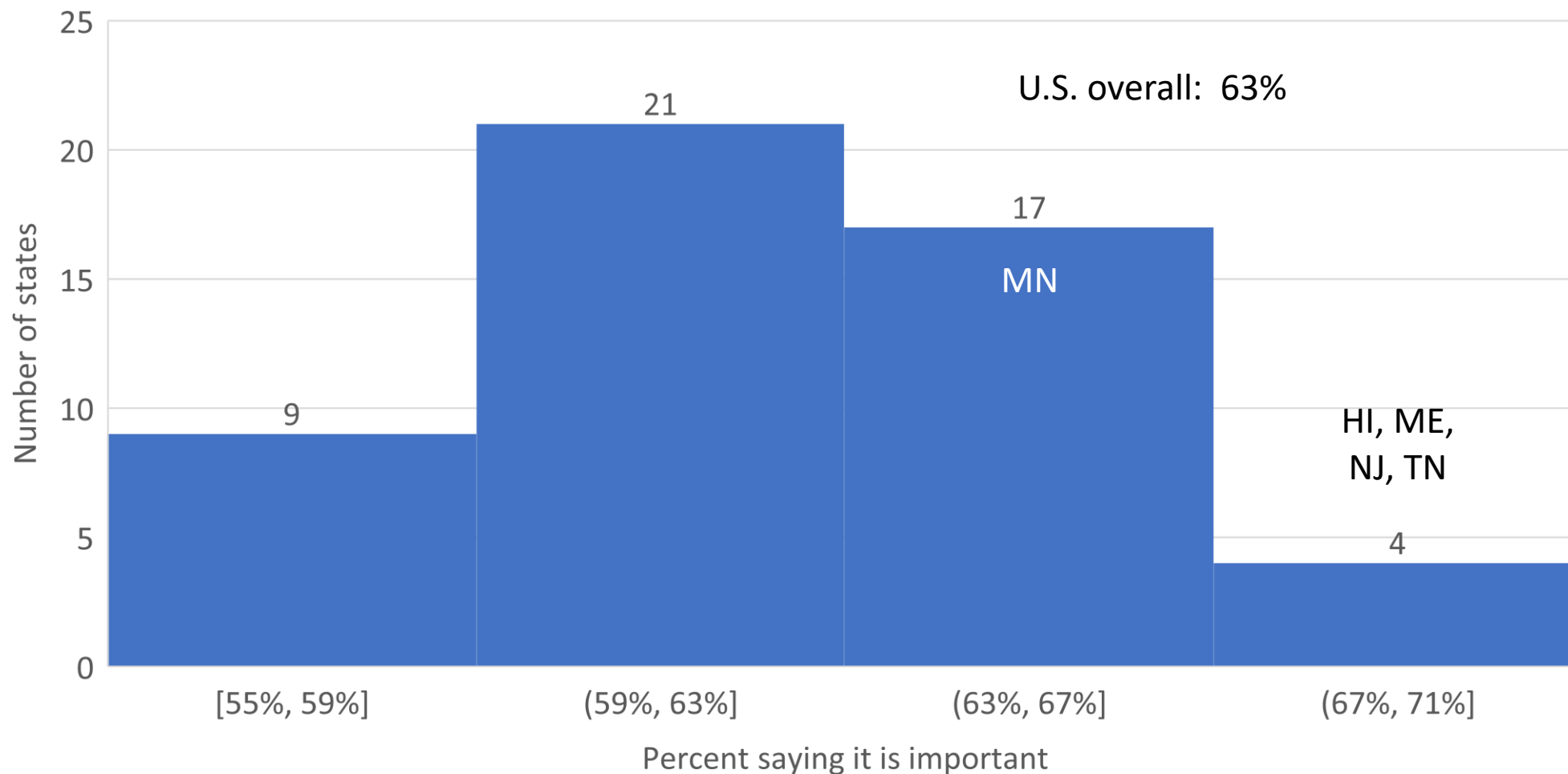


Public opinion

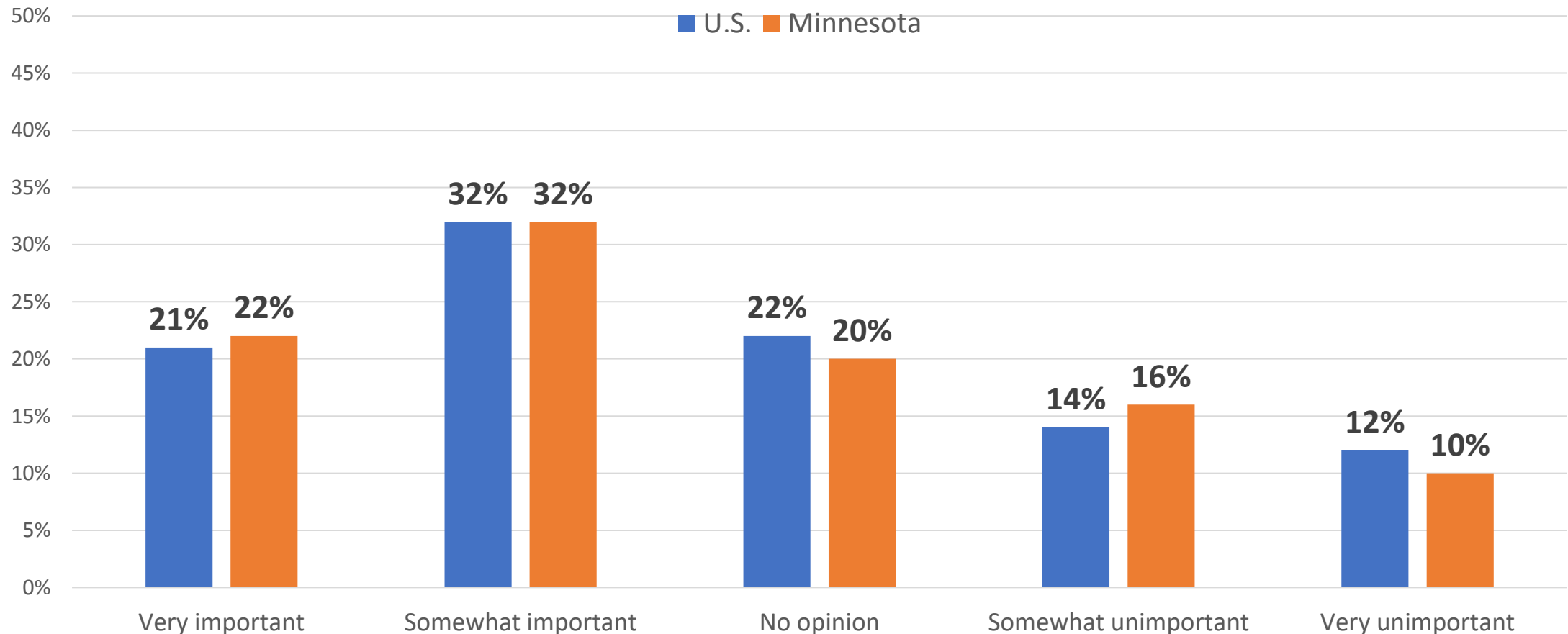
If your state were to legalize/has legalized sports betting, how important is it to require operators to implement responsible gambling measures?



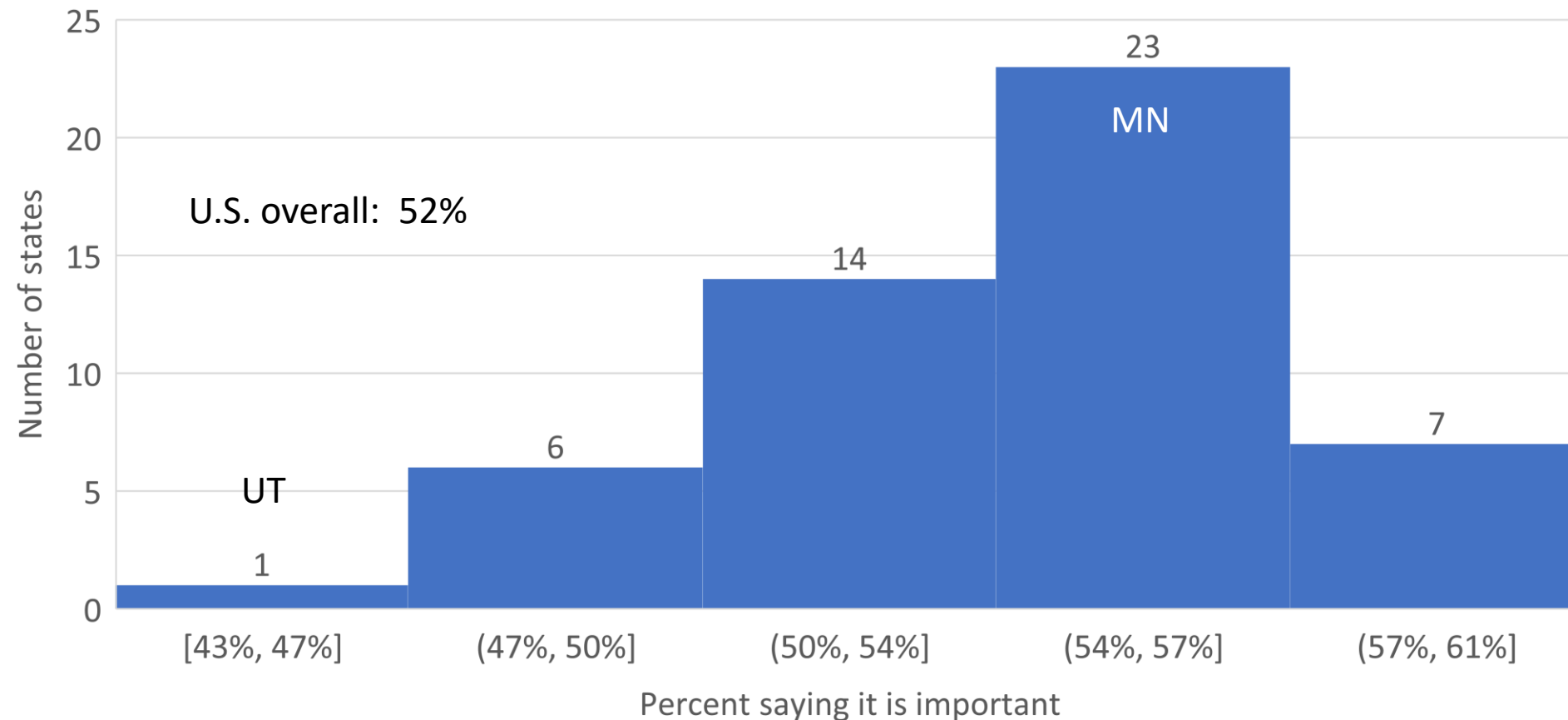
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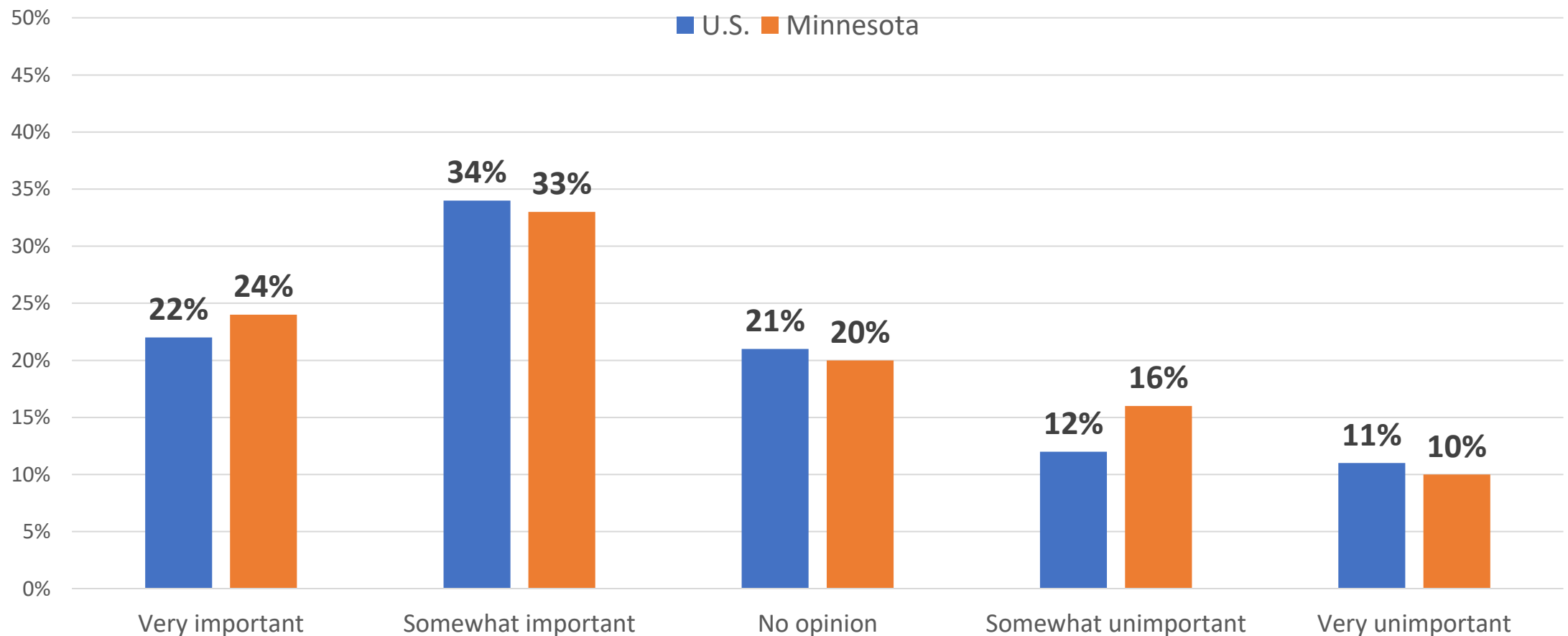
If your state were to legalize/has legalized sports betting, how important is it to set aside revenues to treat people who develop gambling problems?



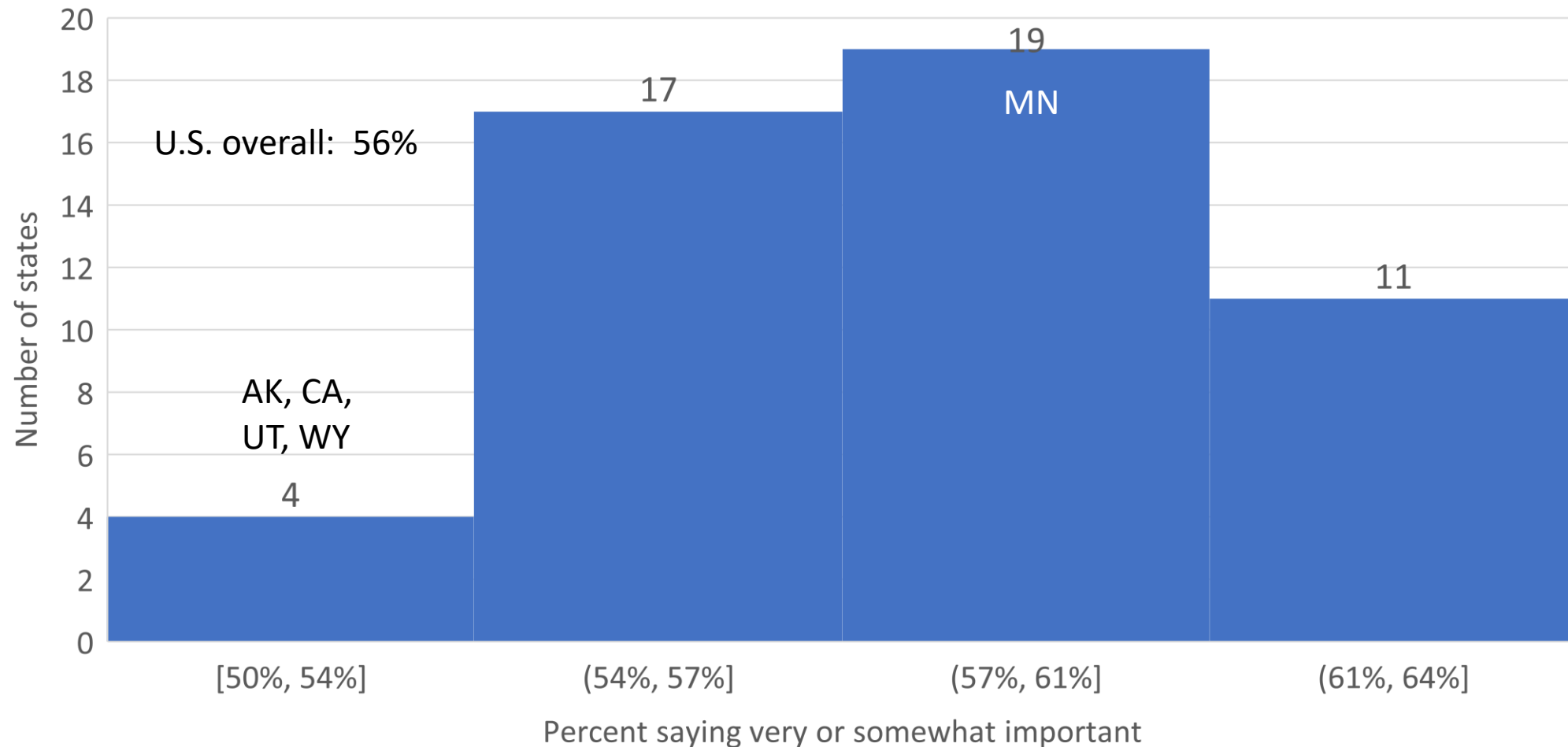
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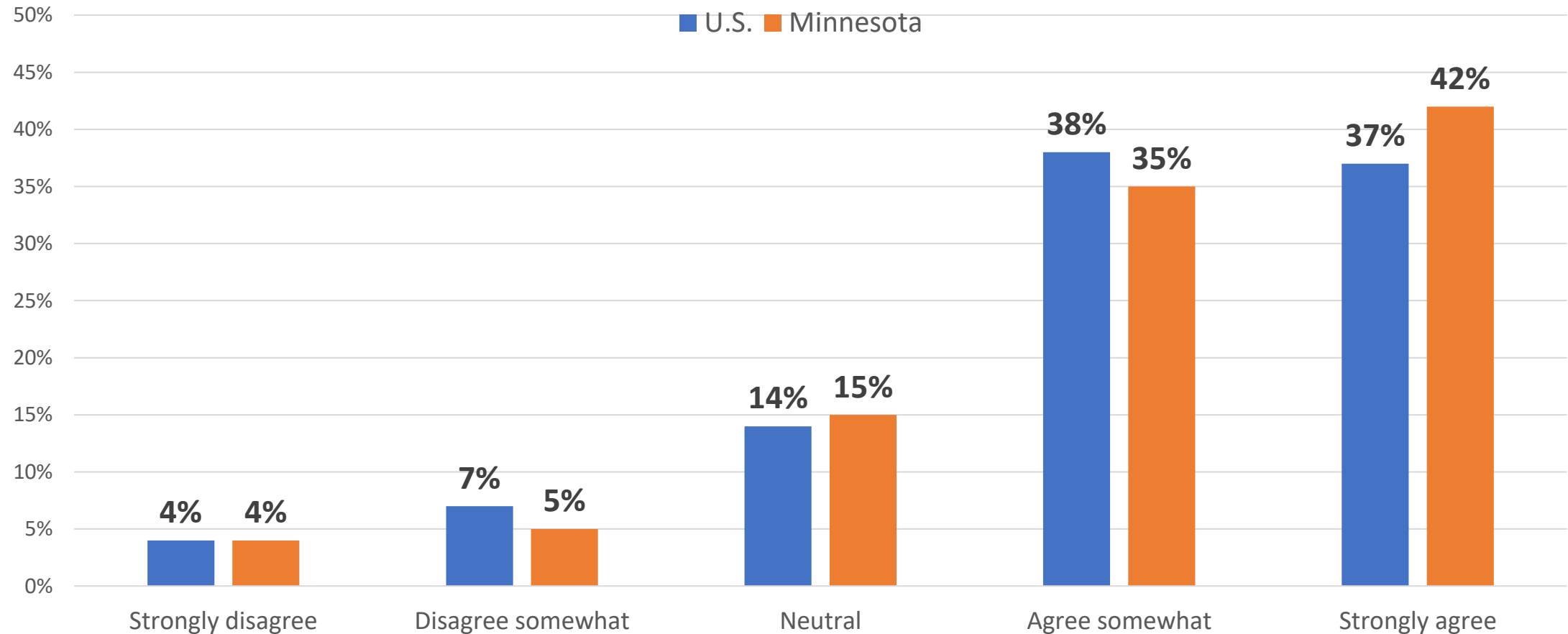
If your state were to legalize/has legalized sports betting, how important is it to set aside revenues for public awareness campaigns?



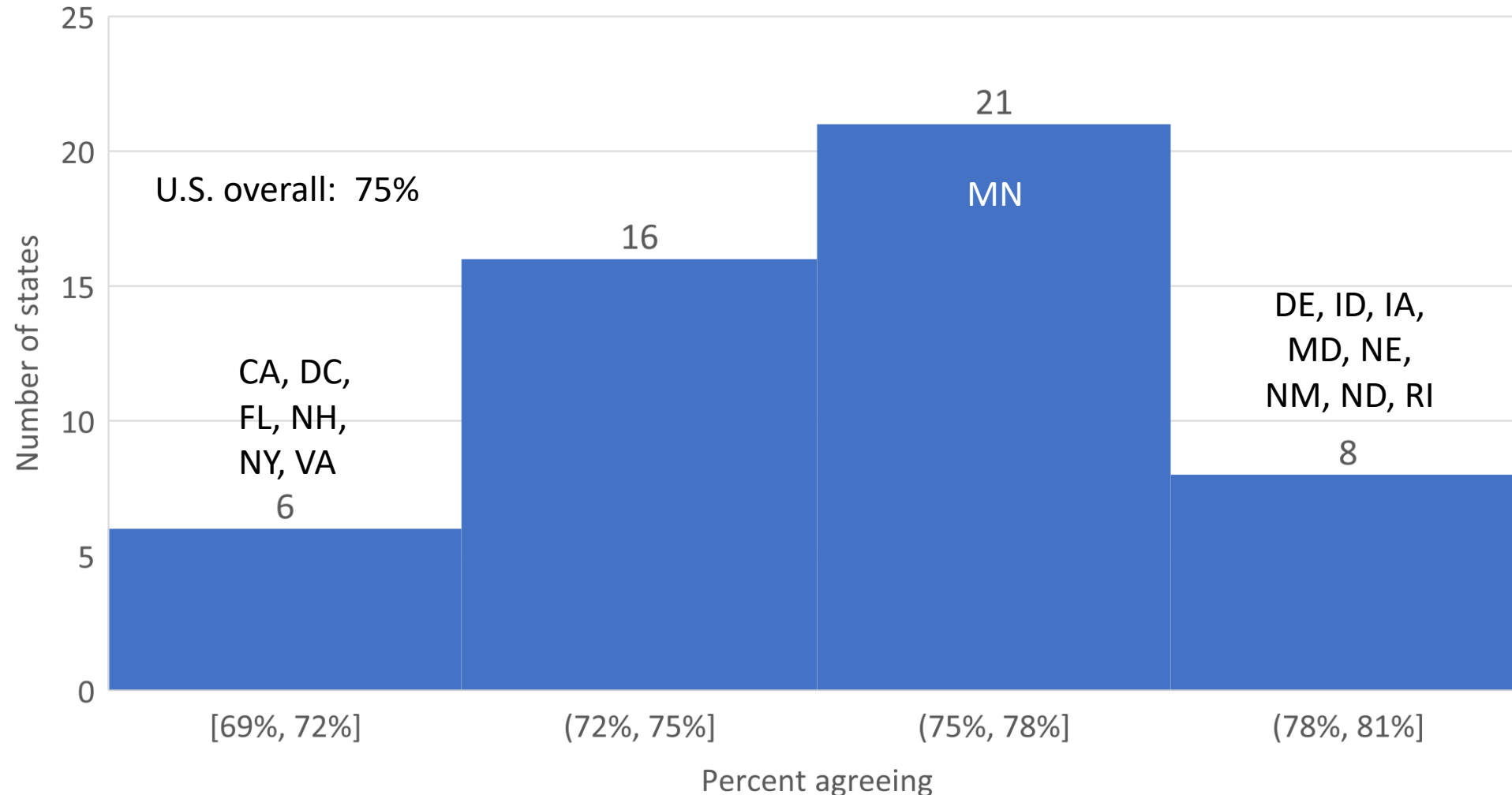
If your state were to legalize/has legalized sports betting, how important is it to set aside revenues for public awareness campaigns?



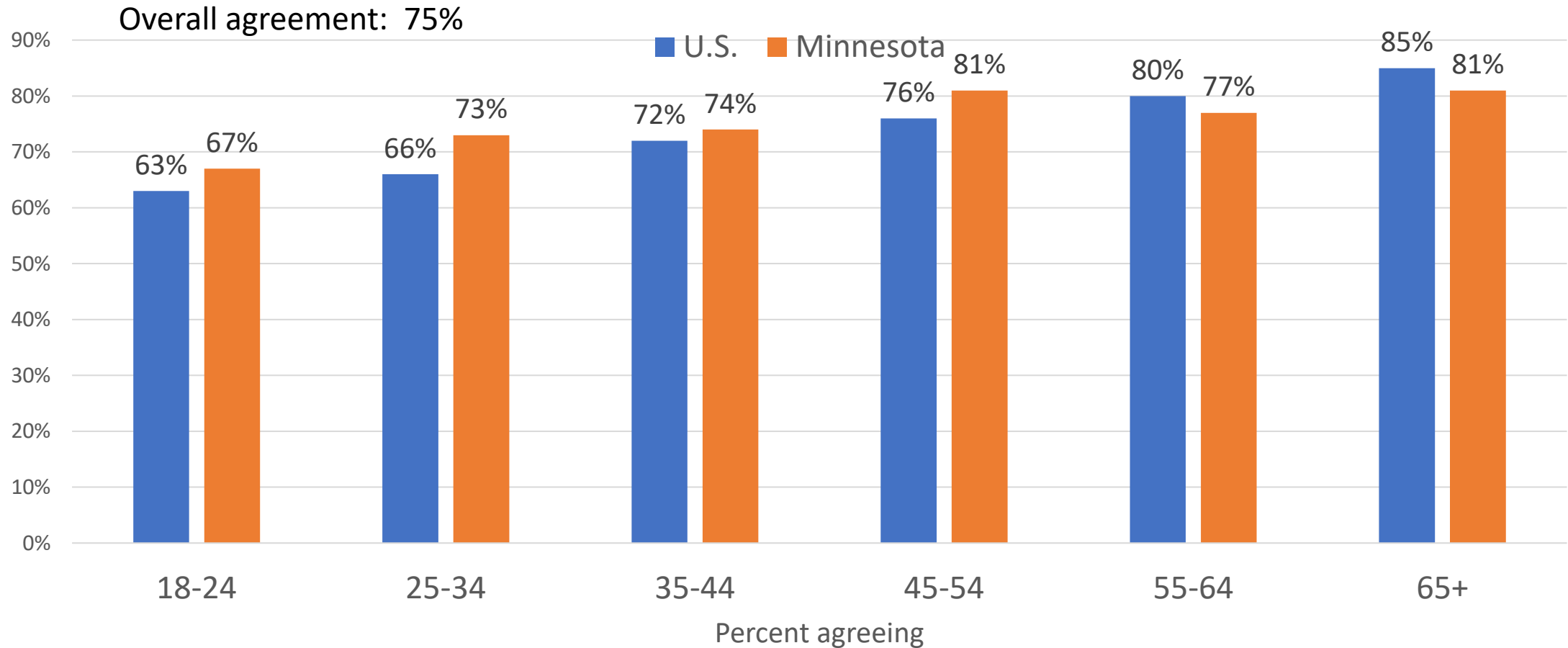
Addiction to gambling is a lot like addiction to drugs or alcohol



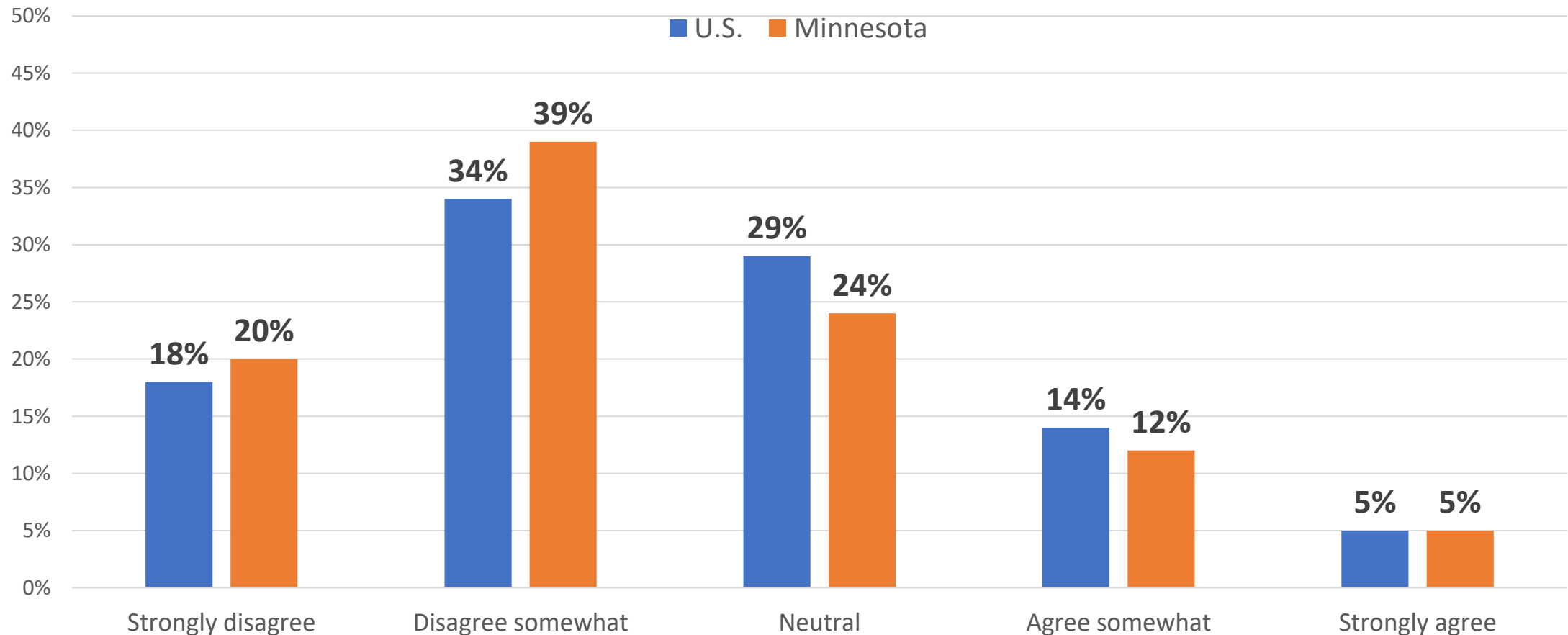
Addiction to gambling is a lot like addiction to drugs and alcohol



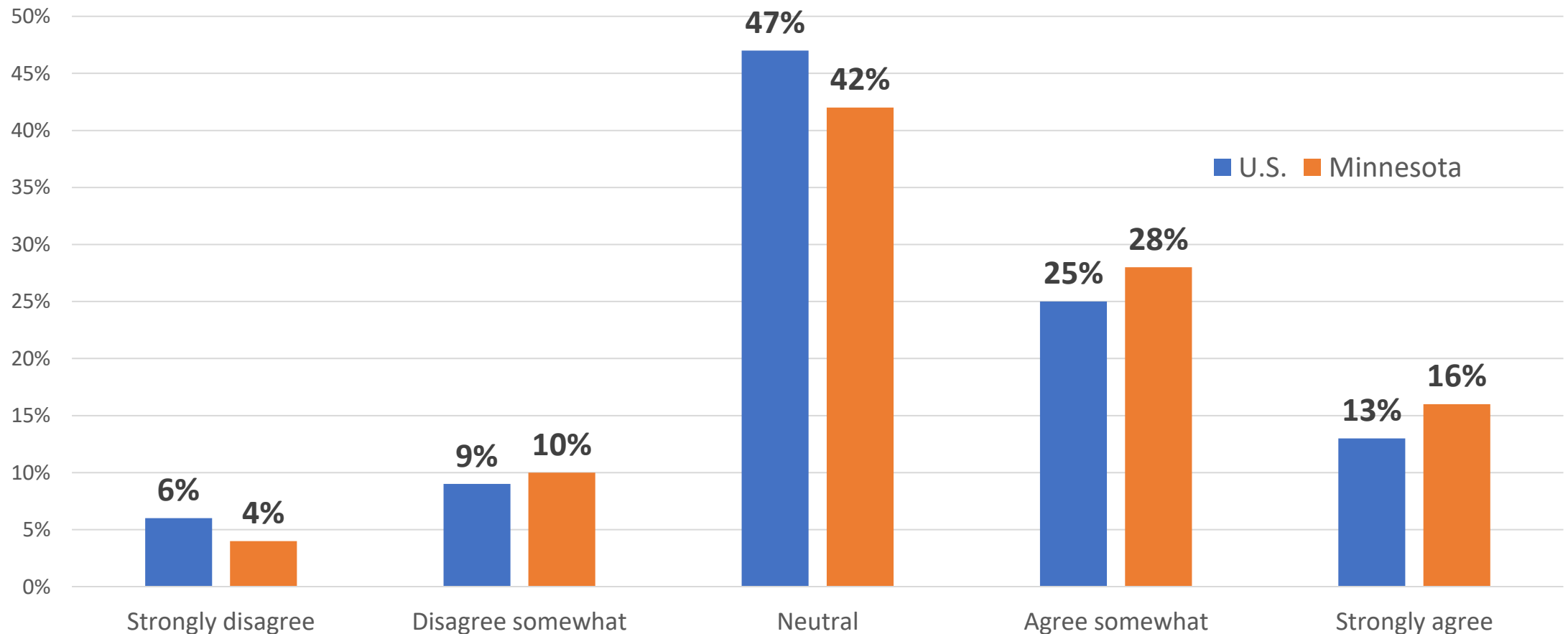
% agreeing that addiction to gambling is a lot like addiction to drugs or alcohol, by age



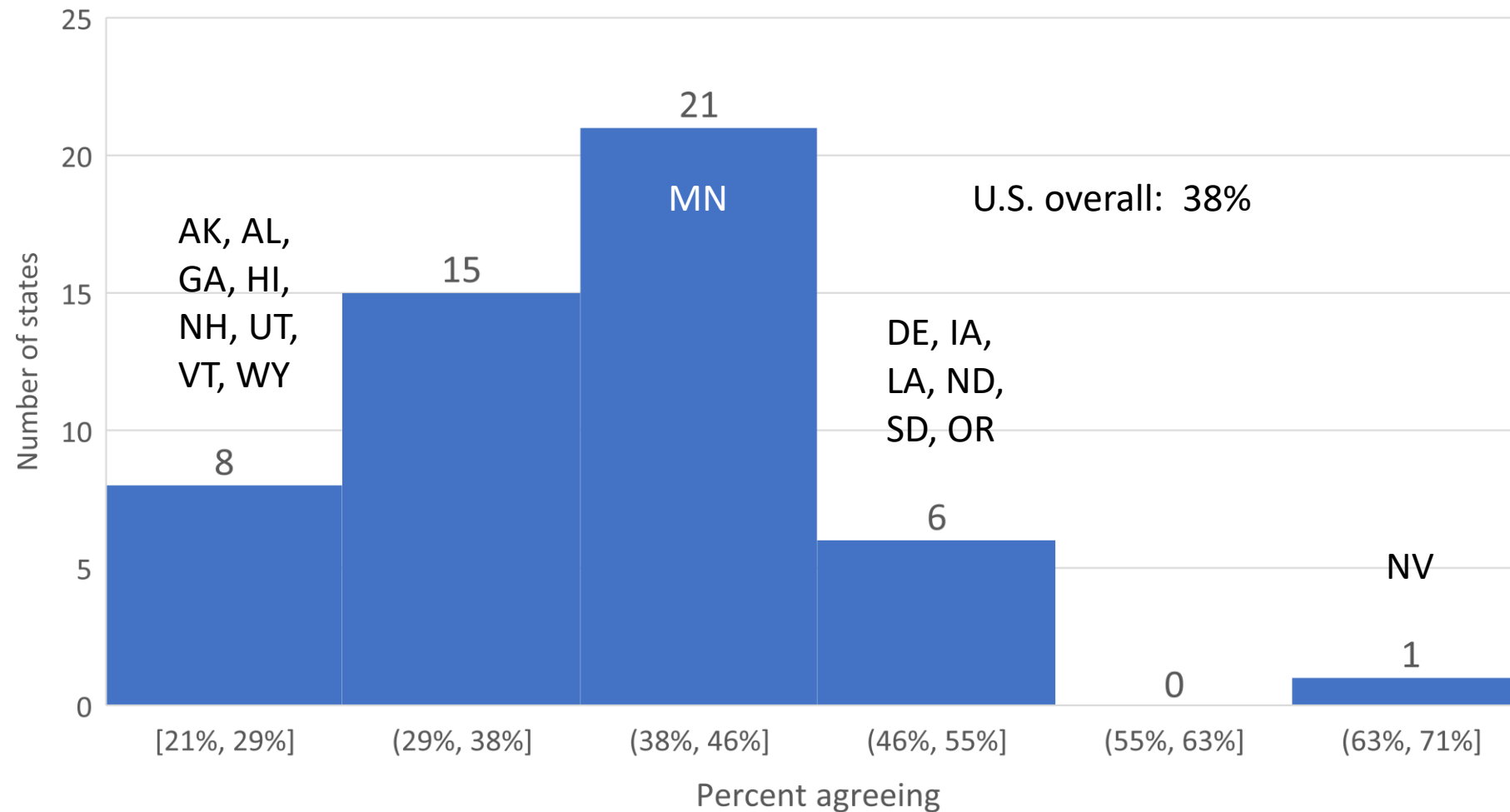
People with a gambling problem are unlikely to recover or get better



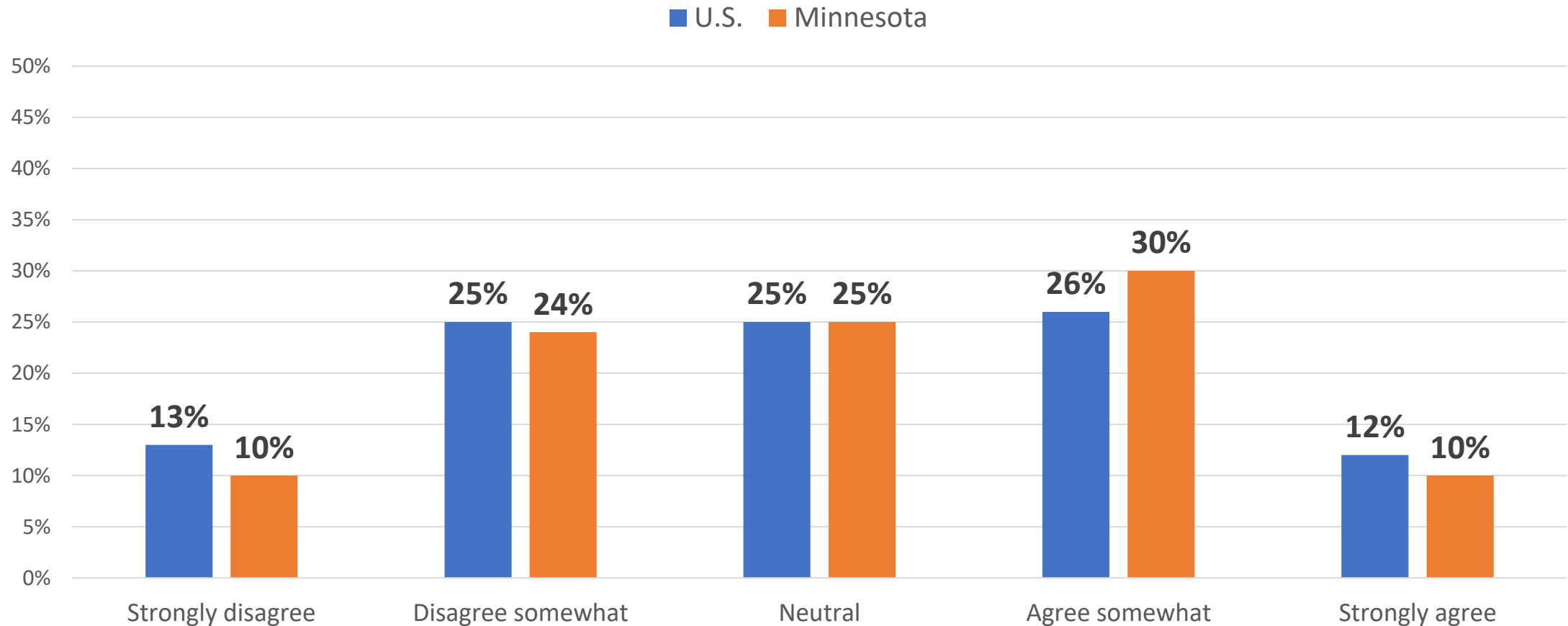
Services to treat compulsive gambling are available in my community



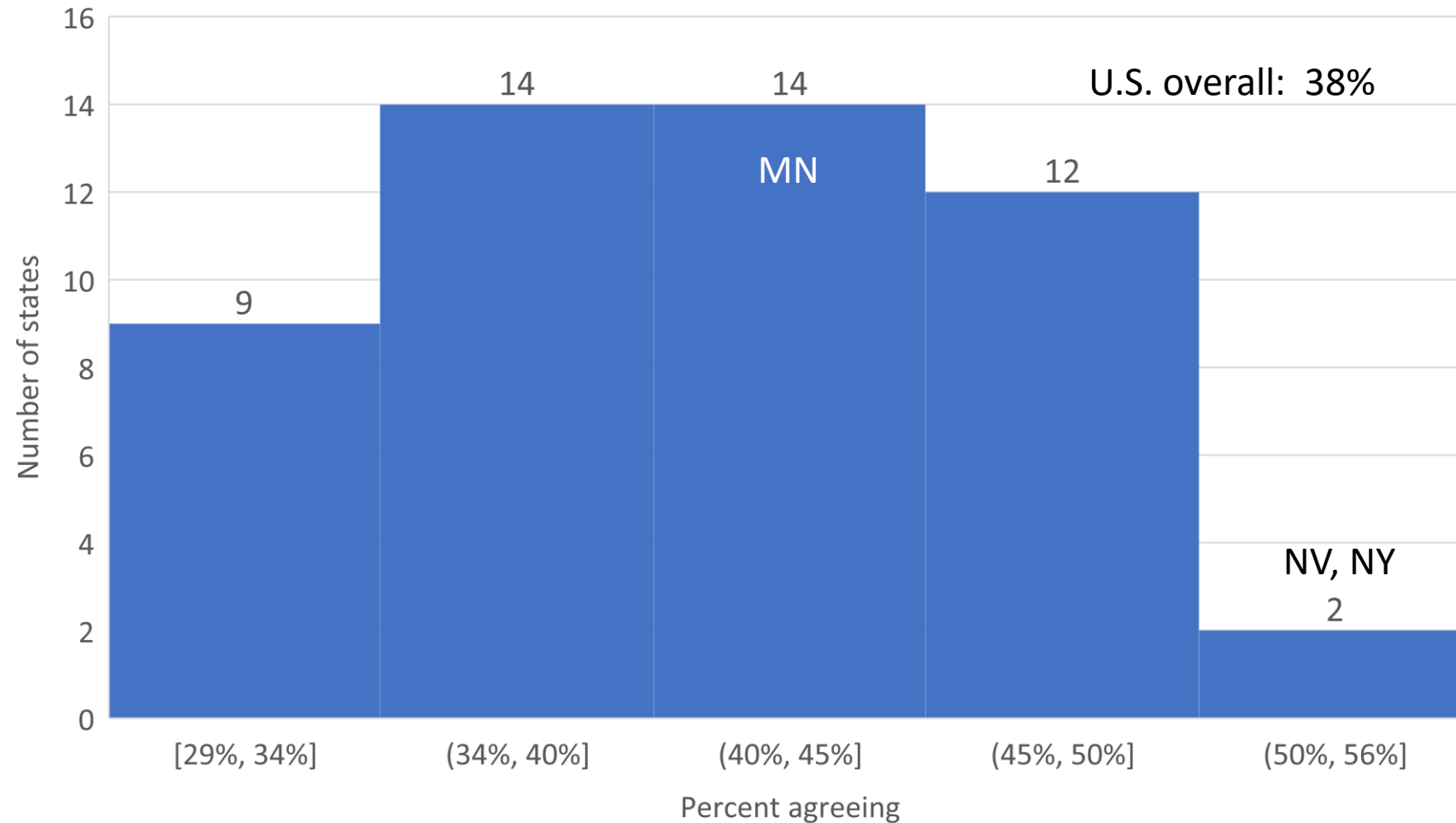
Services to treat compulsive gambling are available in my community



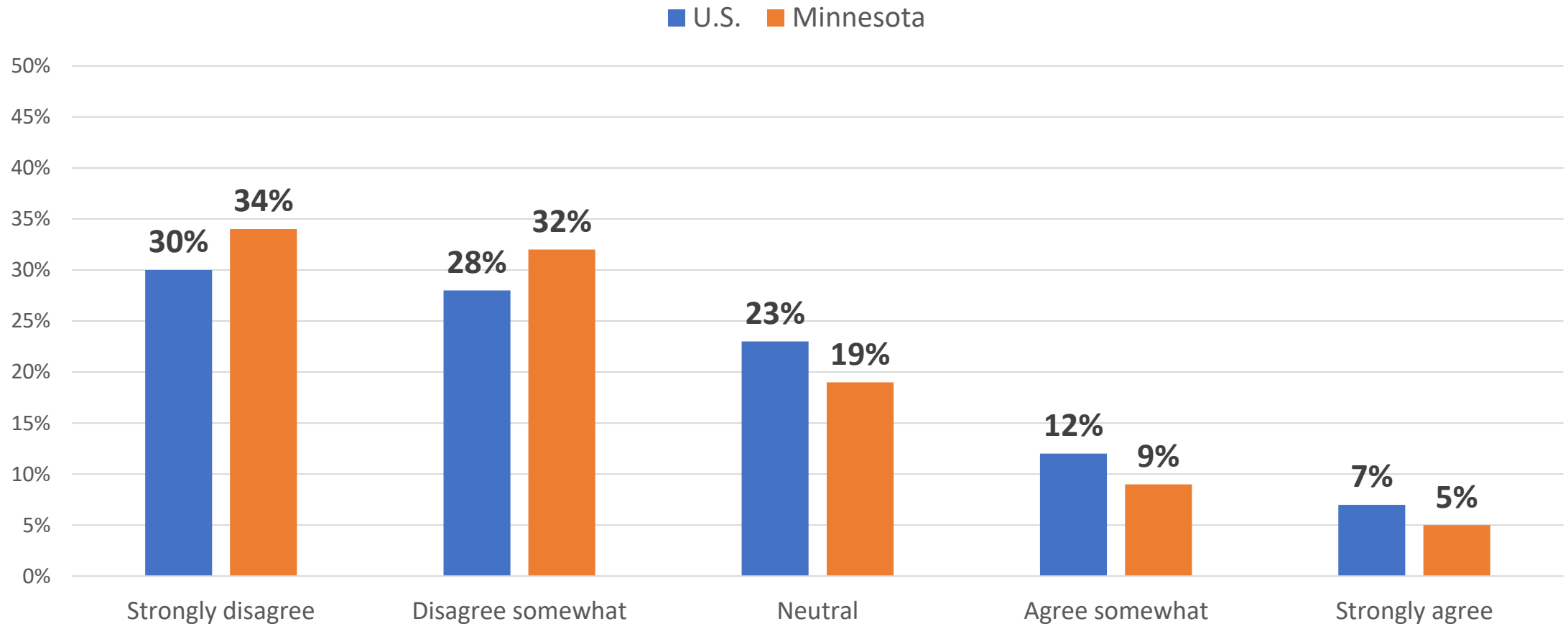
If someone close to me had a gambling problem, I would know where to get them help



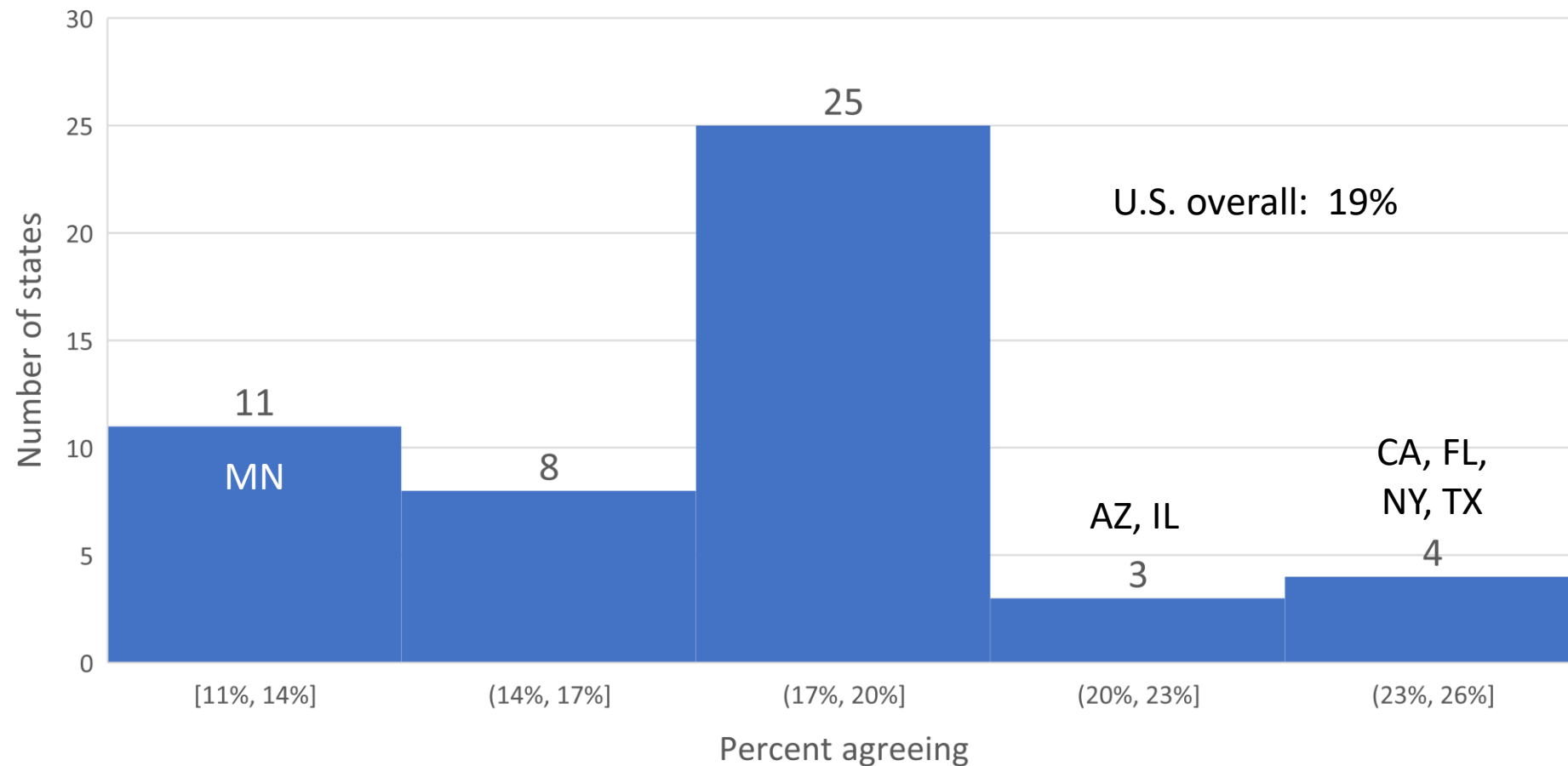
If someone close to me had a gambling problem, I would know where to get them help



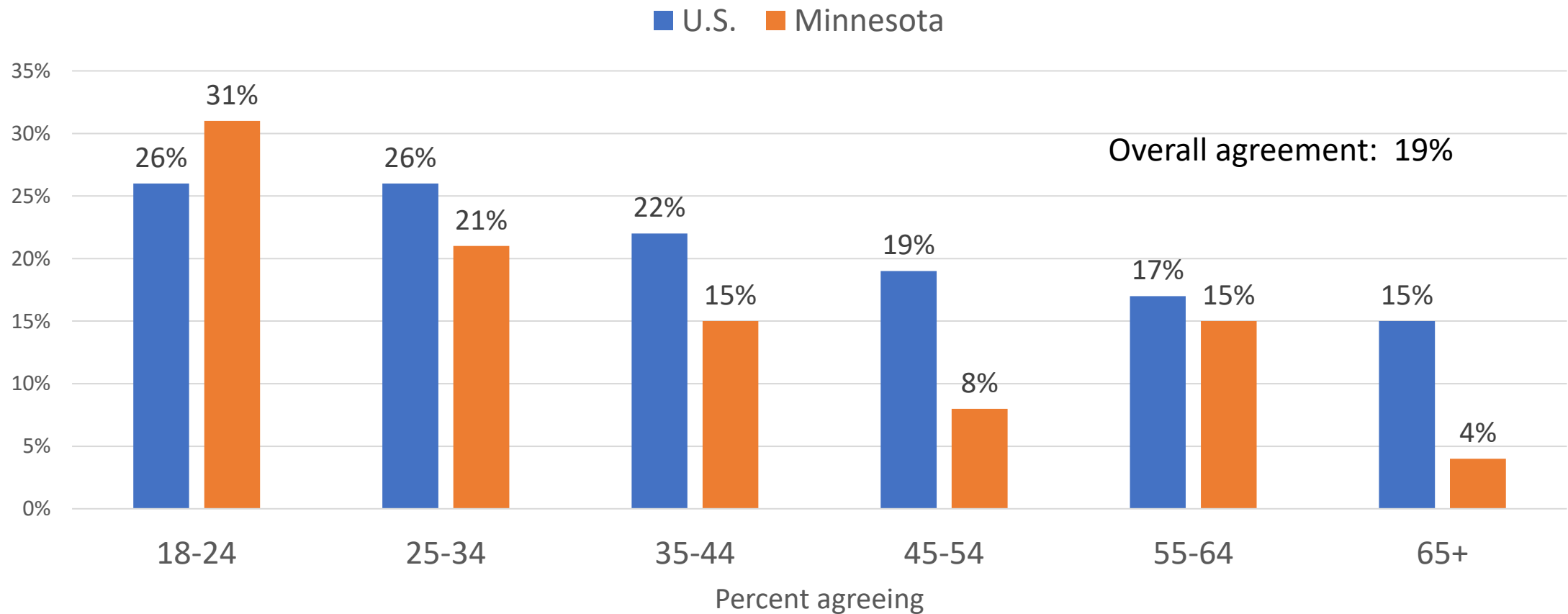
If someone in my family had a gambling problem, I would advise them not to discuss it with anyone outside the family



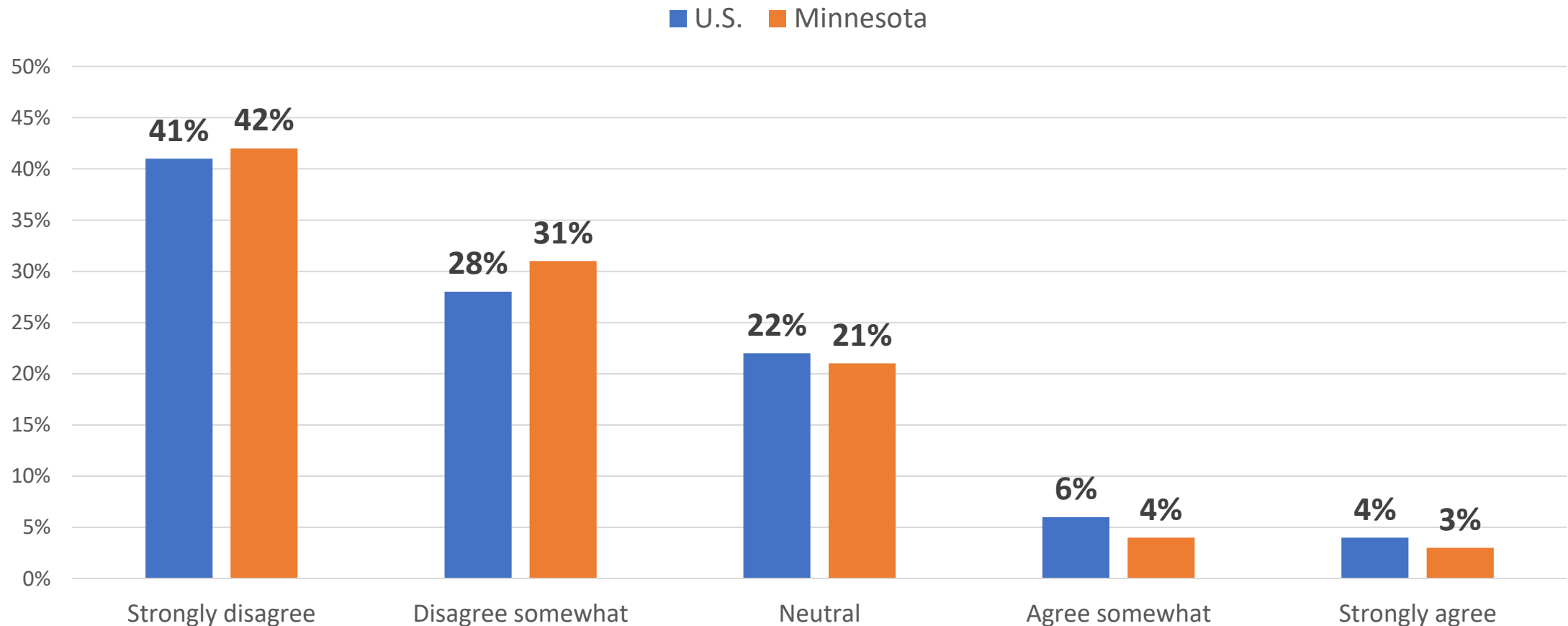
If someone in my family had a gambling problem, I would advise them not to discuss it with anyone outside the family



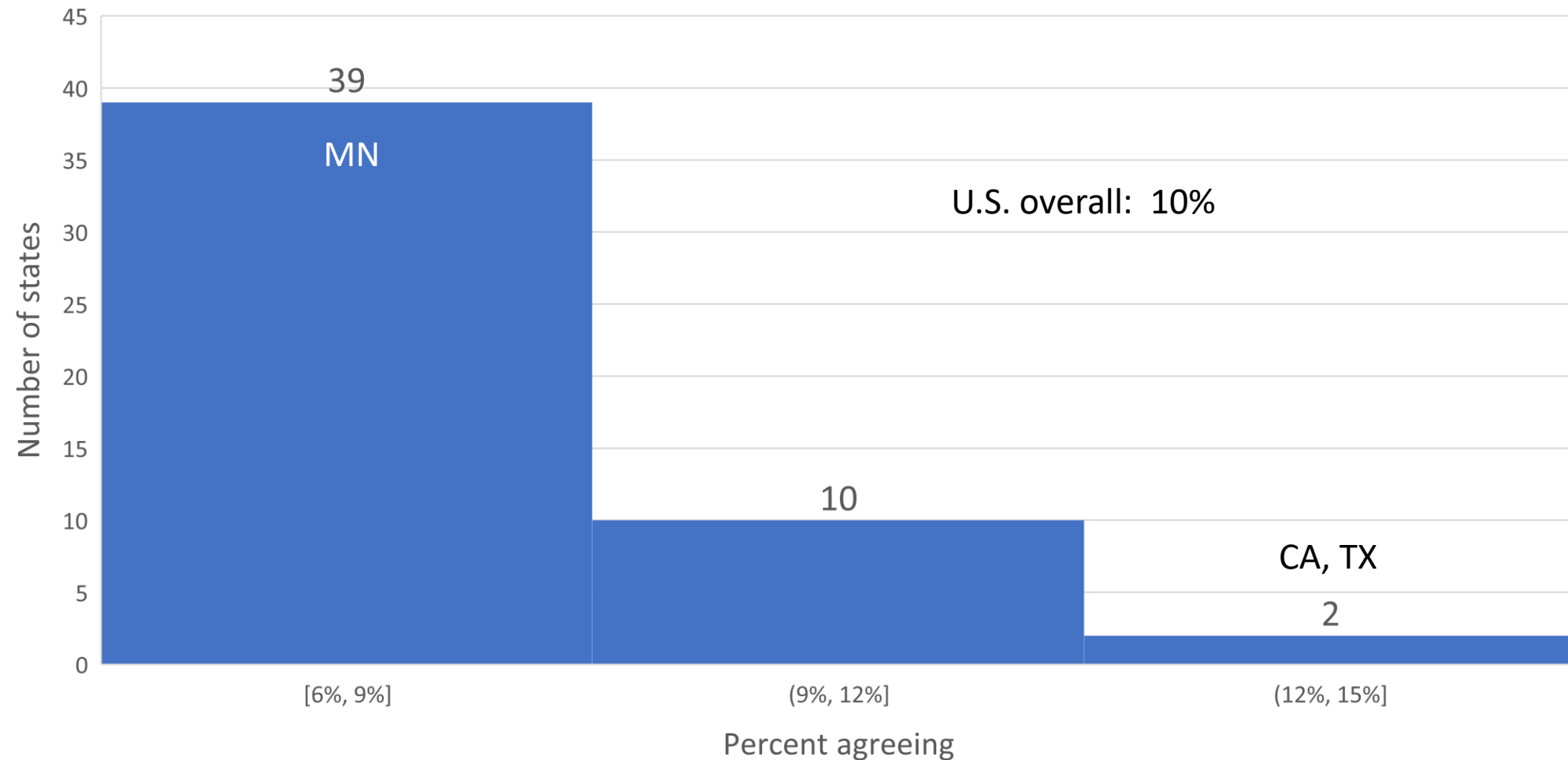
% agreeing that if someone in their family had a gambling problem, they would advise them not to discuss it outside the family, by age



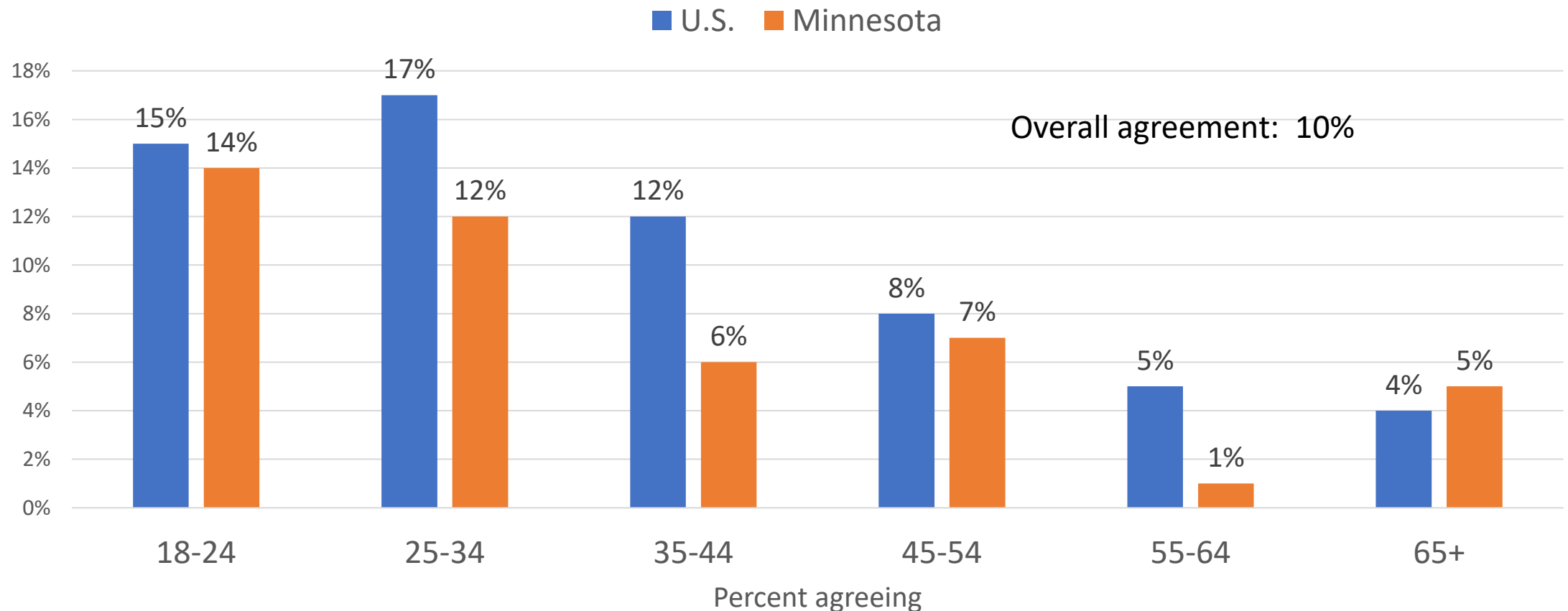
People with a gambling problem are below average in intelligence



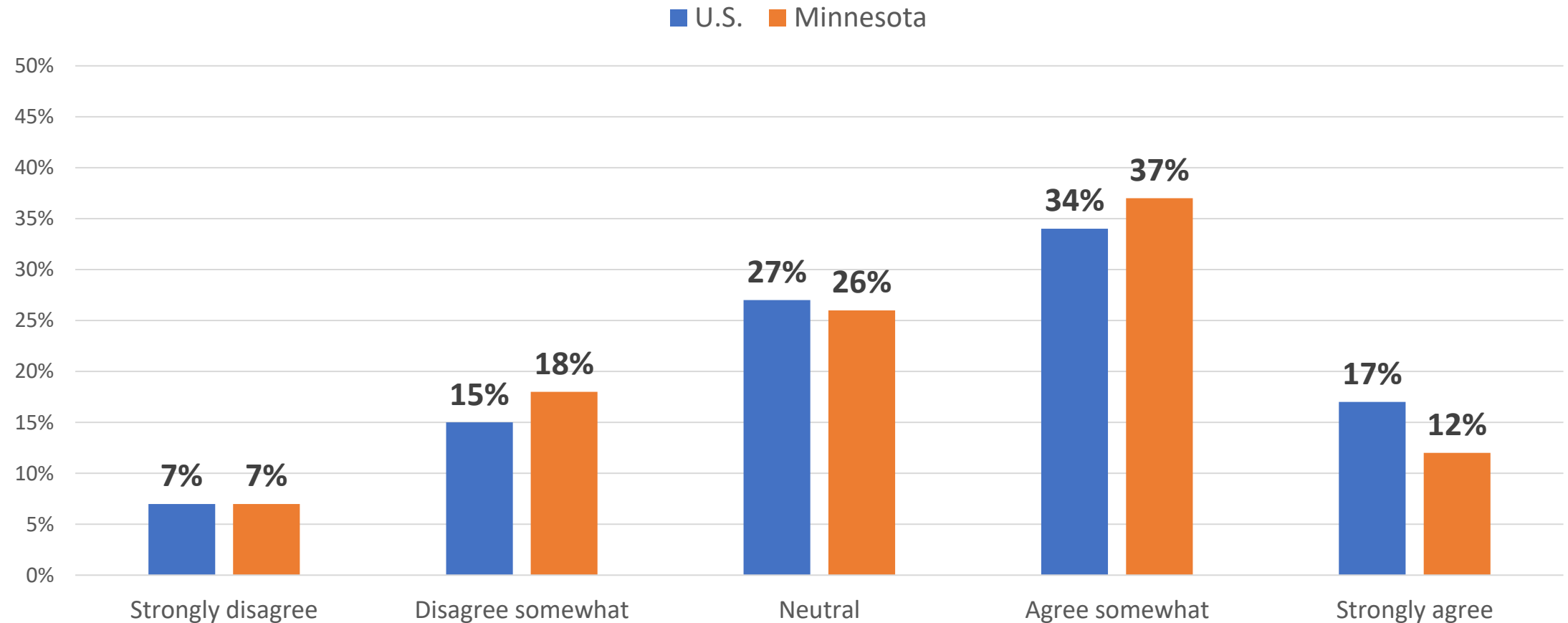
People with a gambling problem are below average in intelligence



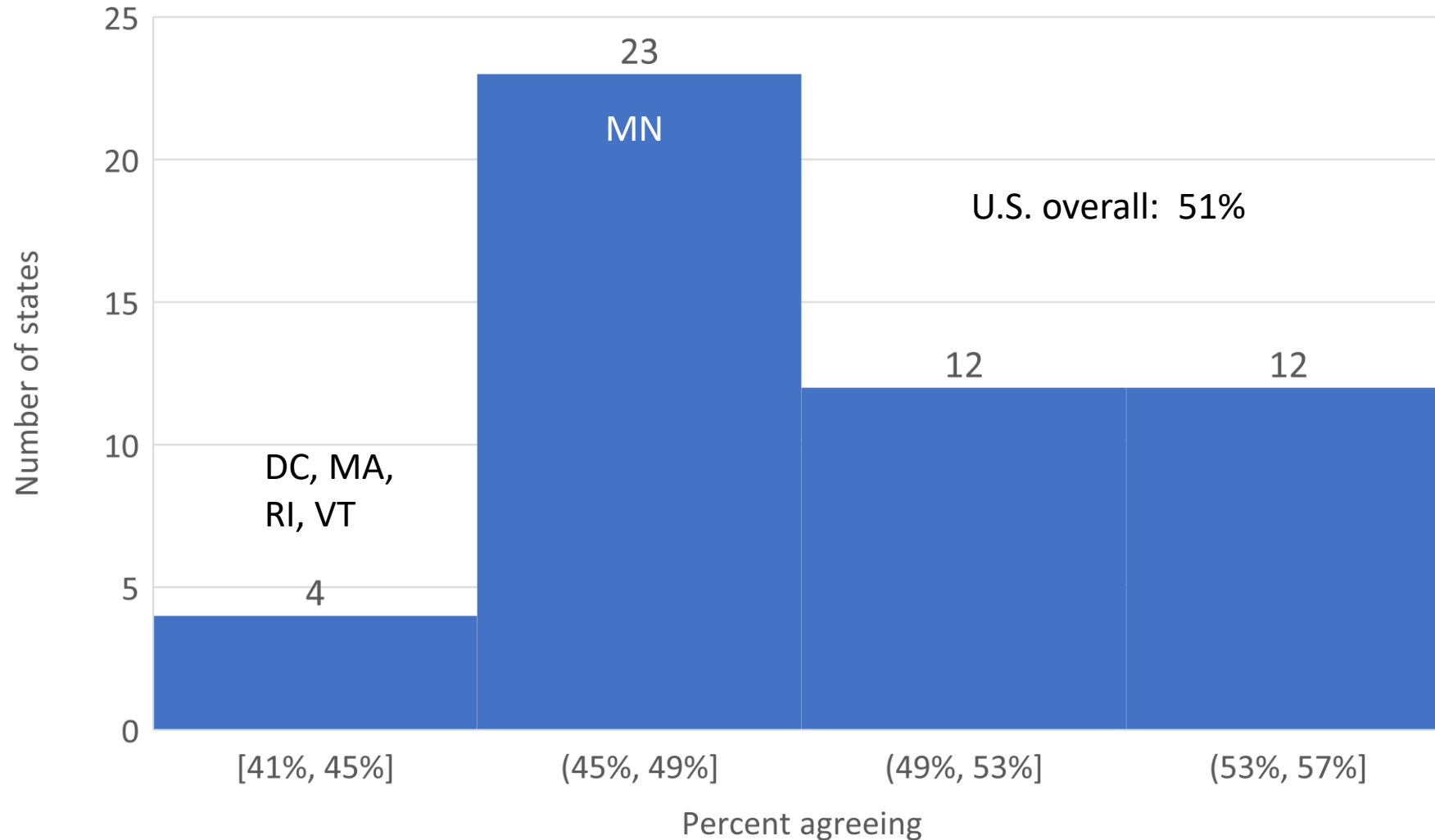
% agreeing that people with a gambling problem are below average in intelligence, by age



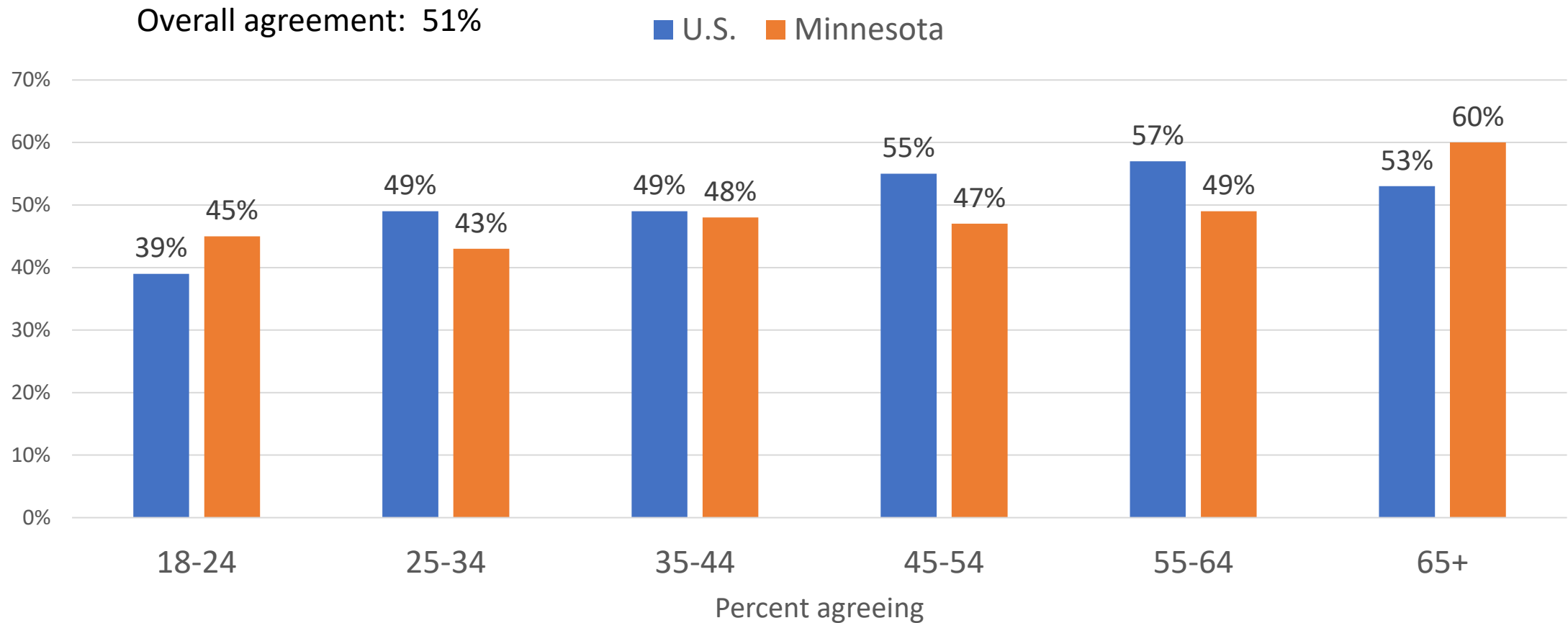
People with a gambling problem are to blame for their problems



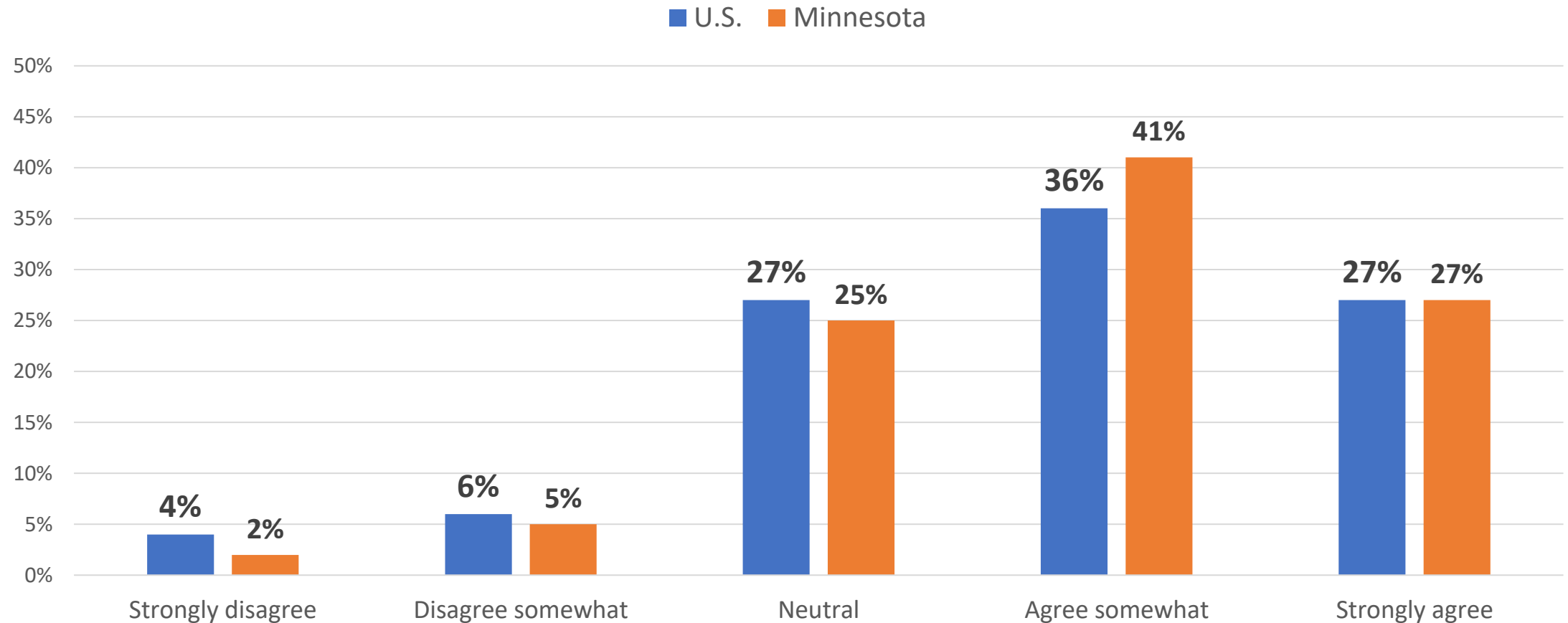
People with a gambling problem are to blame for their problems



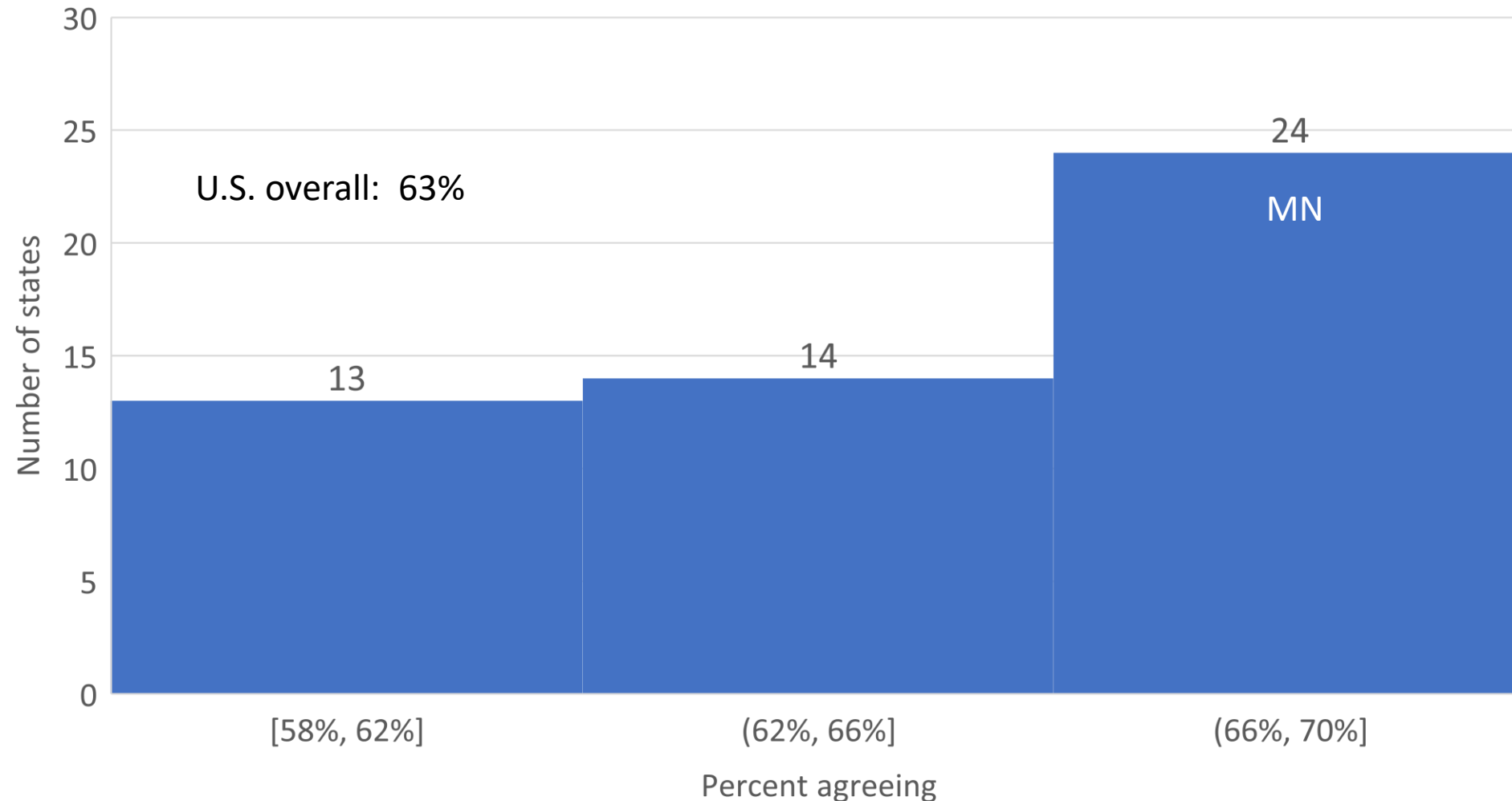
% agreeing that people with a gambling problem are to blame for their problems, by age



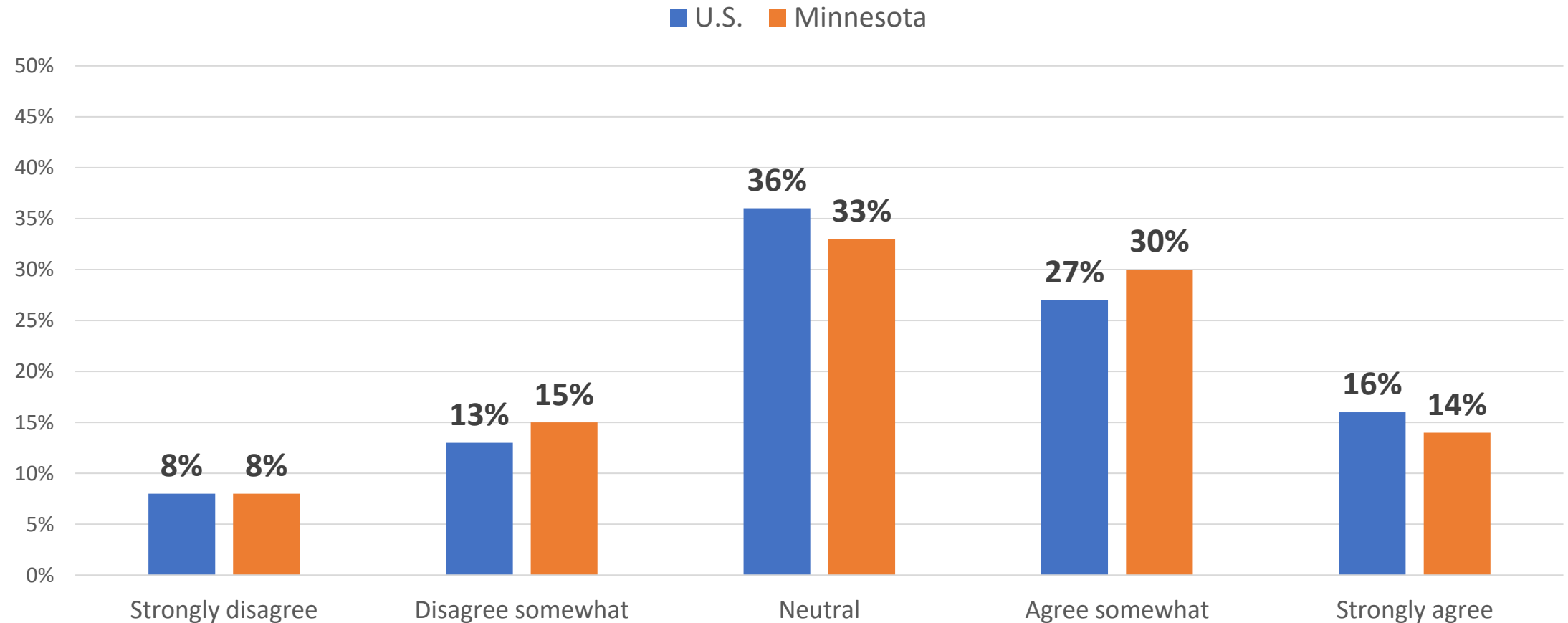
The gambling industry should do more to help people with a gambling addiction



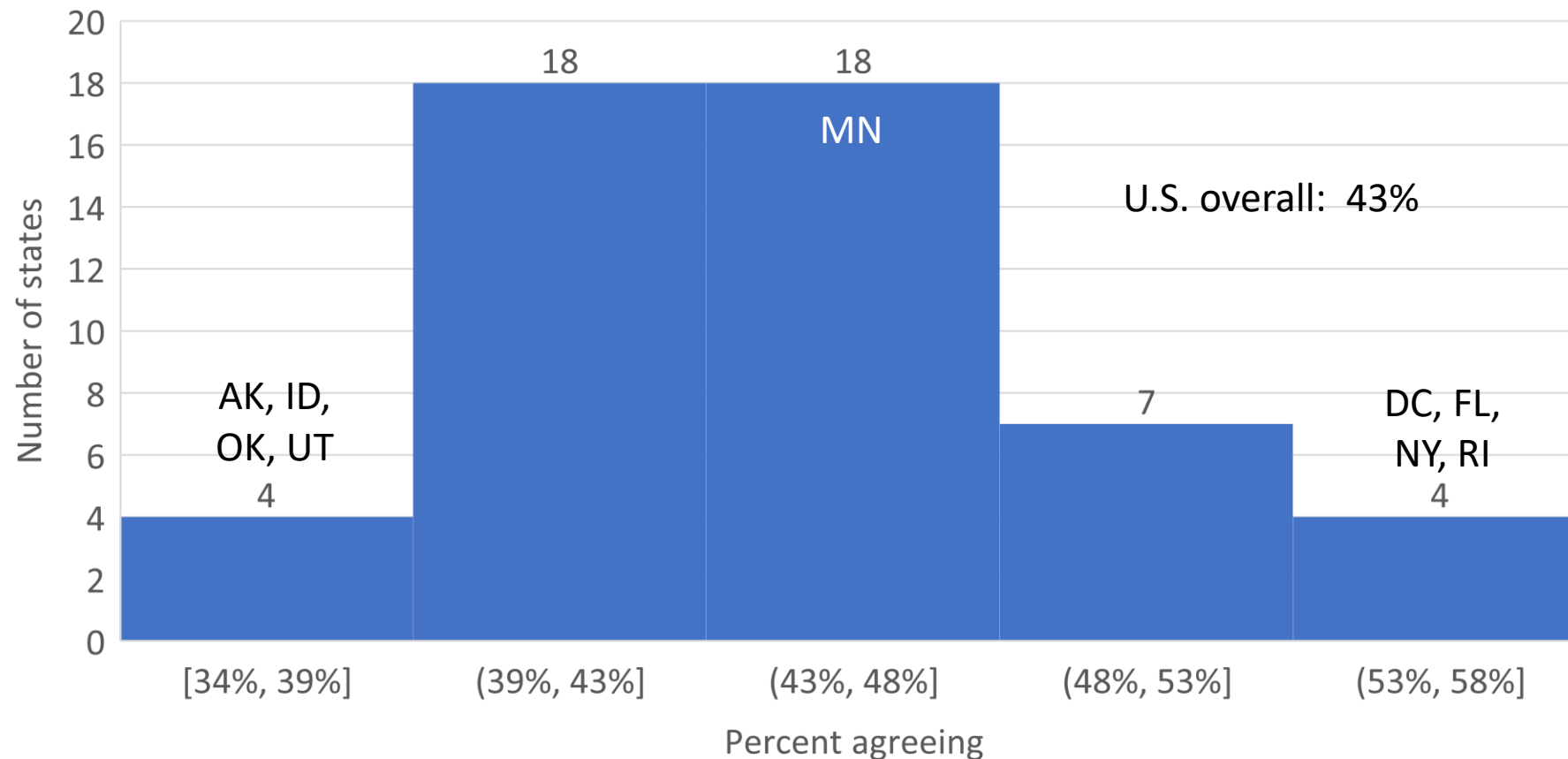
The gambling industry should do more to help people with a gambling addiction.



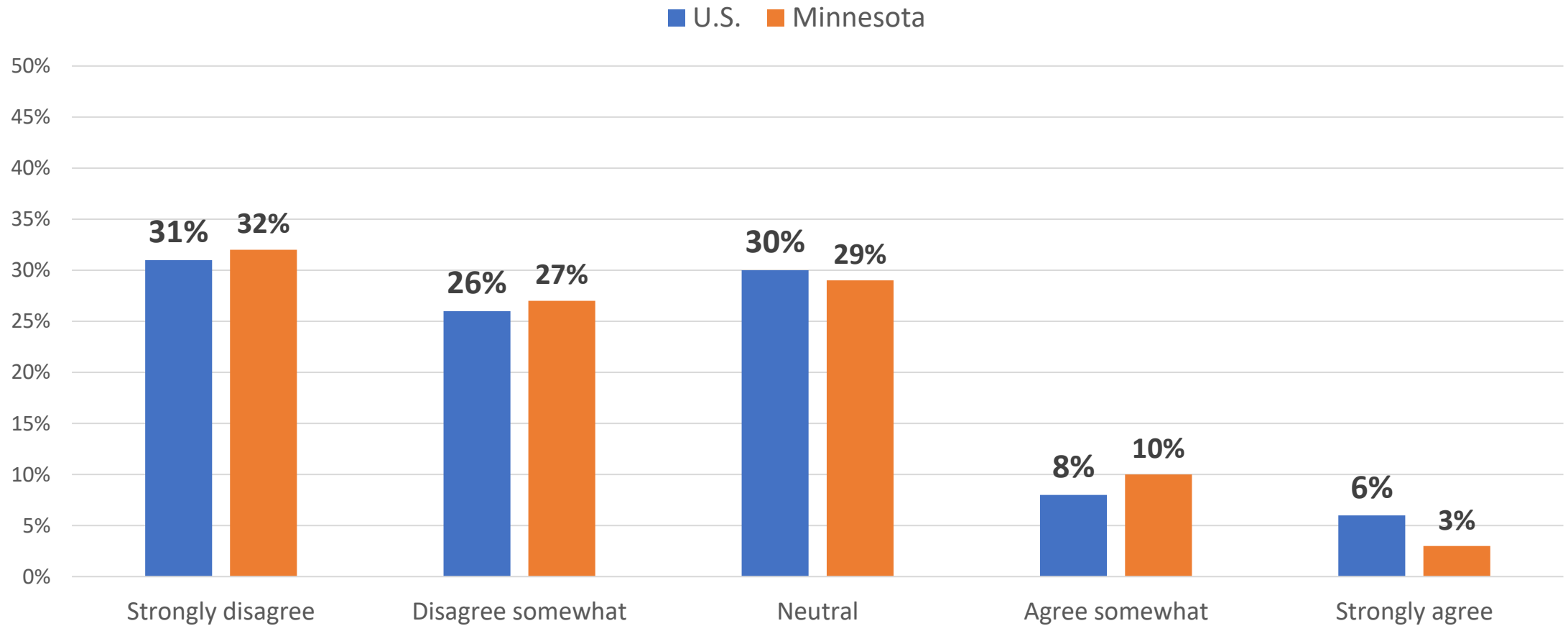
The government should do more to help people with a gambling addiction



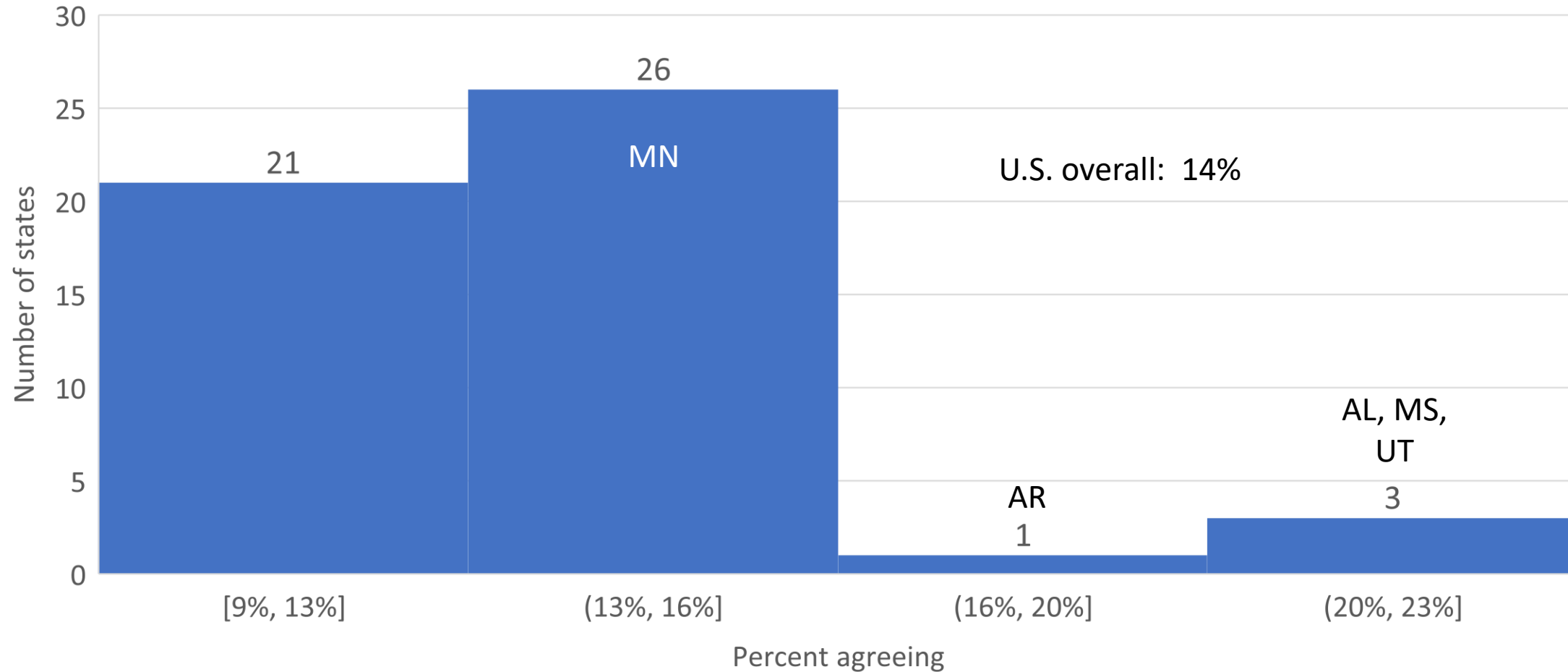
The government should do more to help people with a gambling addiction.



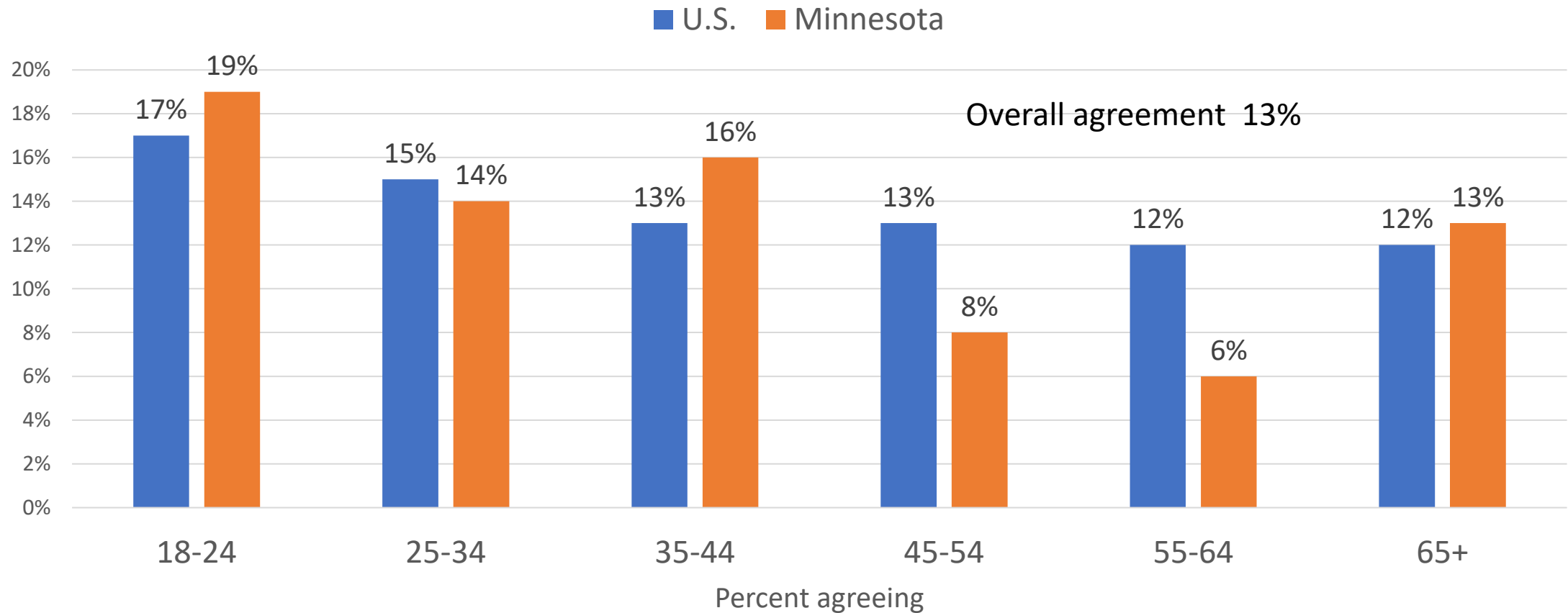
Gambling is immoral



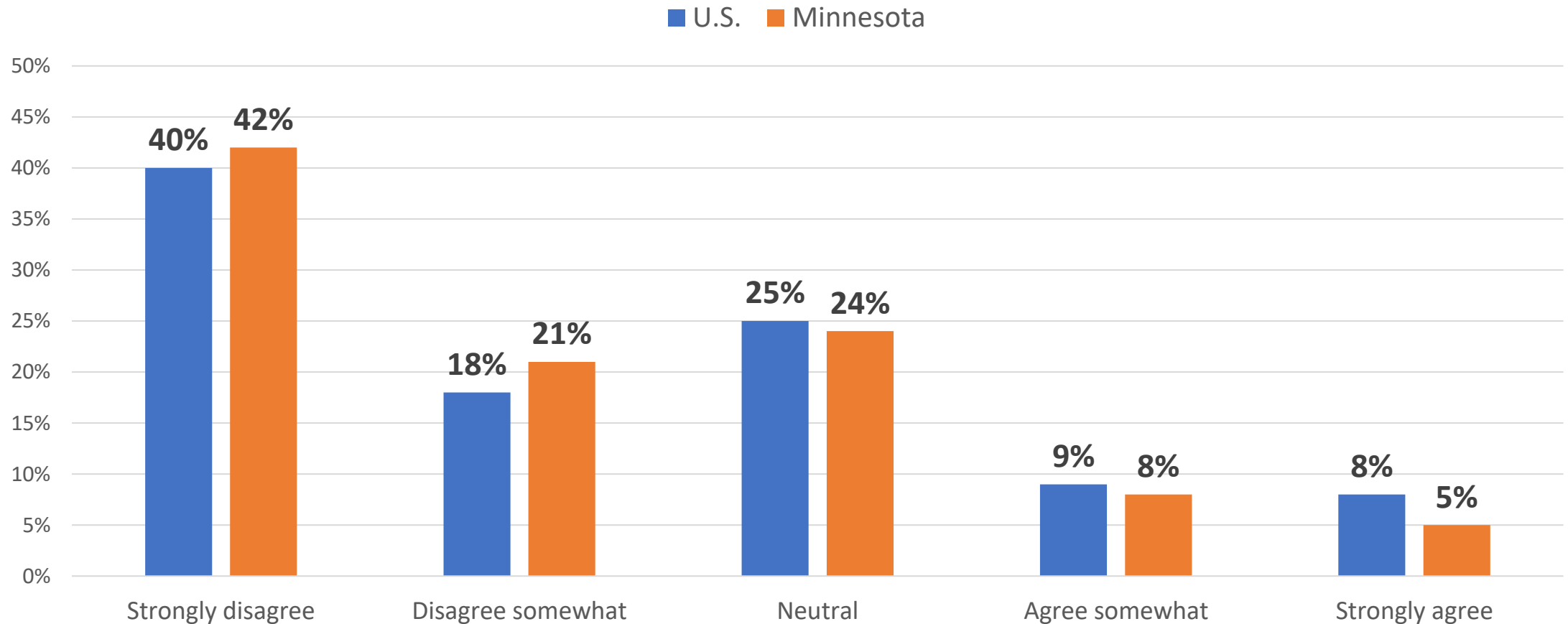
Gambling is immoral.



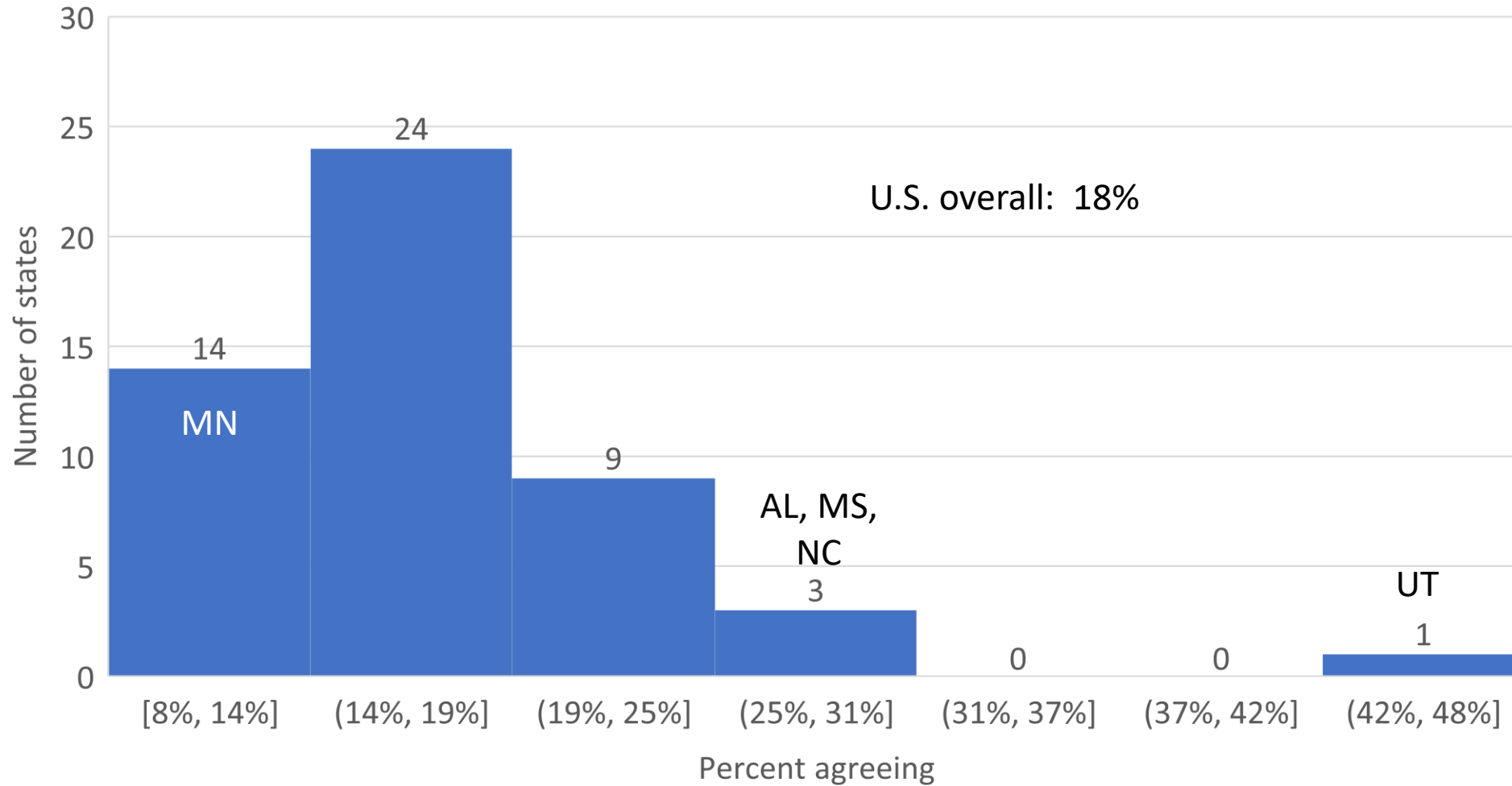
% agreeing that gambling is immoral, by age



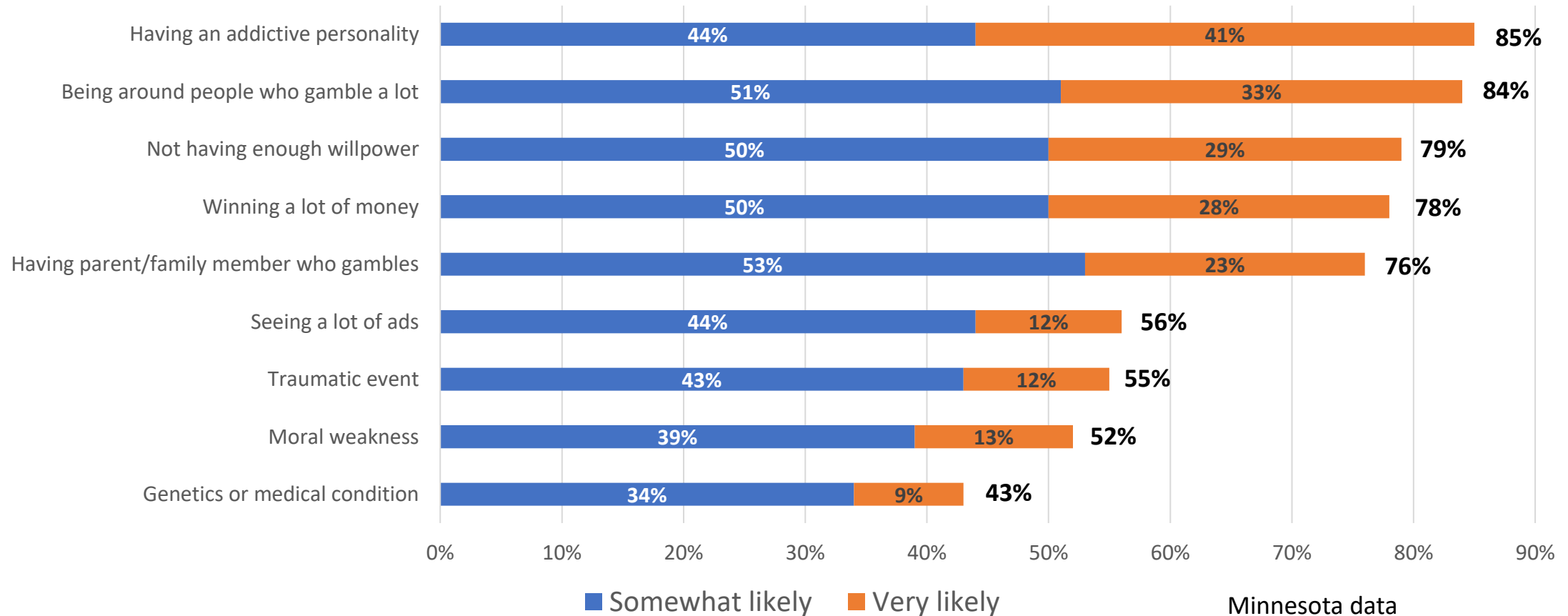
Gambling is against my religion



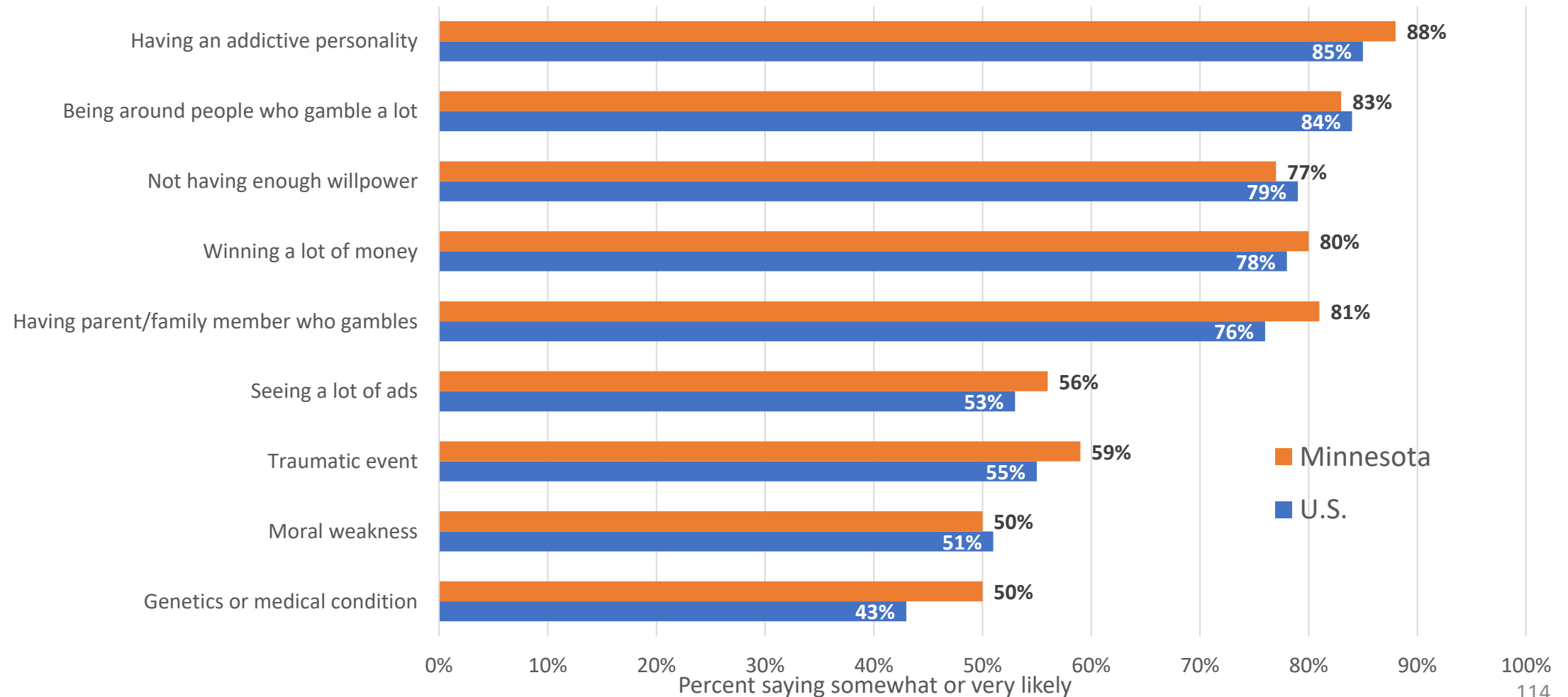
Gambling is against my religion



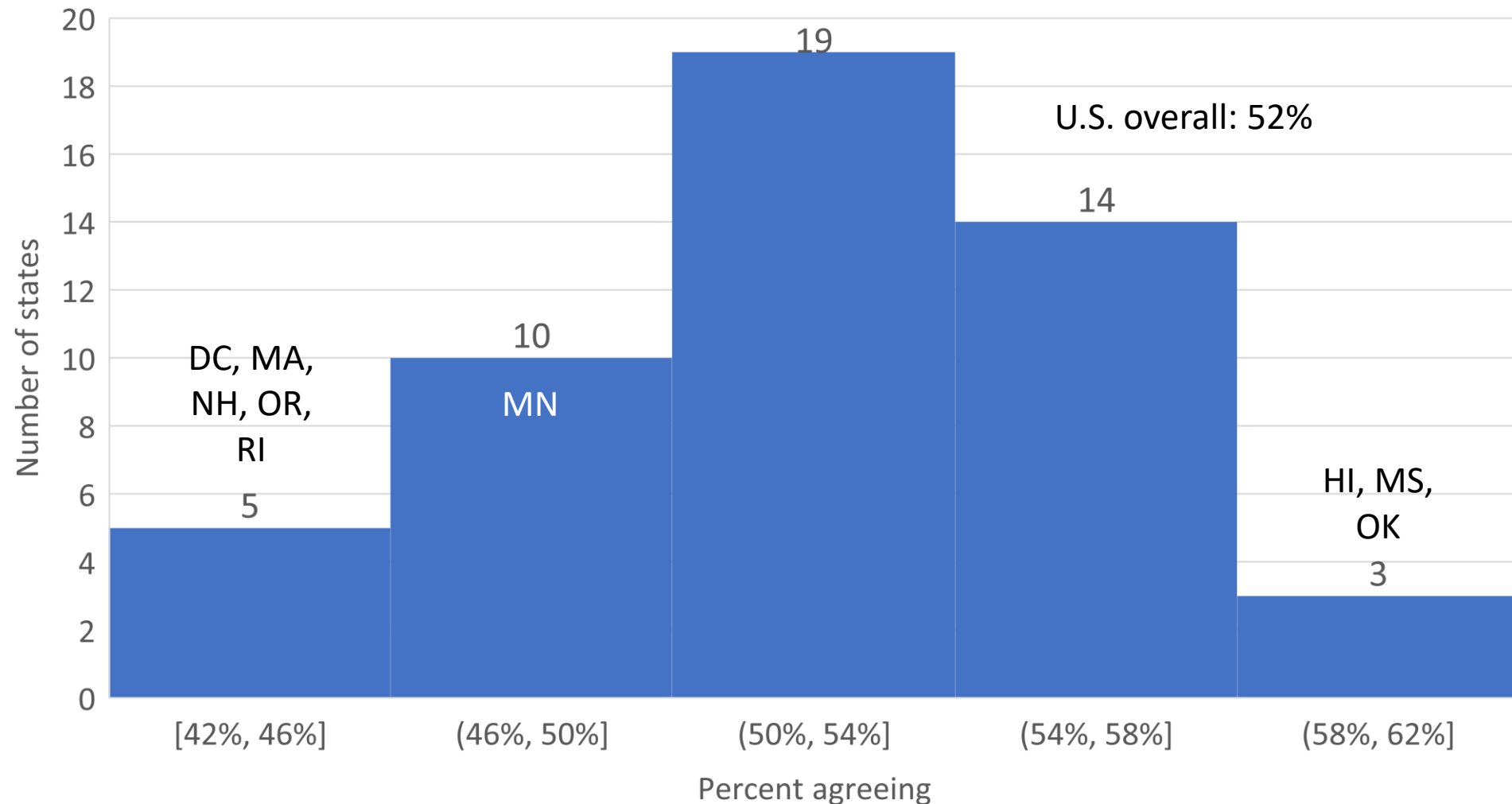
How likely is this to cause a gambling problem?



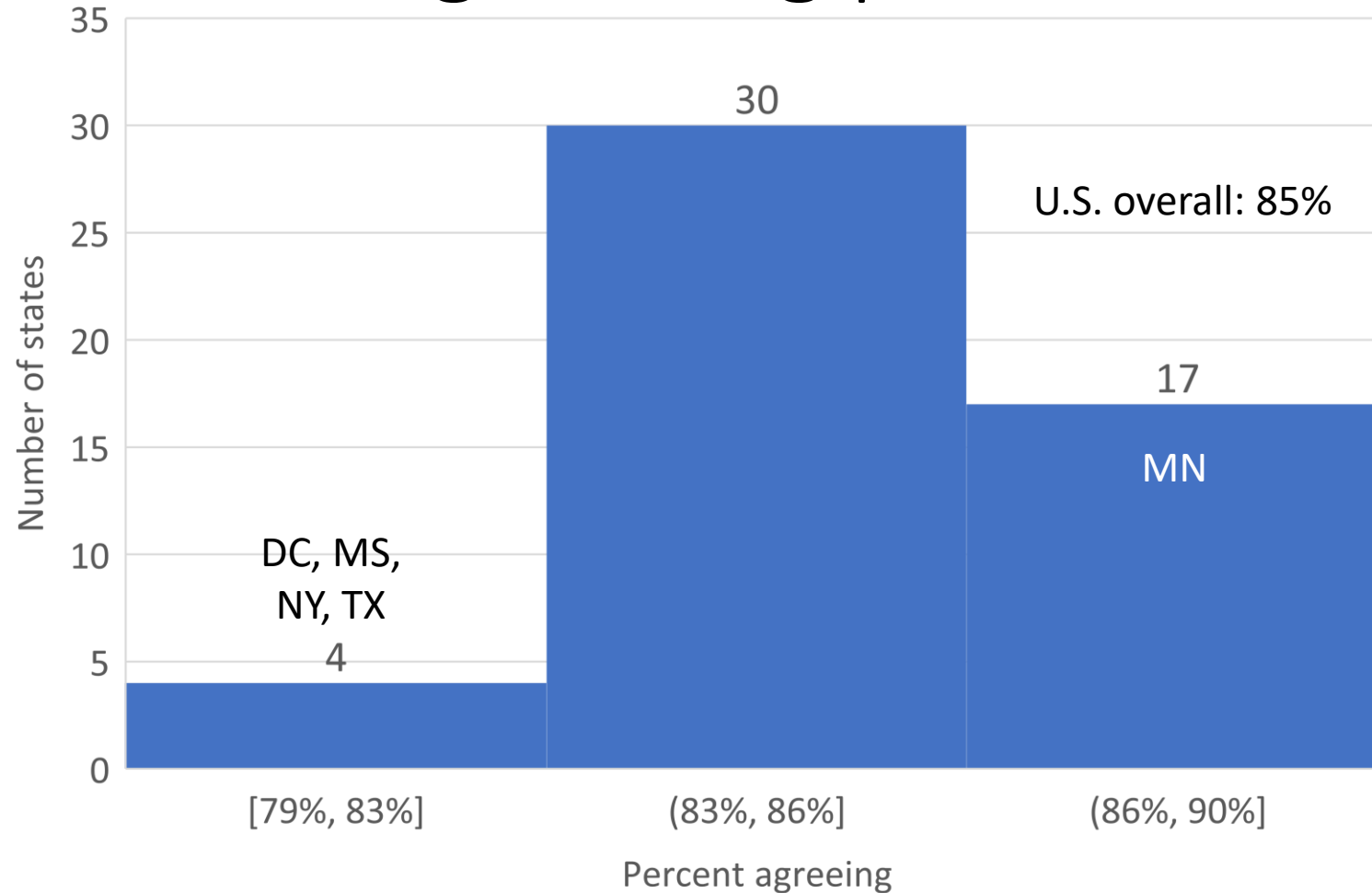
How likely is this to cause a gambling problem?



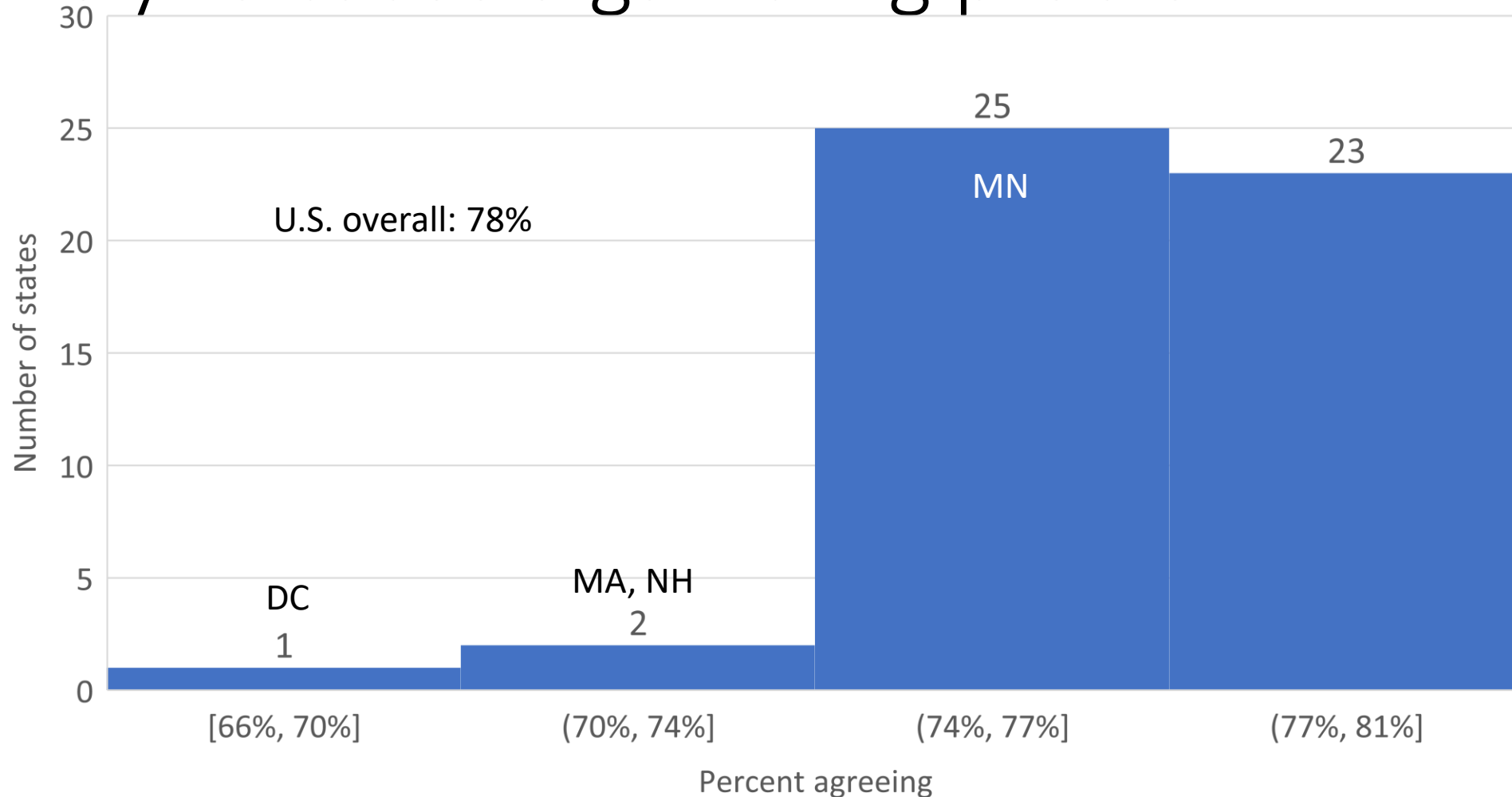
% agreeing that moral weakness is likely to cause a gambling problem



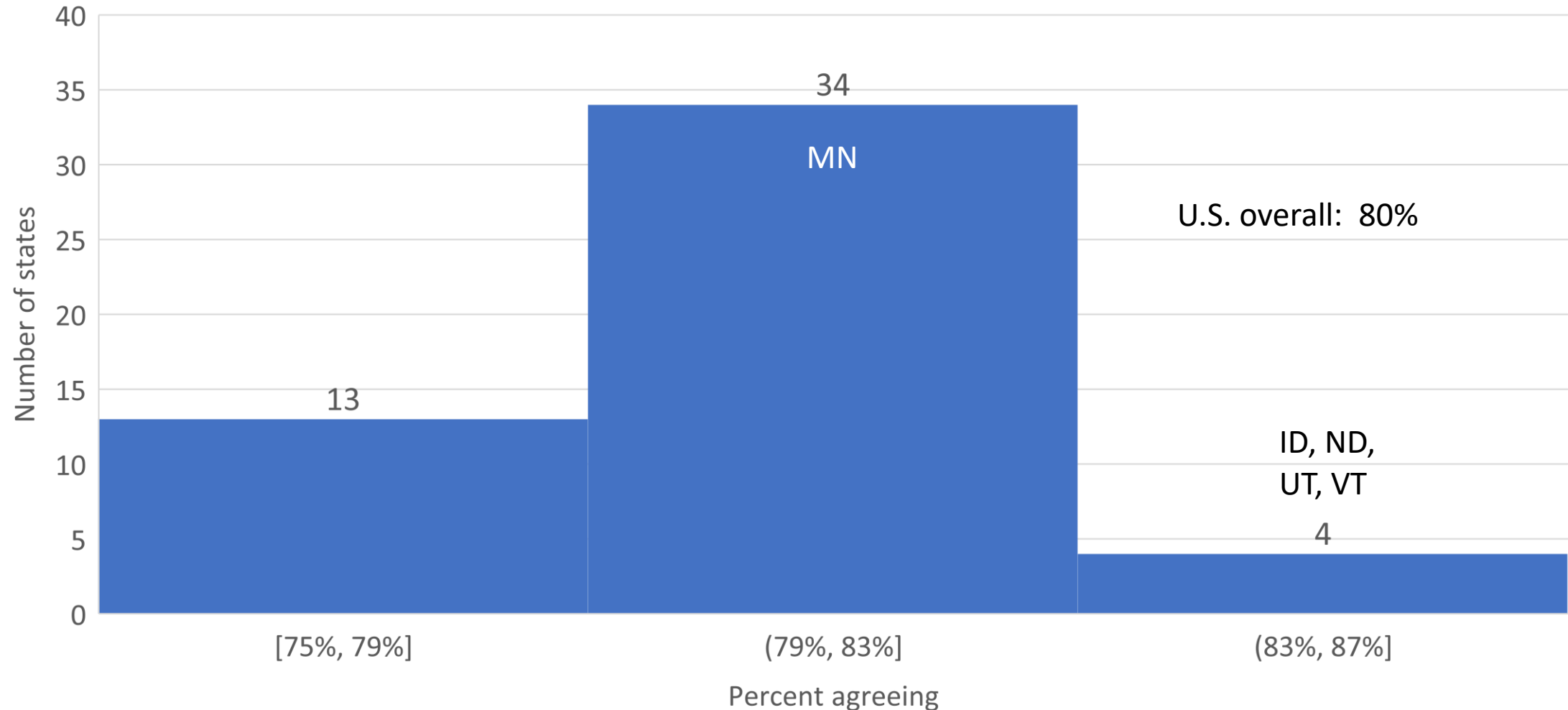
% agreeing that an addictive personality is likely to cause a gambling problem



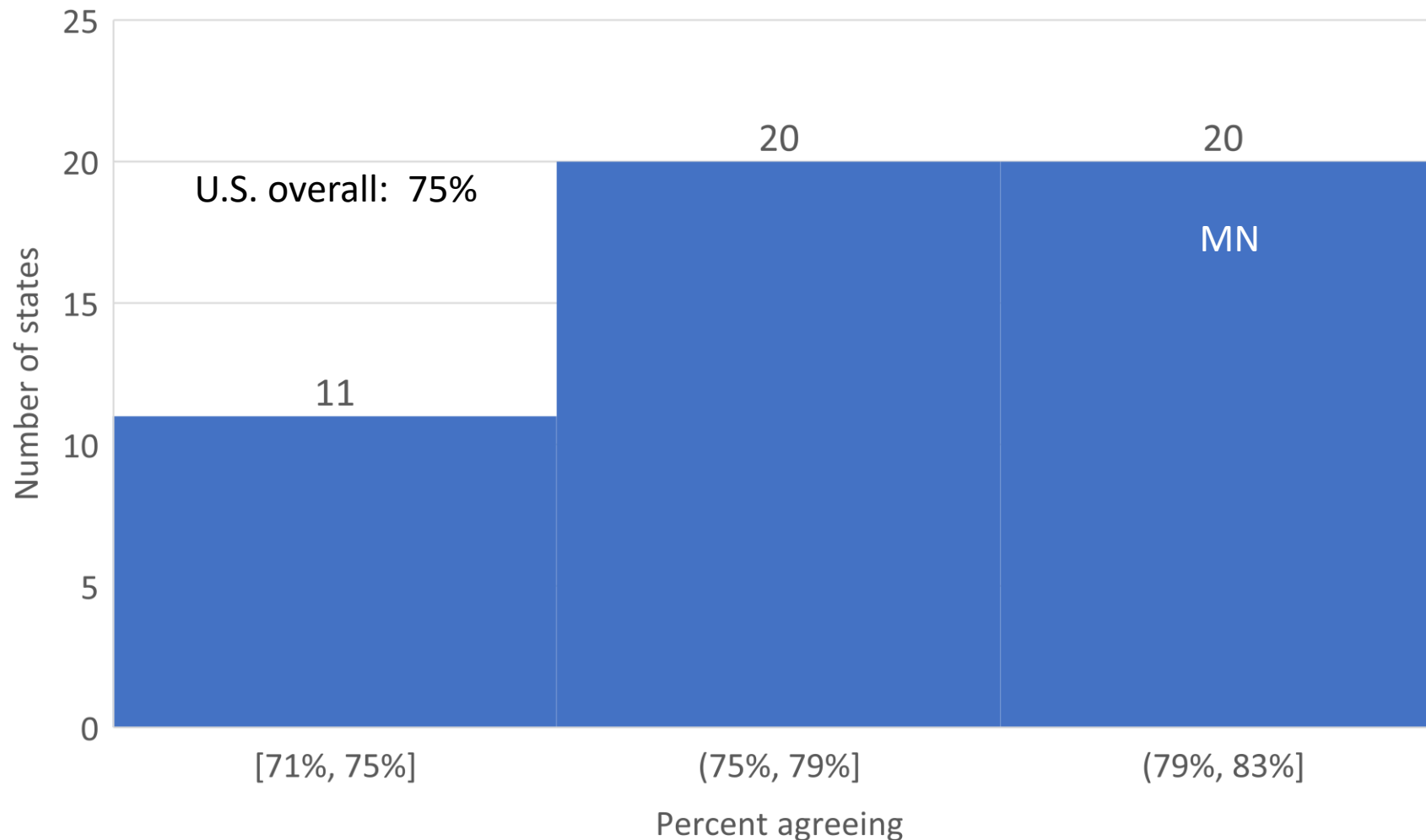
% agreeing that not having enough willpower is likely to cause a gambling problem



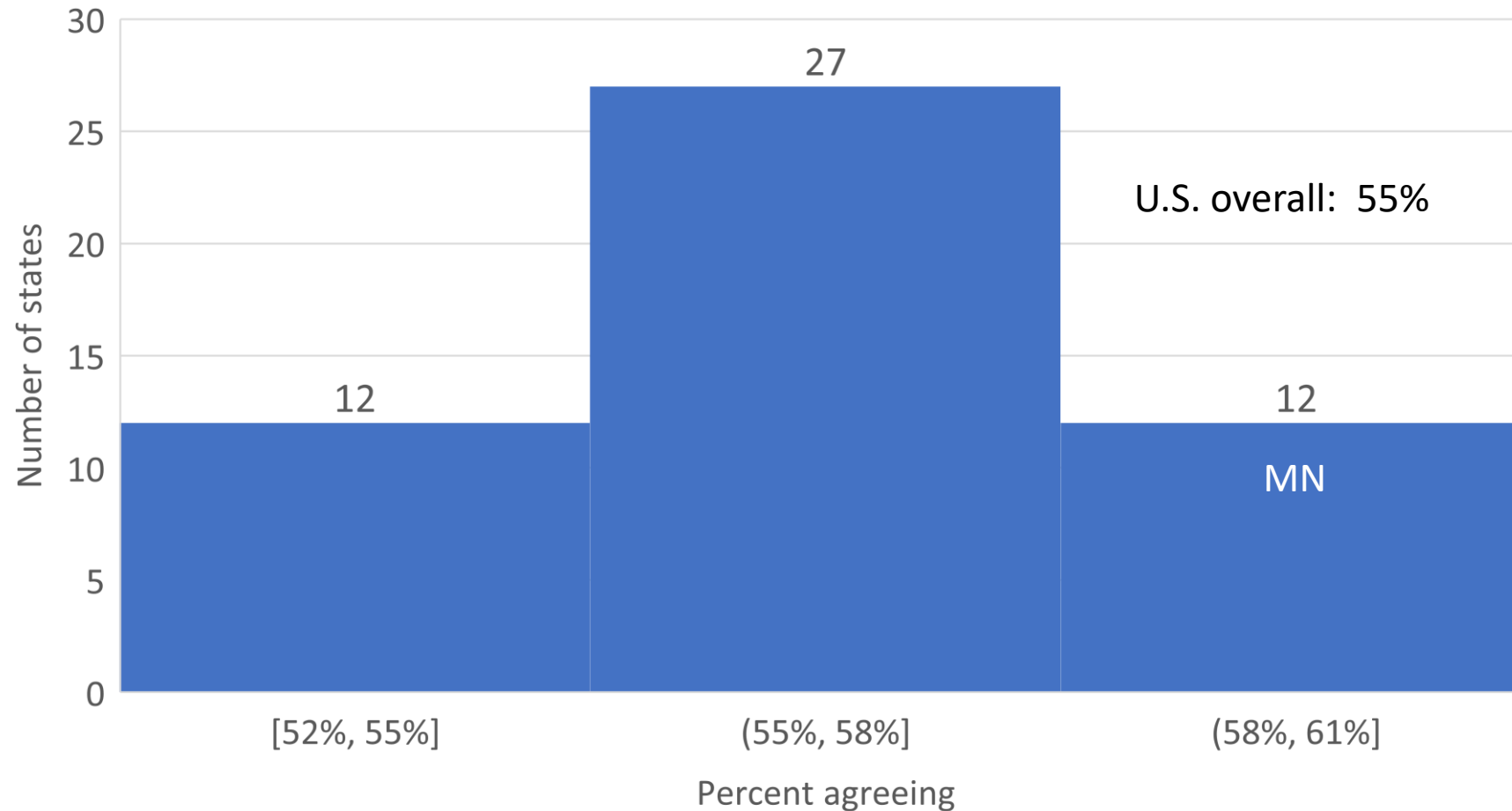
% agreeing that being around people who gamble a lot is likely to cause a gambling problem



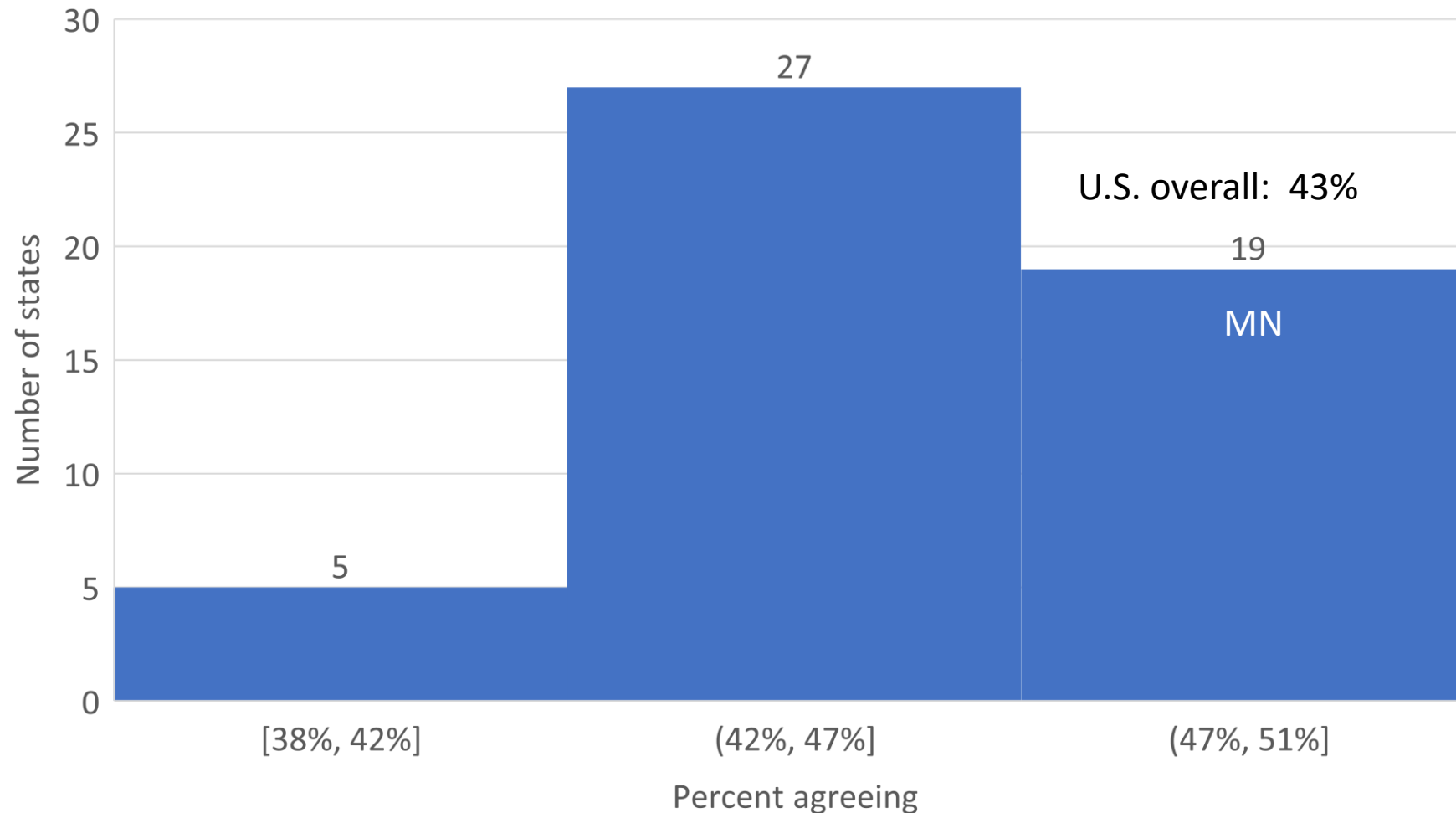
% agreeing that having a parent or family member who gambles is likely to cause a gambling problem



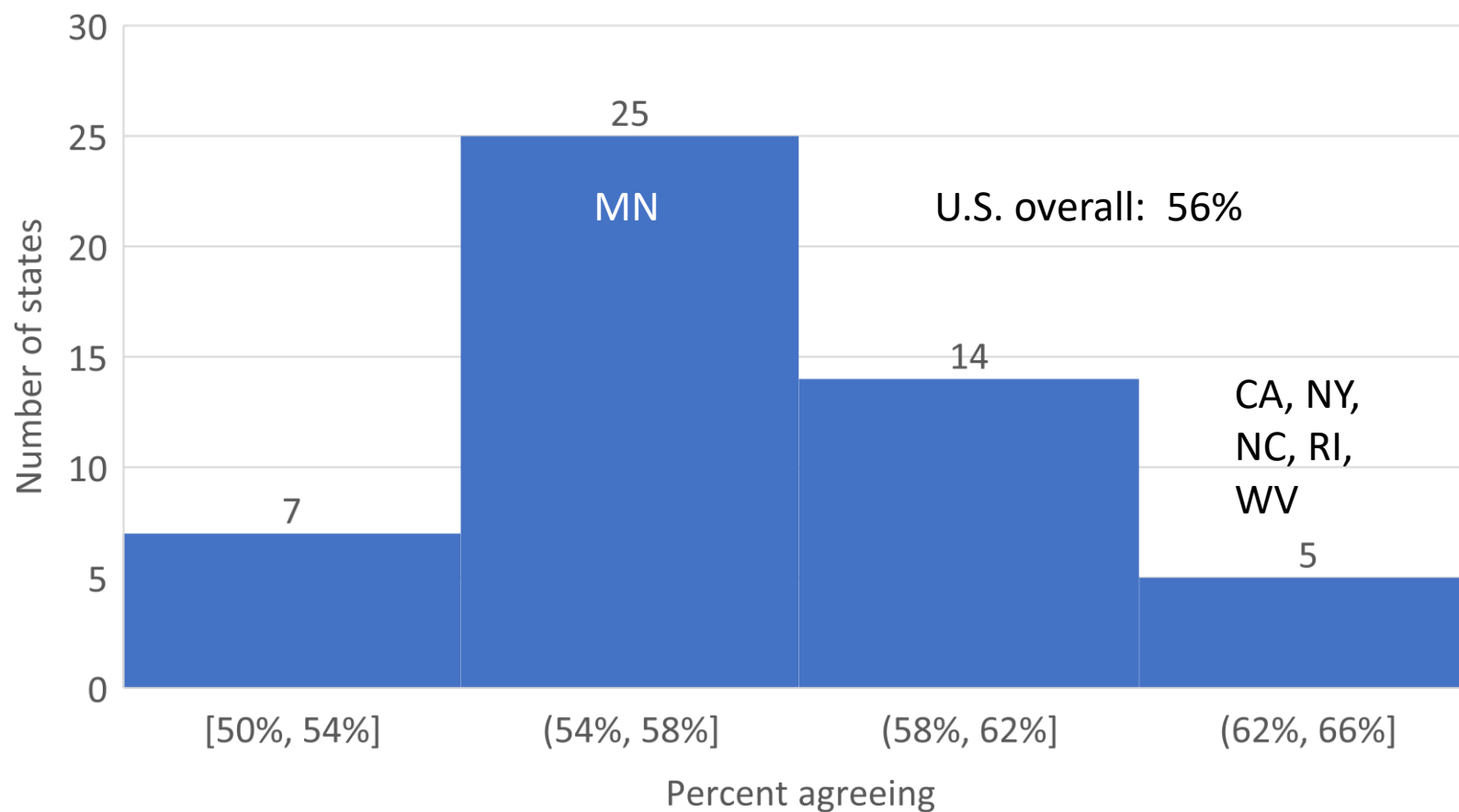
% agreeing that a traumatic event in someone's life is likely to cause a gambling problem



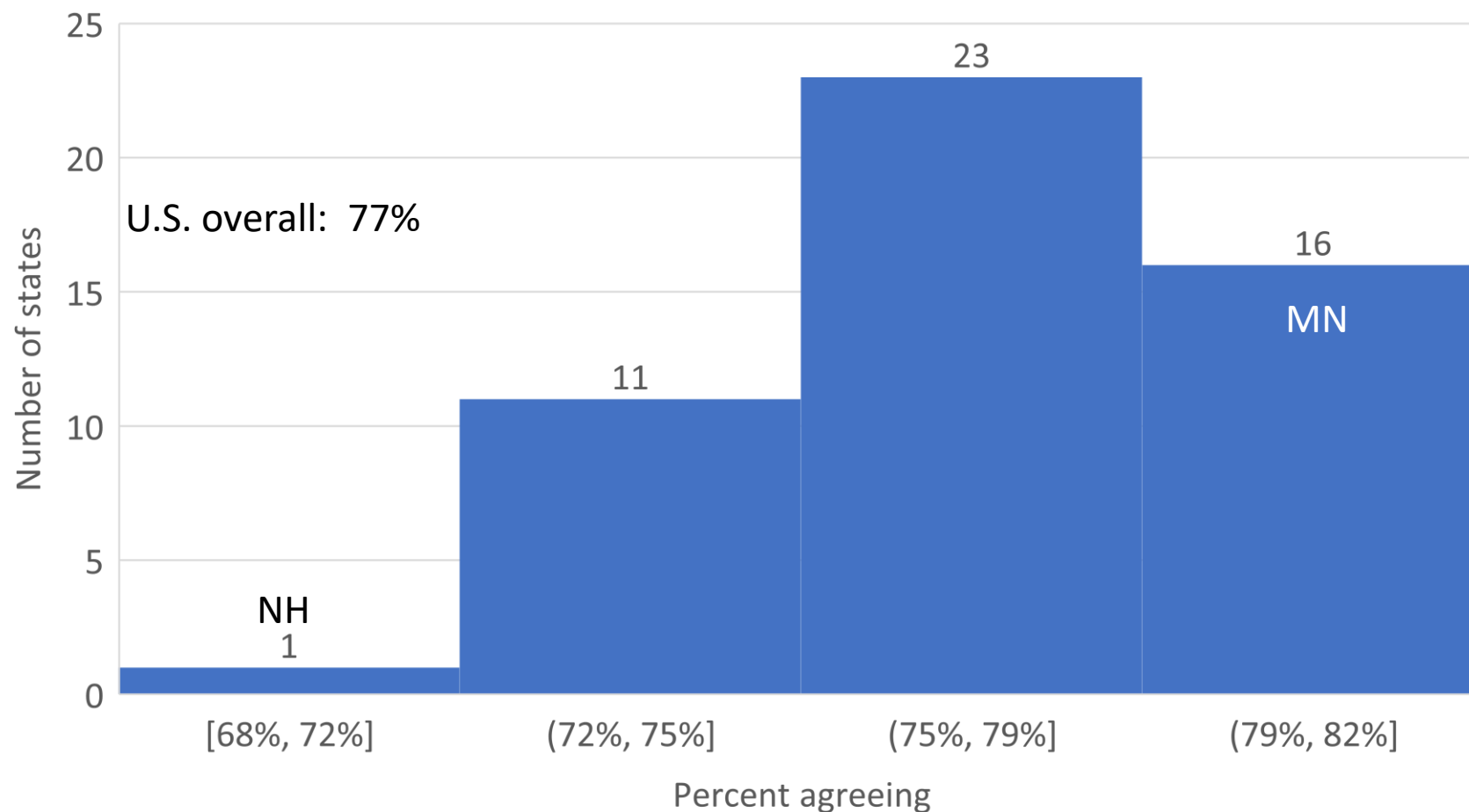
% agreeing that a person's genetics or other medical condition is likely to cause a gambling problem



% agreeing that seeing a lot of ads promoting gambling is likely to cause a gambling problem



% agreeing that winning a lot of money is likely to cause a gambling problem

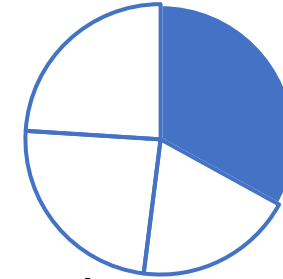


Segments

What is segmentation?

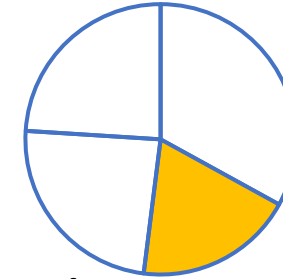
- Segmentation is the division of a population into groups based on the similarity of their responses to survey questions
- Segmentation employs multiple mathematical techniques which are analyzed and interpreted by project researchers
- Researchers assign names to segments to aid in interpretation
- The analysis was done nationally, though the size of each segment varies from state to state
- This segmentation was based on responses to questions about attitudes and beliefs about problem gambling
- Four segments were identified, each encompassing roughly $\frac{1}{4}$ of the population

Responsible Gamblers



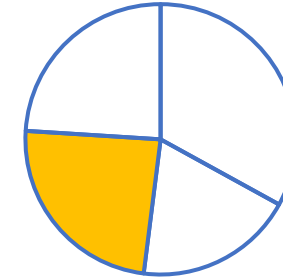
- Believe that genetics, medical issues, traumatic experience can cause gambling problems
- Do not believe gambling problems result from moral weakness
- Believe in effective recovery
- Know where to get help
- Endorse more services
- 81% past year gambling
- Bet on games of chance
- Endorse positive play and have low rates of risky behavior
- 33% of Minnesota adults

It's Your Fault

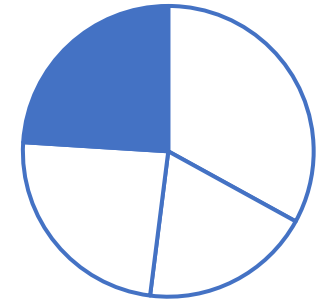


- Do not believe that genetics, medical issues, traumatic experience can cause gambling problems
- Believe gambling problems result from lack of willpower and believe gamblers are to blame
- Do not support more services
- Do not believe gambling is immoral
- 87% past year gambling
- Bet on games of chance and games of skill
- Average levels of positive play and risky play
- 19% of Minnesota adults

Moralists



- Most likely to believe that gambling is immoral and against their religion
- Believe gambling problems result from lack of willpower and moral weakness and believe gamblers are to blame
- Somewhat supportive of more services
- Not aware of services
- 58% past year gambling (mostly lottery)
- Average levels of positive play and risky play
- 24% of Minnesota adults

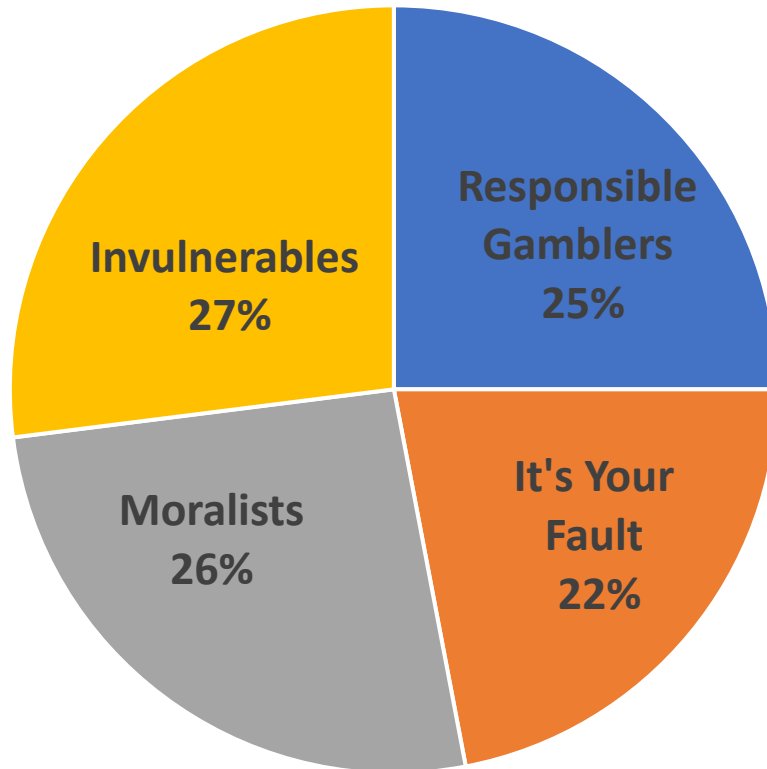


Invulnerables

- Most likely to stigmatize those with gambling problems
- Most likely to believe problem gambling comes from moral weakness and to believe gamblers are to blame
- Not supportive of more services
- Most likely to believe gambling is immoral
- 70% past year gambling
- Most likely to bet on sports
- Highest levels of risky play and lowest levels of positive play (by far)
- 24% of Minnesota adults

Segments

U.S.



Minnesota

