National Survey on Gambling Attitudes and Gambling Experience (NGAGE)

DETAILED REPORT
MINNESOTA
May, 2019
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
• 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. 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 percent 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

- Any gambling: 73% (Minnesota), 78% (U.S.)
- Lottery: 66% (Minnesota), 66% (U.S.)
- Raffle: 41% (Minnesota), 46% (U.S.)
- Spending money at a casino: 37% (Minnesota), 44% (U.S.)
- Slots/gaming machine: 34% (Minnesota), 32% (U.S.)
- Card games: 24% (Minnesota), 23% (U.S.)
- Pull-tabs: 21% (Minnesota), 35% (U.S.)
- Bingo: 20% (Minnesota), 28% (U.S.)

November 2018
Past year gambling (continued)

Sports event/outcomes: Minnesota 19%, U.S. 20%
Fantasy sports: Minnesota 17%, U.S. 17%
Online wager: Minnesota 16%, U.S. 15%
Horse or dog race: Minnesota 13%, U.S. 14%
Spinning wheel games: Minnesota 11%, U.S. 14%
Roulette: Minnesota 13%, U.S. 13%
Craps or other dice games: Minnesota 13%, U.S. 13%

November 2018
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

National rate = 73%

- [50%, 55%]: 1 (Utah)
- (55%, 60%]: 1 (Hawaii)
- (60%, 65%]: 1 (Alabama)
- (65%, 70%]: 4
- (70%, 75%]: 9
- (75%, 80%]: 23 (MN)
- (80%, 85%]: 12 (AZ, CT, IL, MA, NV, NH, NJ, NY, OH, PA, RI, TX)
Number of past year gambling activities

Median (total population) = 3  Median (past year gamblers) = 4
Past year gambling by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>80%</td>
</tr>
<tr>
<td>25-34</td>
<td>79%</td>
</tr>
<tr>
<td>35-44</td>
<td>81%</td>
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<tr>
<td>45-54</td>
<td>84%</td>
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<tr>
<td>55-64</td>
<td>75%</td>
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<tr>
<td>65-74</td>
<td>69%</td>
</tr>
<tr>
<td>75+</td>
<td>70%</td>
</tr>
</tbody>
</table>
Past year gambling by gender

Male: 83%
Female: 73%
Lottery play

% of population playing once a year or more

Draw games such as Powerball or Mega Millions
- U.S.: 56%
- Minnesota: 56%

Daily numbers or keno-style games
- U.S.: 37%
- Minnesota: 25%

Instant/Scratch games
- U.S.: 56%
- Minnesota: 51%

November 2018
Lottery draw game frequency

% of population playing ...

- Weekly or more: U.S. 12%, Minnesota 12%
- Once or more a month: U.S. 14%, Minnesota 15%
- Several times a year: U.S. 18%, Minnesota 20%
- Once or twice a year: U.S. 13%, Minnesota 16%
- Less often than once a year: U.S. 17%, Minnesota 15%
- Never: U.S. 26%, Minnesota 22%

November 2018
Lottery instant/scratch game frequency

% of population playing...

- Weekly or more: 11% (U.S.), 7% (Minnesota)
- Once or more a month: 13% (U.S.), 12% (Minnesota)
- Several times a year: 16% (U.S.), 14% (Minnesota)
- Once or twice a year: 14% (U.S.), 17% (Minnesota)
- Less often than once a year: 19% (U.S.), 22% (Minnesota)
- Never: 25% (U.S.), 27% (Minnesota)

November 2018
Past year lottery play by state

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
<td>[30%, 40%]</td>
</tr>
<tr>
<td>Hawaii</td>
<td>[30%, 40%]</td>
</tr>
<tr>
<td>Utah</td>
<td>[30%, 40%]</td>
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<tr>
<td>(40%, 50%)</td>
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<tr>
<td>(50%, 60%)</td>
<td></td>
</tr>
<tr>
<td>(60%, 70%)</td>
<td>21</td>
</tr>
<tr>
<td>(70%, 80%)</td>
<td>23</td>
</tr>
</tbody>
</table>

States in red do not currently have lotteries.
Pari-mutuel racing frequency

% of population playing...

- **Weekly or more**: 2% U.S., 1% Minnesota
- **Once or more a month**: 3%, 2%
- **Several times a year**: 4%, 4%
- **Once or twice a year**: 6%, 7%
- **Less often than once a year**: 14%, 15%
- **Never**: 72%, 72%

November 2018
Pari-mutuel racing participation by state

Percentage of adult population playing in past year

- MN: 26 states (9%, 14%)
- Florida: 11 states (4%, 9%)
- Illinois: 9 states (14%, 19%)
- Kentucky: 4 states (19%, 24%)
- New Jersey: 1 state (24%, 29%)
- New York: 1 state (24%, 29%)

U.S. overall: 14%

November 2018
Past year bingo play by state

- HI, ID, NE, UT: 4 states
- MN, NV, NY: 3 states
- TX: 1 state
- U.S. overall: 20%

November 2018
Past year bingo play by age

- 18-24: 27%
- 25-34: 37%
- 35-44: 36%
- 45-54: 27%
- 55-64: 30%
- 65-74: 12%
- 75+: 15%

November 2018
Pull-tabs or break-open tickets by state

U.S. overall: 21%

Percent playing in past year

- [10%, 16%]: 5 states
- (16%, 21%]: 21 states
- (21%, 27%]: 14 states
- (27%, 32%]: 7 states
- (32%, 38%]: 4 states

States:
- AK, MN, ND, WI
- MN
Sports betting
Type of sports betting

- Traditional sports: 30%
- Fantasy sports: 17%
- Both: 53%

November 2018
Traditional Sports betting
Past year traditional sports betting by state

- U.S. overall = 22%
- Nevada
- New Jersey

<table>
<thead>
<tr>
<th>Percent betting in past year</th>
<th>Number of states</th>
</tr>
</thead>
<tbody>
<tr>
<td>[13%, 18%]</td>
<td>17</td>
</tr>
<tr>
<td>(18%, 23%)</td>
<td>23</td>
</tr>
<tr>
<td>(23%, 28%)</td>
<td>9</td>
</tr>
<tr>
<td>(28%, 33%)</td>
<td>2</td>
</tr>
</tbody>
</table>
Number of sports bet on

- 1 to 2: 55% (U.S.), 61% (Minnesota)
- 3 to 5: 36% (U.S.), 31% (Minnesota)
- 6 or more: 8% (U.S.), 7% (Minnesota)

Past year sports bettors only

November 2018
Frequency of sports bets

- Weekly or more: 15% (U.S.), 15% (Minnesota)
- 1-3 times a month: 19% (U.S.), 14% (Minnesota)
- Several times a year: 23% (U.S.), 18% (Minnesota)
- Once or twice a year: 26% (U.S.), 28% (Minnesota)
- Less often than once a year: 7% (U.S.), 13% (Minnesota)

November 2018
How do you make sports bets?

- Social bets with family or friends: 90% (Minnesota), 91% (U.S.)
- Online sportsbook: 50% (Minnesota), 62% (U.S.)
- "Brick and mortar" sportsbook: 51% (Minnesota), 57% (U.S.)
- Bookie/Bookmaker: 28% (Minnesota), 48% (U.S.)

Questions asked of sports bettors only

November 2018
How do you make sports bets?

- Social bets with family or friends: 43% (Often), 47% (Occasionally)
- Online sportsbook: 19% (Often), 31% (Occasionally)
- "Brick and mortar" sportsbook: 10% (Often), 41% (Occasionally)
- Bookie/Bookmaker: 5% (Often), 23% (Occasionally)

Questions asked of sports bettors only

November 2018
What sports have you bet on in past year for real money (Sports bettors only)

- Pro football: 65% (Minnesota), 73% (U.S.)
- College football: 24% (Minnesota), 36% (U.S.)
- Pro basketball: 27% (Minnesota), 30% (U.S.)
- Baseball: 30% (Minnesota), 32% (U.S.)
- College basketball: 24% (Minnesota), 26% (U.S.)
- Soccer: 10% (Minnesota), 17% (U.S.)
- Ice hockey: 11% (Minnesota), 29% (U.S.)
- E-sports: 9% (Minnesota), 11% (U.S.)
- Combat sports: 11% (Minnesota), 12% (U.S.)
- Motor racing: 10% (Minnesota), 14% (U.S.)
- Tennis: 6% (Minnesota), 9% (U.S.)
- Golf: 7% (Minnesota), 7% (U.S.)

November 2018

NGAGE Survey - Minnesota
What type of sports bet have you made in the past year?

- Single bets on the outcome of a game: 88% (Minnesota), 85% (U.S.)
- Bet on events within a game ("prop bets"): 42% (Minnesota), 40% (U.S.)
- Parley bets: 16% (Minnesota), 23% (U.S.)

November 2018
Past year sports betting by gender

Percent betting on sports in past year

- Male: 27%
- Female: 11%

November 2018
Past year sports betting by age

- 18-24: 38%
- 25-34: 27%
- 35-44: 22%
- 45-54: 16%
- 55-64: 14%
- 65-74: 6%
- 75+: 0%

November 2018
How have you played sports contests in the past year?

- With people I know outside of office: 67% (Minnesota) vs. 60% (U.S.)
- Office pool: 47% (Minnesota) vs. 38% (U.S.)
- Online with people I did not know: 33% (Minnesota) vs. 37% (U.S.)

November 2018
Fantasy sports
Fantasy sports participation

U.S.
- Daily only, 34%
- Traditional season-long only, 44%
- Both DFS and traditional, 22%

Minnesota
- Both DFS and traditional, 36%
- Traditional season-long only, 45%
- Daily only, 19%
Fantasy sports participation by state

National rate = 17%

DC, IL, MD, NJ, NY, NC, OH, VA,

Past year participation

Number of states

[10%, 15%] 21
(15%, 20%)
(20%, 25%) 8
Method of playing traditional fantasy sports leagues

U.S.
- Online only, 50%
- Offline only, 29%
- Both online and offline, 21%

Minnesota
- Online only, 69%
- Offline only, 12%
- Both online and offline, 19%
Fantasy sports played in past year

- Minnesota
- U.S.

- Pro football: 85% (Minnesota), 69% (U.S.)
- Baseball: 33% (Minnesota), 30% (U.S.)
- Pro basketball: 24% (Minnesota), 25% (U.S.)
- College football: 14% (Minnesota), 25% (U.S.)
- College basketball: 14% (Minnesota), 5% (U.S.)
- Soccer: 15% (Minnesota), 6% (U.S.)
- Motor racing: 15% (Minnesota), 10% (U.S.)
- E-sports: 11% (Minnesota), 9% (U.S.)
- Golf: 11% (Minnesota), 13% (U.S.)
- Combat sports: 9% (Minnesota), 7% (U.S.)
- Ice hockey: 20% (Minnesota), 9% (U.S.)
- Other: 1% (Minnesota), 2% (U.S.)

November 2018
Number of fantasy sports bet on

Past year fantasy sports bettors only

November 2018
Number of traditional fantasy sports leagues

- 60% of traditional fantasy sports leagues in the U.S.
- 64% of traditional fantasy sports leagues in Minnesota

Past year traditional fantasy sports bettors only

November 2018
Past year fantasy sports betting by gender

Percent betting on fantasy sports in past year

Male: 22%
Female: 7%

November 2018
Past year fantasy sports betting by age

- 18-24: 28%
- 25-34: 32%
- 35-44: 24%
- 45-54: 15%
- 55-64: 6%
- 65-74: 2%
- 75+: 0%

November 2018
Frequency of daily fantasy sports bets

- Weekly or more: 39% (U.S.), 36% (Minnesota)
- 1-3 times a month: 31% (U.S.), 38% (Minnesota)
- Several times a year: 20% (U.S.), 22% (Minnesota)
- Once or twice a year: 7% (U.S.), 2% (Minnesota)
- Less often than once a year: 4% (U.S.), 2% (Minnesota)
“On average, how much do you spend to enter a daily fantasy sports contest?”

- **$15 or less**: 30% (U.S.) 54% (Minnesota)
- **$16 to $50**: 38% (U.S.) 27% (Minnesota)
- **$51 to $100**: 20% (U.S.) 10% (Minnesota)
- **$101 to $300**: 10% (U.S.) 7% (Minnesota)
- **More than $300**: 2% (U.S.) 2% (Minnesota)

November 2018
“How much does your traditional, season-long fantasy sports league(s) cost to play?”

<table>
<thead>
<tr>
<th>Cost Range</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>$15 or less</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>$16 to $50</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td>$51 to $100</td>
<td>22%</td>
<td>29%</td>
</tr>
<tr>
<td>$101 to $300</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>$300 to $500</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>More than $500</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Card games
Card game gambling by state

U.S. overall: 23%

- MN: 18 states
- NV, NY: 2 states
- NJ: 1 state
What type of card games have you wagered money on in the past year?

- **Blackjack**: 80% (Minnesota), 77% (U.S.)
- **Poker**: 61% (Minnesota), 60% (U.S.)
- **Other**: 13% (Minnesota), 10% (U.S.)
- **Pai Gow**: 8% (Minnesota), 6% (U.S.)
- **Baccarat**: 7% (Minnesota), 5% (U.S.)
- **Cribbage**: 16% (Minnesota), 6% (U.S.)

As asked of past year card players only.

November 2018
Where have you played poker?

- Casino: 59% in Minnesota, 65% in the U.S.
- Someone's home: 60% in Minnesota, 65% in the U.S.
- Card club or racetrack: 14% in Minnesota, 21% in the U.S.
- Bar or restaurant: 13% in Minnesota, 21% in the U.S.
- Somewhere else: 4% in Minnesota and the U.S.

As of November 2018, asked of past year poker players only.
Where have you played blackjack?

- **Casino**: 87% (Minnesota), 79% (U.S.)
- **Someone's home**: 49% (Minnesota), 38% (U.S.)
- **Card club or racetrack**: 12% (Minnesota), 11% (U.S.)
- **Bar or restaurant**: 11% (Minnesota), 9% (U.S.)
- **Somewhere else**: 3% (Minnesota), 3% (U.S.)

Asked of past year blackjack players only

November 2018
Gaming machines
Gaming machine play by state

Past year gaming machine wagering

- [18%, 23%]: 8 states
- [23%, 28%]: 9 states
- [28%, 33%]: 10 states
- [33%, 38%]: 14 states (MN)
- [38%, 43%]: 7 states
- [43%, 48%]: 2 states (AZ, NY)
- [48%, 53%]: 0 states
- [53%, 58%]: 0 states
- [58%, 63%]: 1 state (Nevada)

U.S. overall: 32%
Where did you play slots, VLTs or other gaming machines in the past year?

- Casino: 94% (Minnesota 86%, U.S. 94%)
- Bar or restaurant: 21% (Minnesota 20%, U.S. 21%)
- Convenience store: 14% (Minnesota 14%, U.S. 14%)
- Racetrack: 12% (Minnesota 6%, U.S. 12%)
- Other: 4% (Minnesota 2%, U.S. 4%)

November 2018
Frequency of gaming machine play

- **Weekly or more**: 6% (U.S.), 3% (Minnesota)
- **1-3 times a month**: 10% (U.S.), 11% (Minnesota)
- **Several times a year**: 19% (U.S.), 18% (Minnesota)
- **Once or twice a year**: 22% (U.S.), 24% (Minnesota)
- **Less often than once a year**: 43% (U.S.), 44% (Minnesota)

November 2018
Past year gaming machine betting by gender

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

Male: 38%
Female: 29%

November 2018
Past year gaming machine betting by age

- 18-24: 35%
- 25-34: 38%
- 35-44: 37%
- 45-54: 34%
- 55-64: 36%
- 65-74: 22%
- 75+: 15%

November 2018
Online gambling
What type of gambling have you done online, on a website, or on a mobile app in the past year?

- Poker: 35% (Minnesota), 33% (U.S.)
- Slots: 30% (Minnesota), 28% (U.S.)
- Table games (blackjack, roulette, etc.): 23% (Minnesota), 23% (U.S.)
- Bingo: 23% (Minnesota), 22% (U.S.)
- Raffles: 19% (Minnesota), 19% (U.S.)
- eSports: 15% (Minnesota), 10% (U.S.)
- Horse race: 13% (Minnesota), 10% (U.S.)
- Virtual sports: 11% (Minnesota), 8% (U.S.)
- Non-sporting events (elections, Oscars, etc.): 8% (Minnesota), 7% (U.S.)

November 2018
Casinos
Casino betting by state

Number of states

- AK, SC, VT: 3 (24%, 29%)
- MN: 12 (39%, 44%)
- Arizona: 1 (54%, 59%)
- Nevada: 1 (69%, 74%)

National rate = 37%

Past year casino participation

[19%, 24%] [29%, 34%] [39%, 44%] [49%, 54%] [59%, 64%] [69%, 74%]
Why have you visited a casino in the past year?

- Mostly to gamble, but also to socialize: 44% in Minnesota, 51% in the U.S.
- Just to gamble: 31% in Minnesota, 27% in the U.S.
- Mostly to socialize, but sometimes to gamble: 23% in Minnesota, 20% in the U.S.
- Only to socialize: 2% in Minnesota, 3% in the U.S.

Askered of casino-goers only

November 2018
What types of casinos have you been to in the past year?

- Home state: 90% (Minnesota), 65% (U.S.)
- Neighboring state: 35% (Minnesota), 29% (U.S.)
- Las Vegas/Nevada: 30% (Minnesota), 26% (U.S.)
- Atlantic City: 12% (Minnesota), 2% (U.S.)
- Elsewhere in the U.S.: 10% (Minnesota), 8% (U.S.)
- Outside the U.S.: 10% (Minnesota), 6% (U.S.)
- Riverboat: 6% (Minnesota), 3% (U.S.)
- Cruise ship: 6% (Minnesota), 4% (U.S.)
Past year casino attendance by gender

- Male: 48%
- Female: 41%

November 2018
Past year casino attendance by age

- 18-24: 45%
- 25-34: 50%
- 35-44: 50%
- 45-54: 42%
- 55-64: 45%
- 65-74: 34%
- 75+: 18%

November 2018
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

- I should be aware of how much money I spend when I gamble: 93% in Minnesota, 91% in the U.S.
- I should only gamble when I have money to cover bills and living expenses: 90% in Minnesota, 85% in the U.S.
- It's my responsibility to spend only money that I can afford to lose: 92% in Minnesota, 89% in the U.S.
- I should be able to walk away from gambling at any time: 91% in Minnesota, 90% in the U.S.
Past year positive play – gambling literacy

- My chances of winning get better after I've lost (% disagreeing)
  - Minnesota: 76%
  - U.S.: 69%

- If I gamble more often it will help me to win more than I lose (% disagreeing)
  - Minnesota: 81%
  - U.S.: 73%

- Gambling is not a good way to make money (% agreeing)
  - Minnesota: 81%
  - U.S.: 74%

Questions asked of past year gamblers only

November 2018
Positive play by age – “I should be able to walk away from gambling at any time”

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percent Strongly Agreeing</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>64%</td>
</tr>
<tr>
<td>25-34</td>
<td>63%</td>
</tr>
<tr>
<td>35-44</td>
<td>70%</td>
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<tr>
<td>45-54</td>
<td>77%</td>
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<tr>
<td>55-64</td>
<td>80%</td>
</tr>
<tr>
<td>65-74</td>
<td>85%</td>
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<tr>
<td>75+</td>
<td>87%</td>
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</tbody>
</table>
Positive play by age – “I should be aware of how much money I spend when I gamble”

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<tr>
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</table>
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”

Percent strongly disagreeing

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<td>35-44</td>
<td>41%</td>
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<td>45-54</td>
<td>53%</td>
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<td>55-64</td>
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</tbody>
</table>
Positive play by age – “My chances of winning get better after I’ve lost”

Percent strongly disagreeing


November 2018
Sports gamblers vs non-sports gamblers
Past year positive play – personal responsibility

I should be aware of how much money I spend when I gamble

- Sports gamblers: 87%
- Non-sports gamblers: 93%

I should only gamble when I have money to cover bills and living expenses

- Sports gamblers: 89%
- Non-sports gamblers: 91%

It’s my responsibility to spend only money that I can afford to lose

- Sports gamblers: 91%
- Non-sports gamblers: 94%

I should be able to walk away from gambling at any time

- Sports gamblers: 91%
- Non-sports gamblers: 94%

Questions asked of past year gamblers only

November 2018
Sports gamblers vs non-sports gamblers
Past year positive play – personal responsibility
Percent strongly agreeing

- I should be aware of how much money I spend when I gamble
  - Non-sports gamblers: 68%
  - Sports gamblers: 80%
- I should only gamble when I have money to cover bills and living expenses
  - Non-sports gamblers: 71%
  - Sports gamblers: 81%
- It's my responsibility to spend only money that I can afford to lose
  - Non-sports gamblers: 70%
  - Sports gamblers: 81%
- I should be able to walk away from gambling at any time
  - Non-sports gamblers: 69%
  - Sports gamblers: 83%

Questions asked of past year gamblers only
Sports gamblers vs non-sports gamblers
Past year positive play – gambling literacy

- My chances of winning get better after I've lost
  - Sports gamblers: 52%
  - Non-sports gamblers: 76%

- If I gamble more often it will help me to win more than I lose
  - Sports gamblers: 52%
  - Non-sports gamblers: 81%

- Gambling is a good way to make money
  - Sports gamblers: 60%
  - Non-sports gamblers: 77%

November 2018
Sports gamblers vs non-sports gamblers
Past year positive play – gambling literacy
% strongly disagreeing

- My chances of winning get better after I've lost
  - Sports gamblers: 41%
  - Non-sports gamblers: 54%

- If I gamble more often it will help me to win more than I lose
  - Sports gamblers: 35%
  - Non-sports gamblers: 60%

- Gambling is a good way to make money
  - Sports gamblers: 29%
  - Non-sports gamblers: 57%

November 2018
Public opinion
If your state was to legalize/has legalized sports betting, how important is it to require operators to implement responsible gambling measures?
If your state was to legalize/has legalized sports betting, how important is it to require operators to implement responsible gambling measures?

U.S. overall: 63%

- MN: 21
- HI, ME, NJ: 17
- (67%, 71%): 4

Percent saying it is important

Number of states

[55%, 59%] 10
(59%, 63%) 20
(63%, 67%) 25
(67%, 71%)

November 2018
If your state was to legalize/has legalized sports betting, how important is it to set aside revenues to treat people who develop gambling problems?

- Very important: U.S. 21%, Minnesota 22%
- Somewhat important: U.S. 32%, Minnesota 32%
- No opinion: U.S. 22%, Minnesota 20%
- Somewhat unimportant: U.S. 14%, Minnesota 16%
- Very unimportant: U.S. 12%, Minnesota 10%

November 2018
If your state was to legalize/has legalized sports betting, how important is it to set aside revenues to treat people who develop gambling problems?

U.S. overall: 52%
If your state was to legalize/has legalized sports betting, how important is it to set aside revenues for public awareness campaigns?

<table>
<thead>
<tr>
<th>Importance</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>No opinion</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Somewhat unimportant</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Very unimportant</td>
<td>11%</td>
<td>10%</td>
</tr>
</tbody>
</table>
If your state was to legalize/has legalized sports betting, how important is it to set aside revenues for public awareness campaigns?

U.S. overall: 56%

AK, CA, UT, WY: 4

MN: 19

[50%, 54%] 17

(54%, 57%)

(57%, 61%)

(61%, 64%): 11

November 2018
Addiction to gambling is a lot like addiction to drugs or alcohol

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Disagree somewhat</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Neutral</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Agree somewhat</td>
<td>38%</td>
<td>35%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>37%</td>
<td>42%</td>
</tr>
</tbody>
</table>
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

Overall agreement: 75%

- 18-24: 63%
- 25-34: 66%
- 35-44: 72%
- 45-54: 76%
- 55-64: 80%
- 65-74: 85%
- 75+: 85%

November 2018
People with a gambling problem are unlikely to recover or get better

<table>
<thead>
<tr>
<th>Strongly disagree</th>
<th>Disagree somewhat</th>
<th>Neutral</th>
<th>Agree somewhat</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>18%</td>
<td>34%</td>
<td>29%</td>
<td>14%</td>
<td>5%</td>
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<tr>
<td>20%</td>
<td>39%</td>
<td>24%</td>
<td>12%</td>
<td>5%</td>
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<td>35%</td>
<td>25%</td>
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<td>5%</td>
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<td>5%</td>
</tr>
<tr>
<td>0%</td>
<td>30%</td>
<td>20%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

U.S. vs. Minnesota

November 2018
Services to treat compulsive gambling are available in my community

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Disagree somewhat</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Neutral</td>
<td>47%</td>
<td>42%</td>
</tr>
<tr>
<td>Agree somewhat</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>13%</td>
<td>16%</td>
</tr>
</tbody>
</table>

November 2018
Services to treat compulsive gambling are available in my community

U.S. overall: 38%

- AK, AL, GA, HI, NV
- NH, UT, VT, WY: 8
- MN: 21
- DE, IA, LA, ND, SD, OR: 6
- NV: 1
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.

U.S. overall: 38%

Number of states

Percent agreeing

[29%, 34%] (34%, 40%) (40%, 45%) (45%, 50%) (50%, 56%)
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.

U.S. overall: 19%

- MN: 11
- FL, NY, TX: 7
- AZ, IL: 3
% agreeing that if someone in their family had a gambling problem, they would advise them not to discuss it outside the family, by age

Overall agreement: 19%

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percent Agreeing</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>31%</td>
</tr>
<tr>
<td>25-34</td>
<td>21%</td>
</tr>
<tr>
<td>35-44</td>
<td>15%</td>
</tr>
<tr>
<td>45-54</td>
<td>8%</td>
</tr>
<tr>
<td>55-64</td>
<td>15%</td>
</tr>
<tr>
<td>65+</td>
<td>4%</td>
</tr>
</tbody>
</table>

November 2018
People with a gambling problem are below average in intelligence

![Survey Results Graph]

<table>
<thead>
<tr>
<th>Strongly disagree</th>
<th>Disagree somewhat</th>
<th>Neutral</th>
<th>Agree somewhat</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>Minnesota</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>41%</td>
<td>42%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28%</td>
<td>31%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22%</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6%</td>
<td>4%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4%</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

November 2018
People with a gambling problem are below average in intelligence

- U.S. overall: 10%
- MN: 39 (%6, 9%)
- CA, TX: 12 (%9, 12%)
- CA, TX: 2 (%12, 15%)
% agreeing that people with a gambling problem are below average in intelligence, by age

Overall agreement: 10%

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percent Agreeing</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>14%</td>
</tr>
<tr>
<td>25-34</td>
<td>12%</td>
</tr>
<tr>
<td>35-44</td>
<td>6%</td>
</tr>
<tr>
<td>45-54</td>
<td>7%</td>
</tr>
<tr>
<td>55-64</td>
<td>1%</td>
</tr>
<tr>
<td>65+</td>
<td>5%</td>
</tr>
</tbody>
</table>

November 2018
People with a gambling problem are to blame for their problems

<table>
<thead>
<tr>
<th>Strongly disagree</th>
<th>Disagree somewhat</th>
<th>Neutral</th>
<th>Agree somewhat</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
<td>15%</td>
<td>27%</td>
<td>34%</td>
<td>17%</td>
</tr>
<tr>
<td>7%</td>
<td>18%</td>
<td>26%</td>
<td>37%</td>
<td>12%</td>
</tr>
</tbody>
</table>

U.S. vs Minnesota

November 2018
People with a gambling problem are to blame for their problems.

U.S. overall: 51%

- MN: 23
- DC, MA, RI, VT: 4
- 41%, 45%: 12
- 49%, 53%: 12
- 53%, 57%: 12

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

Overall agreement: 51%

- 18-24: 45%
- 25-34: 43%
- 35-44: 48%
- 45-54: 47%
- 55-64: 49%
- 65-74: 60%

November 2018
The gambling industry should do more to help people with a gambling addiction

![Bar chart showing responses to the statement. The chart compares U.S. and Minnesota responses.]

- **Strongly disagree**: U.S. 4%, Minnesota 2%
- **Disagree somewhat**: U.S. 6%, Minnesota 5%
- **Neutral**: U.S. 27%, Minnesota 25%
- **Agree somewhat**: U.S. 36%, Minnesota 41%
- **Strongly agree**: U.S. 27%, Minnesota 27%

November 2018
The gambling industry should do more to help people with a gambling addiction.

U.S. overall: 63%

- [58%, 62%]: 13 states
- (62%, 66%): 14 states
- (66%, 70%): 24 states, MN
The government should do more to help people with a gambling addiction

<table>
<thead>
<tr>
<th>Opinion Level</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Disagree somewhat</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Neutral</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Agree somewhat</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>16%</td>
<td>14%</td>
</tr>
</tbody>
</table>

November 2018
The government should do more to help people with a gambling addiction.

U.S. overall: 43%

- AK, ID, OK, UT: 4
- MN: 18
- DC, FL, NY, RI: 4
- (34%, 39%): 18
- (39%, 43%): 18
- (43%, 48%): 7
- (48%, 53%): 18
- (53%, 58%): 4
Gambling is immoral

<table>
<thead>
<tr>
<th>Strongly disagree</th>
<th>Disagree somewhat</th>
<th>Neutral</th>
<th>Agree somewhat</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>31%</td>
<td>26%</td>
<td>30%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>32%</td>
<td>27%</td>
<td>29%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>U.S.</td>
<td>Minnesota</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

November 2018
% agreeing that gambling is immoral, by age

Overall agreement 13%
Gambling is immoral.

- **U.S. overall**: 14%
- **MN**: 26
  - [9%, 13%]: 21
  - (13%, 16%): MN
  - (16%, 20%): AR
  - (20%, 23%): AL, MS, UT

November 2018
Gambling is against my religion

NGAGE Survey - Minnesota

<table>
<thead>
<tr>
<th>Strongly disagree</th>
<th>Disagree somewhat</th>
<th>Neutral</th>
<th>Agree somewhat</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td>18%</td>
<td>25%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>42%</td>
<td>21%</td>
<td>24%</td>
<td>8%</td>
<td>5%</td>
</tr>
</tbody>
</table>

U.S. | Minnesota

November 2018
Gambling is against my religion.

U.S. overall: 18%
How likely is this to cause a gambling problem?

- Having an addictive personality: 44% somewhat likely, 41% very likely, 85% total likely
- Being around people who gamble a lot: 51% somewhat likely, 33% very likely, 84% total likely
- Not having enough willpower: 50% somewhat likely, 29% very likely, 79% total likely
- Winning a lot of money: 50% somewhat likely, 28% very likely, 78% total likely
- Having parent/family member who gambles: 53% somewhat likely, 23% very likely, 76% total likely
- Seeing a lot of ads: 44% somewhat likely, 12% very likely, 56% total likely
- Traumatic event: 43% somewhat likely, 12% very likely, 55% total likely
- Moral weakness: 39% somewhat likely, 13% very likely, 52% total likely
- Genetics or medical condition: 34% somewhat likely, 9% very likely, 43% total likely
How likely is this to cause a gambling problem?

- Having an addictive personality: 88% (Minnesota), 83% (U.S.)
- Being around people who gamble a lot: 84% (Minnesota), 83% (U.S.)
- Not having enough willpower: 79% (Minnesota), 77% (U.S.)
- Winning a lot of money: 80% (Minnesota), 78% (U.S.)
- Having parent/family member who gambles: 81% (Minnesota), 76% (U.S.)
- Seeing a lot of ads: 56% (Minnesota), 53% (U.S.)
- Traumatic event: 59% (Minnesota), 55% (U.S.)
- Moral weakness: 51% (Minnesota), 50% (U.S.)
- Genetics or medical condition: 50% (Minnesota), 50% (U.S.)

November 2018
% agreeing that moral weakness is likely to cause a gambling problem

- DC, MA, NH, OR, RI: 5
- MN: 10
- U.S. overall: 52%
- HI, MS, OK: 3
% agreeing that an addictive personality is likely to cause a gambling problem

U.S. overall: 85%

- DC, MS, NY, TX: 4
- MN: 17

[79%, 83%] [83%, 86%] (86%, 90%)

Percent agreeing
% 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

U.S. overall: 80%

MN

ID, ND, UT, VT

[75%, 79%]

(79%, 83%)

(83%, 87%)

Number of states

Percent agreeing

13

34

4

November 2018
% agreeing that having a parent or family member who gambles is likely to cause a gambling problem

U.S. overall: 75%

[71%, 75%] 11 states
(75%, 79%) 20 states
(79%, 83%) 20 states

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

U.S. overall: 55%

Percent agreeing

- [52%, 55%]: 12 states
- (55%, 58%): 27 states
- (58%, 61%): 12 states

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

U.S. overall: 43%

MN

[38%, 42%] 5

(42%, 47%) 27

(47%, 51%) 19
% agreeing that seeing a lot of ads promoting gambling is likely to cause a gambling problem

U.S. overall: 56%

<table>
<thead>
<tr>
<th>Percent agreeing</th>
<th>Number of states</th>
</tr>
</thead>
<tbody>
<tr>
<td>[50%, 54%]</td>
<td>7</td>
</tr>
<tr>
<td>(54%, 58%)</td>
<td>25</td>
</tr>
<tr>
<td>(58%, 62%)</td>
<td>14</td>
</tr>
<tr>
<td>(62%, 66%)</td>
<td>5</td>
</tr>
</tbody>
</table>

CA, NY, NC, RI, WV
% agreeing that winning a lot of money is likely to cause a gambling problem

U.S. overall: 77%

- NH: 68% - 72% (1 state)
- MN: 75% - 79% (23 states)
- Overall: 79% - 82% (16 states)
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 ¼ 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
D.I.Y. (Deniers, invulnerable, young)

• 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.

- D.I.Y. 27%
- Responsible Gamblers 25%
- Moralists 26%
- It's Your Fault 22%

Minnesota

- D.I.Y. 24%
- Responsible Gamblers 33%
- Moralists 24%
- It's Your Fault 19%