

2024

CHANNEL ISLANDS LOTTERY

RESEARCH REPORT



June 2024



Island Global Research

CONTENTS

This report presents findings from research with residents in the Bailiwick of Guernsey and Jersey undertaken March - June 2024.

Key Findings	3
Phase 1 Survey: Background and Approach	7
Phase 1 Survey: Profile of Respondents	8
Phase 2 Focus Groups: Background and Approach	9
Phase 2 Focus Groups: Profile of Respondents	10
Segmentation of respondents by gambling status	11
Profile of respondents by gambling status	20
Attitudes towards gambling	24
Future of the Channel Islands Lottery	29
Focus group views on scratch cards and a monthly lottery	34
The Christmas Lottery	47
Understanding of the Channel Islands Lottery	50
Appendices A-C	53

About Island Global Research

Island Global Research is a market research and consultancy company with experience in both quantitative and qualitative research methods. We regularly conduct market research for clients in the Crown Dependencies.

Island Global Research is part of the BWCI Group, and a member of Abelica Global.

KEY FINDINGS (1)

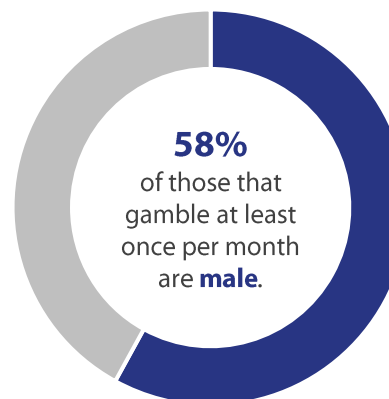
This survey on gambling was completed by 2354 Channel Island residents, including 1090 in Guernsey and 1264 in Jersey. Data was collected 28 February to 13 March 2024.

This report focuses on the results for segments of interest. This includes:

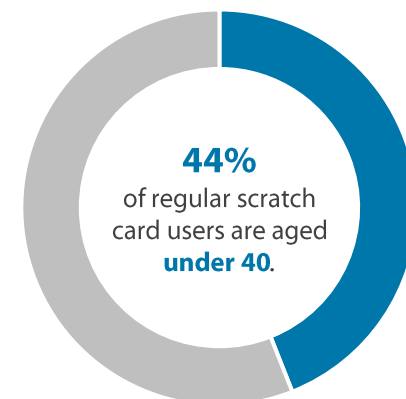
- Regular gamblers – defined as gambling once a month or more in person, online or both
- Regular scratch card users – buy scratch cards at least once a month or more
- Problem & moderate risk gamblers – defined according to the screening tool (see Appendix C).

Demographic profile of gamblers

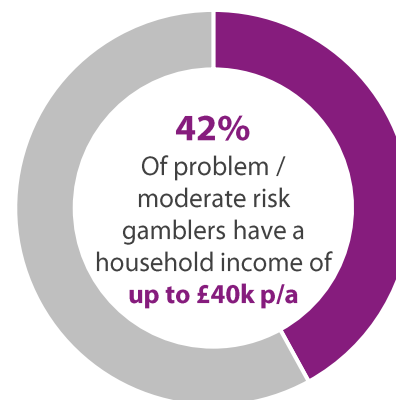
- Regular gamblers come from a range of demographic backgrounds but are more likely to be male (58%), particularly those who participate in online gambling (76%) and/or are a problem/moderate-risk gambler (64%).
- Scratch card users along with online gamblers and those displaying risky behaviours are more likely to be aged under 40 (44%, 45% & 57%) and have children in the household (35% & 37%).
- Problem or moderate-risk gamblers are more likely than other gamblers to have a lower income of up to £40k p/a (42% vs 22-32% of other groups).
- Regular online gamblers on the other hand are more likely to have higher incomes (44% earn >£80K vs 23-40% of other groups).
- 15% of regular scratch-card users believe they definitely or maybe have a gambling problem, as do 17% of those who regularly gamble online. These figures are consistent with the percentage categorised as displaying higher risk behaviours.



This rises to 76% of those that regularly gamble online and 64% of those classified as problem/moderate-risk gamblers



And 35% have children in the household



KEY FINDINGS (2)

Attitudes towards gambling

This section focuses on the views of regular gamblers vs those who gamble infrequently (less than once per month) and not at all. Attitudes towards gambling are contradictory. Although many recognise the potential dangers (e.g. towards family life) and believe that there are too many opportunities for gambling, a large proportion still believe that most people gamble sensibly and have the right to gamble whenever they want. This leads to little appetite for banning it completely. There is some appetite for more safeguards to be put in place by the Governments, particularly amongst those who are not regular gamblers.

Impact

- 48% of regular gamblers, 44% of infrequent gamblers and 40% of those who never gamble themselves believe most people gamble sensibly.
- 22% of regular gamblers, 14% of infrequent gamblers and 10% of those who never gamble themselves believe that gambling is good for society on balance.
- 33% of regular gamblers, 48% of infrequent gamblers and 59% of those who never gamble themselves agree gambling is dangerous for family life.

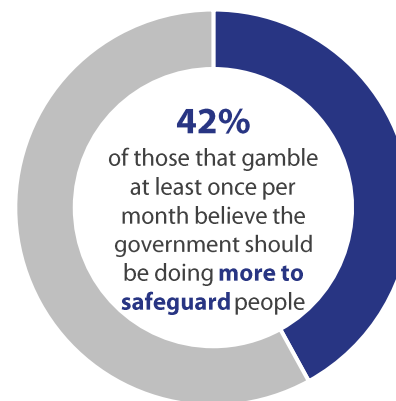
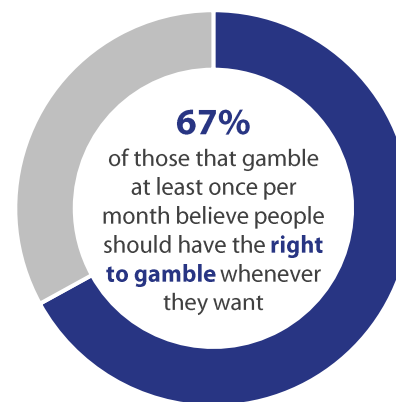
Opportunity

- 47% of regular gamblers, 61% of infrequent gamblers and 70% of those who never gamble themselves believe there are too many opportunities for gambling,
- 5% of regular gamblers, 10% of infrequent gamblers and 27% of those who never gamble believe it would be better if gambling was banned.
- 67% of regular gamblers, 49% of infrequent gamblers and 45% of those who never gamble believe people should have the right to gamble whenever they want.

Safeguarding: The role of government

- 42% of regular gamblers, 51% of infrequent gamblers and 61% of those who never gamble believe the government should be doing more to safeguard people who are problem gamblers or at risk of problem gambling.

VIEWS OF REGULAR GAMBLERS



KEY FINDINGS (3)

Future of the Channel Islands Lottery

This section focuses on the views of regular scratch card users as they are the main market and will be most impacted by the suggested changes. On balance, those who buy scratch cards at least once per month believe they should continue to be offered and do not support restrictions for sale. Views are split with regards to the suggested modifications, but there is support for having a monthly lottery draw.

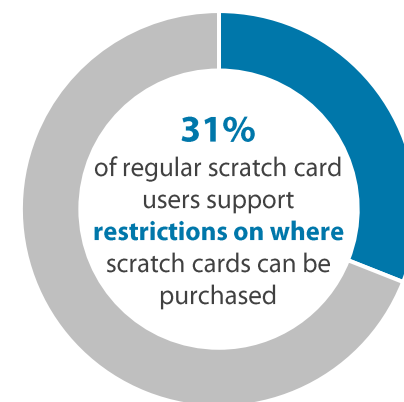
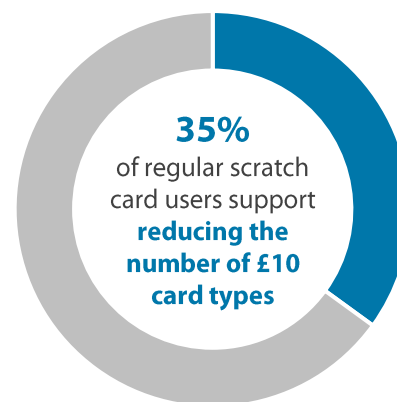
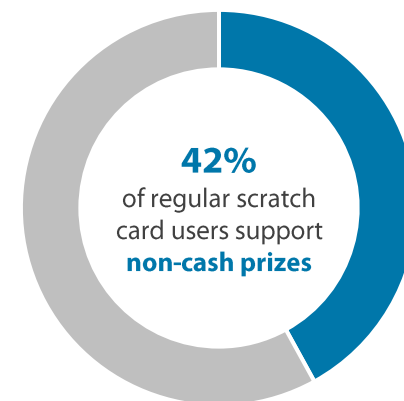
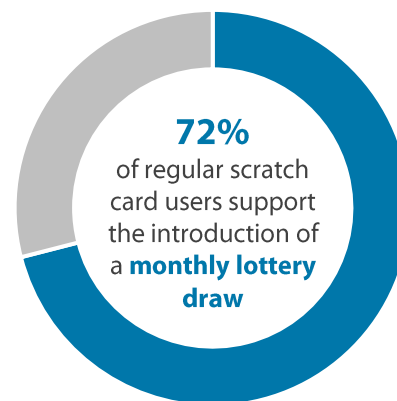
Of regular scratch card users:

- 55% believe instant win scratch cards should continue to be offered as now, and further 30% do with modifications (85% total)
- 72% support or strongly support the introduction of a monthly lottery draw
- 15% would support having to register to buy scratch cards
- 19% would support a maximum monthly spend on scratch cards
- 31% would support restrictions on where scratch cards can be purchased
- 42% would support non-cash prizes vs 37% in opposition
- 35% would support reducing the number of types of £10 scratch card vs 29% in opposition
- 32% would support transitioning to online games vs 38% in opposition

Those who gamble infrequently or not at all are more concerned with safeguarding. They are more likely to support actions which discourage gambling and vice versa. For example, around half of those who never gamble:

- Oppose the introduction of online games
- Oppose the introduction of non-cash prizes
- Support restrictions to where scratch cards are sold
- Support a maximum spend on scratch cards (even if there remains low appetite for requiring registration)

VIEWS OF REGULAR SCRATCH CARD USERS



KEY FINDINGS (4)

Focus Group Key Messages

It was explained to participants that CI Lottery are aiming to broaden the appeal of scratchcards, so there is a broader range of people playing less frequently and implement safeguards to mitigate against problem gambling. Participants were asked for their views on potential actions to achieve these goals.

It was also explained to participants that CI Lottery are considering introducing a regular lottery for Channel Island residents. Potentially this would be on a monthly basis, and they wanted participants to provide input into the design of it.

Scratch cards

- There is wide skepticism that any actions can truly tackle problem gambling as it is thought that people with such addictions will always find a way to gamble e.g. online. This to some extent explains the split views on ideas such as alternative prizes.
- However, being seen to do nothing except widen their appeal could be contentious as there are groups of the population who are strongly against scratch cards due to the highly addictive nature of this form of gambling.
- Even with changes to scratch cards there is limited appeal amongst those who don't currently use them. Broadening their appeal would be highly challenging. This also helps to explain the split views on scratch cards in the survey.

Monthly Lottery

- Despite initial interest, the vast majority of people say they would probably participate on an ad-hoc basis only and scratch card users tended to say it would not replace scratch cards for them.
- Further consideration would need to be given as to whether there would be enough participation to build an appealingly large prize pot and fund charities to a meaningful amount via a regular lottery. Two or three times a year may be more viable than monthly, but reflecting on the experience of the Christmas Lottery in the last few years some participants believe that even this could be difficult to achieve.
- In addition, Jersey respondents strongly believe that the idea only holds real appeal if there is a guaranteed Jersey winner (i.e. prize for each island) and if local Jersey charities will definitely benefit.

PHASE 1 SURVEY: BACKGROUND AND APPROACH

Island Global Research conducted a survey on behalf of the Channel Islands Lottery, in February and March 2024, the feedback of which will help inform decisions about the lottery's future governance and operations. It was conducted in the Bailiwick of Guernsey and Jersey to understand islanders' gambling behaviour, attitudes towards gambling and views on potential changes to scratch cards.

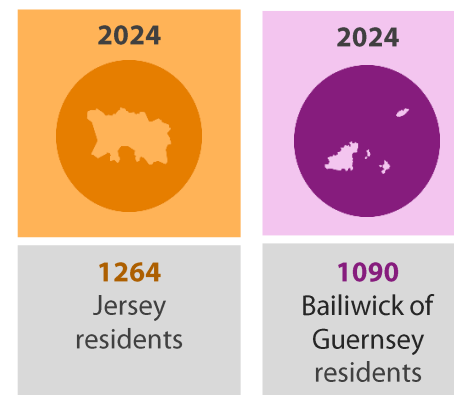
The survey was conducted online and comprised of up to 43 questions. It was open to respondents aged 18+. Responses were collected between 28 February and 13 March. We contacted our market research panel, inviting them to participate in the survey, we also promoted the survey using social media. The survey was also shared via a States of Guernsey press release and on social media by the Government of Jersey. The option of people being able to conduct the survey over the telephone was also given.

The survey had a tremendous response and was completed by 2354 respondents in total - 1264 residents in Jersey and 1090 from the Bailiwick of Guernsey. This represents 2% of the eligible population as there are just over 52,500 adults (aged 18+) resident in Guernsey and just over 84,000 in Jersey.*

We are aware that this survey may have appealed more to those that gamble on a regular or occasional basis. Due to this potential response bias this report does not report results at a population level or try to estimate prevalence of gambling amongst the total population, but instead focuses on the views of several distinct sub-groups as set out on page 9.

Jersey & Bailiwick of Guernsey

2354 total respondents



PHASE 1 SURVEY: PROFILE OF RESPONDENTS

The profile of people who completed the survey was compared to the latest available data on the population of Jersey and Bailiwick of Guernsey.

Survey responses were weighted in proportion to the age and gender profile of the adult population on both islands. All figures, tables and text presented in this report refer to weighted responses, unless otherwise specified.

Please refer to Appendix A for the demographic profile of the sample by island.

About survey weights

Survey weights correct for age and gender differences between the sample and the population. Thus, they compensate for different patterns of non-response from different sub-groups of the population, such that survey results can be generalised from the sample back to the population from which they are drawn.

The sample is highly representative of the adult population aged 25+ by age and gender. Fewer young people completed the survey and more females participated in the survey than males (see right, and Appendix A). However, the survey was completed by a wide range of the people and the differences are relatively small. The largest weights are for males aged 16-24 from Jersey and they were capped at 3.0.

Results rounded to the nearest integer

All calculations were independently rounded so totals published in tables and graphs may not necessarily sum 100%.

The table shows the age and gender profile of the adult population living in the Channel Islands, and the profile of the sample who completed the survey. It also shows the profile of the sample after weights have been applied.

		Channel Islands Population	Survey	
		%	% of sample	% after survey weights
Age group				
	18-24	9%	2%	6%
	25-29	7%	4%	7%
	30-34	8%	6%	8%
	35-39	8%	7%	9%
	40-44	8%	8%	9%
	45-49	8%	9%	9%
	50-54	10%	13%	10%
	55-59	10%	13%	10%
	60-64	8%	13%	8%
	65-69	6%	10%	7%
	70-74	6%	8%	6%
	75-79	5%	5%	5%
	80+	7%	2%	5%
	Prefer not to say	-	<1%	<1%
Gender				
	Female	51%	56%	50%
	Male	49%	42%	48%
	Prefer to self-describe	*	<1%	<1%
	Prefer not to say	-	1%	1%

* Gender is not available for the population, and biological sex has been used as a proxy for gender

PHASE 2 FOCUS GROUPS: BACKGROUND AND APPROACH

Island Global Research then conducted focus groups on behalf of the Channel Islands Lottery, in May and June 2024. The main research objectives were to further explore participant views on:

1. Changes to the existing scratch card game

This was asked in the context of the Channel Islands Lottery aiming to A. Broaden the appeal of scratchcards, so there is a have a broader range of people playing less frequently; and B. Implement safeguards to mitigate against problem gambling.

2. The design of a monthly lottery

The main aspects to test were:

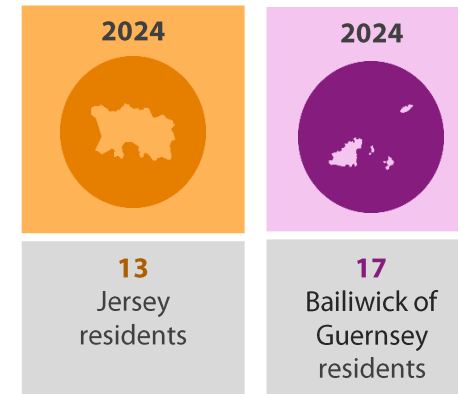
- Appetite for a subscription model
- The ability to select which charity you want to support through the lottery
- Participation via an app / web platform
- The impact of a monthly lottery on the Christmas Lottery

Four 60 minute focus groups were conducted in person – two in Jersey and two in Guernsey – between 20 May and 4 June 2024.

We contacted those who had volunteered to participate in further research at the end of the online survey. 40 people aged 18+ were invited to participate across the two islands based on selection criteria described overleaf. 30 of these attended on the day (13 from Jersey and 17 from Guernsey).

Jersey & Bailiwick of Guernsey

30 participants



PHASE 2 FOCUS GROUPS: PROFILE OF PARTICIPANTS

The table shows the profile of participants across the Channel Islands.

A range of types of people took part:

- There was a slight focus on scratch card users, to ensure enough views were sought from those who would be directly impacted by any changes to scratch cards. This causes a very slight emphasis on under 40s and males, reflecting the demographic profile of regular gamblers.
- However, there was also significant participation from those who don't gamble regularly, ensuring that a robust set of views were sought from those who may be interested in either scratch cards or a monthly lottery despite not currently participating in such activities on a regular basis.

Total number of people:		30
Island	Guernsey	17
	Jersey	13
Scratch card user	Yes	11
	No	19
Regular Gambler	Yes	18
	No	12
Annual Household Income	Up to £40,000	9
	£40,001-80,000	11
	£Over 80,000	7
	Prefer not to answer	3
Age Group	18-39	6
	40-64	18
	65+	6
Gender	Male	16
	Female	13
	Prefer to self-describe	1

SEGMENTATION OF RESPONDENTS BY GAMBLING STATUS



Focusing on regular gamblers (including regular scratch card users) vs those who gamble less often, and problem / moderate-risk gamblers.

SEGMENTATION BY GAMBLING STATUS

We are aware that this survey may have appealed more to those that gamble on a regular or occasional basis. Due to this potential response bias this report does not report results at a population level or try to estimate prevalence of gambling amongst the total population, but instead focuses on the views of several distinct sub-groups. These sub-groups have been defined based on reported gambling behaviour, as set out below, alongside the sample size of each group.

	Definition		Maximum Sample Size
	Survey Question	Answer	
Regularly Gamble	<ul style="list-style-type: none"> How frequently do you participate in lotteries? How frequently do you purchase scratch cards? How frequently do you participate in betting in person (e.g. at a betting shop, in the pub, at an event)? How frequently do you participate in online betting (e.g. on sport, reality TV, politics)? How frequently do you participate in online gambling games, such as bingo, casino or poker where you pay to play and could win a prize? How frequently do you play on slot machines (i.e. gambling and fruit machines)? 	To one or more of these questions: <ul style="list-style-type: none"> Most days (4 or more times a week) 2 or 3 times a week Once a week 2 or 3 times a month Once a month 	
All			883
In person			807
Online			241
Using Scratch-cards		In-person category based on responses to lotteries, scratch cards, slot machines and in person gambling. Online category based on responses to online betting and online gambling games. Using scratch cards based on responses to how frequently do you purchase scratch cards.	336
Infrequent Gambler		To one or more of these questions: <ul style="list-style-type: none"> Less than once a month 	1471
Never Gamble	<ul style="list-style-type: none"> Have you participated in any of the following types of lotteries, games or forms of gambling in the past 12 months? Please select all that apply. 	<ul style="list-style-type: none"> None of the above 	146
Problem or moderate-risk gambler	<ul style="list-style-type: none"> Have you bet more than you could really afford to lose? Have people criticised your betting or told you that you had a gambling problem regardless of whether or not you thought it was true? Have you felt guilty about the way you gamble or what happens when you gamble? 	Scored and categorised as per PGSI mini screen. See Appendix C.	86 <i>(small base)</i>

REGULAR GAMBLERS

PARTICIPATION IN GAMBLING ACTIVITIES AND SPEND SUMMARY

Those who gamble once a month or more are considered 'regular' gamblers in the context of this report. They may regularly gamble in person, online or both.

This page illustrates what types of gambling activities this group engages in and whether they are spending £50 or more on each activity in an average month. For example:

- 90% of regular gamblers do so in person at least once per month, including 79% who regularly participate in lotteries. A further 20% of regular gamblers occasionally participate in lotteries (making 99% in the last 12 months).
- 11% of regular gamblers spend £50 or more on lotteries in an average month.
- 32% of regular gamblers do so online at least once per month, including 26% who regularly participate in online betting. A further 7% of this group occasionally participate in online betting (making 33%).
- 11% of regular gamblers spend £50 or more on online betting in an average month.

	Participate in activity...		Spend £50+ on activity in an average month
	In the last 12 months	At least once a month	
Gambling activities asked about:			34%
In person	100%	90%	25%
Lotteries*	99%	79%	11%
Scratch Cards	56%	40%	8%
Betting in person	14%	4%	1%
Slot machines	8%	3%	1%
Online	40%	32%	16%
Online Betting	33%	26%	11%
Online gambling games	19%	12%	5%



REGULAR GAMBLERS

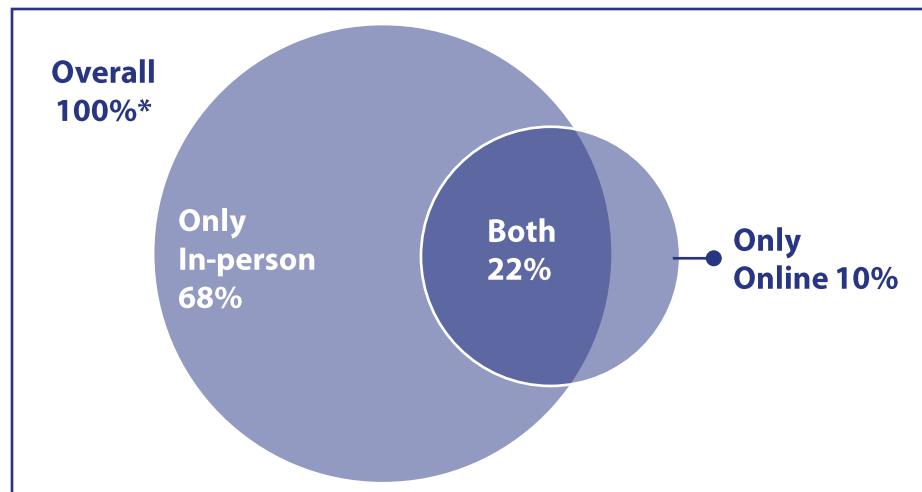
THE OVERLAP BETWEEN IN-PERSON AND ONLINE GAMBLING ACTIVITIES

The majority (90%) of those that gamble once a month or more are doing it in-person, and just under a third (32%) are doing so online.

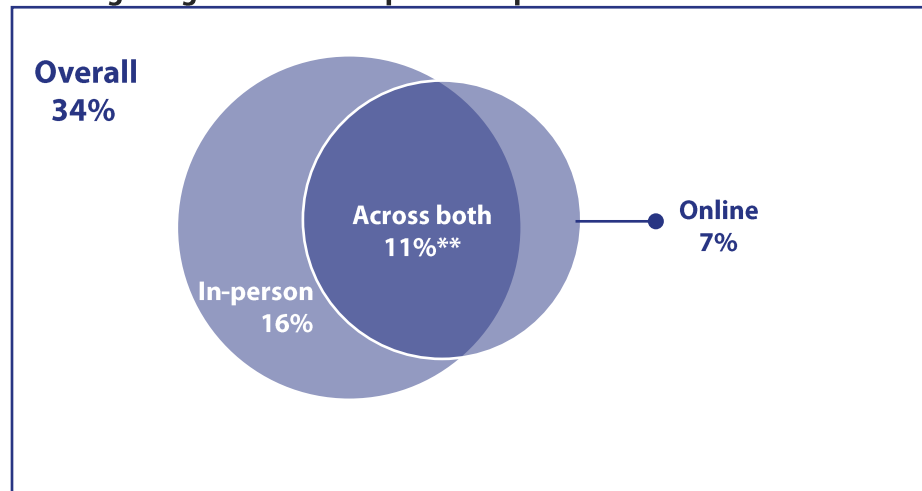
- This includes 22% who are regularly gambling online as well as in-person.
- 10% of regular gamblers do so only online.
- Just over a third of those that gamble regularly spend £50+ in an average month on the gambling activities asked about.
- This includes around a quarter who spend this in-person (16% + 9%** = 25%) and 16% who spend this online (7% + 9%** = 16%).
- 9% of regular gamblers spend £50+ per month in-person AND £50+ per month online.
- We also note (not shown) that those who regularly gamble in-person only are around three times less likely to spend £50+ in an average month than those who regularly gamble online (19% vs 64%).

Online gambling is conducted by a minority of regular gamblers, however, this group is much more likely to spend larger amounts on their gambling habit.

% of regular gamblers* who gamble at least once per month...



% of regular gamblers who spend £50 per month** on activities...



*This report defines a regular gambler as a person who gambles once per month or more frequently in any form.

**includes 9% who spend £50+ in-person AND £50+ online & 2% who spend this when you add up spending across the two categories

REGULAR SCRATCH CARD USERS

PARTICIPATION IN GAMBLING ACTIVITIES AND SPEND SUMMARY

Elements of this report focus on the views of regular scratch card users. These are respondents who buy scratch cards once per month or more frequently.

This page illustrates what other types of gambling activities this group engages in and whether they are spending £50 or more on each activity in an average month. For example:

- 1 in 5 (20%) of regular scratch card users spend £50 or more on scratch cards in an average month.
- 76% of regular scratch card users also participate in lotteries at least once per month. 17% spend £50 or more on lotteries in an average month.
- Online betting is conducted by 25% of regular scratch card users. 14% spend £50 or more on this in an average month.
- Slot machines and online gambling games are regularly participated in to a lesser extent.

Three-quarters of those who use scratch cards at least once per month also partake in lotteries regularly, while betting online and betting in-person are both regularly done by a quarter of this group.

	Participate in activity...		Spend £50+ on activity in an average month
	In the last 12 months	At least once a month	
Gambling activities asked about:			51%
In person	100%	100%	44%
Lotteries*	99%	76%	17%
Scratch Cards	100%	100%	20%
Betting in person	16%	6%	3%
Slot machines	13%	7%	3%
Online	42%	31%	19%
Online Betting	34%	25%	14%
Online gambling games	25%	16%	7%



REGULAR SCRATCH CARD USERS

THE OVERLAP BETWEEN GAMBLING ACTIVITIES PARTICIPATED IN BY THIS GROUP

76% of regular scratch card users also participate in lotteries at least once per month; 25% participate in online betting; and 16% participate in online gambling games.

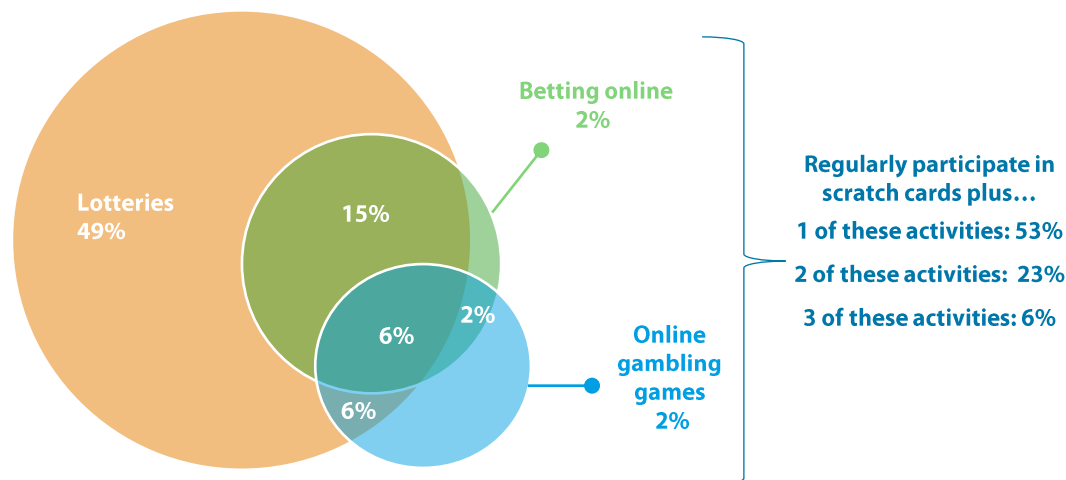
This includes:

- 49% who do lotteries but not online betting or gambling games.
- 15% who also regularly do lotteries and betting online but not online gambling games.
- 6% who also regularly do lotteries and online betting and online gambling games.
- 6% who also regularly do lotteries and online gambling games but not online betting.

As well as:

- 2% who do not participate in lotteries regularly but do regularly participate in online betting as well as online gambling games.
- 2% who do not participate in lotteries or betting* regularly but do regularly participate in online gambling games.
- 2% who do not participate in lotteries or online gambling games regularly but do regularly participate in online betting*.

% of regular scratch card users* who also participate in the following at least once per month...



For just under half of regular scratch card users (49%), lotteries are the only other gambling activity they participate in regularly. 2% say online gambling games are the only other activity they do regularly.

29% of regular scratch card users undertake multiple of these activities, including 6% who do all three at least once per month.

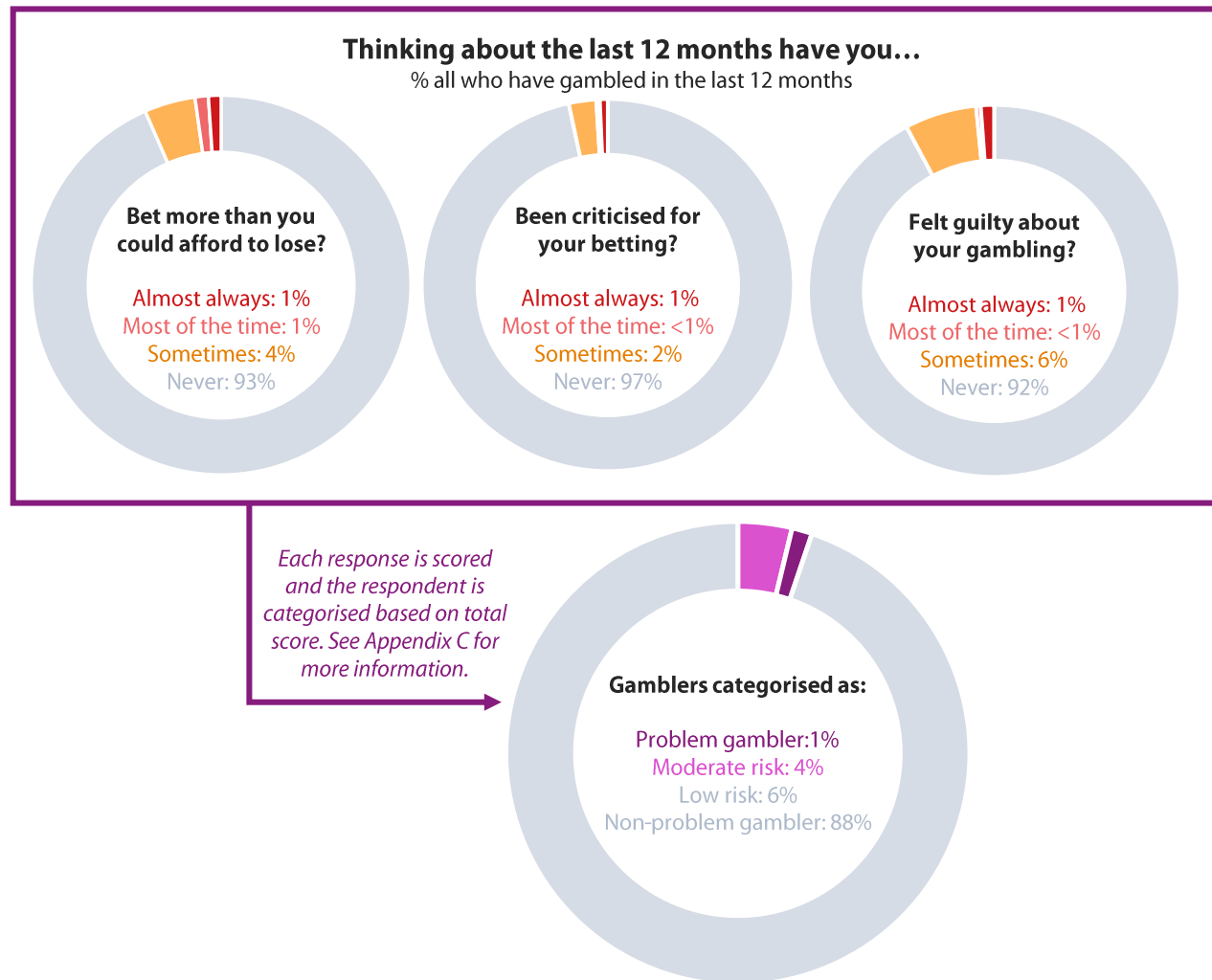
PROBLEM OR MODERATE-RISK GAMBLERS

Identifying risky gambling behaviour amongst all gamblers

This report also highlights the views of those defined as 'problem' or 'moderate-risk' gamblers.

Respondents who have gambled to any extent in the last 12 months have been categorised based on their responses to three questions. See Appendix C for more information.

1% of everyone who reported gambling in the last 12 months are considered problem gamblers according to this screening tool. A further 4% are moderate-risk gamblers. In total, this means 5% of gamblers are considered to be at higher-risk from their gambling behaviour.



PROBLEM OR MODERATE-RISK GAMBLERS

PARTICIPATION IN GAMBLING ACTIVITIES AND SPEND SUMMARY

This page illustrates what types of gambling activities problem and moderate-risk gamblers engage in, and whether they are spending £50 or more on each activity in an average month.

65% of this group gamble in person once a month or more, while 43% also gamble online once a month or more (do both).

In relation to scratch-card use:

- Around half (51%) of problem or moderate-risk gamblers buy scratch cards at least once a month.
- A further 16% have bought them in the last 12 months but do not do so regularly (67% total).
- Around a quarter (24%) of problem or moderate-risk gamblers spend £50 or more on scratch cards in an average month.

The results for lottery participation are similar, except all of this group have participated in a lottery at some point in the last year.

Just over a third (36%) regularly bet online with 1 in 5 (20%) of problem or moderate-risk gamblers spending £50 or more on online betting per month.

Three-quarters of problem and moderate-risk gamblers gamble at least once per month and 41% spend £50 or more in an average month. Around half regularly participate in lotteries and scratch-cards, while just over a third in online betting.

	Participate in activity...		Spend £50+ on activity in an average month
	In the last 12 months	At least once a month	
Any gambling activity	100%	75%	46%
In person	100%	65%	40%
Lotteries*	100%	50%	25%
Scratch Cards	67%	51%	24%
Betting in person	25%	11%	6%
Slot machines	28%	16%	9%
Online	55%	43%	31%
Online Betting	45%	36%	20%
Online gambling games	36%	27%	15%

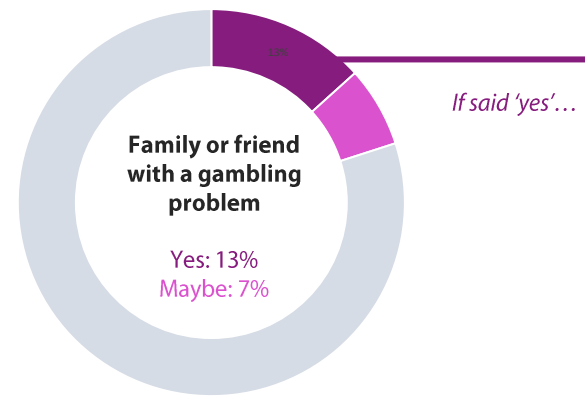
PROBLEM OR MODERATE-RISK GAMBLERS

THE BEHAVIOUR OF FRIENDS AND FAMILY

We also note that 13% of all respondents said that they felt a family member or close friend living in the islands might be at risk of gambling addiction or have a problem with gambling. A further 7% said 'maybe' they did.

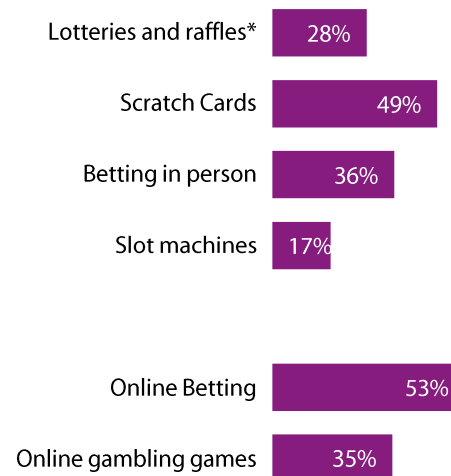
Scratch cards and online betting are considered the most common problem activities by friends and family, followed by in person betting and online gambling games.

No further questions were asked about their friends and family, and they are not included in the 'problem or moderate-risk gamblers' group within this report.



Which of the following forms of gambling do they regularly participate in?

% of those that said 'yes'



PROFILE OF RESPONDENTS BY GAMBLING STATUS

Focusing on different types of regular gamblers and problem / moderate-risk gamblers vs those who gamble infrequently or not at all.



DEMOGRAPHIC PROFILE

BY SEGMENT

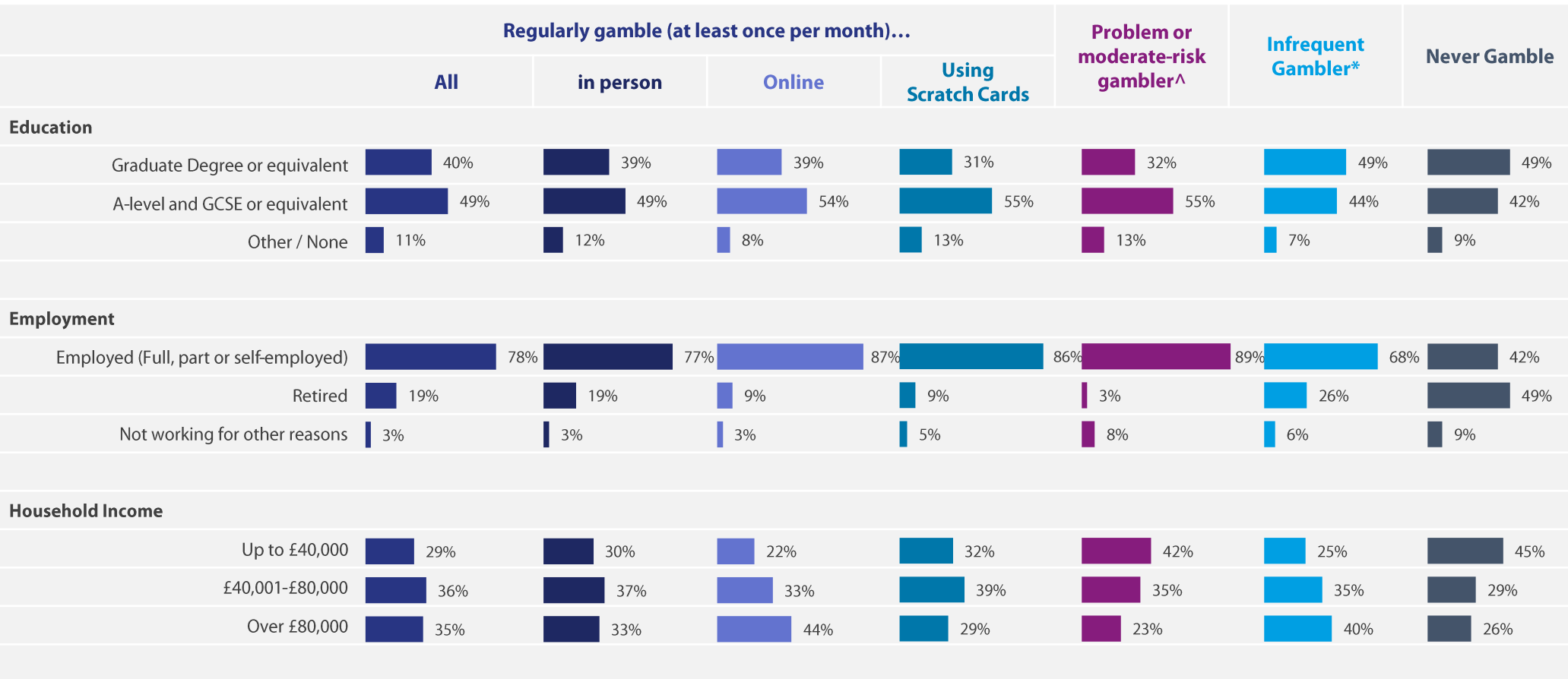
The results below show regular gamblers come from a range of demographic backgrounds but are more likely to be male (58%), particularly those who participate in online gambling (76%) and/or are a problem/moderate-risk gambler (64%). The later two groups along with scratch card users are also more likely to be aged under 40 (44%, 45% & 57%) and have children in the household (35% & 37%).

Regularly gamble (at least once per month)...					Problem or moderate-risk gambler^	Infrequent Gambler*	Never Gamble
All	in person	Online	Using Scratch Cards				
Age							
18-39	<div><div></div><div>32%</div></div>	<div><div></div><div>31%</div></div>	<div><div></div><div>44%</div></div>	<div><div></div><div>45%</div></div>	<div><div></div><div>57%</div></div>	<div><div></div><div>30%</div></div>	<div><div></div><div>23%</div></div>
40-64	<div><div></div><div>49%</div></div>	<div><div></div><div>50%</div></div>	<div><div></div><div>45%</div></div>	<div><div></div><div>46%</div></div>	<div><div></div><div>38%</div></div>	<div><div></div><div>45%</div></div>	<div><div></div><div>30%</div></div>
65+	<div><div></div><div>19%</div></div>	<div><div></div><div>19%</div></div>	<div><div></div><div>11%</div></div>	<div><div></div><div>9%</div></div>	<div><div></div><div>5%</div></div>	<div><div></div><div>25%</div></div>	<div><div></div><div>47%</div></div>
Gender							
Female	<div><div></div><div>42%</div></div>	<div><div></div><div>44%</div></div>	<div><div></div><div>24%</div></div>	<div><div></div><div>46%</div></div>	<div><div></div><div>36%</div></div>	<div><div></div><div>56%</div></div>	<div><div></div><div>50%</div></div>
Male	<div><div></div><div>58%</div></div>	<div><div></div><div>55%</div></div>	<div><div></div><div>76%</div></div>	<div><div></div><div>53%</div></div>	<div><div></div><div>64%</div></div>	<div><div></div><div>43%</div></div>	<div><div></div><div>50%</div></div>
Prefer to self-describe	<div><div></div><div><1%</div></div>	<div><div></div><div><1%</div></div>	<div><div></div><div><1%</div></div>	<div><div></div><div><1%</div></div>	<div><div></div><div><1%</div></div>	<div><div></div><div><1%</div></div>	<div><div></div><div><1%</div></div>
Household Composition							
Working Age	<div><div></div><div>45%</div></div>	<div><div></div><div>45%</div></div>	<div><div></div><div>46%</div></div>	<div><div></div><div>46%</div></div>	<div><div></div><div>49%</div></div>	<div><div></div><div>41%</div></div>	<div><div></div><div>31%</div></div>
Working Age & Children	<div><div></div><div>28%</div></div>	<div><div></div><div>28%</div></div>	<div><div></div><div>35%</div></div>	<div><div></div><div>35%</div></div>	<div><div></div><div>37%</div></div>	<div><div></div><div>25%</div></div>	<div><div></div><div>14%</div></div>
Pension Age	<div><div></div><div>14%</div></div>	<div><div></div><div>14%</div></div>	<div><div></div><div>7%</div></div>	<div><div></div><div>6%</div></div>	<div><div></div><div>2%</div></div>	<div><div></div><div>20%</div></div>	<div><div></div><div>39%</div></div>
Other	<div><div></div><div>14%</div></div>	<div><div></div><div>13%</div></div>	<div><div></div><div>12%</div></div>	<div><div></div><div>13%</div></div>	<div><div></div><div>12%</div></div>	<div><div></div><div>14%</div></div>	<div><div></div><div>15%</div></div>

DEMOGRAPHIC PROFILE

BY SEGMENT CONT

The results below show that problem or moderate-risk gamblers and regular scratch card users are marginally less likely than other groups to be educated to degree level (31-32% vs 39-49%). Problem or moderate-risk gamblers are more likely than other gamblers to have a lower income of up to £40k p/a (42% vs 22-32%). Regular online gamblers on the other hand are more likely to have higher incomes (44% earn >£80K vs 23-40% of other groups).



DEMOGRAPHIC PROFILE

BY SEGMENT CONT

The results below show problem or moderate-risk gamblers are less likely to say they have good health than other groups. Half of this group show self-awareness of their gambling issues - 30% of this group recognise they have a problem with gambling and further 20% said they 'maybe' do.

15% of regular scratch-card users believe they definitely or maybe have a gambling problem, as do 17% of those who regularly gamble online. These figures are consistent with the percentage categorised as displaying higher risk behaviours.

Regularly gamble (at least once per month)...					Problem or moderate-risk gambler^	Infrequent Gambler*	Never Gamble
All	in person	Online	Using Scratch Cards				
How is your health in general?							
Very Good	<div><div></div></div> 25%	<div><div></div></div> 25%	<div><div></div></div> 28%	<div><div></div></div> 22%	<div><div></div></div> 15%	<div><div></div></div> 28%	<div><div></div></div> 31%
Good	<div><div></div></div> 45%	<div><div></div></div> 44%	<div><div></div></div> 43%	<div><div></div></div> 46%	<div><div></div></div> 42%	<div><div></div></div> 45%	<div><div></div></div> 35%
Fair	<div><div></div></div> 24%	<div><div></div></div> 25%	<div><div></div></div> 24%	<div><div></div></div> 27%	<div><div></div></div> 31%	<div><div></div></div> 21%	<div><div></div></div> 27%
Poor	<div><div></div></div> 5%	<div><div></div></div> 5%	<div><div></div></div> 5%	<div><div></div></div> 4%	<div><div></div></div> 10%	<div><div></div></div> 5%	<div><div></div></div> 4%
Very Poor	<div><div></div></div> 1%	<div><div></div></div> 1%	<div><div></div></div> 1%	<1%	<div><div></div></div> 2%	<div><div></div></div> 1%	<div><div></div></div> 3%
Have you ever felt that you might be at risk of a gambling addiction or have a problem with gambling?							
Yes	<div><div></div></div> 6%	<div><div></div></div> 5%	<div><div></div></div> 9%	<div><div></div></div> 8%	<div><div></div></div> 30%	<div><div></div></div> 3%	<div><div></div></div> 2%
Maybe	<div><div></div></div> 5%	<div><div></div></div> 5%	<div><div></div></div> 8%	<div><div></div></div> 7%	<div><div></div></div> 20%	<div><div></div></div> 1%	<div><div></div></div> 2%
Categorised as a problem or moderate-risk gambler:							
10%	9%	17%	16%	100%	2%	N/A	

ATTITUDES TOWARDS GAMBLING



Attitudes by gambling status

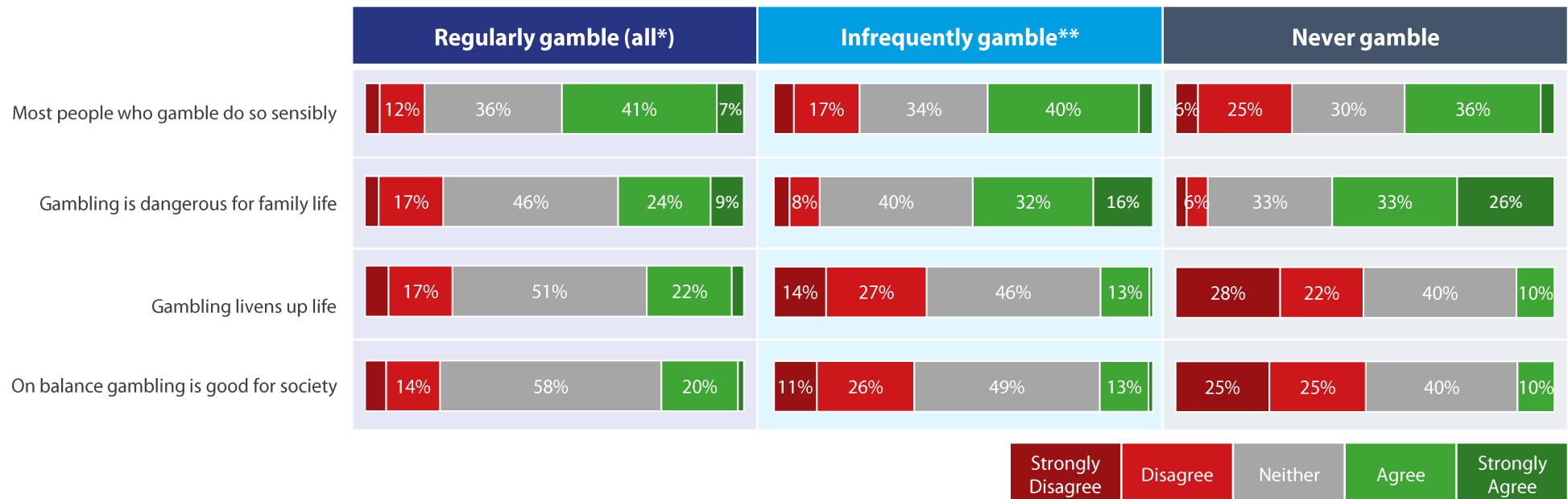
IMPACT

Respondents were asked to what extent they agreed or disagreed with a set of statements about their attitude to how gambling can impact individuals and society.

There are differing strengths of opinion, with those who never gamble feeling more negatively towards the impact it has than those who regularly do, but a similar sense of contradiction between attitudes towards the control of an individual vs the impact on those around them:

- Although a large percentage of people believe most people gamble sensibly (48% of regular gamblers, 44% of infrequent gamblers and 40% of those who never gamble themselves),
- Less than a quarter of each group believe that it is good for society on balance (22%, 14%, 10%), with between one and two thirds of each group going so far as to agree it is dangerous for family life.

To what extent do you agree or disagree with the following statements?



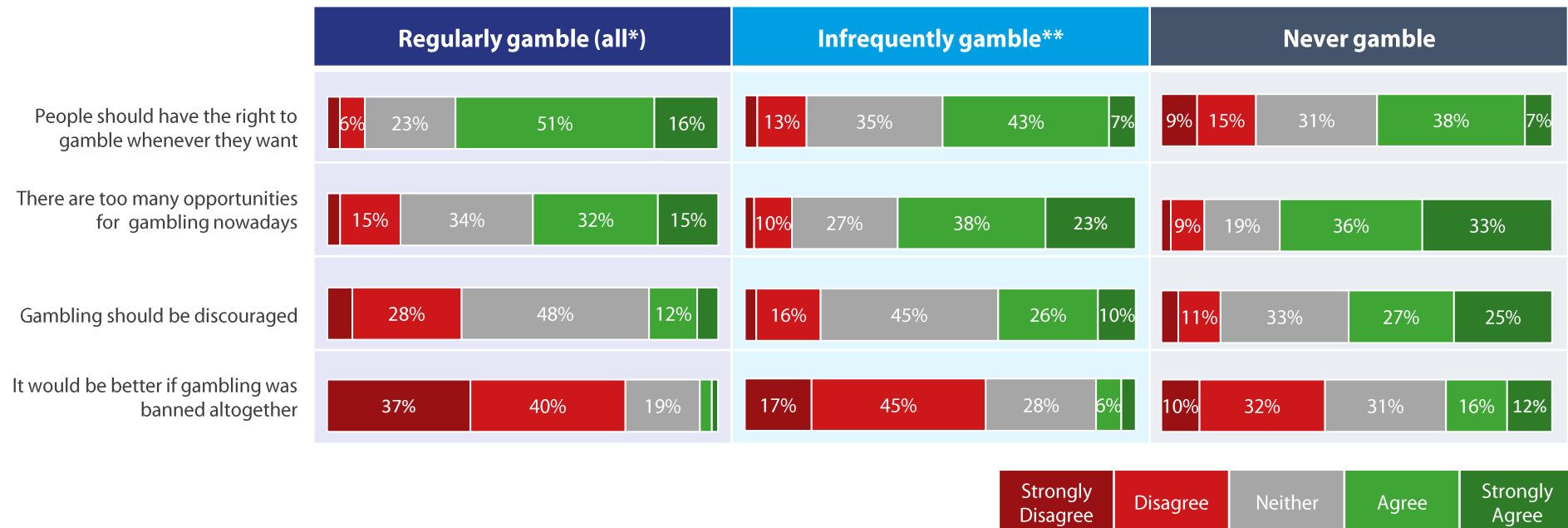
OPPORTUNITY

Respondents were asked to what extent they agreed or disagreed with a set of statements about opportunities to gamble in the Channel Islands.

There are differing strengths of opinion, with those who regularly gamble feeling more strongly about their right to gamble, but overall there is little appetite for greater restrictions:

- Although a large percentage of people believe there are too many opportunities for gambling (47% of regular gamblers, 61% of infrequent gamblers and 70% of those who never gamble themselves),
- There is little support for banning gambling (5% of regular gamblers, 10% of infrequent gamblers and 27% of those who never gamble), with around half to two-thirds of gamblers agreeing people should have the right to gamble whenever they want.

To what extent do you agree or disagree with the following statements?



THE ROLE OF THE GOVERNMENT

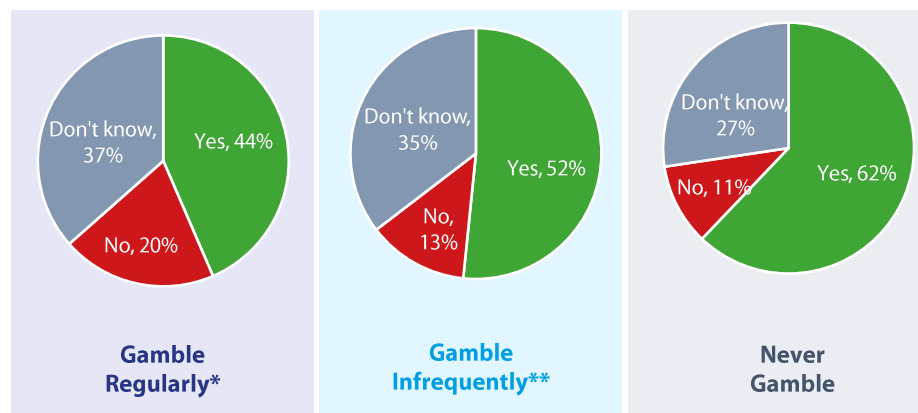
Instead, there is some support for putting more safeguarding measures in place.

Respondents were told that the States of Guernsey and the Government of Jersey jointly operate the Channel Islands Lottery, before being asked “Should [the government] be doing more to safeguard people who are problem gamblers or at risk of problem gambling?” They were then given the option to leave a comment explaining their answer.

61% of those who never gamble themselves think the government should be doing more, as do 51% of those who gamble infrequently and 42% of regular gamblers. Suggestions for how (see right) were inspired by the statements reported on in the next section of this report (support for some of these ideas is quantified on pages 28-29).

A notable percentage of people selected ‘don’t know’ (27-37%), with only 1 in 5 or fewer saying the government should not do more. These groups of respondents highlighted the potential difficulties of introducing effective measures while not impacting on the freedom of responsible gamblers. Particularly if an individual with a problem does not recognise that this is the case. Comparisons were drawn with alcohol addiction, where it is the responsibility of the individual rather than businesses or the government to seek help, with questions as to why gambling is different to alcohol or drugs.

Should [the government] be doing more to safeguard people who are problem gamblers or at risk of problem gambling?



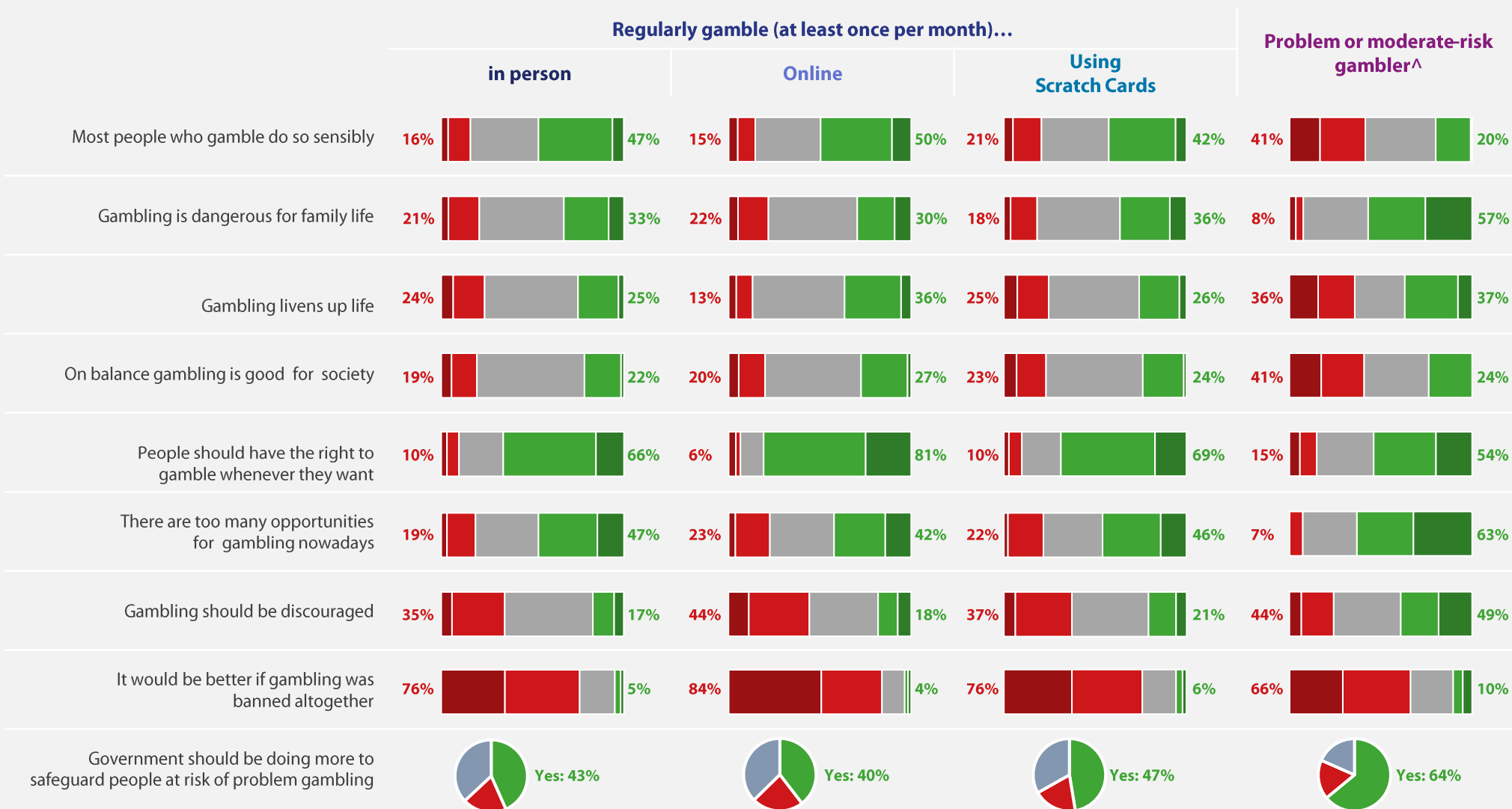
Suggestions for safeguarding included active measures to reduce harm (see p.28-29):

- Stop the sale of scratch cards where alcohol is also being sold and in supermarkets,
- Do not consider introducing online gambling games (concerns it would fuel addiction),
- Remove scratch cards from sale,
- Introduce a maximum spend limit on scratch cards (either for all or so each registered person can choose their limit) and when spending online.

Supported by:

- Require retailers to have a license to sell scratch cards and lottery tickets,
- Print help line numbers on scratch cards,
- Campaigns to raise awareness of where to seek help from,
- More education for young people about the risks.

IMPACT AND OPPORTUNITY BY GAMBLING STATUS



FUTURE OF THE CHANNEL ISLANDS LOTTERY

Views by gambling status with a focus on potential changes to scratch cards.

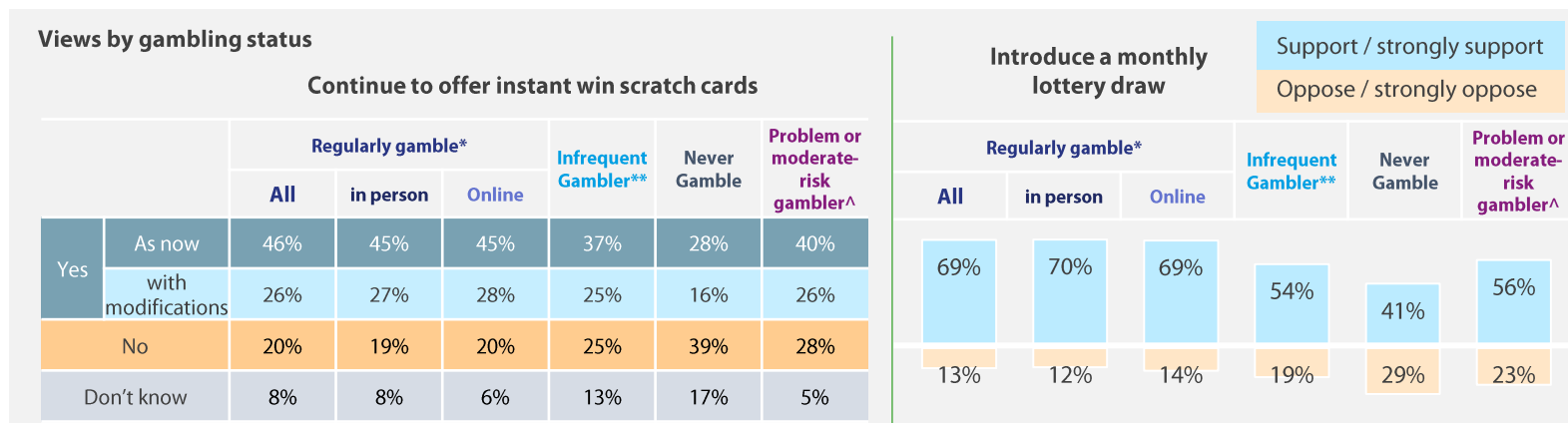
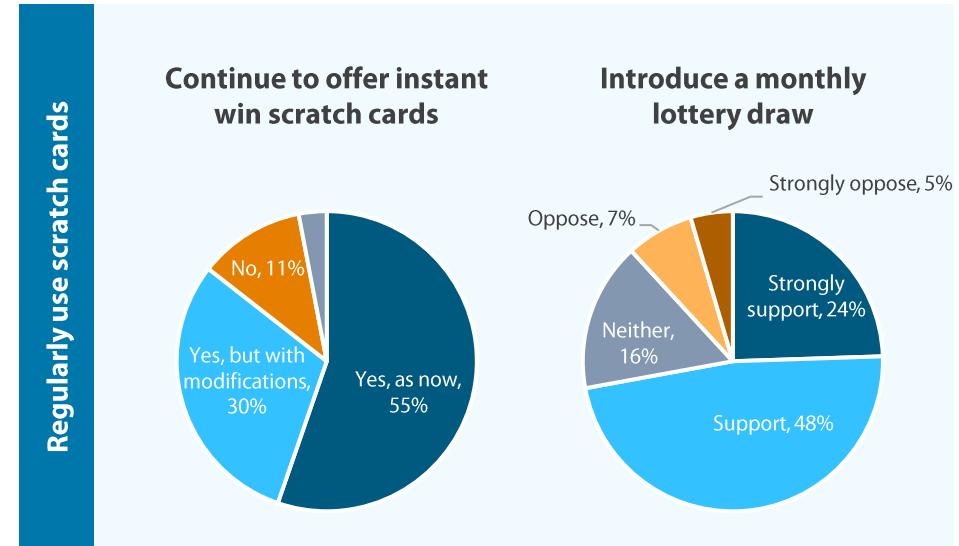
TIMING: INSTANT WIN VS MONTHLY DRAW

Respondents were asked “Do you think the Channel Islands Lottery should continue to offer instant-win scratch card games?” and later if they would support or oppose if “A monthly lottery draw is introduced, with 60% of income going to prizes.”

The results to the right focus on the views of those who buy scratch cards at least once per month, because they are the main market and would be most impacted by changes. There is strong support for both:

- 55% of regular scratch card users believe instant win scratch cards should continue to be offered as now, and further 30% do with modifications.
- 72% of regular scratch card users support or strongly support the introduction of a monthly lottery draw.

To the right you can see that there is more support than opposition for each offering amongst all groups, but the level of support is lower amongst those who gamble less frequently or not at all.



CHANGES TO INSTANT WIN SCRATCH CARDS

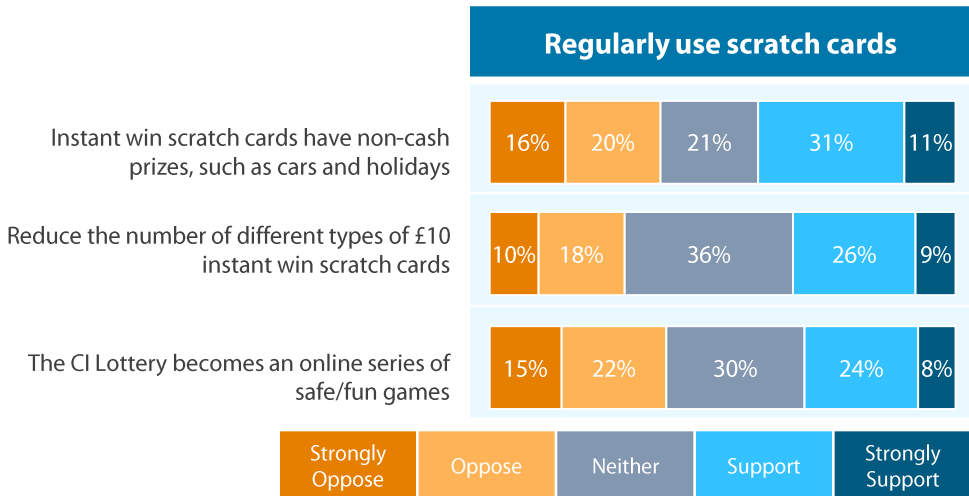
Respondents were asked the extent to which they would support or oppose **changes to instant win** scratch cards.

Views are split amongst those who buy scratch cards at least once per month (main market). For example, of the three ideas, there is most support for the introduction of non-cash prizes with 42% of regular scratch card users supporting or strongly supporting this. However, on the other side, 37% oppose or strongly oppose non-cash prizes.

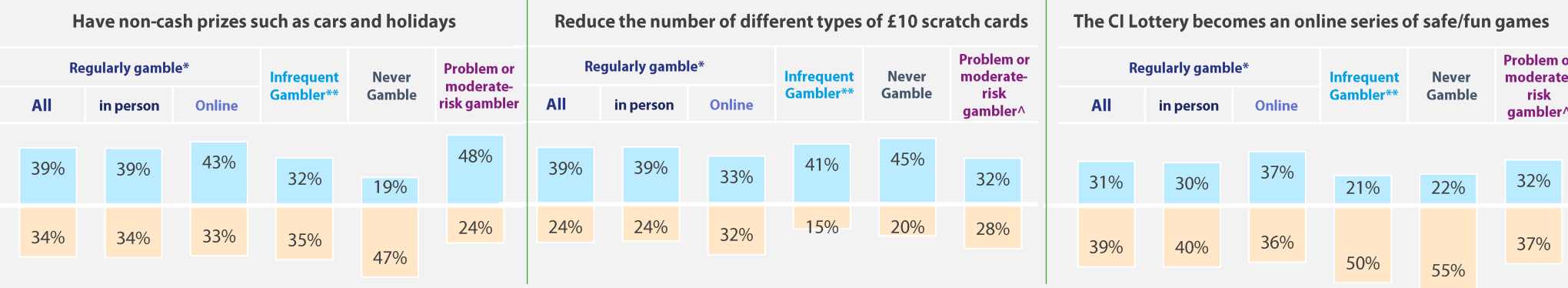
The results below suggest that:

- Non-cash prizes appeal to problem gamblers (48% support) and are opposed by those who never gamble (47% oppose). Otherwise views remain split.
- Those who gamble infrequently or not at all more strongly believe the lottery should NOT become online games (50-55% oppose).

To what extent you would support or oppose the following potential changes:



Support and Oppose by gambling status



RESTRICTIONS ON THE SALE OF SCRATCH CARDS

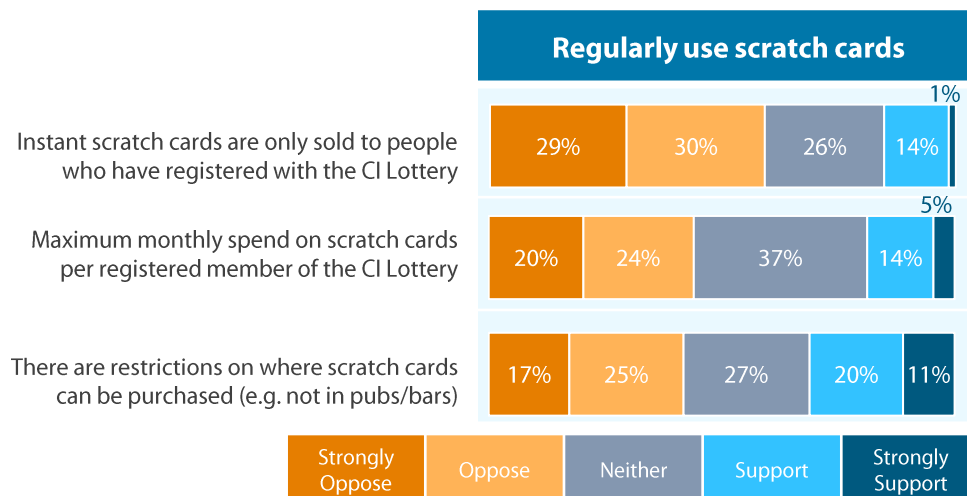
Respondents were asked the extent to which they would support or oppose **restrictions on the sale** of scratch cards in the Channel Islands.

Those who buy scratch cards at least once per month (main market), on balance, do not support restrictions:

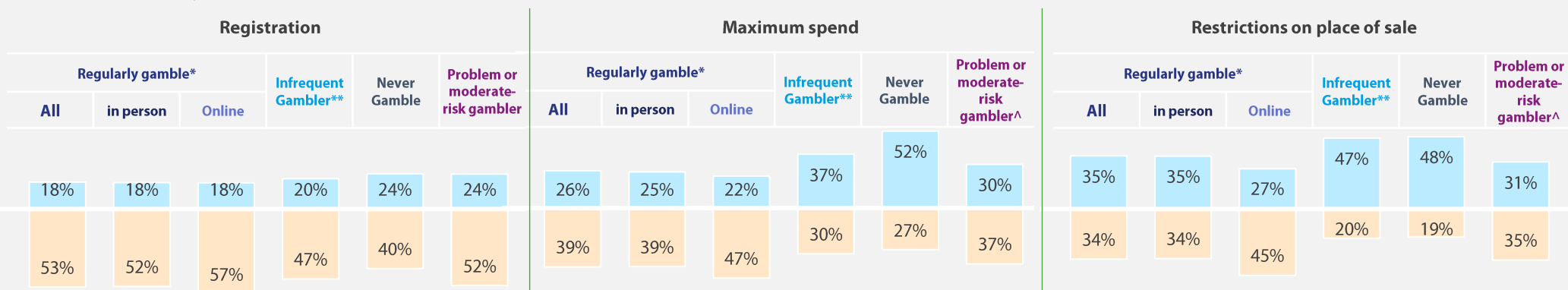
- 15% would support registering to buy
- 19% would support a maximum spend
- 31% would support restrictions on where they can be purchased.

However, you can see below that those who gamble infrequently or not at all are more in favour of restricting places of sale (47-48%). They are also more in favour of implementing a maximum spend (37% & 52%) despite low appetite from all groups for requiring registration (18-24%).

To what extent you would support or oppose the following potential changes:



Support and Oppose by gambling status



VIEWS ON INSTANT WIN SCRATCH CARDS

Other suggested modifications to scratch cards included:

- Simplify the options (e.g. "There are far too many choices. A simple 1 or 2 would suffice.").
- Make it clearer to understand if you have won. (e.g. "A simple scratch off with amount won would be better than those tiny pictures you can barely see and the matching numbers.")
- Changes to the prizes – many preferred more opportunities for smaller wins (E.g. "Less of the expensive 10 ones, have 1 and 2 more available"), but there were also a few voices requesting fewer opportunities but for larger amounts (e.g. "If people could win 10, 50 or up to 100 instant cash prizes they would feel more benefited rather than 2 which inevitably goes back into buying another ticket.")
- Themed cards- for example, seasonal or based on the charity it is supporting.
- Non-cash prizes could include local experiences.

Views on this will be explored further in focus groups.

Those who do not support the sale of scratch-cards highlighted issues around safeguarding the most vulnerable in society and the environment. Scratch cards are viewed as particularly addictive. To the right, these views are contrasted against those who feel more positive about scratch cards.

"A little is a good thing."

"Scratch card wins are little bumps of happiness"

"Still far less addictive than the worst forms of gambling"

"Addicts are addicts in any part of life; deal with it."

"It's a nice instance play"

"The chance of 5000 win is exciting"

VS

"Those who buy most scratch cards are those in the greatest financial need, and as such there is a moral consideration to whether they should be available."

"Numbered [lottery] tickets less addictive, particularly to teens/young adults"

"There are no safeguards as regards who can purchase cards & the amount"

"They are not eco-friendly at all and create a lot of mess."



FOCUS GROUP VIEWS ON SCRATCH CARDS AND A MONTHLY LOTTERY

This section summarises the findings from the focus groups, which sought to better understand the opinions informing the quantitative results in the previous section.

CHANGES TO SCRATCH CARDS: SUMMARY

Introduction

It was explained to participants that CI Lottery are aiming to do two things through potential changes to scratch cards:

1. Broaden the appeal of scratchcards, so there is a broader range of people playing less frequently.
2. Implement safeguards to mitigate against problem gambling.

Activity

Participants were asked to what extent they believe the following changes to scratch cards would address each of the goals above:

- Reducing the number of £10 card types
- Voluntary registration to buy scratch cards
- Alternative prizes
- Any other actions they would like to suggest

This was conducted as a group activity, to encourage discussion. They did not need to come to a consensus and the variety of views in the room were encouraged.

Key Messages

- There is wide skepticism that any actions can truly tackle problem gambling as it is thought that people with such addictions will always find a way to gamble e.g. online. This to some extent explains the split views on ideas such as alternative prizes.
- However, being seen to do nothing except widen their appeal could be contentious as there are groups of the population who are strongly against scratch cards due to the highly addictive nature of this form of gambling.
- Even with changes to scratch cards there is limited appeal amongst those who don't currently use them. Broadening their appeal would be highly challenging. This also helps to explain the split views on scratch cards in the survey.

CHANGES TO SCRATCH CARDS: SUMMARY CONTINUED

This page summarises how well each idea discussed helps achieve each goal.

It highlights the potential conflict of banning scratch cards from behind tills, more chances to win smaller cash prizes and introducing online platforms.

	GOAL: Broaden the appeal of scratchcards	GOAL: Implement safeguards to mitigate against problem gambling
Reducing the types of £10 scratch card	No impact	No impact
Voluntary registration to be able to buy scratch cards	Makes goal <u>harder</u> to achieve	No impact
Alternative (non-cash) prizes	Helps <u>somewhat</u> to achieve	Helps <u>somewhat</u> to achieve
£1 scratch cards	Helps <u>a lot</u> to achieve goal	No impact
Do not display scratch cards at tills	Makes goal <u>harder</u> to achieve	Helps <u>a lot</u> to achieve goal
More prominent play responsibly messaging	No impact	Helps <u>somewhat</u> to achieve
More chances to win smaller cash prizes	Helps <u>somewhat</u> to achieve	Makes goal <u>harder</u> to achieve
Say on the scratch card that it supports charity	Helps <u>a lot</u> to achieve goal	Not discussed in this context
Helpline number & warnings on the card	Not discussed in this context	Helps <u>somewhat</u> to achieve
Less complicated / more visually appealing	Helps <u>a lot</u> to achieve goal	Not discussed in this context
Recyclable cards	Could help but not widely discussed	Not discussed in this context
Ability to dispose of ticket at reseller for another entry to a prize draw	Could help but not widely discussed	Not discussed in this context
Online platform – if optional	Helps <u>somewhat</u> to achieve	Could make goal <u>harder</u> to achieve
Limited run / time tickets	Could help but not widely discussed	Not discussed in this context
Odds of winning on the card	Could help but not widely discussed	Helps <u>somewhat</u> to achieve

CHANGES TO SCRATCH CARDS: BROADEN THE APPEAL

- Reducing the number of £10 card types was thought to have no impact on this goal. Doing so would not help broaden the appeal, but equally most thought it would be unlikely to harm it.
- Voluntary registration to be able to buy scratch cards could have no impact on this goal, although some said it potentially makes it harder to broaden their appeal as it makes it feel like more of an illicit activity.
- A range of views were expressed on alternative prizes, as in the survey. Some found them appealing and tended to specify that they should be larger e.g. a house to appeal to middle- and higher-income earners who wouldn't necessarily be enticed by a smaller cash prize like you usually find on scratch cards. Others didn't, particularly those who said they would never be tempted by a scratch card even if changes were made. Another view expressed was that smaller cash prizes could be enticing but only if there were more of them.
- There was more consensus that the following could all help widen scratch card appeal: £1 scratch cards, less complicated / more visually appealing looking games, and stating on the card that funds raised support charity. That being said, there were very limited numbers of participants who don't (often) buy scratch cards but said they would be tempted to in the future with these changes.
- There was consensus that not displaying cards at tills would make it harder to broaden the appeal.
- The waste created by scratch cards was a particular talking point for one focus group. They suggested two solutions to appeal to the environmentally conscious consumer - recyclable cards and the ability to dispose of your ticket at reseller for another entry to a prize draw. Littering and the environmental cost of producing the cards also came up in other groups.
- Some felt an app would help make scratch cards feel more accessible, but there were those who warned there should still be the option to buy physical cards. Introducing an online platform should, however, be done with careful consideration of the risks to potential problem gamblers and mindful of the opposition to the CI Lottery becoming an online series of games from a safeguarding perspective.



CHANGES TO SCRATCH CARDS: BROADEN THE APPEAL CONTINUED

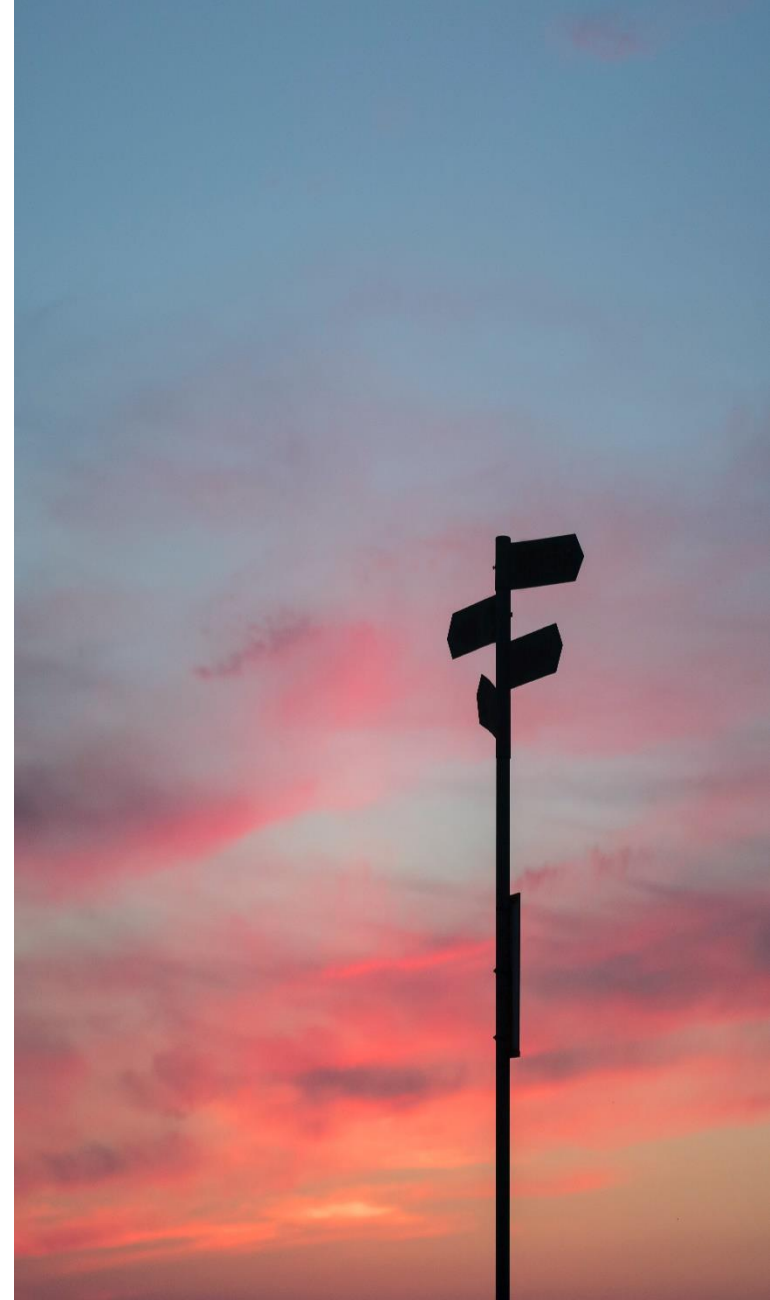
A summary of how the ideas were categorized by participants across all 4 focus groups.

GOAL: Broaden the appeal of scratchcards

Helps A LOT to achieve goal	Helps SOMEWHAT to achieve goal	Makes it HARDER to achieve goal
<p>Came up in multiple groups:</p> <ul style="list-style-type: none"> • £1 scratch cards • Say on the scratch card that funds raised support charity. Could include charity logos. • Less complicated / more visually appealing looking games • Recyclable cards <p>Came up once:</p> <ul style="list-style-type: none"> • Ability to dispose of ticket at reseller for another entry to a prize draw • Limited time tickets • Odds of winning on the card 	<p>A range of views across groups:</p> <ul style="list-style-type: none"> • More chances to win smaller cash prizes e.g. More prizes of up to £3k • Non-cash prizes, mainly if they are larger e.g. a house • Option to sign up and play online 	<p>Came up in multiple groups:</p> <ul style="list-style-type: none"> • Voluntary registration to be able to buy cards • Not displaying scratch cards at the till <p>Came up once:</p> <ul style="list-style-type: none"> • Non-cash prizes, particularly smaller ones • Moving to an online only platform
<p>No Impact on goal: Reducing the types of £10 scratch card, Play responsibly messaging</p>		

CHANGES TO SCRATCH CARDS: SAFEGUARDS

- Participants tended to be unclear about how reducing the number of £10 card types would have a positive impact. Similarly, they suggested but didn't all agree that only having £1 scratch cards would help. The view was expressed that scratch card users tend to have a certain amount of money to spend on cards at any one time, and they will spend that regardless of how many different 'types' there are and their denominations. There was discussion about how it is not about collecting all the different types, but about the feeling you get when scratching.
- People do not believe that potential problem gamblers would choose to register, so although potentially effective in theory this idea is not believed to be effective in practice. Concerns about the use of personal data in this context were also raised by some participants. For example, would other departments in the States have access to this information; would winning affect social security benefits received.
- There were initially mixed views on the impact of alternative prizes. The discussions that followed highlighted how scratch card users are likely to prefer cash, so while this may reduce the appeal of scratch cards there were also concerns that this change would drive people into online gambling where a. they could potentially end up spending a larger amount more quickly and b. the money spent would leave the island /not benefit charity.



CHANGES TO SCRATCH CARDS: SAFEGUARDS **CONTINUED**

Other ideas discussed included:

- Do NOT sell scratch cards in pubs, bars or have them displayed at the tills in shops – not all agreed but there was a lot more consensus that this idea would go some way to addressing the issue, by reducing temptation for those who were not actively planning to buy them.
- More chances to win smaller cash prizes potentially make scratch cards more appealing to those looking for a quick dopamine fix, undermining actions to safeguard against problem gambling. On the flip side, there were again concerns about how reducing the appeal of scratch cards could encourage more online gambling.
- There were divided views about the extent to which more prominent “Play Responsibly” messaging would tackle problem gambling, but it would go some way to show that the CI Lottery is taking safeguarding seriously.
- Voluntary ‘no sell list’ – Similar to voluntary registration to be able to buy, this idea was that people who recognised they may have a problem with gambling could register to say they gave permission to be refused sale of scratch cards if they were to attempt to buy one. Although other participants could see the merit in this, there were discussions about how this could work in practice and whether cashiers would really put themselves in that position.



CHANGES TO SCRATCH CARDS: SAFEGUARDS CONTINUED

A summary of how the ideas were categorised by participants across all 4 focus groups.

GOAL: Implement safeguards to mitigate against problem gambling

Helps A LOT to achieve goal	Helps SOMEWHAT to achieve goal	Makes it HARDER to achieve goal
<ul style="list-style-type: none">Do not display scratch cards at the till	<ul style="list-style-type: none">More prominent play responsibly messagingNon-cash prizesInformation displayed on card to include: helpline number, odds of winning, warnings (like cigarette packets)	<ul style="list-style-type: none">More chances to win smaller cash prizesConcerns raised about online gambling in relation to problem gambling (online platform)
No Impact on goal: Reducing the types of £10 scratch card, £1 scratch cards, Voluntary registration to be able to buy cards		

A REGULAR LOTTERY: SUMMARY

Introduction

It was explained to participants that CI Lottery are considering introducing a regular lottery for Channel Island residents. Potentially this would be on a monthly basis, and they wanted participants to provide input into the design of it.

Activity

Participants were asked to what extent they believe the following ideas for a monthly lottery appealed:

- Participation via a subscription model
- The ability to select which charity you want to support
- Participation via an app / web platform
- Any other ideas they would like to suggest

There was also some discussion about the impact of a monthly lottery on the Christmas Lottery.

This was conducted as a group activity, to encourage discussion. They did not need to come to a consensus and the variety of views in the room were encouraged.

Key Messages

- Despite initial interest, the vast majority of people say they would probably participate on an ad-hoc basis only and scratch card users tended to say it would not replace scratch cards for them.
- Jersey respondents strongly believe that the idea only holds real appeal if there is a guaranteed Jersey winner (i.e. prize for each island) and if local Jersey charities will definitely benefit.
- Therefore, further consideration would need to be given as to whether there would be enough participation to build an appealingly large prize pot and fund charities to a meaningful amount via a regular lottery. Two or three times a year may be more viable than monthly, but reflecting on the experience of the Christmas Lottery in the last few years some participants believe that even this could be difficult to achieve.

A REGULAR LOTTERY: SUMMARY

CONTINUED

A summary of how the ideas were categorised by participants across all 4 focus groups. There was not complete consensus on each one, but this gives a sense of the most common views expressed.

Do each of the following ideas make a monthly lottery more or less appealing?

More Appealing	No Impact	Less Appealing
<ul style="list-style-type: none"> • Draws 3 or 4 times a year instead of monthly • Both an app / online platform and the ability to buy tickets in person • Funds raised by the lottery support charity • Substantial cash top prize • Separate lottery for each island and/or large prize for each island* <p>Also noted by 1 group:</p> <ul style="list-style-type: none"> • Register syndicates (as currently on trust in Christmas Lottery) • Electronic payment of winnings 	<ul style="list-style-type: none"> • More chances to win smaller cash prizes • Ability to select which charities you are supporting – <i>some appeal through to no impact</i> 	<ul style="list-style-type: none"> • Participation on a subscription basis

A REGULAR LOTTERY: APPEAL

Motivations for participation:

- Most participants indicated that prize amounts would need to be substantial for the lottery to hold much appeal. Prize pots are often the main motivating factor for taking part, especially amongst those who gamble regularly. One group specified £0.5M or more. Some people were open to non-cash prizes, but only if it was substantial (e.g. a house).
- That players would be supporting charity was an attractive feature, especially amongst those who do not gamble regularly. This is supported by the fact that a number of participants currently take part in local charity lotteries. Most participants felt that there was room for the CI Lottery to also move into this space as it would benefit charities that don't currently have the option of running one themselves, although there were a small number who felt strongly the other way.
- Participants wanted to better understand which charities are supported and how much goes to each of them, with a lack of thought currently given to what proportion of the ticket price directly benefits good causes. This was definitely thought to both broaden the appeal and soften the blow of not winning.
- However, it is important to note that supporting charities was NOT the main motivating factor for the vast majority of people, and the ability to choose which charities your tickets support was appealing to some but overall much less important.

Other aspects in relation to appeal:

- Jersey and to some extent Guernsey respondents strongly believe that the idea only holds real appeal if there is a guaranteed Jersey winner (i.e. prize for each island) and if local Jersey charities will definitely benefit.
- The CI Lottery would be competing with UK based lotteries – some participants described how they take part in them via an online app (i.e. Island Lotto). While this suggests that there is a market for a local lottery, it also demonstrates that the local lottery would need to have similar levels of appeal for regular gamblers to switch or incorporate it into what they spend their money on.
- A monthly lottery will not replace scratch cards – regular scratch card users would be likely to either do both (but prioritising scratch card spend over lottery spend) or just continue with scratch cards. If scratch cards were removed discussion turned to the likelihood of them gambling online instead e.g. online games, online betting. A lottery does not have the same dopamine rush as an instant win style game.

A REGULAR LOTTERY: MODELS OF PARTICIPATION

Subscription & Regularity

- There was little interest in a subscription model, with the vast majority indicating that they would participate only on an ad-hoc basis.
- It was noted that monthly lotteries would work better for workplace syndicates, but individuals were more likely to see the appeal of a lottery that occurred 2-4 times a year including the Christmas Lottery.

Online Access

- The exercise showed that many people are open to playing via an online platform or app, but did not think access should be exclusively this way.
- That people commonly gamble online, including the use of apps to participate in UK lotteries, also indicates that participation via an app or online platform would hold appeal.
- A couple of respondents noted that some people may feel left out if you can't buy a physical ticket and the groups tended to feel this should still be an option, but this doesn't appear to be a large portion of your target market.
- However, care should be taken about how such a platform comes across. There are strong views warning against the dangers of online gambling, which can be seen from the survey results and were voiced again during some of the focus groups.

Impact on the Christmas Lottery

- The Christmas Lottery would need to effectively be the December / Winter / Q4 lottery draw for the year. Therefore, if the rest of the lottery is on a subscription only basis, this particular round would need to be opened up more widely to include those who don't participate year round.
- There were mixed views on how a regular lottery would impact excitement around the Christmas Lottery. Of those who regularly take part in the Christmas Lottery, some described the Christmas Lottery as an event that would still feel special to them even if there were other draws throughout the year, while others said that a regular lottery may dilute their feelings towards the Christmas Lottery and could make them less likely to participate.



"something quarterly, monthly we don't have the population to build a prize"

" [like] when I shop in a charity shop, I think this is my donation to charity"

"if the prize was little but more often, that would increase your excitement"

"Even if there is a reduction of [scratch card] games, they'll just buy [more of] the same"

"Whilst getting the gratification of a prize, you can give to charity"

"depends on the prize as people want the big bucks"

"If [registration] is voluntary, then why would you bother?"

"I would never subscribe"

"if you're an addict you'll find a way"

"Always going to draw opinions of [it being] a fix if [the islands are] drawn together"

"If you do a monthly or quarterly lottery, then you have to accept Christmas will be affected"

"I wouldn't do it every month, I already make monthly charity donations"

"I was playing poker and got an email with precaution message, you have been playing a lot, just deleted it/took no notice"

"They could do a prize draw live for Christmas"

"There's enough charities doing their own [lottery draw]"

"If you register, the government can monitor you"

THE CHRISTMAS LOTTERY

Views on the Christmas Lottery by gambling status



MANAGEMENT OF THE CHRISTMAS LOTTERY

Respondents were asked "Looking to the future, do you think the Channel Islands Lottery should continue to operate the annual Christmas Lottery?"

Around a quarter of people in each group said, 'yes as now', while a further 64% of gamblers and 48% of non-gamblers said it should but with modifications. Jersey respondents were slightly more likely than those in Guernsey to say, 'yes but with modifications' than 'yes as now', but overall, a similar percentage of people said yes in both islands.

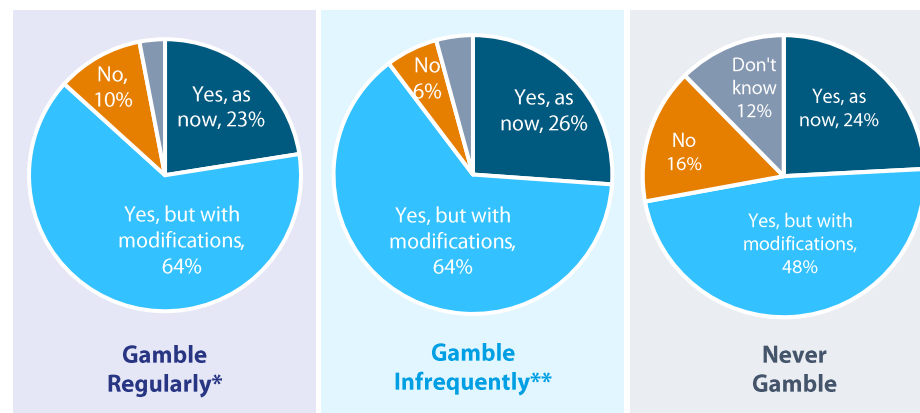
Suggested modifications included:

- Split into two separate draws - one for each Bailiwick, with each island having separate prize structure.
- Remove the scratch card element
- More smaller prizes available.

Those who are not supportive of it continuing cited:

- Participation in the UK National Lottery along side some local, island specific options would be better. With opinions that Jersey were not wanting to pay for Guernsey and vice versa.
- The view that it's an out-of-date means for charitable fund-raising and not very efficient.

Channel Islands Lottery should continue to operate the annual Christmas Lottery



"It's just another scratch card game with a low prize. Each Island should decide if they want to continue and separate them out."

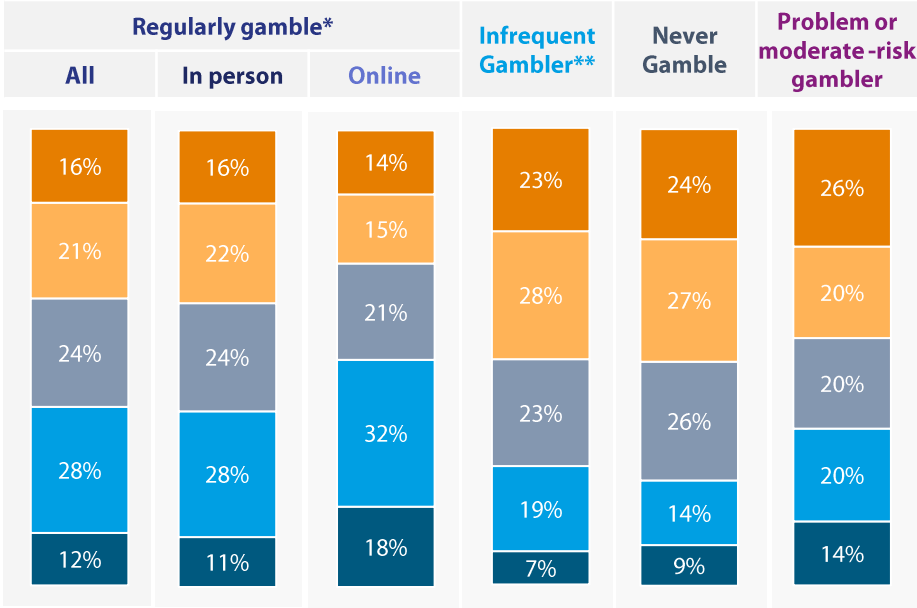
"The CI Lottery has lost its way. I now only buy in the Christmas lottery and much less than I used to. We should scrap it and join the UK lottery."

CHRISTMAS LOTTERY ONLINE

Respondents were asked to indicate to what extent they would support or oppose also making the CI Lottery Christmas Draw available as an online game.

Existing online regular gamblers are most likely to support this change (50% support or strongly support) while those who gamble infrequently or never are least likely to (51% oppose or strongly oppose).

Support and opposition for:
‘The CI Lottery Christmas Draw is also available as an online game’



UNDERSTANDING OF THE CHANNEL ISLANDS LOTTERY



Founding of the lottery
Use of funds

KNOWLEDGE ABOUT THE CI LOTTERY

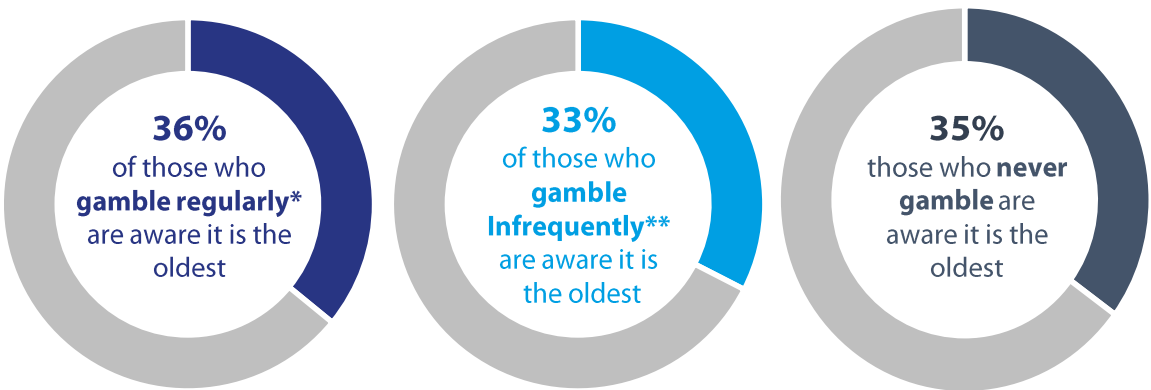
Respondents were asked: “The Channel Islands Lottery was founded in 1975 following the merger of the Lotteries of Guernsey and Jersey and is now the oldest lottery in the British Isles. Were you aware of this?”

Around 1 in 3 said yes and there are no notable differences by frequency with which people gamble.

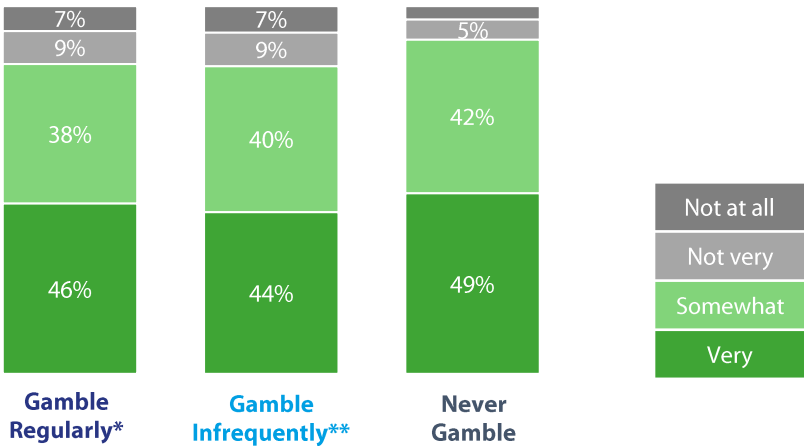
Respondents were then told ‘the funds raised from all games in the CI Lottery portfolio (including Christmas Draw and scratch cards) are distributed to local charities and worthy causes by the Jersey Community Foundation, the Association of Jersey Charities and Guernsey’s Social Investment Fund’ before being asked “Before reading this, please indicate how aware you were of how the Channel Islands Lottery funds are used to support activities on your island?”

Over 80% said they were somewhat or very aware, and there are no notable differences by frequency with which people gamble.

Awareness that the CI Lottery is the oldest lottery in the British Isles



Awareness of how Lottery funds are used



VIEWS ON USE OF FUNDS

Respondents were given the opportunity to leave comments about the use of lottery funds and their awareness of this. We had a small number of comments but have been able to identify common themes amongst different groups as follows:

Very aware...

- **Supports local charities:** Often said that the primary reason they participate is because the money supports local charities, and in Guernsey, Beau Sejour.
- **Income streams:** However, there were also those with concerns that the States / Government are using income streams from gambling to fund good causes.

Somewhat aware...

- **Profits:** Some respondents requested more transparency about aspects around how the profits from the CI Lottery portfolio are being allocated i.e. what percentage goes to charities, how much is allocated for overheads and profits, queries or concerns about the process of how the funds are allocated.
- **Promotion:** Marketing demonstrating what charities have benefited and how was seen as not enough or non-existent by several respondents. Comparisons were made to the UK Lottery where respondents felt that it's common knowledge about how it funds charitable causes.

Not very aware or not at all aware...

- **Promotion:** Although at least some of this group seemed aware charities were being supported there is a lack of awareness of which charities. There were requests that this information is published and promoted in the news.

Very or somewhat aware

"The charitable purpose of the Christmas Lottery is a primary motivation for me to participate in it."

"Charities and good causes should not rely on funds from gambling, it's a terrible way of promising financial gain to those who can usually least afford to participate."

"I would like to know what overheads are taken from all the tickets sold."

Not very aware or not at all aware

"I knew the Christmas Lottery has a charity aspect, but I did not know that the other lotteries/scratch cards also do."

"It needs to be published...how the money is being used."

"I don't think people actually care they don't do it for charity."

APPENDIX A – DEMOGRAPHIC PROFILE OF RESPONDENTS OVERALL AND BY ISLAND

There is relatively little difference between islands in the age or gender of respondents after weighting has been applied.

		Overall		Jersey		Guernsey	
		% Respondents	% after survey weights	% respondents	% after survey weights	% respondents	% after survey weights
Island							
	Jersey	46%	39%	0%	0%	100%	100%
	Guernsey	54%	61%	100%	100%	0%	0%
Age							
	18-39	18%	31%	19%	30%	18%	31%
	40-64	57%	46%	59%	48%	54%	44%
	65+	25%	23%	22%	22%	28%	25%
Gender							
	Female	57%	51%	58%	51%	56%	51%
	Male	43%	49%	42%	49%	44%	48%
	Prefer to self-describe	<1%	<1%	<1%	<1%	<1%	<1%

APPENDIX A – DEMOGRAPHIC PROFILE OF RESPONDENTS OVERALL AND BY ISLAND

Jersey respondents are slightly younger and more affluent, but differences are relatively small.

		Overall	Jersey	Guernsey
		% after survey weights	% after survey weights	% after survey weights
Education				
	Graduate Degree or equivalent	46%	47%	44%
	A-level and GCSE or equivalent	46%	46%	46%
	Other / None	9%	8%	10%
Employment				
	Employed (Full, part or self-employed)	70%	72%	71%
	Retired	25%	22%	24%
	Not working for other reasons	5%	5%	5%
Household Composition				
	Working Age	43%	45%	39%
	Working Age & Children	26%	25%	27%
	Pension Age	18%	16%	20%
	Other	14%	14%	14%
Annual Household Income				
	Up to £40,000	26%	27%	26%
	£40,001-£80,000	35%	33%	39%
	Over £80,000	38%	40%	36%

APPENDIX B – IN MORE DEPTH: FREQUENCY OF PARTICIPATION IN GAMBLING ACTIVITIES AND SPEND



APPENDIX B – LOTTERIES

	Regularly gamble (at least once per month)...				Problem or moderate- risk gambler
	All	in person	Online	Using scratch Cards	
How frequently do you participate in lotteries?					
Most days (4+ times a week)	4%	5%	7%	6%	13%
2 or 3 times a week	11%	12%	11%	13%	13%
Once a week	22%	15%	12%	19%	13%
2 or 3 times a month	19%	21%	14%	21%	11%
Once a month	23%	26%	11%	16%	2%
Less than once a month	26%	22%	29%	0%	24%
Don't know	0%	1%	0%	1%	3%
Prefer not to answer	0%	0%	0%	0%	0%

If less than once a month (but previously indicated within the last year): In the last year, how much did you spend participating in lotteries?					
Under £5	7%	9%	4%	10%	13%
£5	2%	3%	1%	4%	0%
£10	9%	8%	10%	9%	5%
£15	7%	6%	9%	2%	1%
£20	15%	14%	13%	13%	8%
£25	1%	3%	0%	3%	9%
£30	7%	6%	6%	7%	7%
£35	2%	0%	2%	0%	0%
£40	5%	6%	6%	7%	9%
£45	0%	0%	0%	0%	0%
£50	10%	9%	9%	11%	12%
Over £50	32%	32%	37%	31%	33%
Prefer not to answer	2%	3%	2%	4%	2%

	Regularly gamble (at least once per month)...				Problem or moderate-risk gambler
	All	in person	Online	Using scratch cards	
If once a week or more:					
In an average week, how much do you spend participating in lotteries?					
Under £5	23%	23%	12%	10%	Too small
£5	18%	18%	9%	12%	
£10	32%	32%	40%	36%	
£15	6%	6%	2%	9%	
£20	6%	6%	8%	7%	
£25	4%	4%	4%	9%	
£30	4%	4%	8%	4%	
£35	0%	0%	1%	1%	
£40	2%	2%	4%	3%	
£45	0%	0%	0%	0%	
£50	2%	2%	6%	5%	
Over £50	2%	2%	4%	4%	
Prefer not to answer	0%	0%	0%	0%	
If once a month or more:					
In an average month, how much do you spend participating in lotteries?					
Under £5	7%	7%	3%	2%	Too small
£5	19%	19%	20%	16%	
£10	35%	35%	21%	33%	
£15	9%	9%	6%	9%	
£20	14%	14%	24%	20%	
£25	4%	4%	7%	2%	
£30	3%	3%	7%	6%	
£35	0%	0%	0%	1%	
£40	3%	3%	5%	5%	
£45	0%	0%	0%	0%	
£50	2%	2%	2%	3%	
Over £50	1%	1%	1%	0%	
Prefer not to answer	1%	1%	1%	2%	

APPENDIX B – SCRATCH CARDS

	Regularly gamble (at least once per month)...				Problem or moderate- risk gambler
	All	in person	Online	Using scratch Cards	
How frequently do you purchase scratch cards?					
Most days (4+ times a week)	4%	4%	5%	5%	16%
2 or 3 times a week	9%	10%	17%	13%	23%
Once a week	14%	15%	12%	19%	13%
2 or 3 times a month	20%	22%	15%	28%	14%
Once a month	25%	26%	20%	34%	9%
Less than once a month	26%	22%	29%	0%	24%
Don't know	1%	1%	2%	0%	0%
Prefer not to answer	0%	0%	0%	0%	0%

	Regularly gamble (at least once per month)...				Problem or moderate-risk gambler
	All	in person	Online	Using scratch Cards	
If once a week or more:					
In an average week, how much do you spend on scratch cards?					
Under £5	7%	7%	0%	7%	Too small
£5	14%	14%	8%	14%	
£10	29%	29%	30%	29%	
£15	10%	10%	11%	10%	
£20	11%	11%	15%	11%	
£25	2%	2%	5%	2%	
£30	5%	5%	2%	5%	
£35	2%	2%	5%	2%	
£40	8%	8%	10%	8%	
£45	0%	0%	0%	0%	
£50	2%	2%	0%	2%	
Over £50	8%	8%	15%	8%	
Prefer not to answer	2%	2%	0%	2%	
If once a month or more:					
In an average month, how much do you spend on scratch cards?					
Under £5	11%	11%	4%	11%	Too small
£5	15%	15%	22%	15%	
£10	32%	32%	35%	32%	
£15	13%	13%	2%	13%	
£20	17%	17%	25%	17%	
£25	2%	2%	2%	2%	
£30	5%	5%	3%	5%	
£35	0%	0%	0%	0%	
£40	1%	1%	0%	1%	
£45	0%	0%	0%	0%	
£50	1%	1%	0%	1%	
Over £50	1%	1%	2%	1%	
Prefer not to answer	1%	1%	5%	1%	

APPENDIX B – ONLINE BETTING

	Regularly gamble (at least once per month)...				Problem or moderate- risk gambler
	All	in person	Online	Using scratch Cards	
How frequently do you participate in online betting (e.g. on sport, reality TV, politics)?					
Most days (4+ times a week)	17%	16%	21%	18%	30%
2 or 3 times a week	20%	19%	24%	20%	10%
Once a week	17%	18%	21%	18%	5%
2 or 3 times a month	15%	12%	18%	13%	26%
Once a month	12%	9%	15%	6%	7%
Less than once a month	16%	22%	2%	23%	16%
Don't know	1%	2%	0%	2%	0%
Prefer not to answer	1%	1%	0%	0%	5%

	Regularly gamble (at least once per month)...				Problem or moderate-risk gambler
	All	in person	Online	Using scratch Cards	
If once a week or more:					
In an average week, how much do you spend on online betting (e.g. on sport, reality TV, politics)?					
Under £5	9%	8%	9%	1%	Too small
£5	11%	9%	11%	10%	
£10	17%	19%	17%	17%	
£15	8%	8%	8%	12%	
£20	19%	22%	19%	20%	
£25	7%	6%	7%	9%	
£30	6%	6%	6%	6%	
£35	1%	1%	1%	0%	
£40	2%	2%	2%	0%	
£45	0%	0%	0%	0%	
£50	5%	7%	5%	11%	
Over £50	12%	11%	12%	13%	
Prefer not to answer	3%	3%	3%	2%	
If once a month or more: Too Small					

APPENDIX B – ONLINE GAMBLING GAMES

	Regularly gamble (at least once per month)...				Problem or moderate- risk gambler
	All	in person	Online	Using scratch Cards	
How frequently do you participate in online gambling games, such as bingo, casino or poker where you pay to play and could win a prize?					
Most days (4+ times a week)	10%	11%	12%	10%	Too small
2 or 3 times a week	12%	12%	16%	11%	
Once a week	14%	12%	17%	18%	
2 or 3 times a month	14%	14%	18%	11%	
Once a month	12%	11%	15%	12%	
Less than once a month	32%	32%	20%	32%	
Don't know	4%	4%	2%	4%	
Prefer not to answer	2%	3%	0%	1%	

	Regularly gamble (at least once per month)...				Problem or moderate-risk gambler
	All	in person	Online	Using scratch Cards	
If once a week or more:					
In an average week, how much do you spend playing online gambling games?					
Under £5	12%	13%	12%	12%	Too small
£5	6%	4%	6%	6%	
£10	19%	18%	19%	14%	
£15	4%	4%	4%	3%	
£20	32%	37%	32%	37%	
£25	0%	0%	0%	0%	
£30	3%	4%	3%	2%	
£35	0%	0%	0%	0%	
£40	1%	1%	1%	2%	
£45	0%	0%	0%	0%	
£50	7%	9%	7%	13%	
Over £50	14%	8%	14%	7%	
Prefer not to answer	2%	2%	2%	3%	
If once a month or more:					
In an average month, how much do you spend playing online gambling games?					
Under £5	12%	Too small	12%	Too small	Too small
£5	12%		12%		
£10	24%		24%		
£15	3%		3%		
£20	8%		8%		
£25	5%		5%		
£30	10%		10%		
£35	0%		0%		
£40	9%		9%		
£45	0%		0%		
£50	10%		10%		
Over £50	4%		4%		
Prefer not to answer	3%		3%		

APPENDIX B – BETTING IN PERSON & SLOT MACHINES

Betting in Person	Regularly gamble (at least once per month)...				Problem or moderate- risk gambler
	All	in person	Online	Using scratch Cards	
How frequently do you participate in betting in person (e.g. at a betting shop, in the pub, at an event)?					
Most days (4+ times a week)	5%	6%	9%	5%	Too small
2 or 3 times a week	4%	5%	7%	8%	
Once a week	7%	8%	5%	6%	
2 or 3 times a month	5%	5%	3%	5%	
Once a month	10%	12%	12%	12%	
Less than once a month	62%	57%	61%	58%	
Don't know	3%	3%	1%	6%	
Prefer not to answer	3%	3%	0%	0%	

Slot Machines	Regularly gamble (at least once per month)...				Problem or moderate- risk gambler
	All	in person	Online	Using scratch Cards	
How frequently do you play on slot machines (i.e. gambling and fruit machines)?					
Most days (4+ times a week)	12%	14%	Too small	Too small	Too small
2 or 3 times a week	5%	5%			
Once a week	7%	8%			
2 or 3 times a month	10%	11%			
Once a month	10%	11%			
Less than once a month	42%	36%			
Don't know	7%	7%			
Prefer not to answer	8%	9%			

APPENDIX C – PGSI MINI-SCREEN

The problem gambling severity index (PGSI) is a validated instrument to measure gambling behaviour and consequences.

The PGSI mini-screen includes the following three questions (out of the nine asked in the full instrument):

1. Have you bet more than you could really afford to lose?
2. Have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?
3. Have you felt guilty about the way you gamble or what happens when you gamble?

The answer to each question is scored for each respondent:

- Never = 0
- Sometimes = 1
- Most of the time = 2
- Almost always = 3

Summing the question scores gives a total PGSI score between 0 and 9. Respondents are then classified as follows based on the score:

- 0 = 'Non-problem gamblers'
- 1 = 'Low risk' - few or no negative consequences identified
- 2-3 = 'Moderate risk' - some negative consequences identified
- 4+ = 'Problem gamblers' - negative consequences; possible lack of control.

