



Sports Betting Consumption & the Current Landscape

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About PGNO

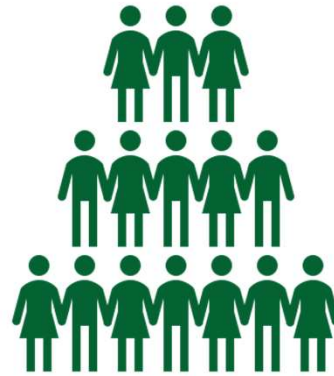
Statewide 501(c)(3)

Ohio Affiliate to NCPG

Gambling Neutral & Advocate



Who We Serve



PGNO's Approach



Partners and Funders



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[LinkedIn.com/Company/PGNOhio](https://www.linkedin.com/company/pgnohio)



Today's Objectives

1. Know the prevalence of gambling and problem gambling in Ohio.
2. Understand which populations are most at-risk for developing problem gambling.
3. Be aware of what the new frontier of sports betting will look like, and the local impact that will result.



What is gambling?

Gambling is risking **something of value** on an event mostly determined by chance

Requires three elements to be present:

- Consideration (something wagered)
- Risk
- A prize





The Changing Gambling Landscape

9:47



9:48



9:48





9:49



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Tipico gets you the best odds for Ohio sports teams & players. Deposit \$200 to get \$250 today.

DEPOSIT \$200 GET \$250

SAME GAME



Terms Apply. 21+ only. Bet with your head, not over it. Gambling problem? Call 1-800-GAMBLER (NJ, OH), 1-800-522-4700 (CO), 1-800-BETS-OFF (IA).

SPORTSHANDLE

US SP... CANADA... SPORTSBOOK APPS... TOOLS... NEWS

NY Bill Proposes Gambling Advertisements

Senators Luis R. Sepúlveda and Leroy Comrie

by Mark Saxon — January 13, 2023 in Legislation, Regulation

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Gambling Problem? Call 1-800-GAMBLER (OH)

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Warnings On... gambling hotline number added

Top Stories

Requiem For The So-Called 'Risk-Free Bet'

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Gambling Problem? 1-800-GAMBLER or Call 1-877-8-HOPENY or text HOPENY (467369) (NY)

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Amanda Conn Starner and 4 others answered this question.

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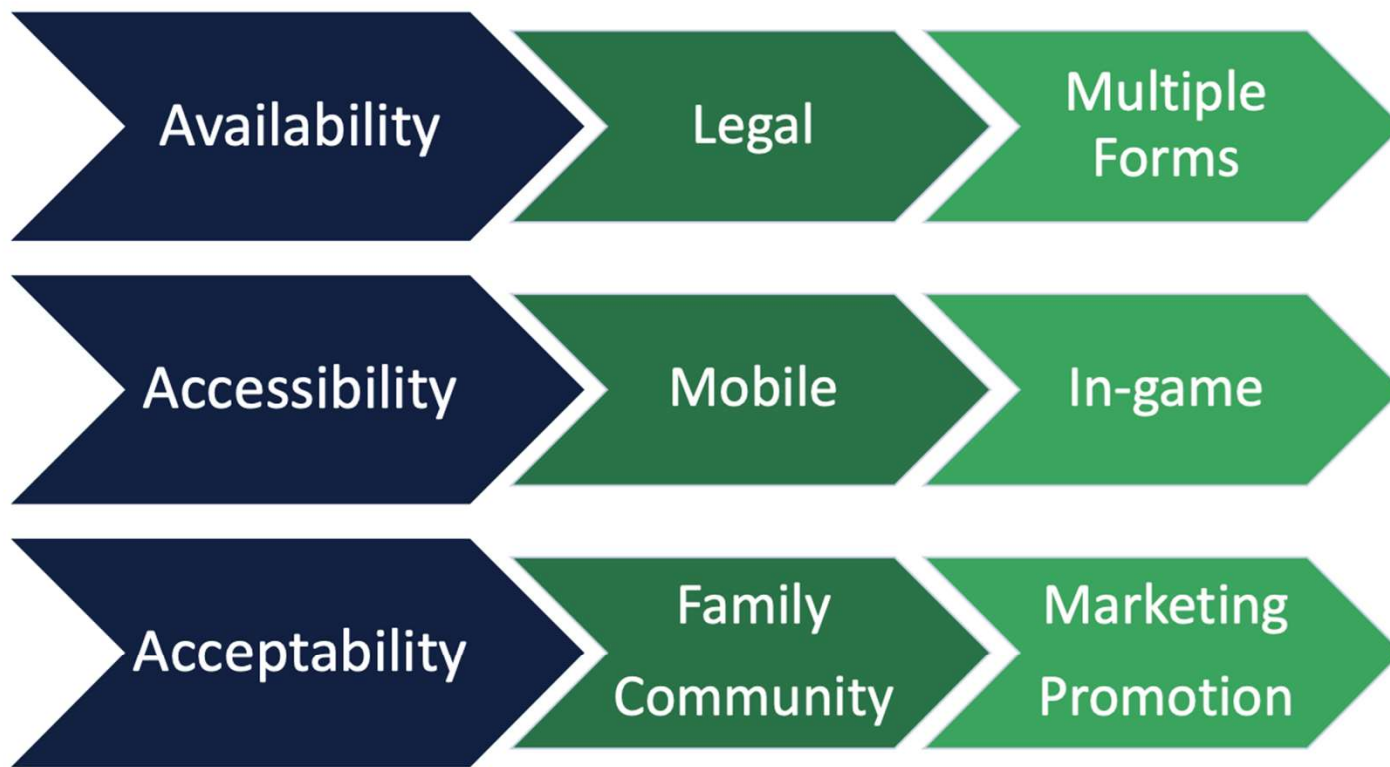
Ohio Prevention Professionals

Jamie Bal...

Christina Hardeman

Home Watch Marketplace Profile Notifications 3

Normalization of Gambling





At-Risk Populations

Continuum of Gambling



Gambling is a problem when it disrupts or damages your:



Health

- Physical
- Mental
- Emotional, Social, Spiritual



Responsibilities

- Employment
- Education
- Finances



Relationships

- Family
- Friends
- Reputation





Ohio Gambling Survey 2016- 2017

Estimated prevalence and types and frequency of gambling data



Estimated Prevalence

Prevalence of Gambling: Ohio						
	Do not gamble	Non-problem gambler	Low risk	Moderate risk	Problem gambler	Total
Ohio	25.1%	64.6%	6.4%	3.0%	0.9%	100.0%
Number (est.)	2,256,346	5,805,227	571,106	271,677	76,379	8,980,735

- Of the 8.98 million residents 18 and older, an estimated 6.72 million (**74.9%**) gamble and an estimated 2.26 million (25.1%) do not gamble.
- Of those who gamble, an estimated 5.81 million (64.6% of adult population) gamble but do not display risk factors for at-risk/problem gambling.
- An estimated 919,162 residents can be categorized as low-risk, moderate-risk, or problem gamblers; **10.3% of the general adult population.**
- The prevalence of problem gambling is **0.9%**, which equates to an estimated 76,379 individuals in the target population of 8.98 million (18 years and older).



Types and Frequency of Gambling

Gambling Participation in the Last 12 Months: Ohio						
	Lottery	Casino/ Racino	Sports	Stock Market	Other	Any Gambling
Ohio	58.2%	23.5%	16.2%	9.3%	54.4%	74.9%
Number (est.)	5,230,747	2,112,081	1,457,481	835,602	4,886,056	6,724,389

- Lottery gambling and “Other” types of gambling were the most popular types of gambling, followed by Casino/Racino gambling, Sports gambling, and Stock Market gambling.
- “Other” types of gambling’s high participation rate may be due to the many diverse types of gambling included in the category.



Addiction Correlates

- **11.9%** of the sample reported that someone in their family has had a gambling problem.
- In the last 12 months, **13.4%** of the sample had used alcohol or drugs while gambling, and 6.2% had gambled while intoxicated.
- At-risk/problem gamblers gambled while using alcohol or other drugs at **2.5x** the rate of non-problem gamblers.
- At-risk/problem gamblers gambled while intoxicated at **4x** the rate of non-problem gamblers.

Addiction Correlates: Ohio				
	Non gamblers	Non-problem gamblers	At-risk/ problem gamblers	All participants
Family history of gambling problem (lifetime)	7.7%	11.7%	23.0%	11.9%
Have used alcohol or drugs while gambling (last 12 months)	N/A	14.9%	36.6%	13.4% (17.9% all gamblers)
Have gambled while intoxicated (last 12 months)	N/A	5.7%	24.0%	6.2% (8.2% all gamblers)



Mental Health Correlates

- At-risk/problem gamblers had the highest rate of serious depression and being under the care of a doctor due to stress in the last 12 months.
- Non-problem gamblers had the lowest rates of serious depression and being under the care of a doctor due to stress in the last 12 months.

Mental Health Correlates: Ohio				
	Non gamblers	Non-problem gamblers	At-risk/ problem gamblers	All participants
Serious depression (last 12 months)	14.9%	14.1%	26.0%	15.5%
Under the care of a doctor due to stress (last 12 months)	14.8%	12.9%	19.7%	14.0%



What comes first, PG or other disorder?

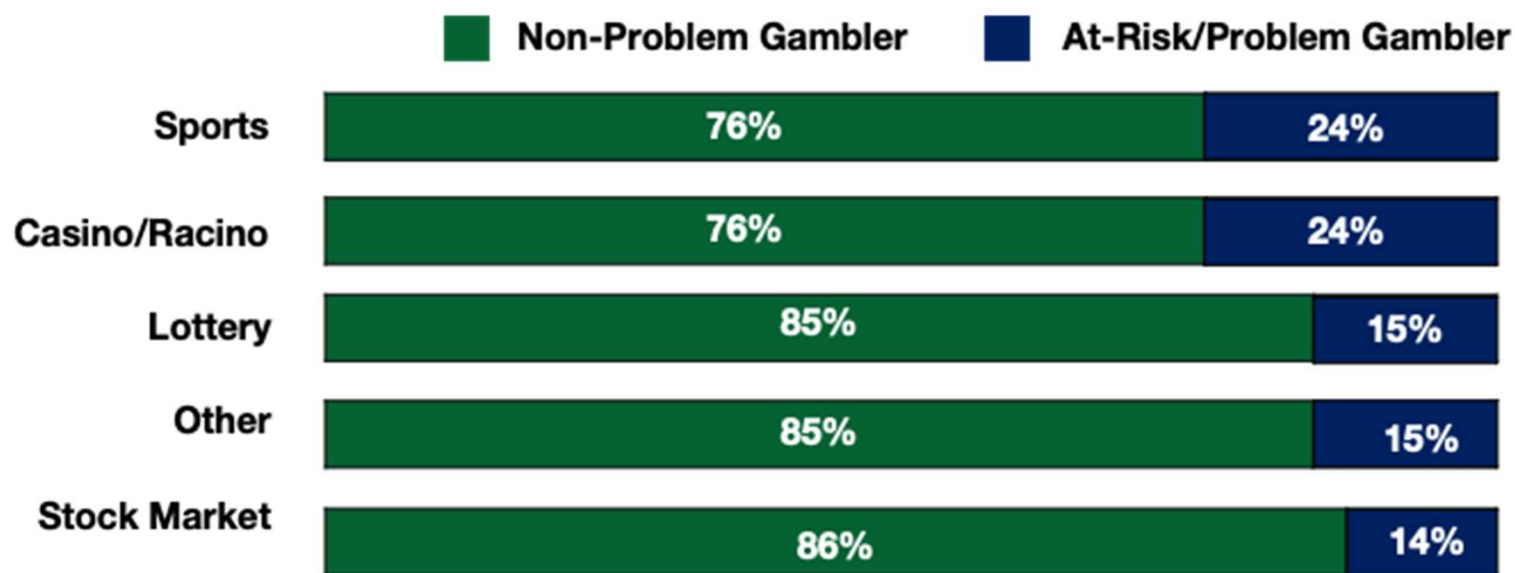
Disorder	PG First	Other Disorder First	Onset at Same Time
Any Mood Disorder*	23%	65%	12%
Any Anxiety Disorder*	13%	82%	5%
Any Impulse Control Disorder	0%	100%	0%
Any SUD*	36%	57%	6%

* These disorders more common among PGs compared to rest of US population

Source: Henry Lesieur (2014, March). Using best practices in treatment of dual diagnosis and pathological gambling. Workshop presentation to 2014 Problem Gambling Conference: "Ohio's Response to a Changing Landscape" Columbus, Ohio.



At-Risk/Problem Gambling By Types of Gambling



Linley, J., Frohnafel-Hasson, S., Sherba, R. T. (n.d.). *2017 Survey of At-Risk and Problem Gambling Prevalence Among Ohioans*. Columbus, OH: Ohio Department of Mental Health and Addiction Services.





Sports Betting

Risk Specific to Sports Betting:

Who

- 18-25, 18-44
- Male
- White

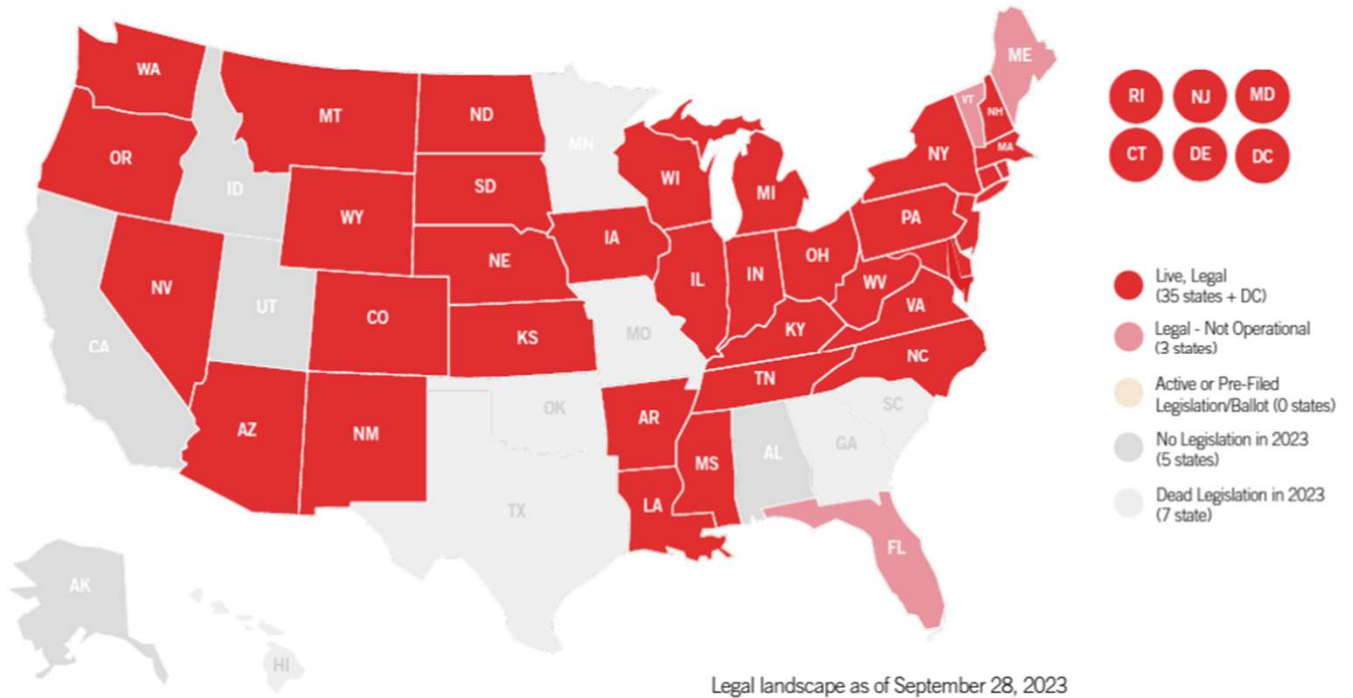
Social Status

- Well educated
- High earner



A Changing Landscape

U.S. Legal Sports Betting



LEARN MORE
AmericanGaming.org



Sports Betting Terms

Money-Line Bet

Spread Bet

Over/Under

Parlays



Sports Betting

In-game “Live” Bet

Proposition “Prop” Bet

Micro Bet



Ohio Sports Betting

- 15 operational retail sportsbooks
23 active licenses
- 20 operational mobile sportsbooks
22 active licenses
- Over 900 active Type C lottery kiosk locations



*As of 10/13/23



License Types Available

TYPE A:

Online Sports Gaming

- Online sportsbook through computers & mobile applications
- Maximum Number: 25
- May partner with 1-2 mobile skins or sportsbooks
- Must also hold a Type B license or have an operational place of business in the state

TYPE B:

Brick-and-Mortar Sportsbook

- Brick-and-mortar facilities with betting windows and terminals
- Maximum Number: 40
- May partner with 1 mobile skin or sportsbook
- Located according to county population limits and economic activity

TYPE C:

Sports Gaming Lottery Product

- Self-service terminals in establishments with Type D liquor permits
- Maximum Number: 20
- Proprietors may place kiosks at an unlimited amount of Type C Gaming Hosts
- Limits on bet types, number of kiosks, weekly betting amounts



GeoComply Data

The Ohio sports betting market demonstrated its massive potential during Super Bowl LVII, **leading the U.S. in unique sportsbook accounts** and ranking second only to New York in **geolocation checks**.

Internet security company **GeoComply** verifies user locations when bettors log on to use a sportsbook. The company performed **over 100 million geolocation checks** on Saturday and Sunday, a 25% increase over last year.

“Super Bowl LVII was a record-breaking event,” GeoComply Co-Founder & CEO Anna Sainsbury said.

“GeoComply data reveals that Americans’ interest in legally betting on the Super Bowl has never been higher.”

Ohio sports betting kicked off on Jan. 1. The state is expected to rank among the biggest in the U.S., and this year’s Super Bowl betting shows that it is **off to a fast start**.

Ohio sports betting market posts huge Super Bowl numbers

GeoComply registered **7.4 million accounts** over Super Bowl weekend, a 32% increase over last year. The total number of **Super Bowl geolocation checks** was up 25% to 100 million.

Ohio, Arkansas, Kansas and Maryland have all legalized sports betting since last year’s Super Bowl.

Ohio far outpaced these new markets and several that are more mature, slotting in just behind New York with **12.6 million geolocation checks** on Sunday.



GeoComply Data

“More than 2.25 million unique accounts have used gambling apps in Ohio, and even Kentuckians are trying (and sometimes driving) to get in on legal sports betting.”

*<https://www.cleveland.com/business/2023/02/more-than-2-million-accounts-using-sports-betting-apps-across-ohio.html>



Ohio Sports Betting Revenue



2023 OHIO SPORTS GAMING TAXABLE REVENUE

Month	Online	Retail	Total Taxable Revenue
January	206,101,672	3,506,071	209,607,743
February	80,112,742	940,380	81,053,122
March	92,001,688	2,852,580	94,854,268
April	61,832,049	1,496,659	63,328,708
May	55,947,286	1,932,383	57,879,669
June	32,084,076	689,028	32,773,104
July	35,914,516	1,235,196	37,149,712
August	39,355,961	1,421,323	40,777,284
Statewide Total	603,349,990	14,073,620	617,423,610



Consumer Protections

- Age (21+) and identity verification
- 2% dedicated funding (Type A & B) toward problem sports gambling
- Marketing and advertising restrictions
- Statewide Sports Gaming VEP (integrated into Ohio VEP)*



Marketing & Advertising Restrictions

- CANNOT target advertising to those under 21
- CANNOT advertise on college/university campuses
- CANNOT include language referring to ‘free bets’ unless they are actually free
- MUST include Ohio/National Problem Gambling Helpline information that is **Clear** and **Conspicuous**

To-date: over \$1M in fines have been issued against sports gaming operators for not following these guidelines.



Sports Betting Research & Concerns

- Nearly half of American adults have bet on a sporting event
- Rate of gambling problems among sports bettors is at least 2x as high as among gamblers in general
 - When conducted online, even higher
- Aggressive marketing promotions
- Populations with increased risk
 - Professional and college athletes
 - Youth

https://www.ncpgambling.org/wp-content/uploads/2020/01/Sports-gambling_NCPGLitRvwExecSummary.pdf



Ohio Sports Betting Trends

- Largest expansion of gambling in state history
- Largest expansion of sports betting in the nation
- 1-in-4 Ohioans who bet on sports are at-risk (2017 Ohio Prevalence data)
- Approximately 97% of sports bets in Ohio placed on mobile apps
- Since January 2023, increase in volume of calls to the Ohio Problem Gambling Helpline
- \$1.1 billion dollars wagered in the first month - January 23

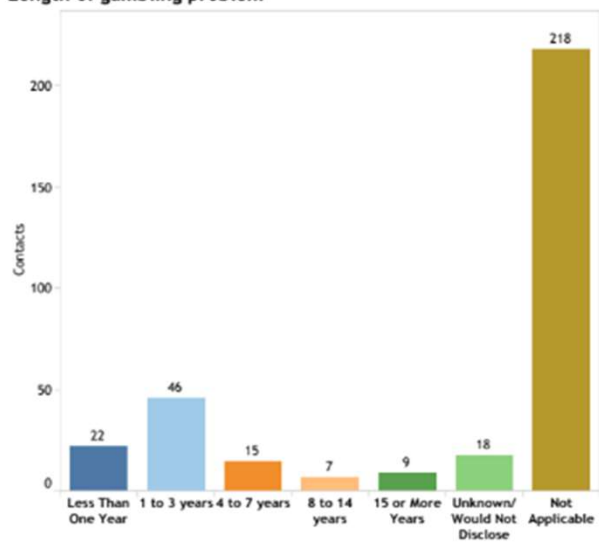


Ohio Problem Gambling Helpline Report

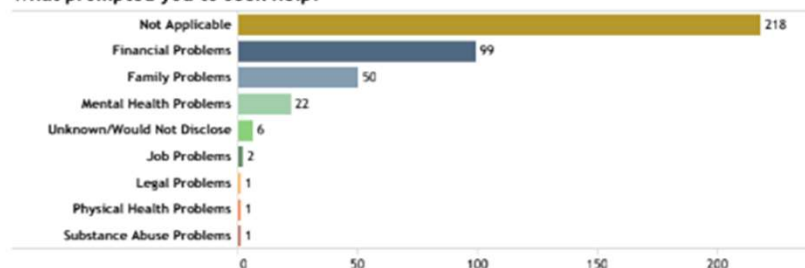
September 2023
Total Contacts: 756

Chats: 31

Length of gambling problem*



What prompted you to seek help?*



Types of gambling activities*



*Not Applicable reflects completed contacts unrelated to gambling addiction. Values not listed are contacts that could not be included due to insufficient data.

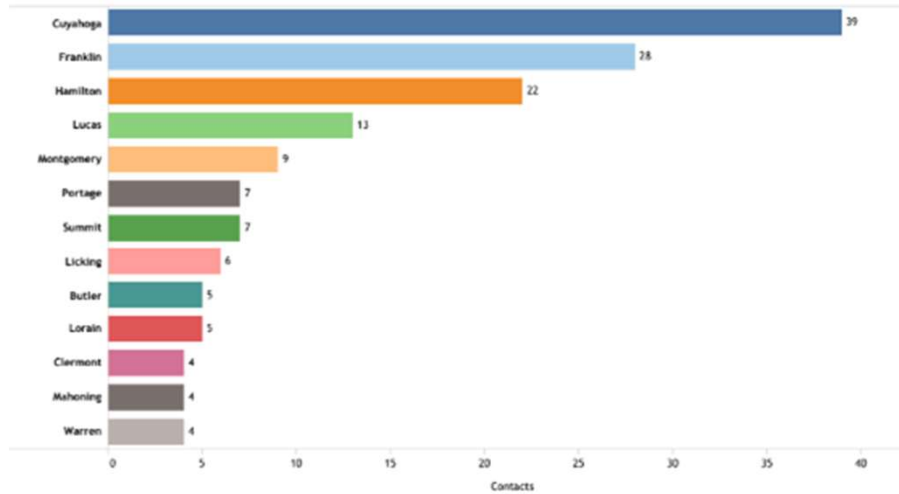
Contact Counts by Month

September 2022	October 2022	November 2022	December 2022	January 2023	February 2023	March 2023	April 2023	May 2023	June 2023	July 2023	August 2023	September 2023
550	599	657	635	1,492	1,046	1,045	739	754	675	773	692	756

prepared by United Way 2-1-1's community resource department



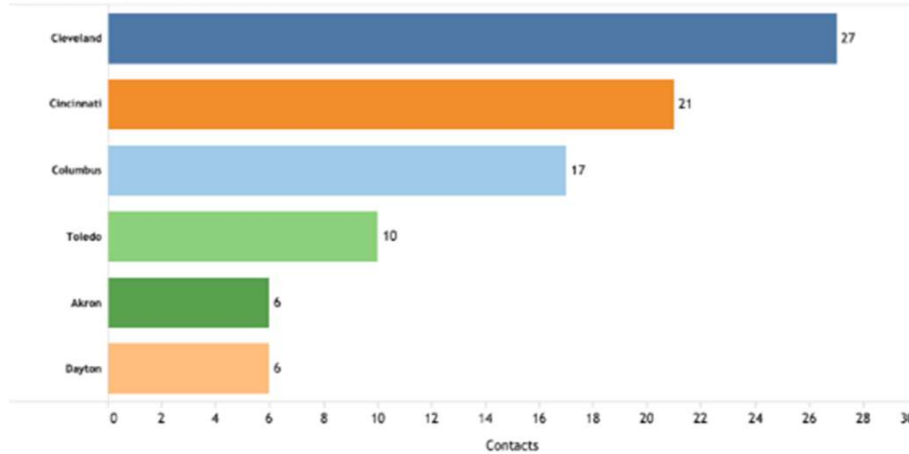
Counties with 3 or more contacts



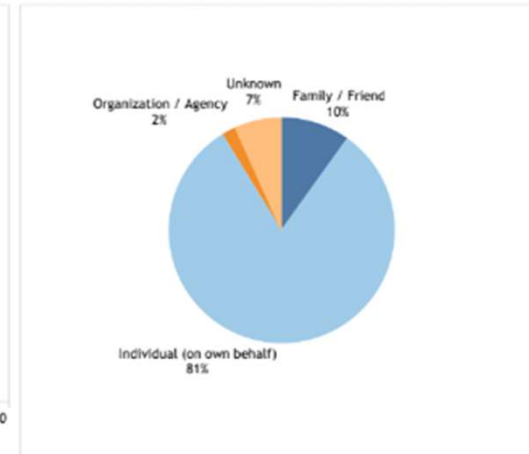
How client heard about the Helpline

Unknown	153
WWW/Internet	88
Lottery Games/Tickets	47
Casino	14
Organization/Agency/Employer/Other Professional	8
Media - TV	7
Family/Friend	4
Media - Radio	2
Media - Other	1
Media - Other: Online Website	1
Media - Other: Radio	1
Media - Other: Repeat Caller	1
National Problem Gambling Helpline	1
Racetrack	1

Cities with 4 or more contacts



Client's relation to person in need of assistance



Sports Betting in Kentucky

Kentucky is the National Council on Problem Gambling's biggest concern

As Kentucky prepares to launch sports betting as early as this month, Gov. Andy Beshear signed emergency regulations to **administer the Kentucky Problem Gambling Assistance account**. That way, the state will provide resources to address problem gambling.

In other words, a portion of the gaming revenue in the state will be used to **help those who struggle with gambling addictions**. In particular, a measure will require 2.5% of the tax dollars from sports betting to fund problem gambling support efforts.

And even though Kentucky will have some public funding in place, Whyte said it is still **not going to be enough**:

"It's going to take years, at a minimum, to build a comprehensive problem gambling system. And it may take even longer than that for people with gambling problems in Kentucky to trust this system because they've been told for their entire lives that there's no help available. And even if you create this system, will they come to it and trust it? That does not happen overnight."

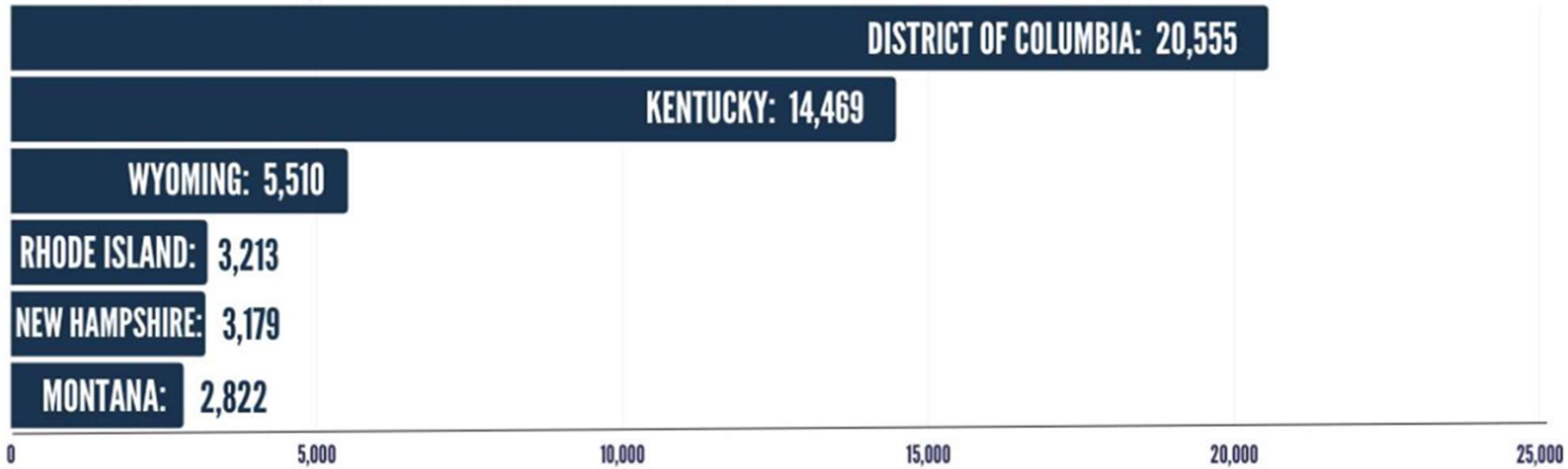
No state has as deep a connection with betting on horses as Kentucky does. The **Kentucky Derby** has been the state's most respectable horse racing event, occurring once a year at Churchill Downs since 1875.

For that reason, Kentucky is one of the NCPG's biggest concerns, as legal betting could and probably will attract young players.



Problem gambling helpline incoming traffic

The six US states that allow legal online sports betting at a minimum age of 18. Chart shows DC and Kentucky with the highest incoming traffic for calls, chats and texts. Period: 1/1/2016 – 9/5/2023



Source: National Council on Problem Gambling
Graphic by PlayUSA



Sports Betting in Indiana

- Legal since 2019
 - Trying to legalize online casino gaming
 - 12 casino properties with retail sports betting
 - 13 online mobile sportsbooks
 - Paper-based exclusion application
-
- Each licensed riverboat casino and racetrack pays \$500,000 per year toward the governance of the self-exclusion system
-
- “A new survey from Indiana University found that 89.3% of Hoosiers participated in gambling in 2022, slightly above the national average of 88%”



Indiana Sports Betting

- 12 Mobile Service Providers*
- 15 Land-Based Sportsbooks*



*As of 7/28/22



Future Implications

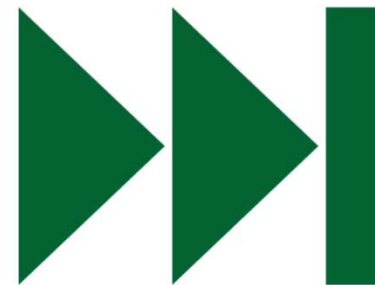
Normalcy

↑ Availability ↑ Accessibility ↑ Acceptability

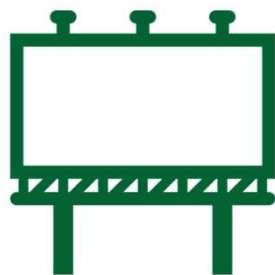
Early onset

Integrity of sport

Problem/Disordered Gambling







Tools & Resources

Marketing Campaigns, Time-Out Ohio, Helpline



Resources

People

Staff &
Volunteers,
Experience

Specialized Knowledge and Skills

Experience
within field

Community Connections

Partnerships,
Access to
populations

Concrete Supplies

Money,
Equipment,
Technology

Community Awareness

News stories,
Local gambling
areas

Existing Efforts

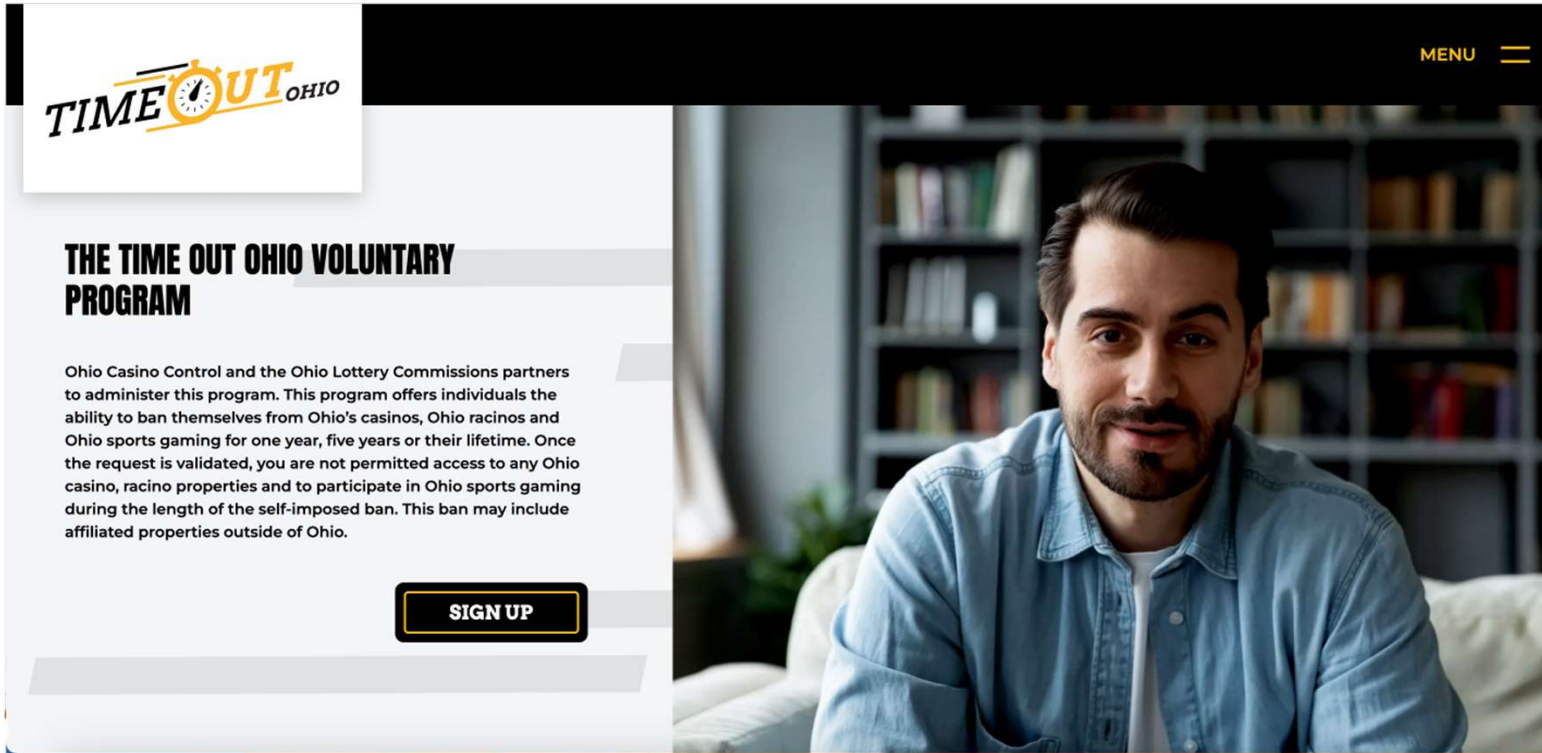
Policies,
Statewide
agencies



Statewide Campaigns & Programs



Time-Out Ohio



TIME OUT OHIO

MENU

THE TIME OUT OHIO VOLUNTARY PROGRAM

Ohio Casino Control and the Ohio Lottery Commissions partners to administer this program. This program offers individuals the ability to ban themselves from Ohio's casinos, Ohio racinos and Ohio sports gaming for one year, five years or their lifetime. Once the request is validated, you are not permitted access to any Ohio casino, racino properties and to participate in Ohio sports gaming during the length of the self-imposed ban. This ban may include affiliated properties outside of Ohio.

SIGN UP



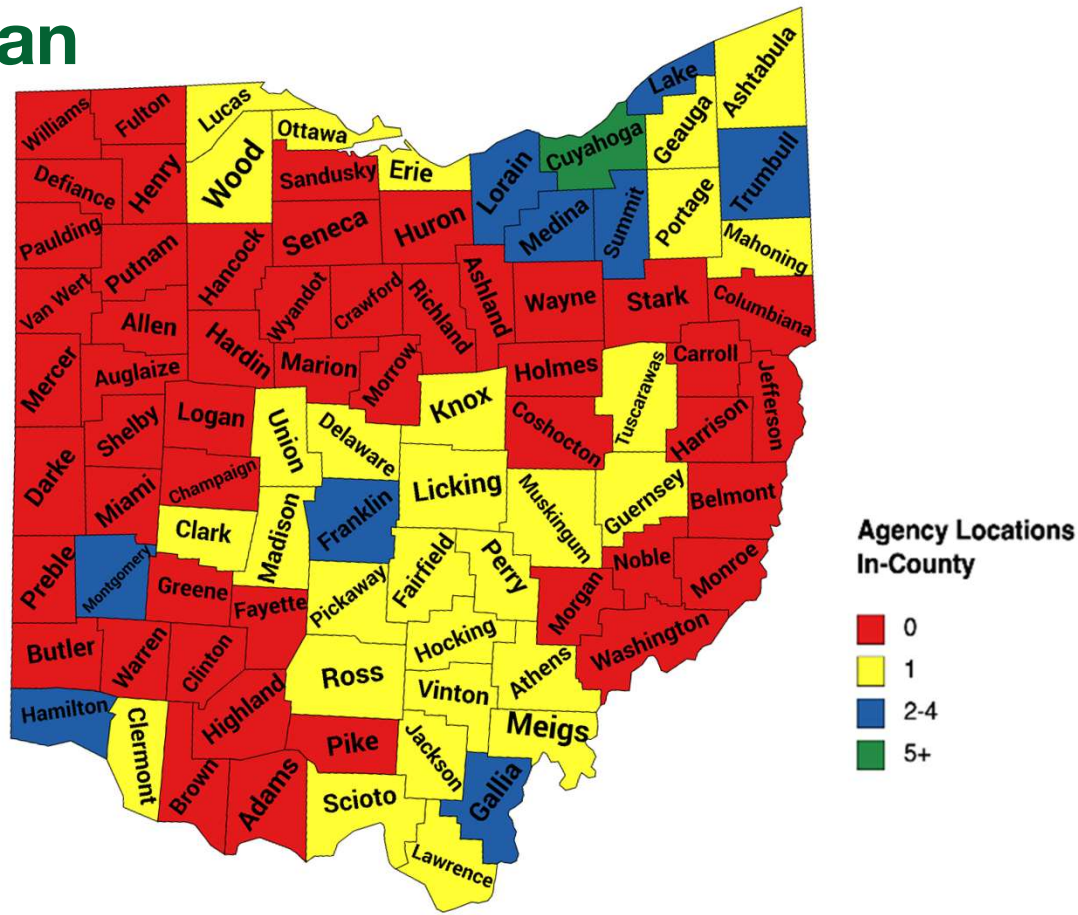
Helpline/Warm Transfer



1-800-589-9966, 1-800-GAMBLER

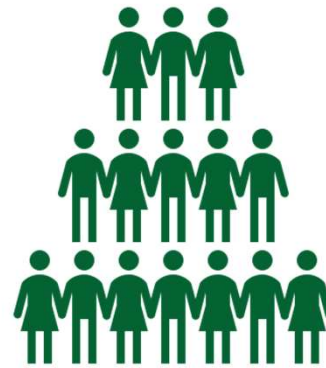


Treatment Providers with a Qualified Clinician



Community Support

- Gambler's Anonymous
- Gam-Anon
- Smart Recovery



What You Can Do

- Know the law
- Engage in the process
- Prepare your community for increased gambling availability
- Know the local resources for gambling –
GamblingHelpOhio.org
- Be aware
- Learn more...



PGNO Programs

- Stages Training Series
- Fellowship program
- Agency Consultation
- Gambling Endorsement Supervisory Program
- Clinical Consultation
- Case presentations
- Gambling Endorsement support
- Casino/Racino Educational Tours
- Ohio Problem Gambling Conference



SPFing Your Way Through Problem Gambling Prevention

During this workshop, participants will learn about the problem gambling service system in Ohio and review national, statewide and local problem gambling data to identify a problem of practice to help guide local prevention programming.

Who Should Attend:

Professionals in the fields of prevention and education; county boards; and anyone wanting to learn more about problem gambling prevention.

Tuesday, **December 19, 2023** 9:00 am to Thursday, **December 21, 2023**
3:30 pm



21st Ohio Problem Gambling Conference

Virtual pre-conference: **February 1st & 2nd, 2024**

In-Person Conference: **February 15 & 16, 2024**

Breakout Sessions from Preventionists, Treatment Professionals, Gaming Industry, Researchers, etc.

Great way to learn more about the current landscape.

Details: PGNOhio.org/CONFERENCE





Questions?



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