

Market Landscape Explorer Research

Scratch Game Player Profile

- report -



Overview

- About the Scratch Player Profile Survey
- Survey Topics
- Profile of the respondents
- 2010 Nebraska Lottery Scratch Segments
- Moving Forward

About the Scratch Player Profile Survey

- Data collected from May 7, 2010 - June 13, 2010.
- Survey ran as an promotion for MVP Club members from May 7-June 6 and within the CFM (as an Ad-hoc survey) from June 1-13.
- The survey length was likely over 20+ minutes
 - Thank you for choosing to take part in this Nebraska Lottery survey being conducted by Axiom Consumer Research. The Lottery would very much appreciate your feedback. **NOTE: This survey will take 20 minutes (on average) to complete.**
- Survey records were deduped to include only those who had ever played Scratch games
- There were 840 completed surveys:
 - 759 respondents from the MVP Club members
 - 81 respondents from the CFM who were not MVP Club members
- Further excluded 28 respondents who typically play Scratch less than once a year

Profile of Respondents



Respondent Demographic Profile

	Total	
Sample Size	812	
Female	480	52%
Count	59%	
Male	332	48%
Count	41%	

	Total	
Sample Size	812	
19 to 29 years	68	23%
Count	8%	
30 to 44 years	200	32%
Count	25%	
45 to 64 years	473	37%
Count	58%	
65+ years	71	8%
Count	9%	

	Total	
Sample Size	812	
Employed part-time	83	10%
Count		
Employed full-time	474	58%
Count		
Self-employed	61	8%
Count		
A stay-at-home mom or dad	47	6%
Count		
Retired	97	12%
Count		
None of the above	50	6%
Count		

	Total	
Sample Size	812	
Under \$25,000	101	12%
Count		
\$25,000 to just under \$50,000	252	31%
Count		
\$50,000 to just under \$75,000	207	25%
Count		
\$75,000 to just under \$100,000	96	12%
Count		
\$100,000 or more	60	7%
Count		
(I do not wish to provide this information.)	96	12%
Count		

Respondent Lotto Game Profile



	Total	Total	Total	Total	Total
Sample Size	812	812	812	812	812
Regular Count Column %	542 67%	344 42%	78 10%	140 17%	118 15%
Occasional Count Column %	159 20%	160 20%	78 10%	64 8%	87 11%
Infrequent Count Column %	95 12%	159 20%	216 27%	203 25%	221 27%
Non-player Count Column %	16 2%	149 18%	440 54%	405 50%	386 48%



Have you ever played... Mega Millions?

	Total
Sample Size	812
No Count Column %	222 27%
Yes Count Column %	590 73%

PLAY FREQUENCY DEFINITIONS

Regular - Every week

Occasional - Every couple of weeks or
Every month

Infrequent - Every couple of months,
Every 6 months, or Once a year

Non-Player - Less than once a year or
Have never played

2010 Scratch Segments

How the segments were derived.



Input #1 used to derive the segments: Purchase Decision Factors (C2)

★ Favorites May 2010 Scratch Survey Research

nebraska LOTTERY AXIOM CONSUMER RESEARCH

Which factor do you feel is the **MOST** and **LEAST** important to you personally when deciding which Scratch game to purchase at a Nebraska lottery retailer?

MOST Important		LEAST Important
<input type="radio"/>	A game that has paid out money at the store	<input type="radio"/>
<input type="radio"/>	The game looks like it will take more time to play than most games of a specific price	<input type="radio"/>
<input type="radio"/>	Top prize	<input type="radio"/>
<input type="radio"/>	Prefer buying tickets that have served me well in the past	<input type="radio"/>
<input type="radio"/>	Ticket price	<input type="radio"/>
<input type="radio"/>	Using a coupon for a free Scratch game	<input type="radio"/>
<input type="radio"/>	Features of the ticket other than its price or top prize (i.e. name of the ticket, theme, play style used, ticket colors, # of play areas, odds of winning, bonus play area, shape of ticket, etc.)	<input type="radio"/>

Next »

(1 of 10)

REMEMBER: Do not use the Back Button on your Internet Browser as your survey answers may be lost.

Questions? Contact survey2@axiom-research.com

23 Items included in the Purchase Decision Factors Question

1. Top prize
2. Ticket price
3. Features of the ticket other than its price or top prize (i.e. name of the ticket, theme, play style used, ticket colors, # of play areas, odds of winning, bonus play area, shape of ticket, etc.)
4. How the tickets looks in the display unit
5. A specific game is promoted throughout the store
6. Returning winning ticket(s) for a particular game
7. Using a coupon for a free Scratch game
8. The game has a promotion to send in or enter the barcodes from your non-winning tickets
9. The game is newly released
10. A game that I haven't seen before
11. A new ticket roll of that game was just added by the clerk
12. Prefer buying tickets that have served me well in the past
13. The game looks easy to play
14. The game looks easier to play than most games of a specific price
15. The game looks more challenging to play than most games of a specific price
16. The game looks like it will take more time to play than most games of a specific price
17. A game that I won playing in the past
18. A popular game that was printed in the past but has NOT been available for some time
19. A game that hasn't paid out much money at the store
20. A game that has paid out money at the store
21. Reviewing the 'Top Prizes Remaining' bulletin
22. A suggestion from the clerk
23. A suggestion from other Scratch players

Input #1 used to derive the segments: Scratch Game Ticket Attributes

May 2010 Scratch Survey Research

nebraska LOTTERY

AXIOM CONSUMER RESEARCH

Which **ticket attribute** do you feel is the **MOST** and **LEAST** important to you personally when deciding which Scratch game to purchase at a Nebraska lottery retailer?

MOST Important		LEAST Important
<input type="radio"/>	Costs \$1 to play and has a top prize of between \$3,000 and \$5,000	<input type="radio"/>
<input type="radio"/>	The ticket colors appeal to me	<input type="radio"/>
<input type="radio"/>	"Add Up & Win" is the primary play style on the ticket	<input type="radio"/>
<input type="radio"/>	Has a feature where I might double or triple my prize	<input type="radio"/>
<input type="radio"/>	Has a bonus play area where I might win a set amount of money instantly	<input type="radio"/>
<input type="radio"/>	"Match 3 Anywhere" is the primary play style on the ticket	<input type="radio"/>
<input type="radio"/>	"Match 3 In A Row" is the primary play style on the ticket	<input type="radio"/>

Next »

(1 of 18)

REMEMBER: Do not use the Back Button on your Internet Browser as your survey answers may be lost.
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41 Items included in Ticket Attributes Question (C3)

1. Costs \$1 to play and has a top prize of \$500-\$2,000
2. Costs \$1 to play and has a top prize of \$3,000-\$5,000
3. Costs \$2 to play and has a top prize of \$1,000-\$10,000
4. Costs \$2 to play and has a top prize of \$15,000-\$17,000
5. Costs \$3 to play and has a top prize of \$20,000-\$25,000
6. Costs \$3 to play and has a top prize of \$30,000-\$35,000
7. Costs \$5 to play and has a top prize of \$25,000-\$35,000
8. Costs \$5 to play and has a top prize of \$40,000-\$50,000
9. Costs \$10 to play and has a top prize of \$50,000-\$75,000
10. Costs \$10 to play and has a top prize of \$80,000-\$100,000
11. Costs \$15 to play and has a top prize of \$75,000-\$100,000
12. Costs \$15 to play and has a top prize of \$125,000-\$200,000
13. Has considerably more prizes of \$1- \$25 than the average game
14. Has considerably more prizes of \$26 -\$500 than the average game
15. The odds of winning any prize is better than most other Scratch games at that price
16. Has an appealing theme that is NOT tied to a familiar product like Monopoly, Trucks & Bucks, Harley Davidson, Orange County Choppers, World Series of Poker, Battleship, etc.
17. Has an appealing theme that IS tied to a familiar product like Monopoly, Trucks & Bucks, Harley Davidson, Orange County Choppers, World Series of Poker, Battleship, etc.
18. Has a feature where I might double or triple my prize
19. Has a feature where I might win a set amount of money instantly
20. Has a bonus play area where I might win a set amount of money instantly
21. The ticket consists of a single play area
22. The ticket consists of more than one play area
23. "Find Symbol & Win" is the primary play style on the ticket
24. "Match 2" is the primary play style on the ticket

41 Items included in Ticket Features Question (C3)

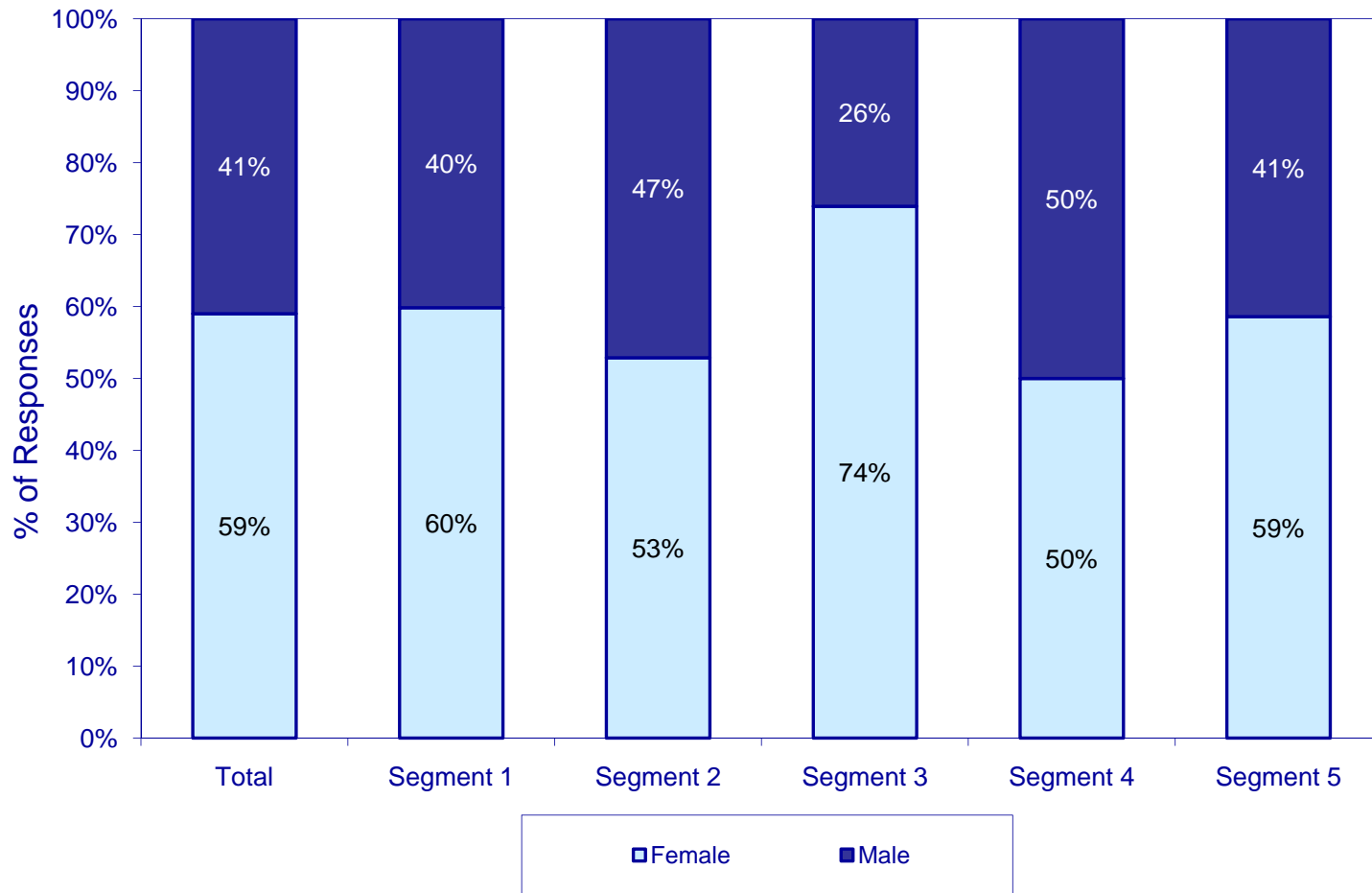
25. “Match 3 Anywhere” is the primary play style on the ticket
26. “Match 3 In A Row” is the primary play style on the ticket
27. “Yours Beats Their Score” is the primary play style on the ticket
28. “Add Up & Win” is the primary play style on the ticket
29. “Key # Match” is the primary play style on the ticket
30. “Key Symbol Match” is the primary play style on the ticket
31. “Key \$ Match” is the primary play style on the ticket
32. “Tic Tac Toe” is the primary play style on the ticket
33. “Poker” is the primary play style on the ticket
34. “Blackjack” is the primary play style on the ticket
35. “Bingo” is the primary play style on the ticket
36. “Crossword” is the primary play style on the ticket
37. Getting through a “Maze” is the primary play style on the ticket
38. The ticket colors appeal to me
39. The ticket colors makes it stand out from the other tickets
40. The ticket is NOT square or rectangular but is instead in a shape that matches the theme of the ticket (the number “7”, a horseshoe, a shamrock, a flower, etc)
41. The name of the ticket appeals to me

2010 Scratch Segments

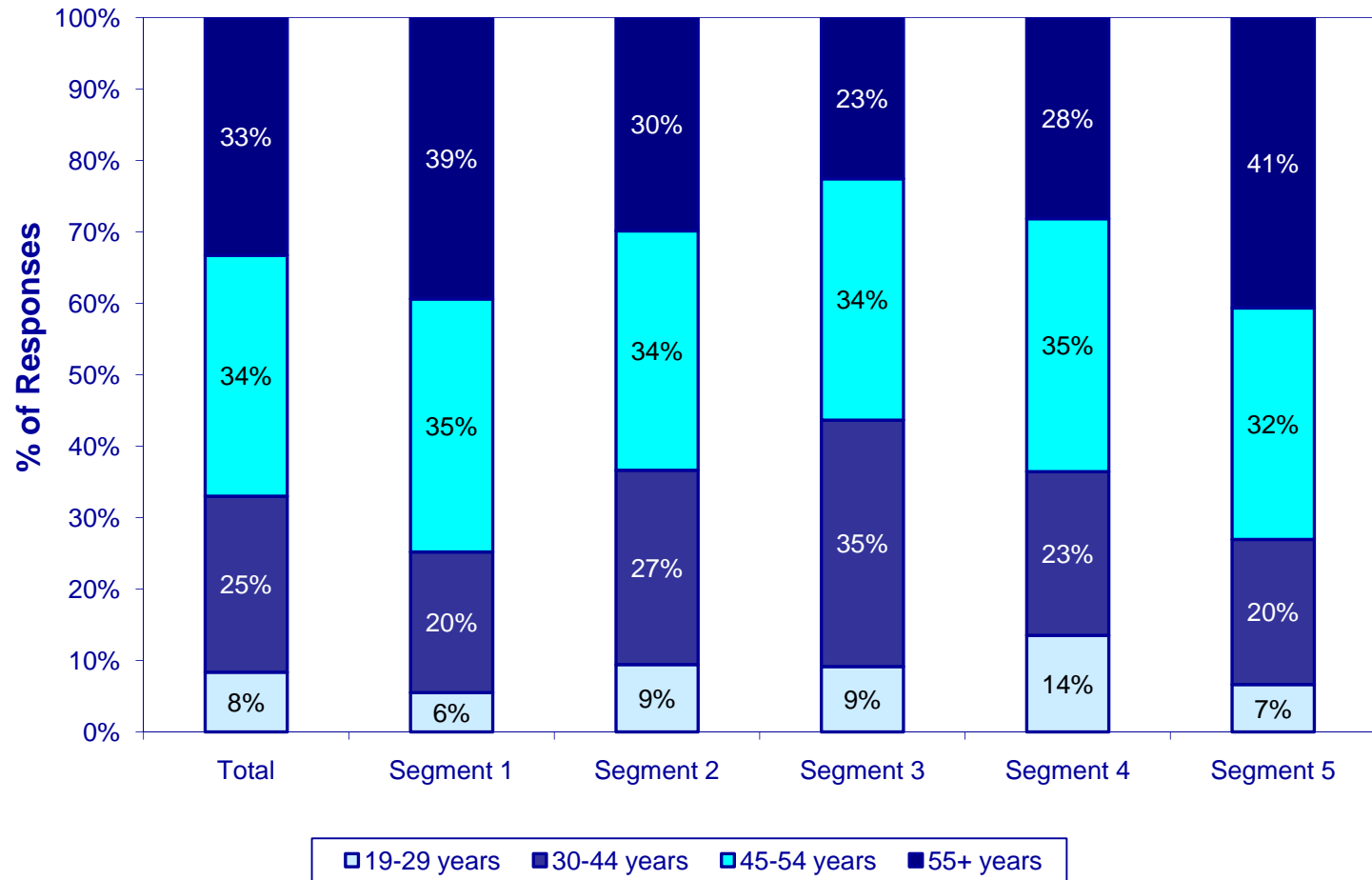
Noteworthy Demographic Characteristics



Gender by segment



Age by Segment



2010 Scratch Segments

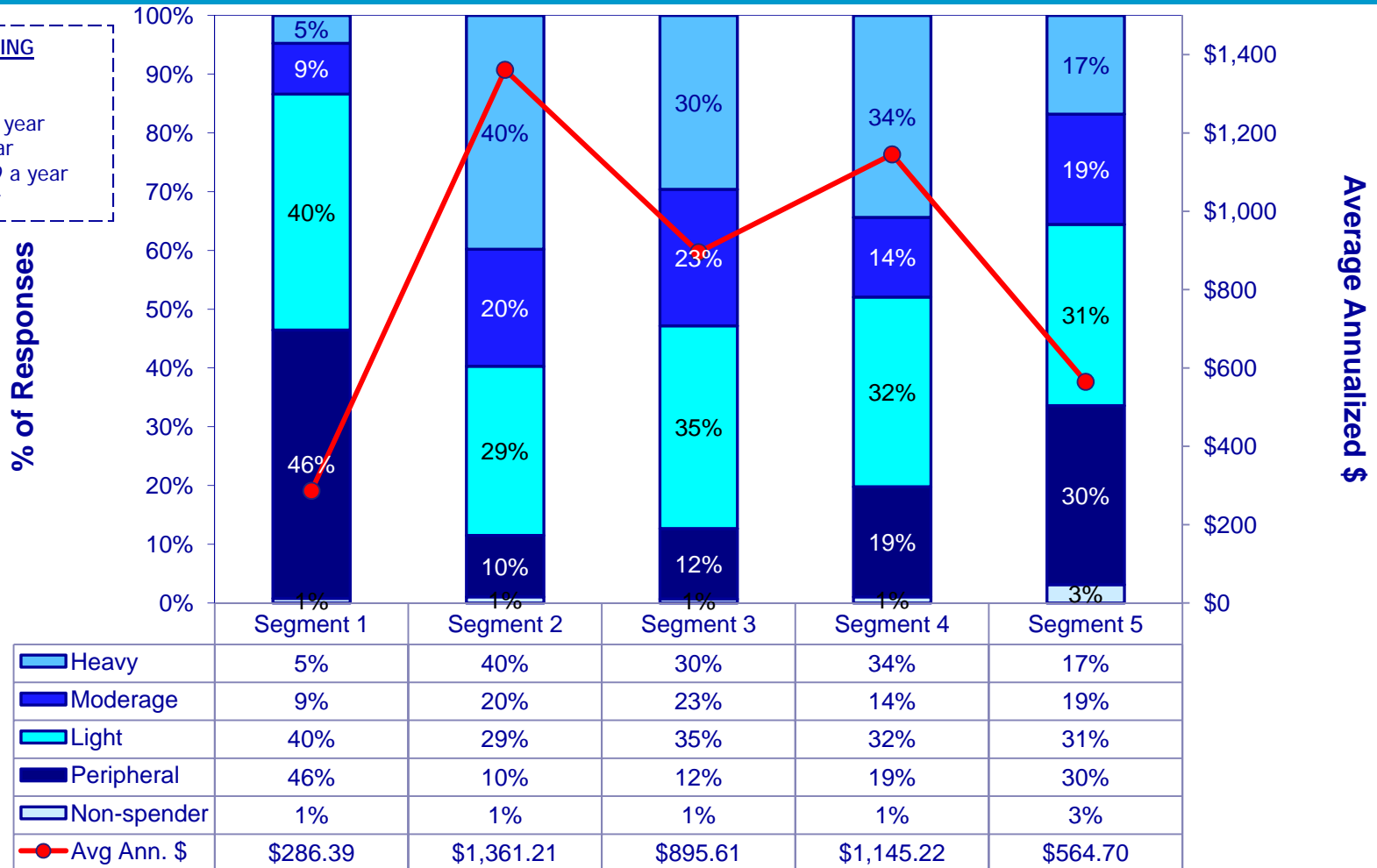
Annualized Lottery Spending



Scratch Spending by Segment

SCRATCH SPENDING DEFINITIONS

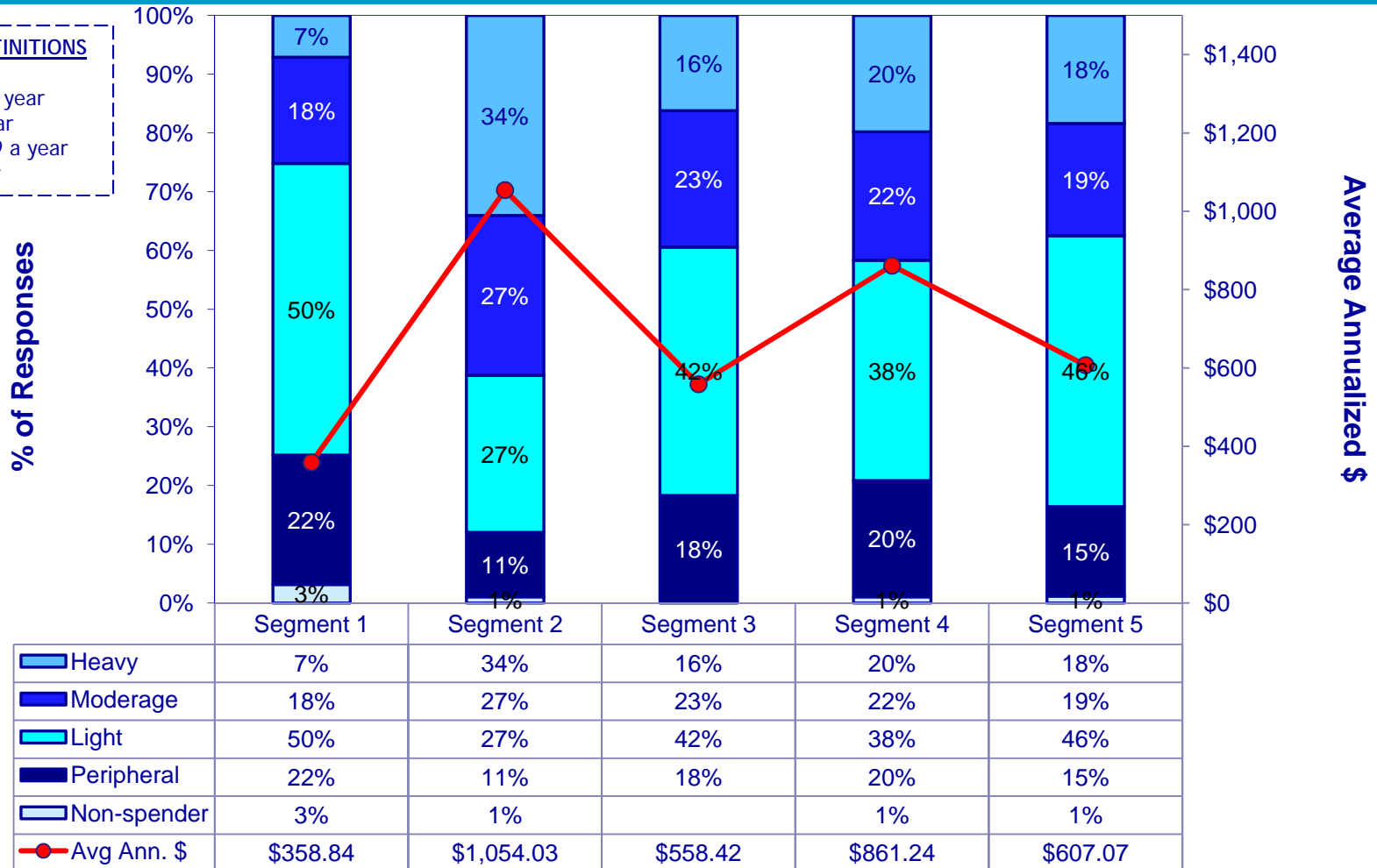
Peripheral = \$1-\$103 a year
 Light = \$104-\$519 a year
 Moderate = \$520-\$1039 a year
 Heavy = \$1040+ a year



Lotto Spending by Segment

LOTTO SPENDING DEFINITIONS

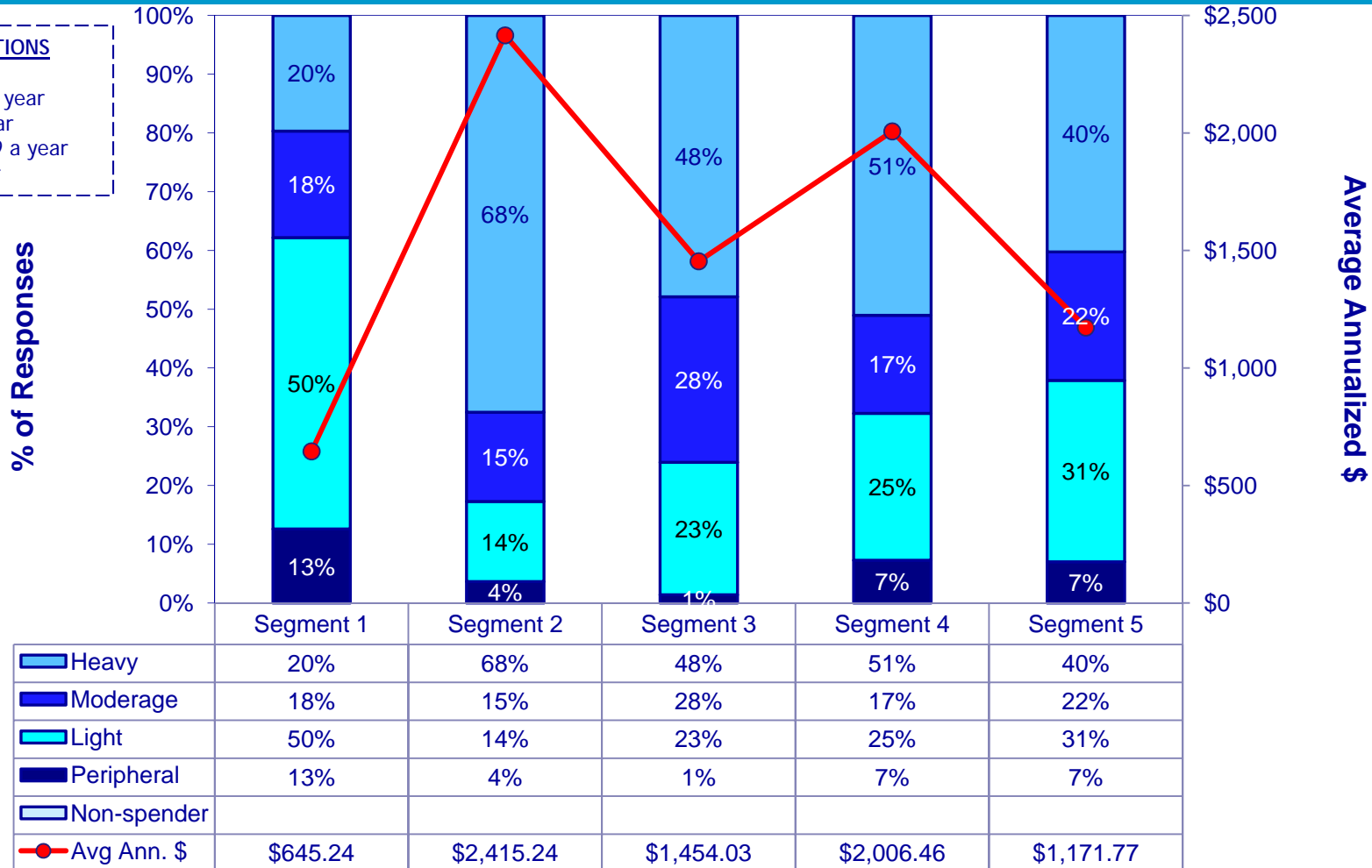
Peripheral = \$1-\$103 a year
 Light = \$104-\$519 a year
 Moderate = \$520-\$1039 a year
 Heavy = \$1040+ a year



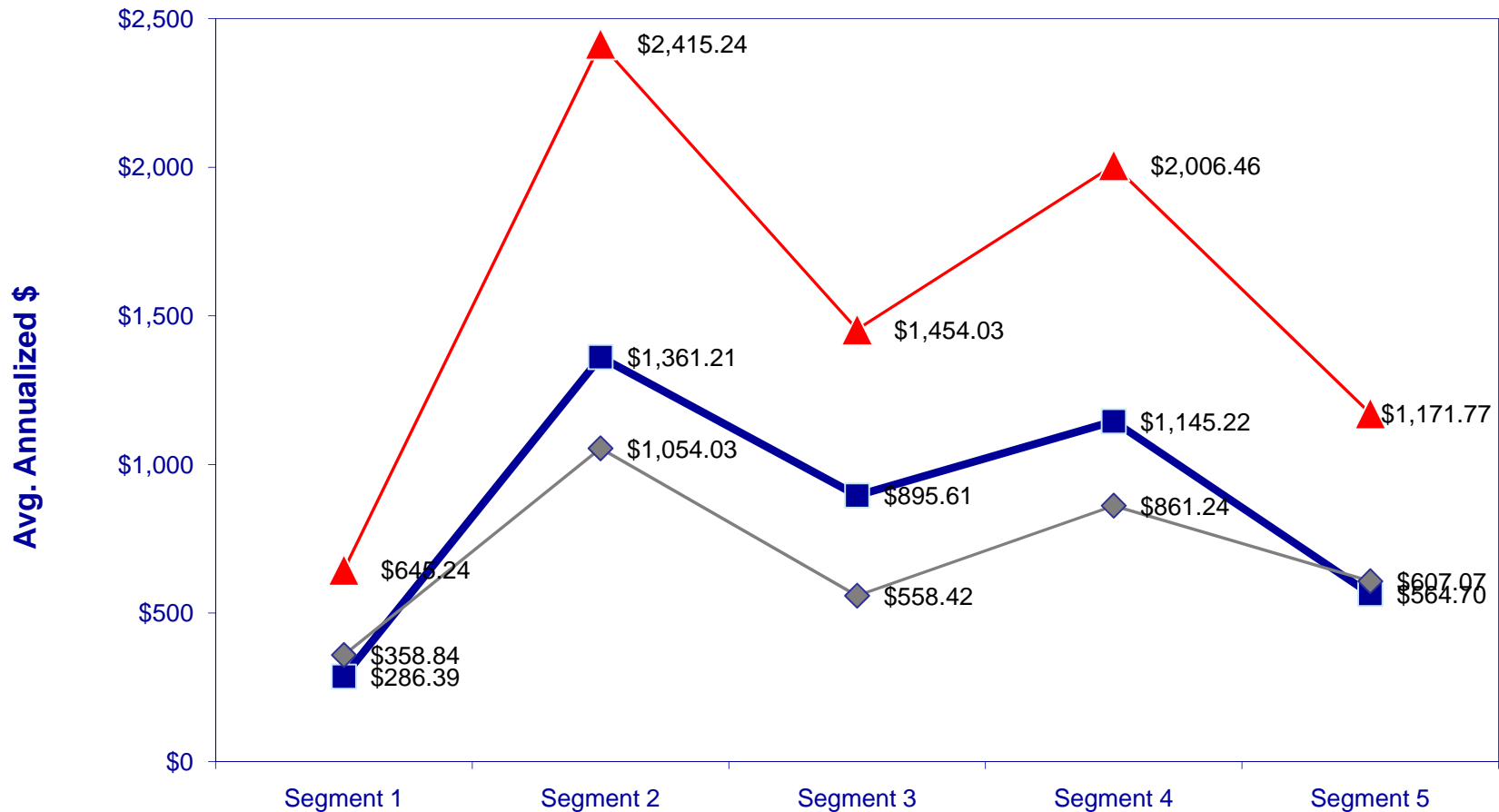
Overall Lottery Spending by Segment

SPENDING DEFINITIONS

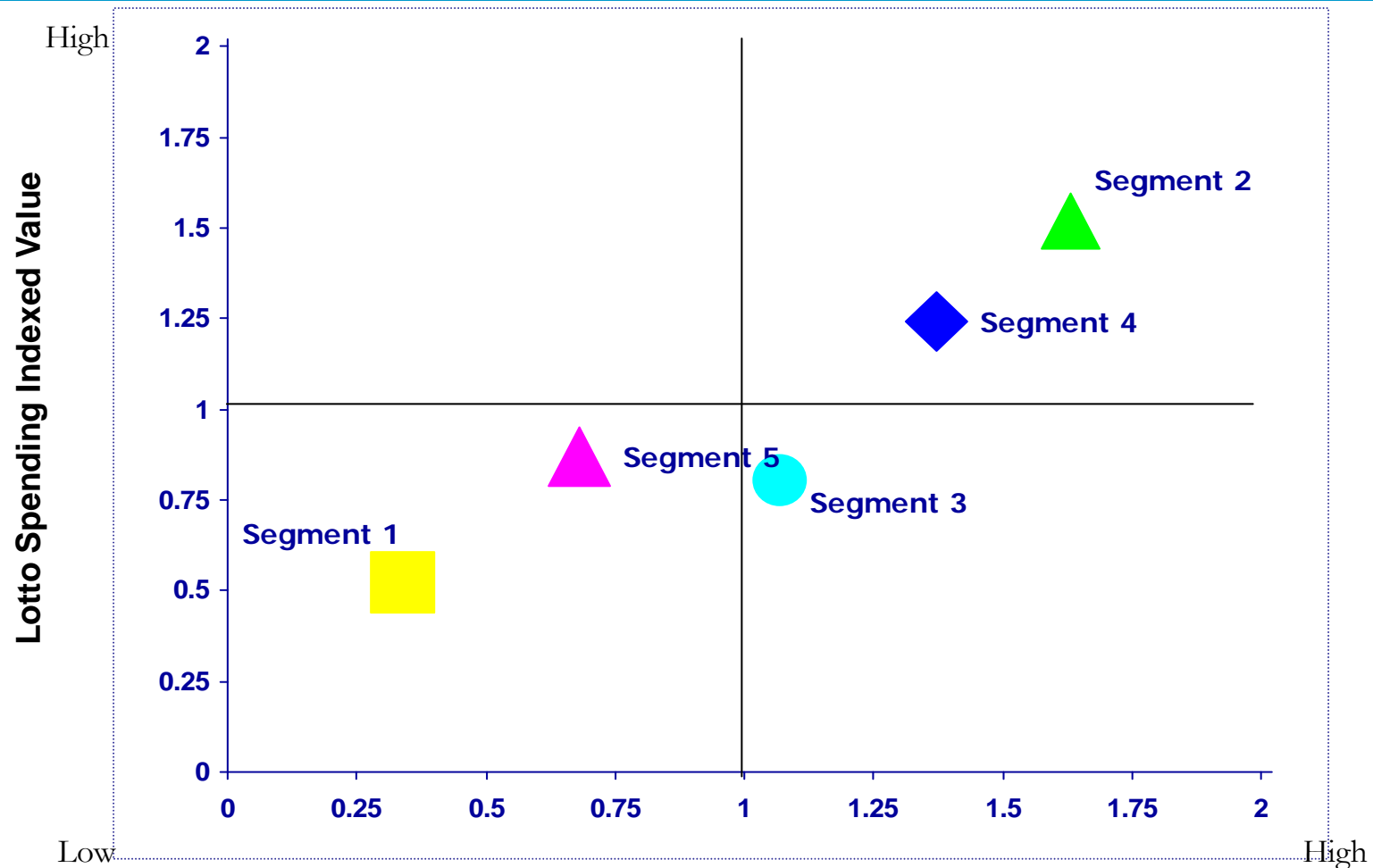
Peripheral = \$1-\$103 a year
 Light = \$104-\$519 a year
 Moderate = \$520-\$1039 a year
 Heavy = \$1040+ a year



Lottery Spending Analysis by Segment



Indexed value of each Segment

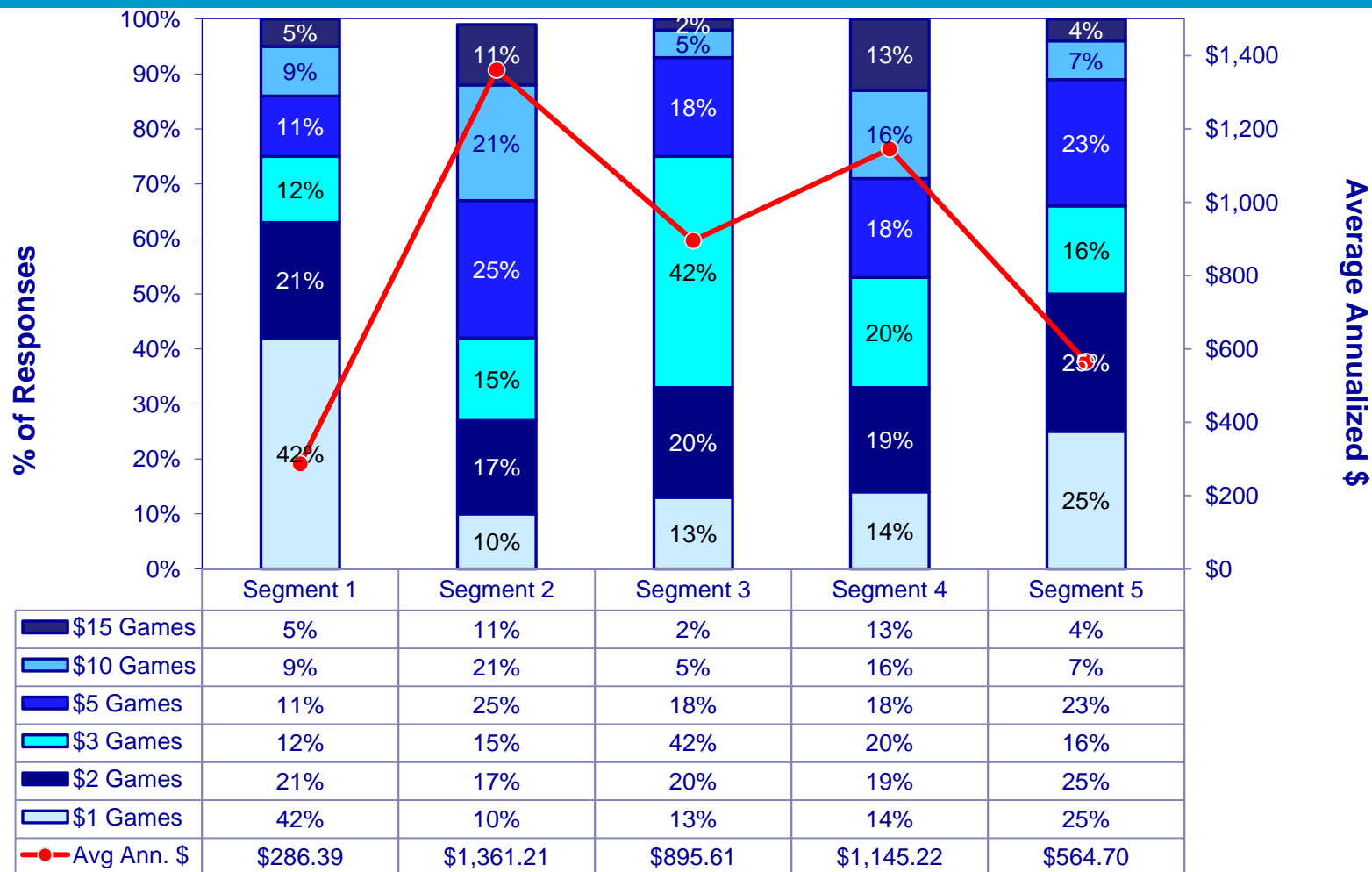


2010 Scratch Segments

Scratch Game Price Point Analysis



Share of Scratch Wallet by Segment

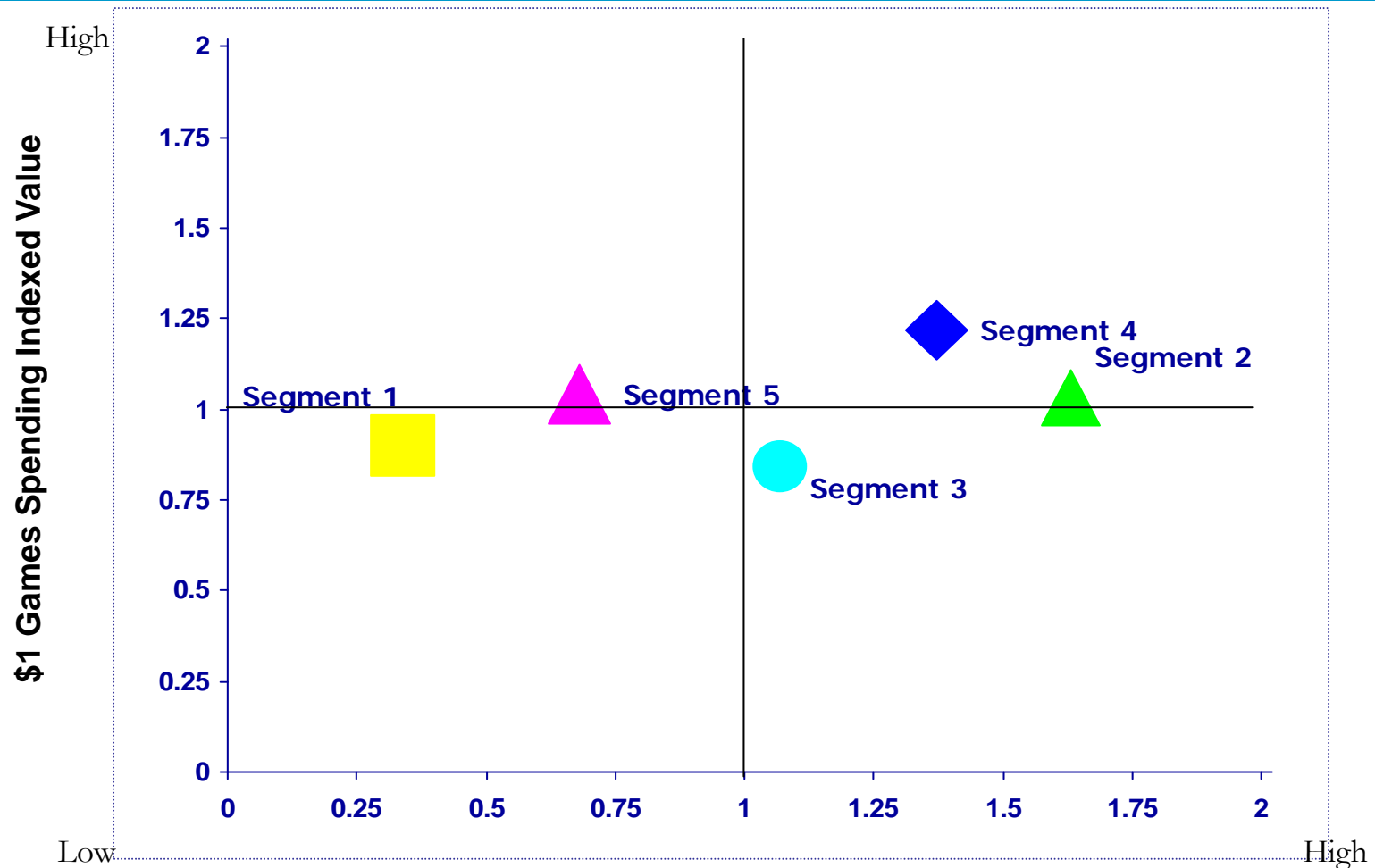


Share of Wallet Analysis

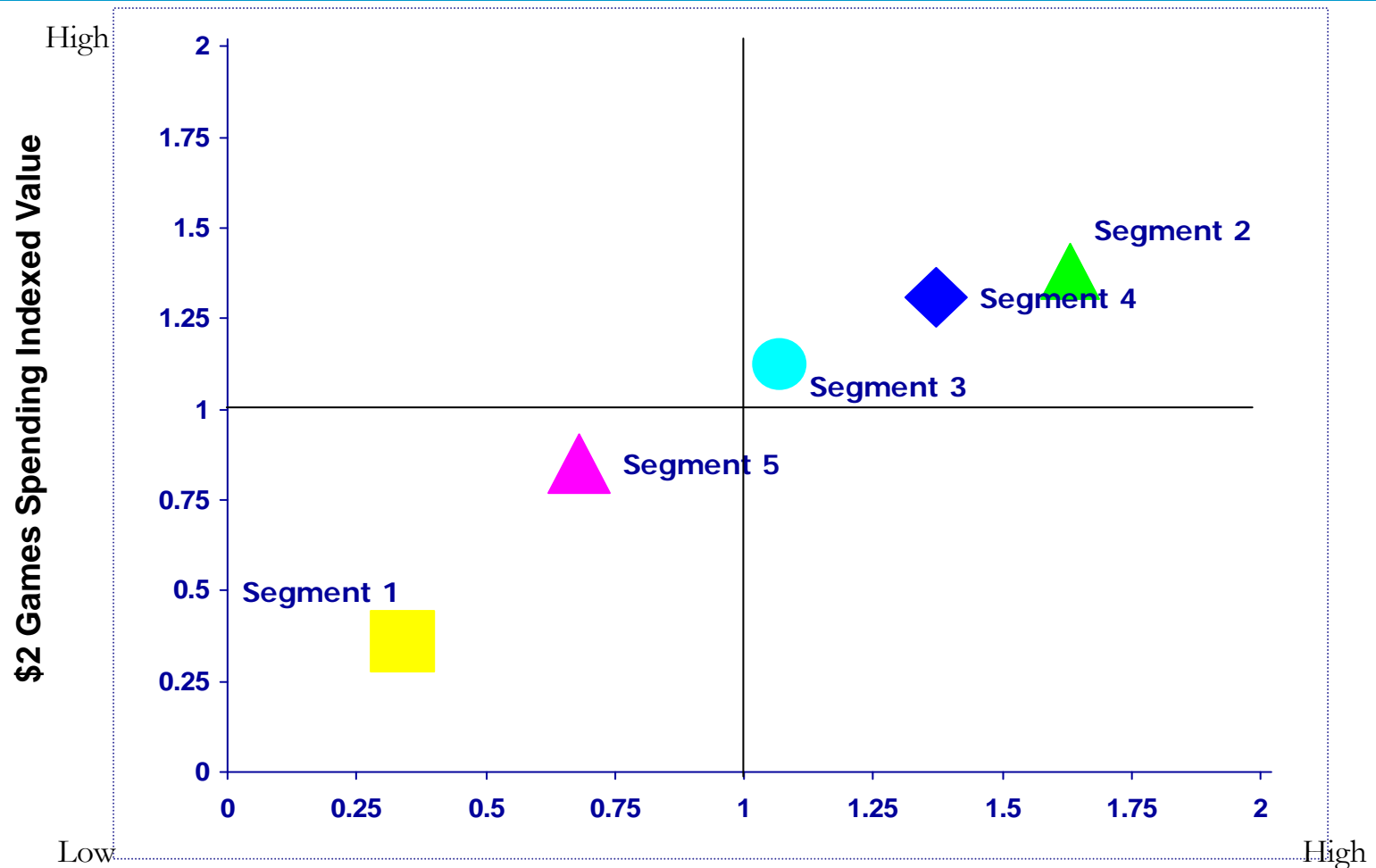
	Total	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
Avg Annual. Lottery \$	1,529.95	\$645.24	\$2,415.24	\$1,454.03	\$2,006.46	\$1,171.77
% on Lotto games	45%	56%	44%	38%	43%	52%
% on Scratch games	55%	44%	56%	62%	57%	48%
% on \$1 Games	16%	42%	10%	13%	14%	25%
% on \$2 Games	20%	21%	17%	20%	19%	25%
% on \$3 Games	21%	12%	15%	42%	20%	16%
% on \$5 Games	22%	11%	25%	18%	18%	23%
% on \$10 Games	14%	9%	21%	5%	16%	7%
% on \$15 Games	8%	5%	11%	2%	13%	4%

Share of
Scratch Wallet

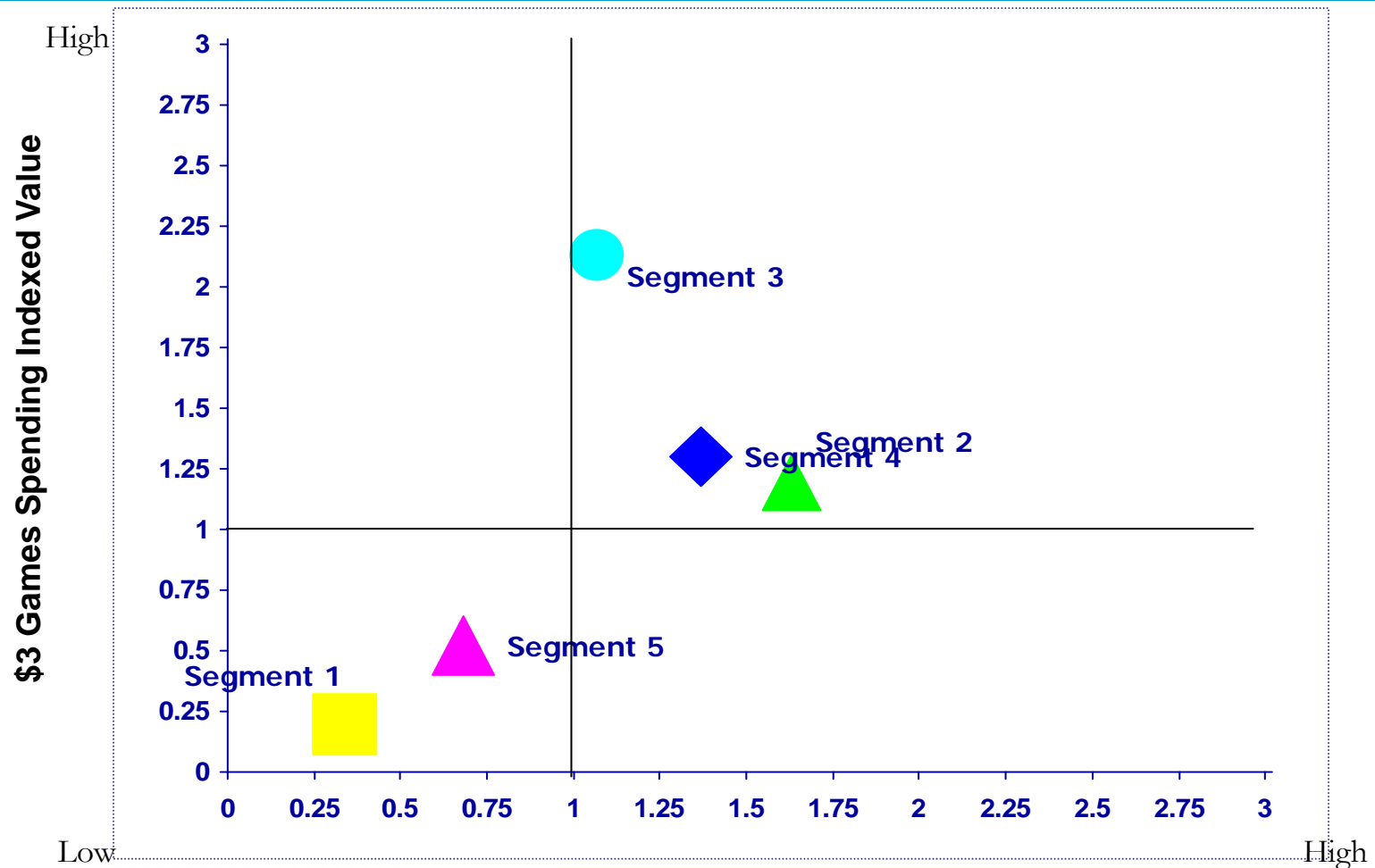
Indexed value of \$1 Games



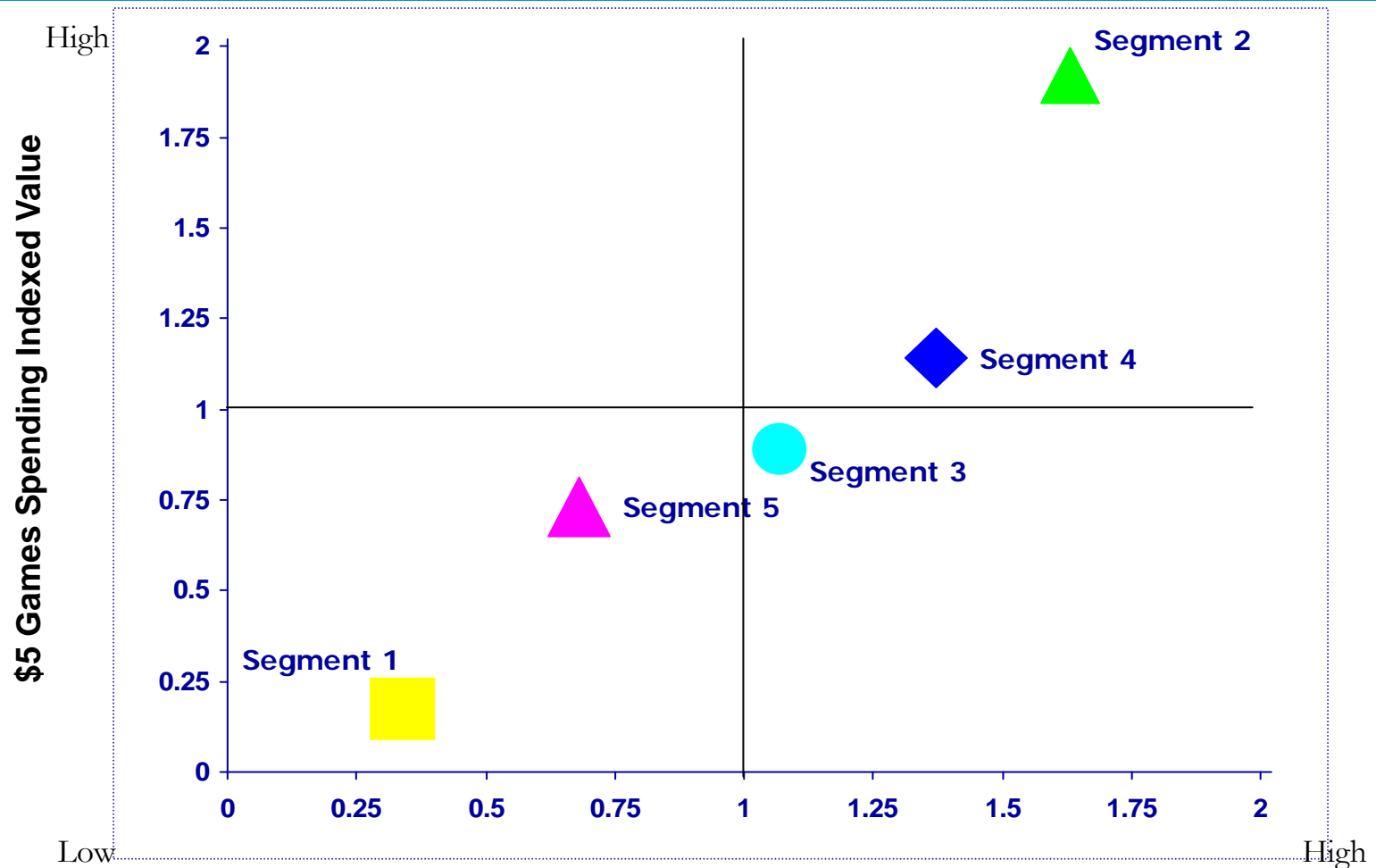
Indexed value of \$2 Games



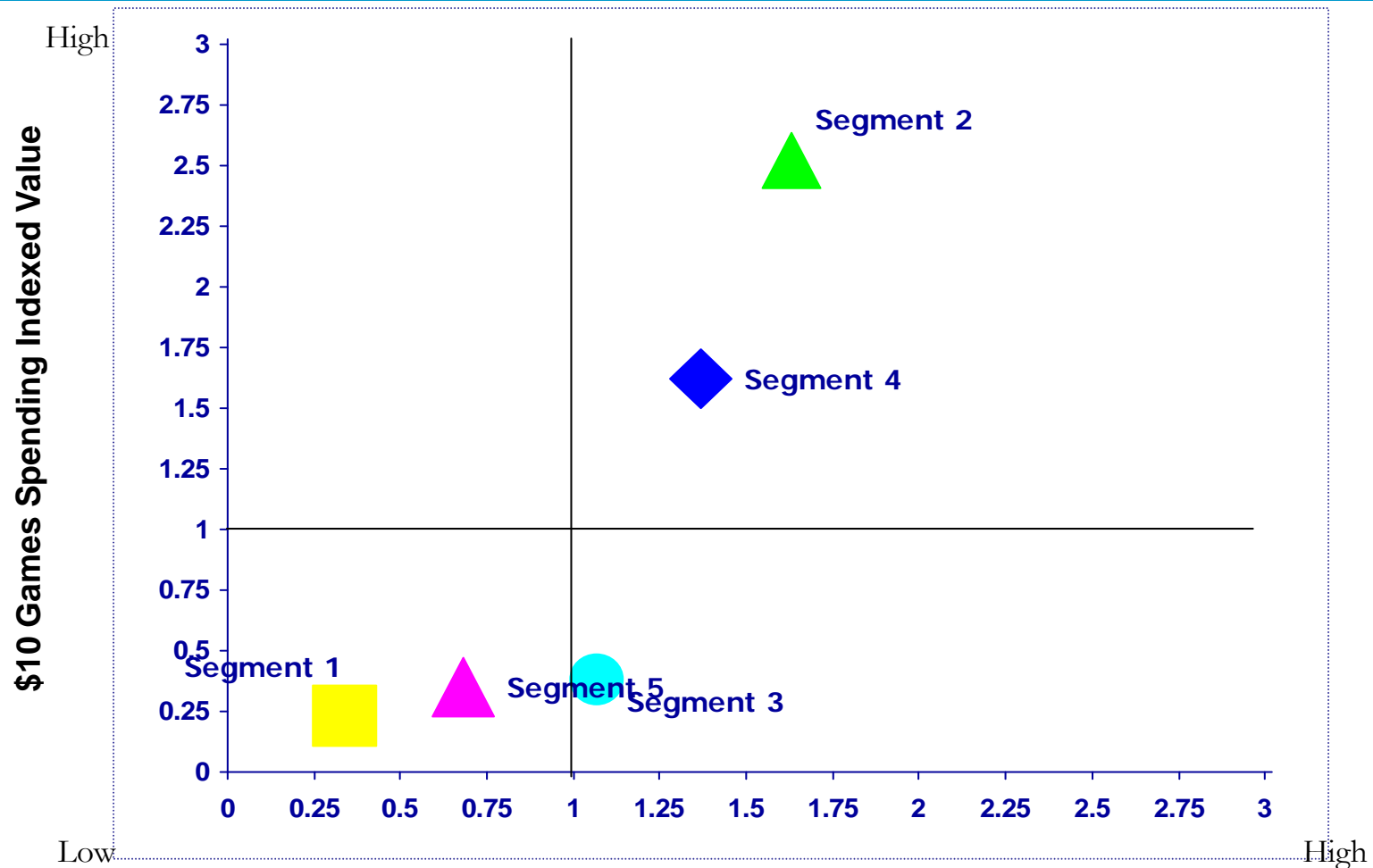
Indexed value of \$3 Games



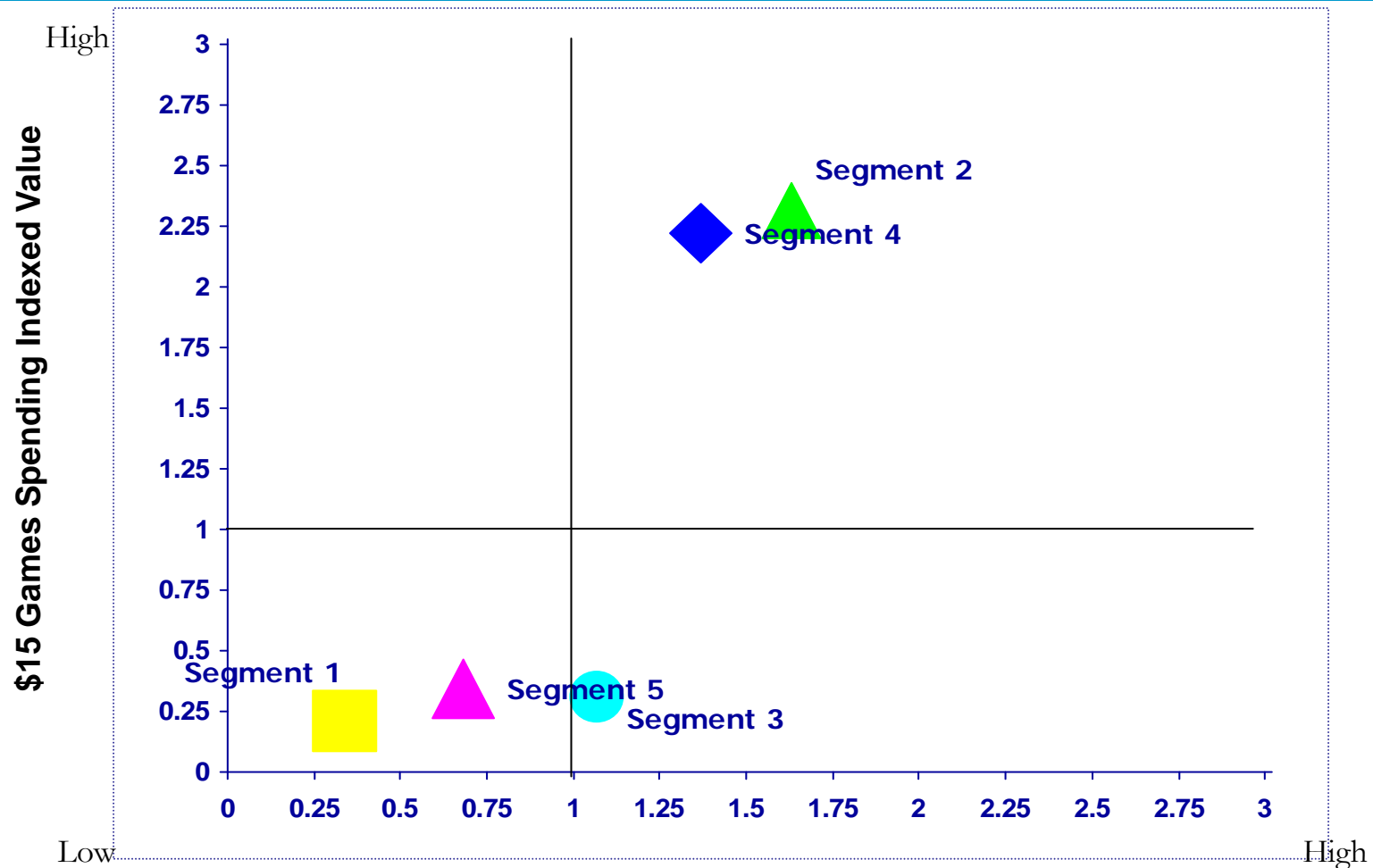
Indexed value of \$5 Games



Indexed value of \$10 Games



Indexed value of \$15 Games



SG Play Analysis of Segment 1

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Heavy SG Spender (\$1040+ a year)	1%	1%			1%	
Moderate SG Spender (\$520-\$1039 a year)	6%	2%		2%		1%
Light SG Spender (\$104-\$519)	39%	20%	8%	4%	2%	
Peripheral SG Spender (\$1-\$104)	52%	46%	24%	28%	9%	5%
Non-spender on SG	2%	31%	68%	66%	88%	94%

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Regular Players	22%	6%	5%	2%	1%	2%
Occasional Players	35%	28%	10%	6%	2%	
Infrequent Players	40%	37%	18%	25%	9%	5%
Non-players	2%	30%	67%	66%	88%	94%

Regular - Every week
 Occasional - Every couple of weeks or Every month
 Infrequent - Every couple of months, Every 6 months, or Once a year

SG Play Analysis of Segment 2

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Heavy SG Spender (\$1040+ a year)	2%	6%	4%	9%	9%	3%
Moderate SG Spender (\$520-\$1039 a year)	5%	12%	8%	16%	8%	5%
Light SG Spender (\$104-\$519)	36%	39%	32%	27%	20%	14%
Peripheral SG Spender (\$1-\$104)	45%	30%	35%	31%	32%	34%
Non-spender on SG	13%	13%	22%	17%	30%	43%

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Regular Players	24%	28%	23%	27%	13%	6%
Occasional Players	31%	35%	30%	26%	22%	14%
Infrequent Players	32%	25%	26%	34%	38%	39%
Non-players	13%	12%	20%	14%	28%	42%

Regular - Every week
 Occasional - Every couple of weeks or Every month
 Infrequent - Every couple of months, Every 6 months, or Once a year

SG Play Analysis of Segment 3

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Heavy SG Spender (\$1040+ a year)	1%	2%	8%	6%	1%	
Moderate SG Spender (\$520-\$1039 a year)	4%	11%	18%	8%	1%	1%
Light SG Spender (\$104-\$519)	35%	40%	37%	17%	7%	4%
Peripheral SG Spender (\$1-\$104)	49%	35%	30%	55%	39%	20%
Non-spender on SG	11%	12%	6%	15%	52%	75%

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Regular Players	25%	28%	44%	12%	1%	1%
Occasional Players	35%	35%	28%	27%	5%	3%
Infrequent Players	30%	25%	23%	46%	42%	21%
Non-players	11%	12%	6%	15%	51%	75%

Regular - Every week
 Occasional - Every couple of weeks or Every month
 Infrequent - Every couple of months, Every 6 months, or Once a year

SG Play Analysis of Segment 4

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Heavy SG Spender (\$1040+ a year)	1%	6%	5%	5%	4%	4%
Moderate SG Spender (\$520-\$1039 a year)	9%	13%	6%	10%	1%	1%
Light SG Spender (\$104-\$519)	43%	32%	26%	21%	14%	7%
Peripheral SG Spender (\$1-\$104)	36%	40%	41%	31%	28%	21%
Non-spender on SG	10%	9%	22%	32%	53%	67%

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Regular Players	35%	34%	23%	15%	4%	4%
Occasional Players	33%	33%	27%	24%	11%	7%
Infrequent Players	21%	23%	28%	30%	34%	23%
Non-players	10%	9%	22%	31%	50%	66%

Regular - Every week
 Occasional - Every couple of weeks or Every month
 Infrequent - Every couple of months, Every 6 months, or Once a year

SG Play Analysis of Segment 5

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Heavy SG Spender (\$1040+ a year)	2%	2%	1%	5%	2%	
Moderate SG Spender (\$520-\$1039 a year)	8%	9%	2%	4%	1%	1%
Light SG Spender (\$104-\$519)	32%	29%	20%	11%	5%	2%
Peripheral SG Spender (\$1-\$104)	50%	43%	36%	37%	19%	11%
Non-spender on SG	9%	16%	40%	43%	73%	86%

	\$1 Games	\$2 Games	\$3 Games	\$5 Games	\$10 Games	\$15 Games
Regular Players	25%	21%	9%	9%	2%	1%
Occasional Players	31%	30%	24%	16%	4%	2%
Infrequent Players	36%	33%	29%	36%	21%	13%
Non-players	8%	16%	38%	40%	72%	24%

Regular - Every week
 Occasional - Every couple of weeks or Every month
 Infrequent - Every couple of months, Every 6 months, or Once a year

Price Point Cross Play by Segment

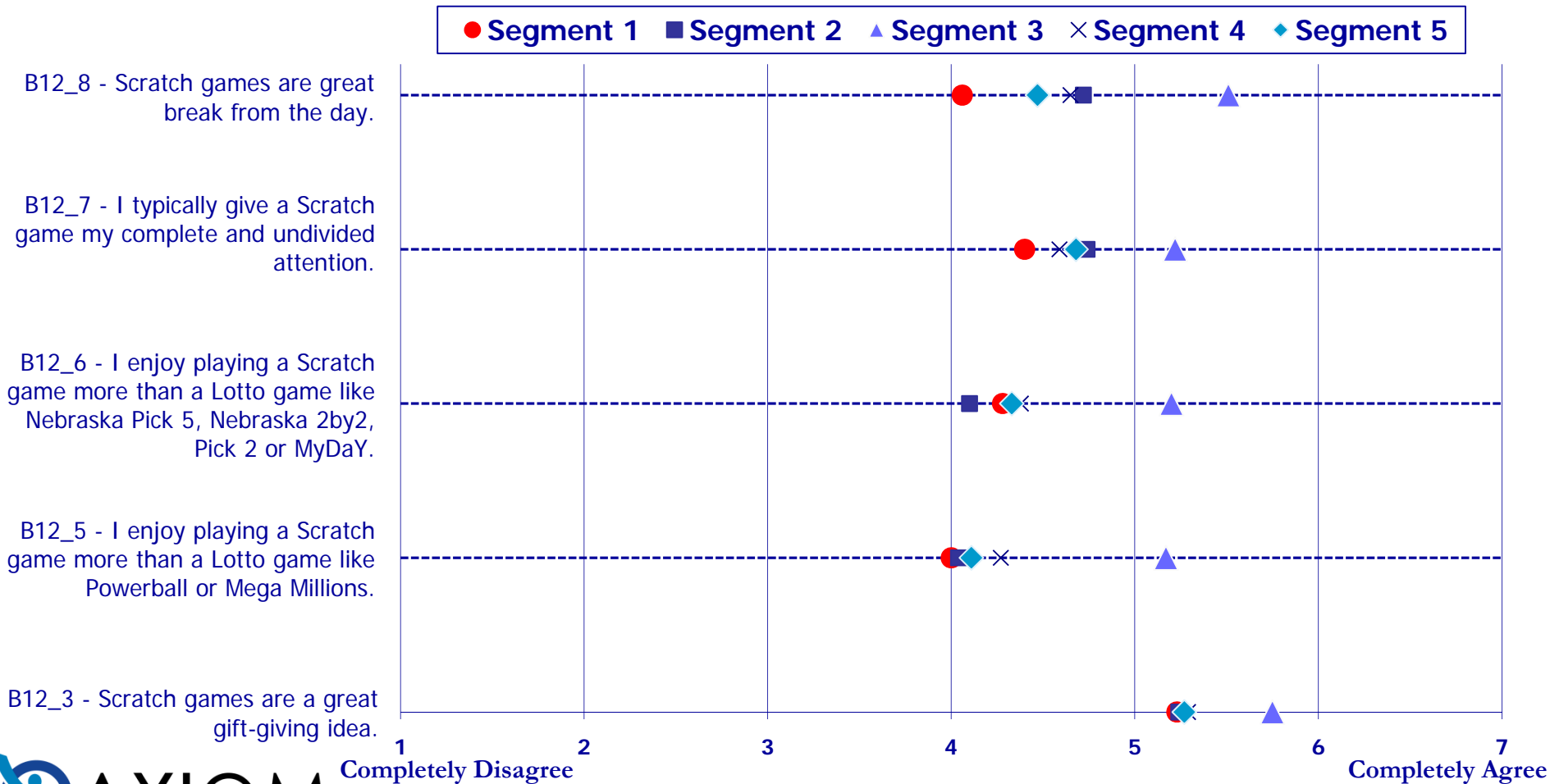
	All Respondents	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
		(B)	(C)	(D)	(F)	(G)
All price points	25%	6%	51%	23%	32%	15%
			BDEF	BF	BF	B
Only \$1, \$2, \$3, \$5	20%	13%	13%	29%	17%	26%
				BCE		BC
Only \$1 & \$2	12%	29%	3%	1%	9%	18%
		CDEF			D	CDE
Only \$1, \$2, \$3, \$5, \$10	12%	3%	9%	22%	15%	11%
			B	BCF	B	B
Only \$1	8%	26%	4%		5%	9%
		CDEF	D		D	DC
Only \$1, \$2, \$3	8%	10%	3%	8%	11%	8%
		C			C	C
Only \$1, \$2, \$5	3%	7%	2%	1%	0%	5%
		CDE				E

2010 Scratch Segments

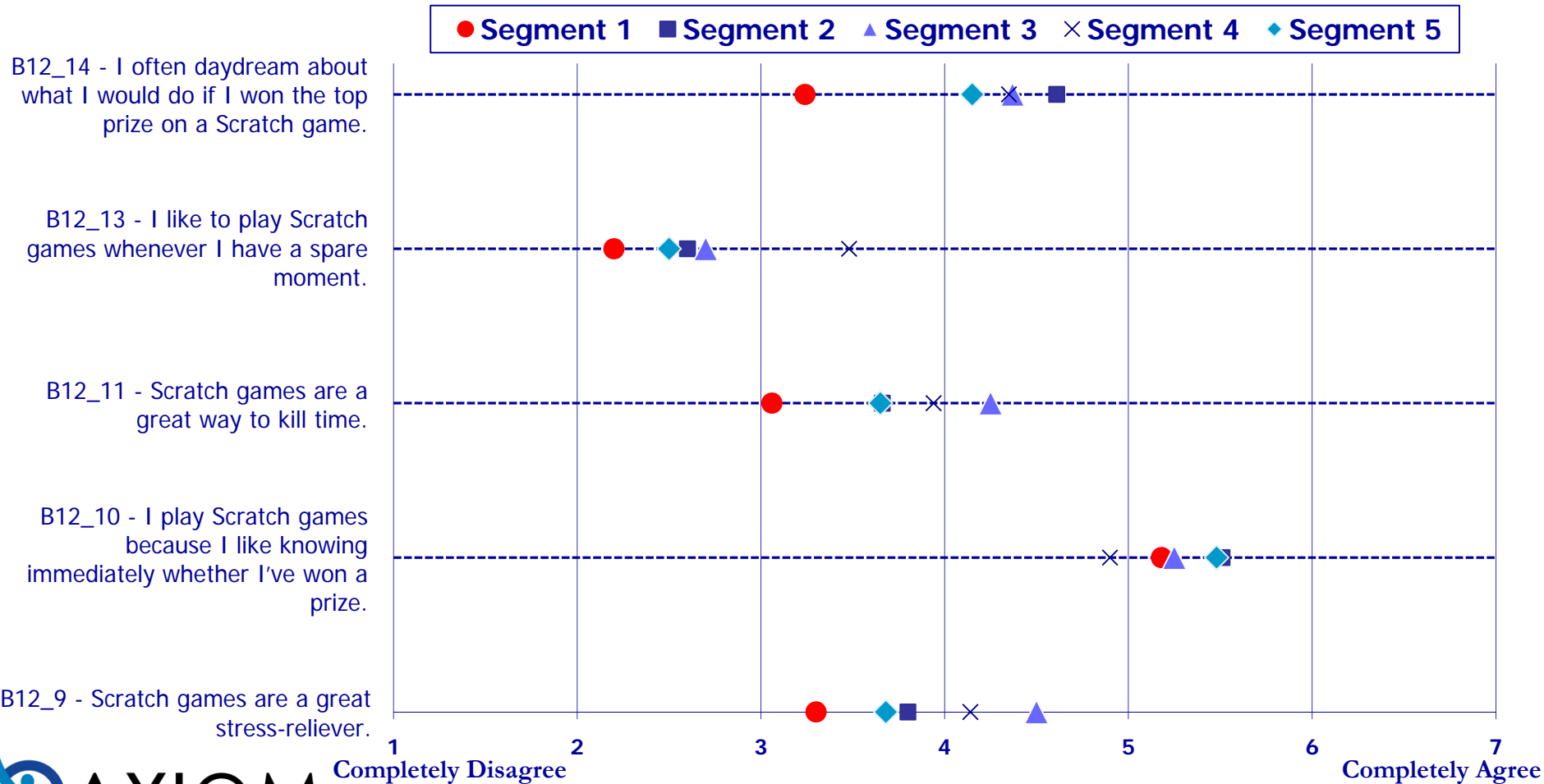
Notable Attitudinal Differences



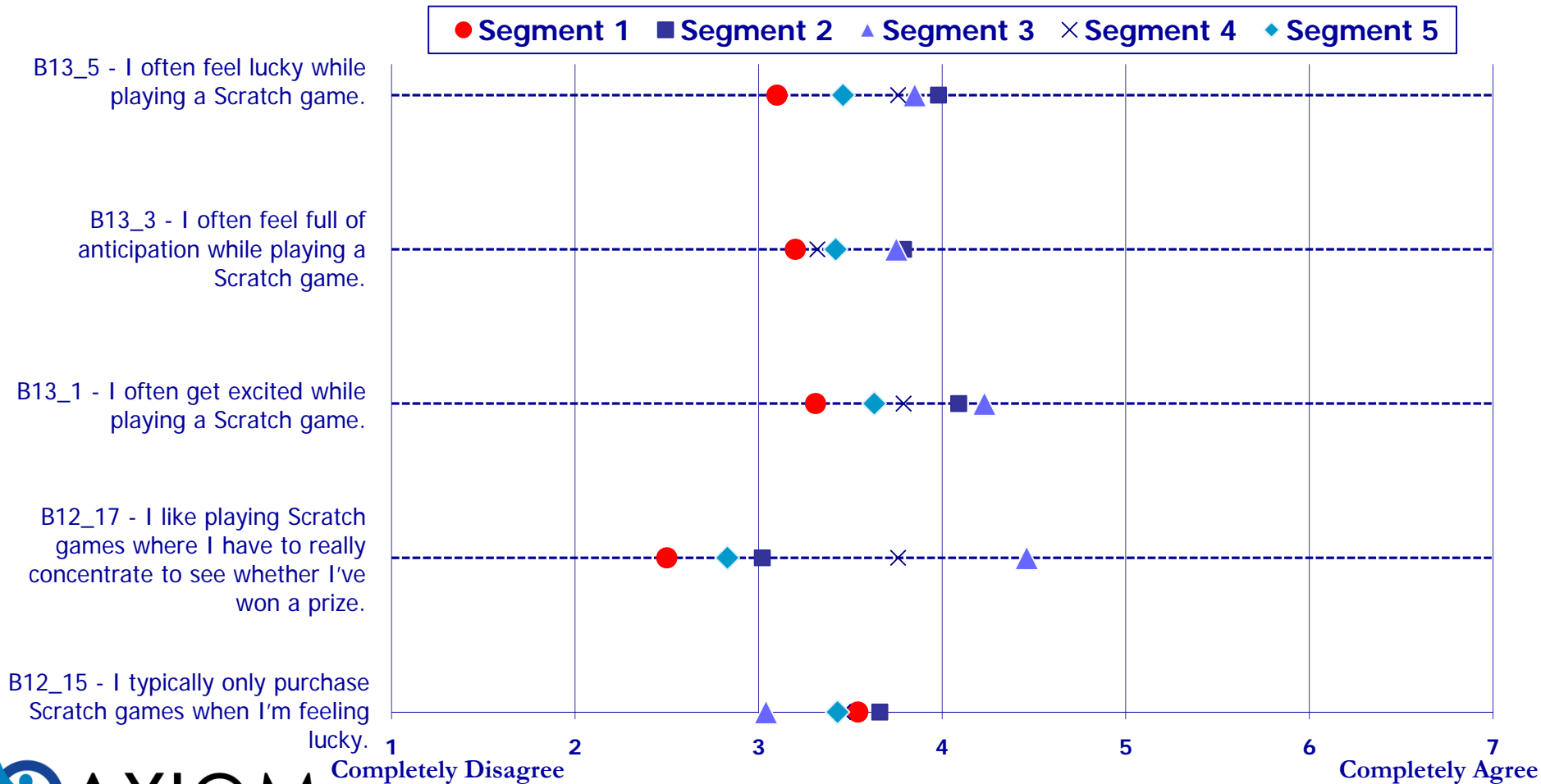
Notable Attitudinal Differences by Segment



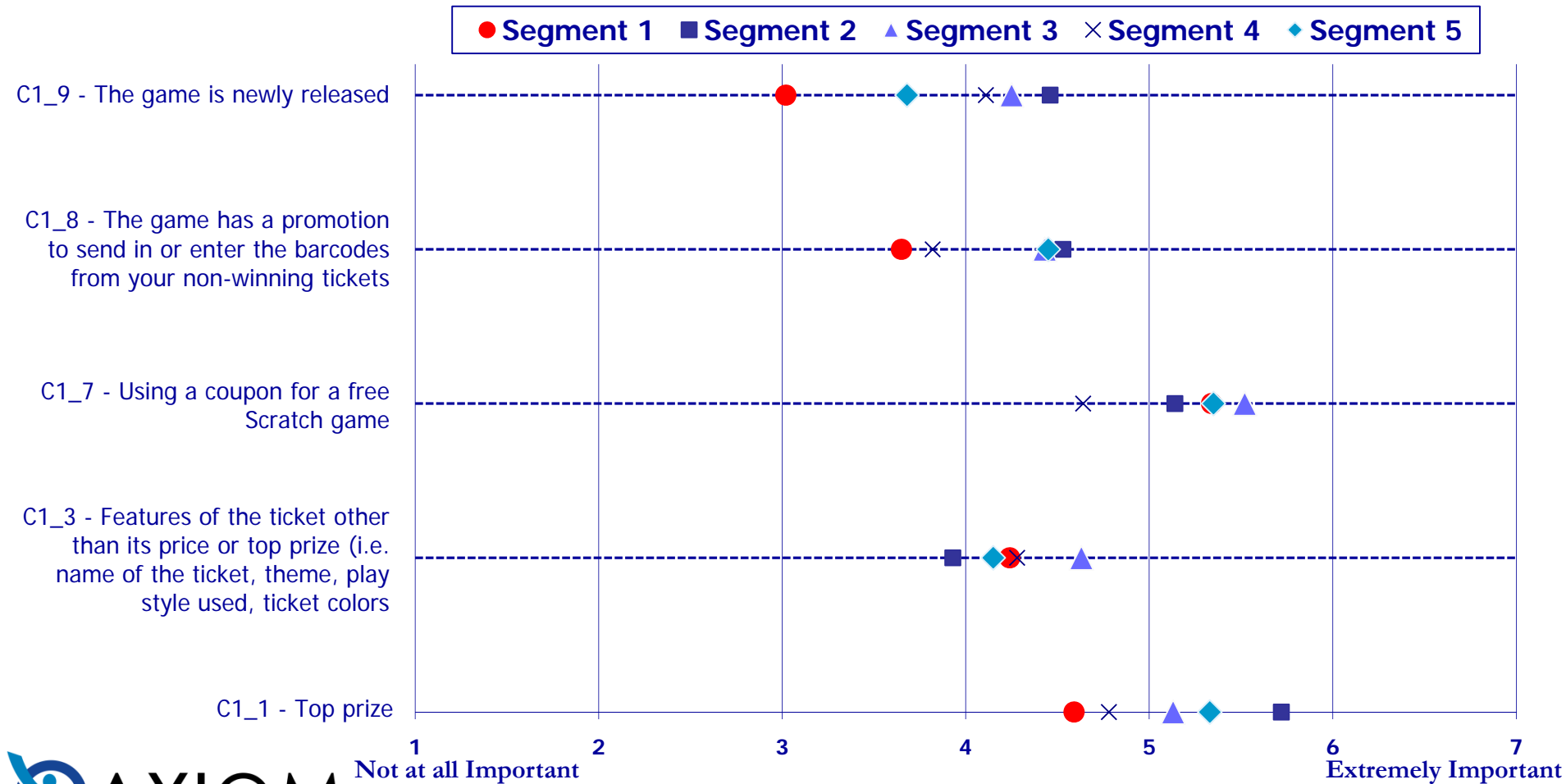
Notable Attitudinal Differences by Segment



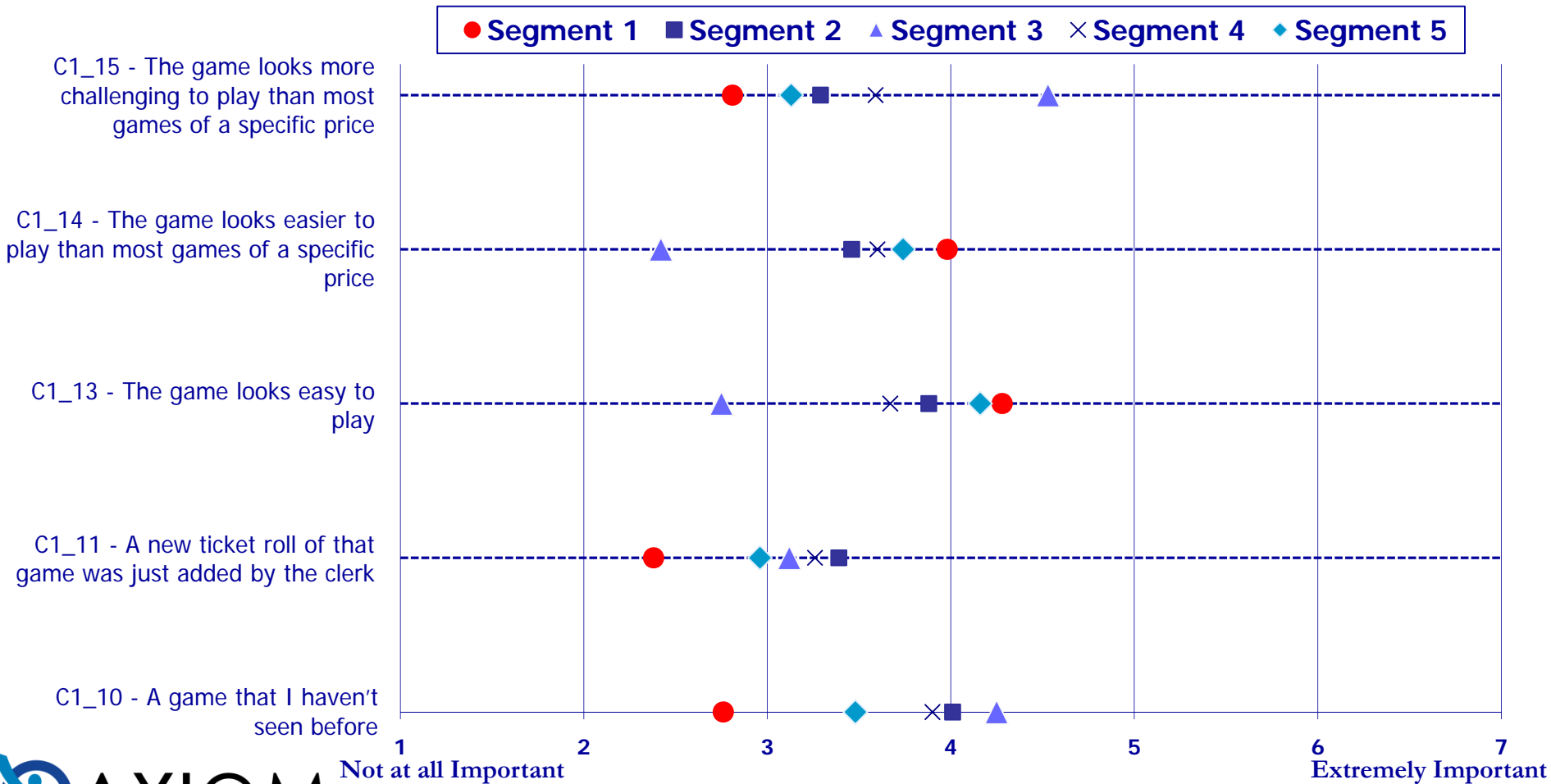
Notable Attitudinal Differences by Segment



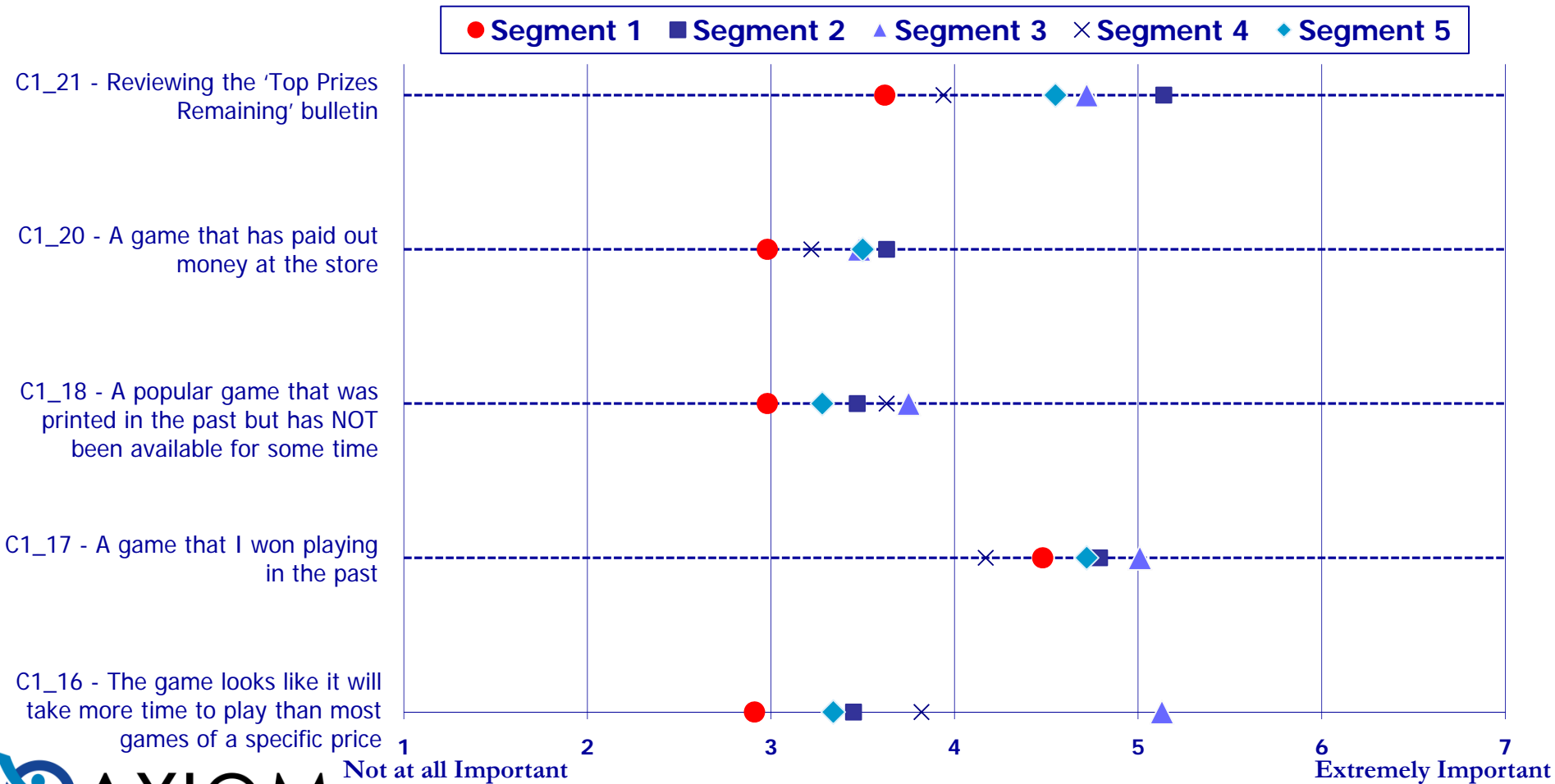
Notable Differences in Importance of Purchase Decision Factors



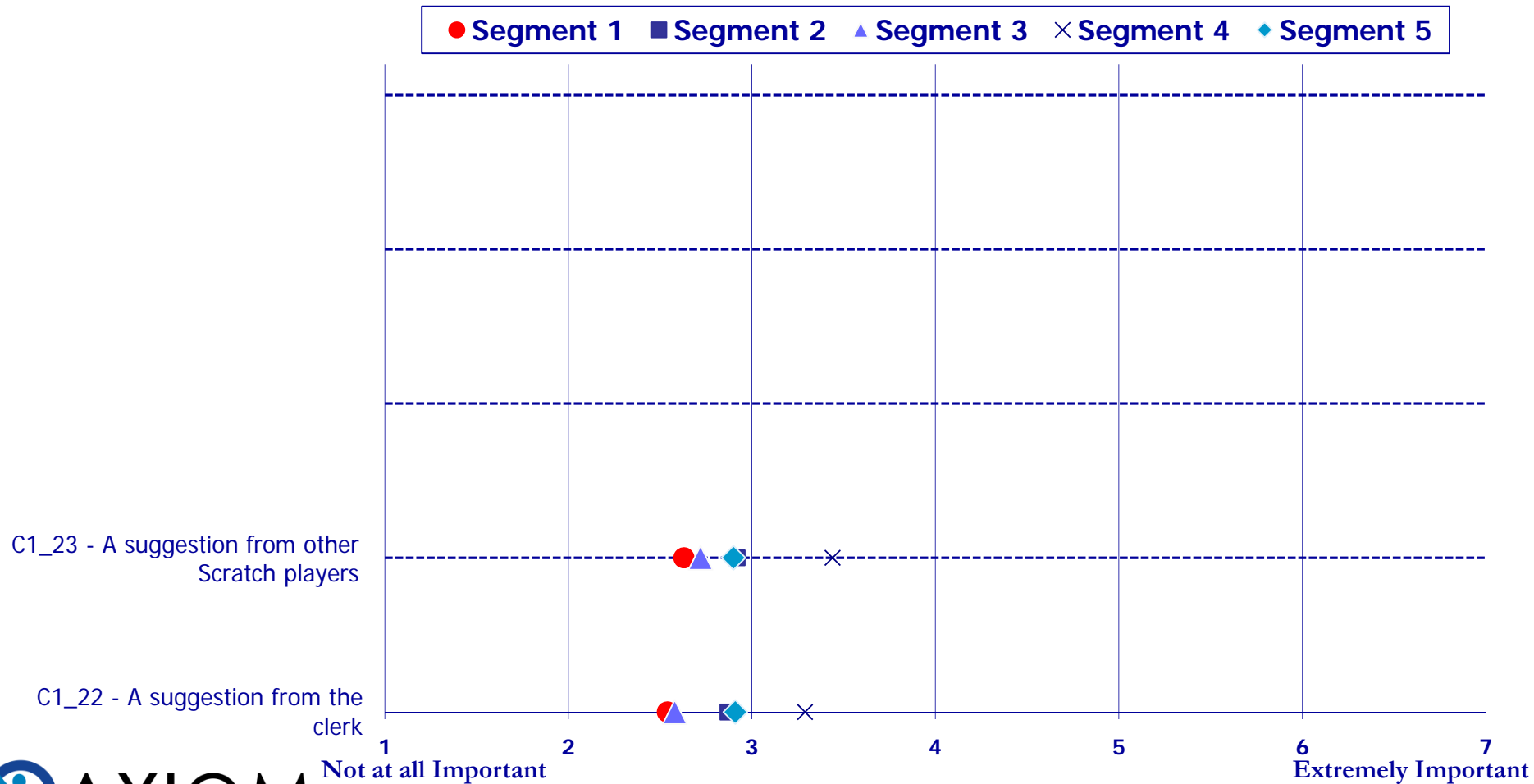
Notable Differences in Importance of Purchase Decision Factors



Notable Differences in Importance of Purchase Decision Factors



Notable Differences in Importance of Purchase Decision Factors

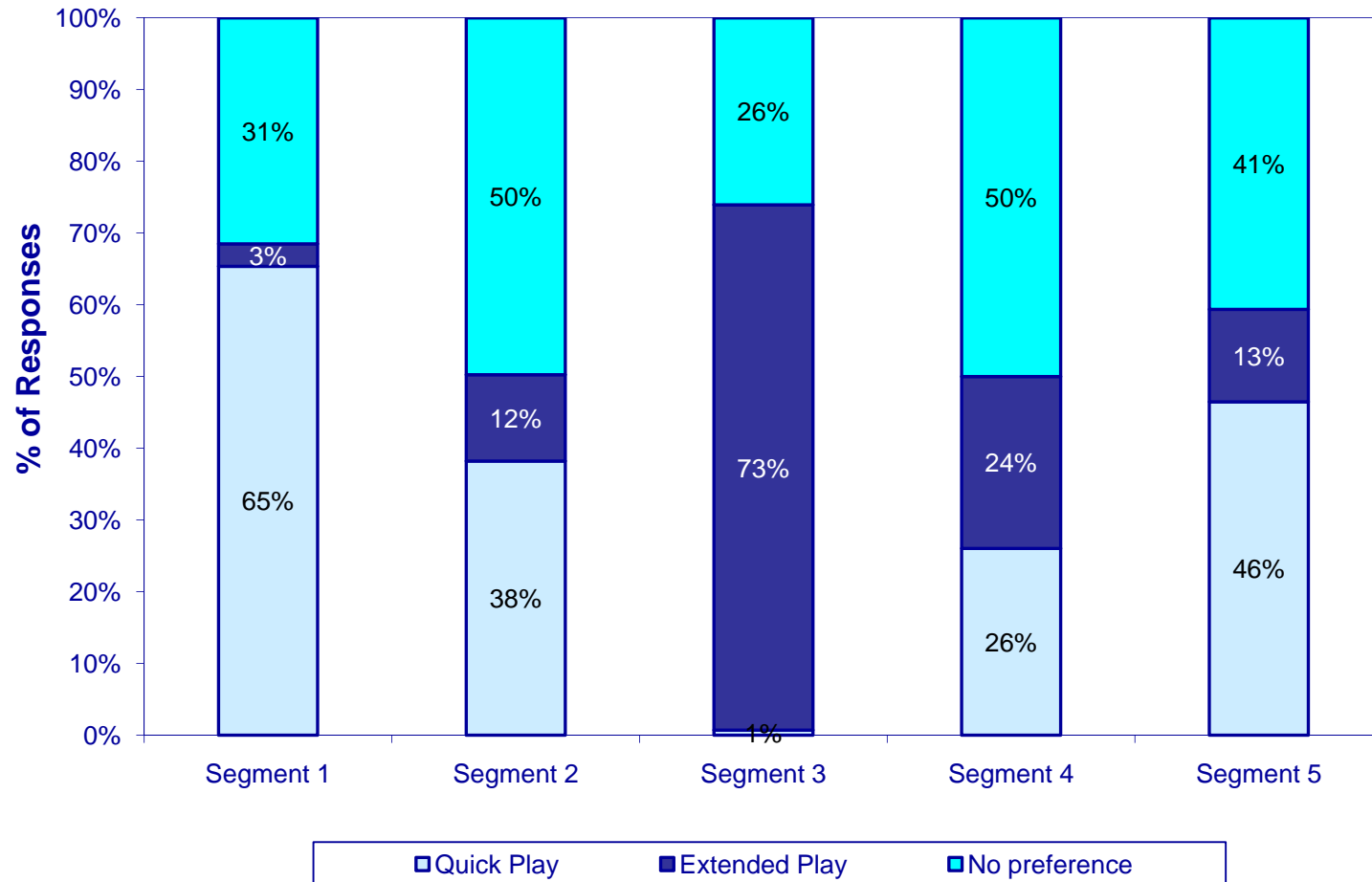


2010 Scratch Segments

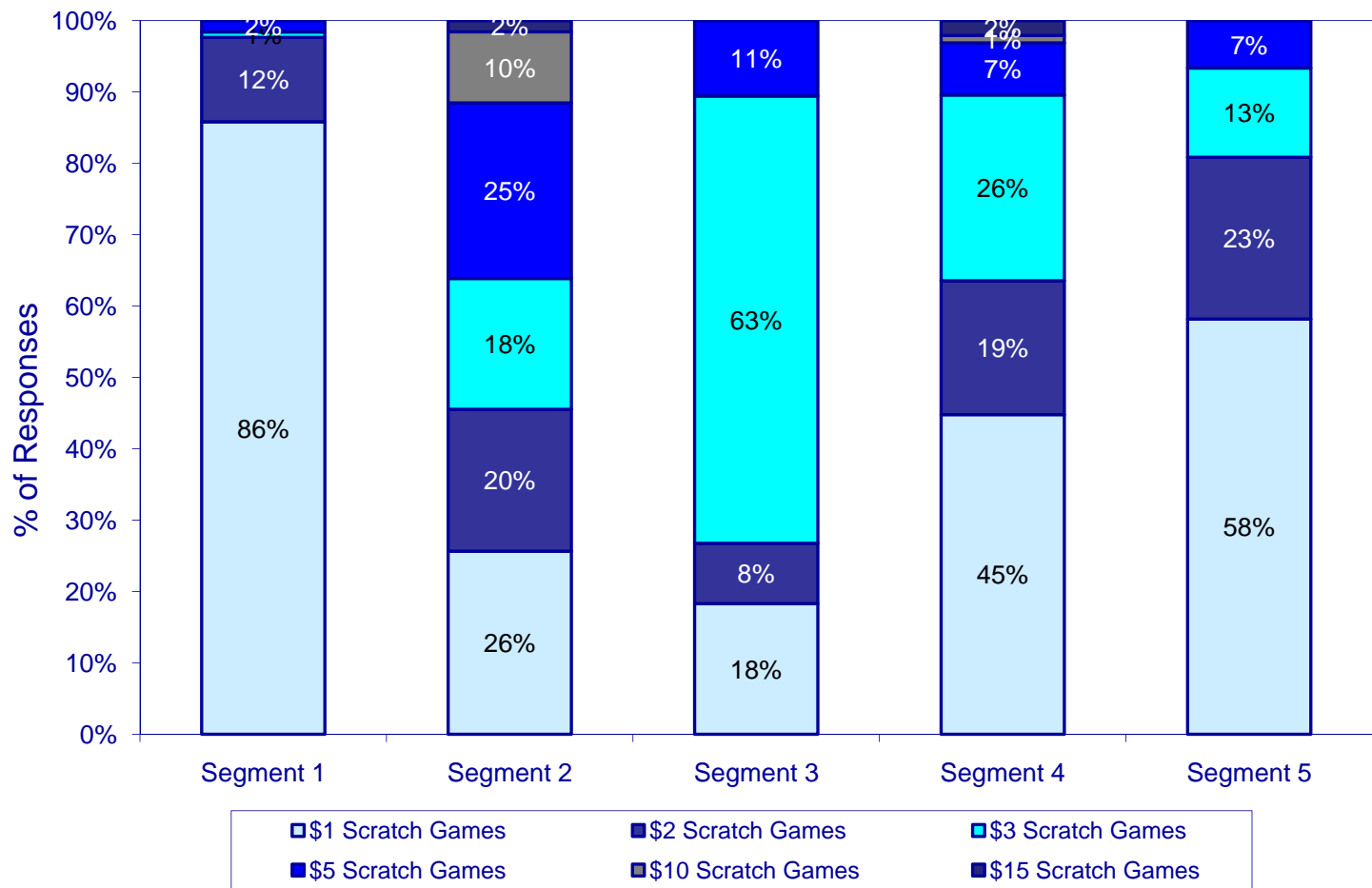
Play Style Preference, Price Point Played
Most Often and Participation in Scratch
Promotions



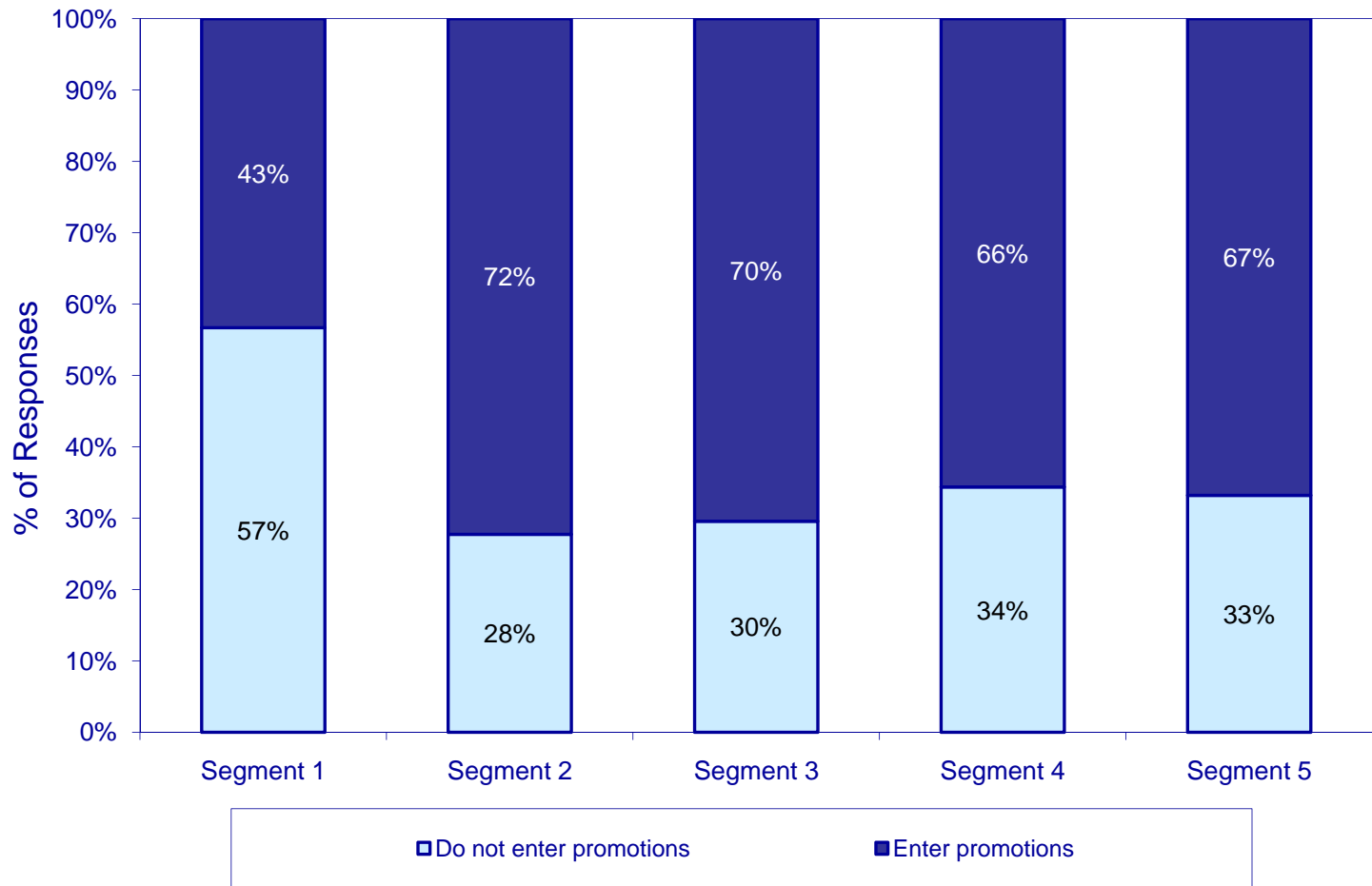
Play Style Preference



Price Point Played Most Often



Scratch Game Promotions



2010 Scratch Segments

Importance of Purchase Decision Factors
& Ticket Attributes

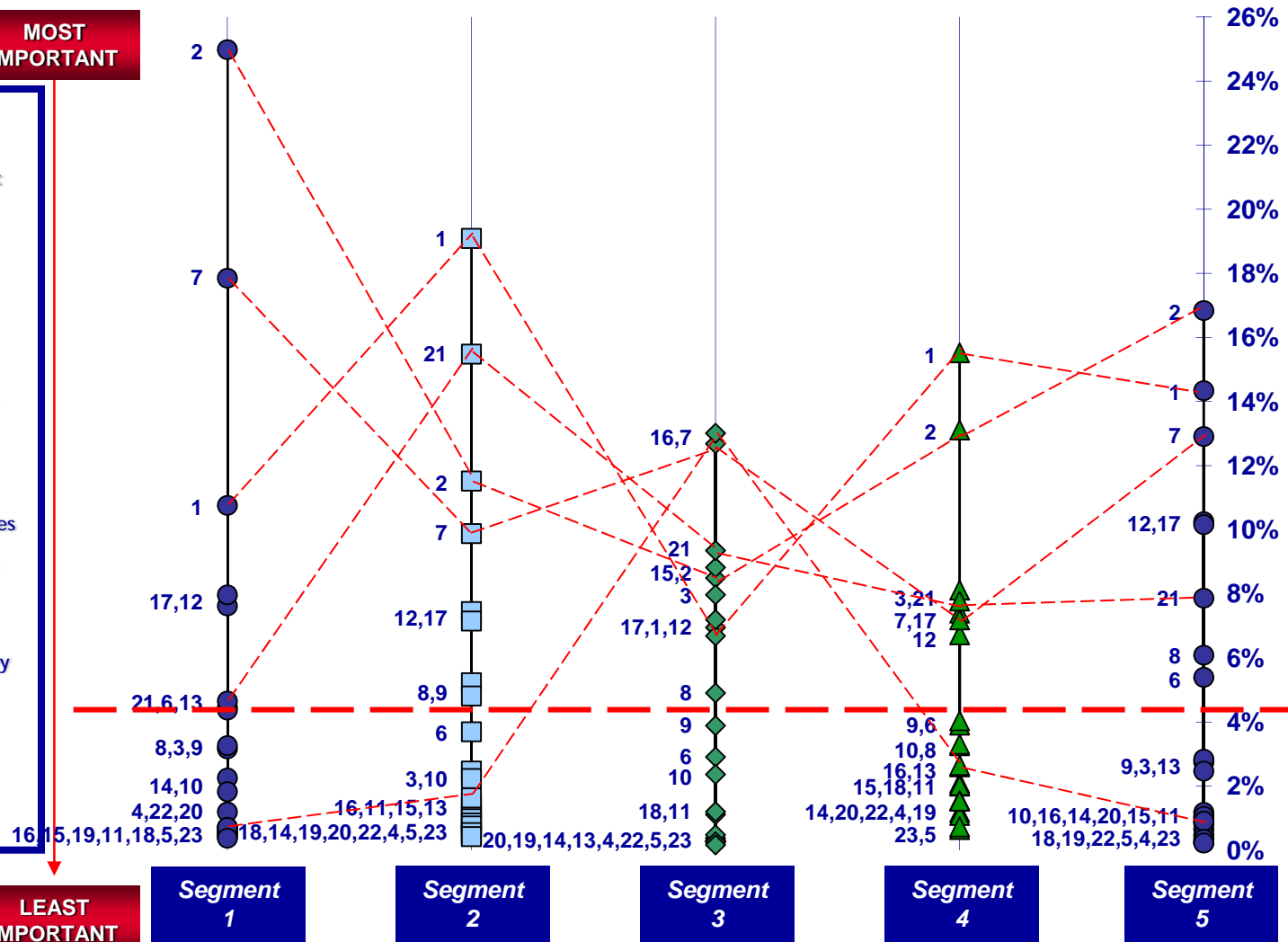


Importance of the following factors when purchasing Scratch games

- 01 Top prize
- 02 Ticket price
- 03 Features other than price or top prize
- 04 How the tickets looks in the display unit
- 05 A specific game is promoted
- 06 Returning winning ticket(s)
- 07 Using a coupon for a free Scratch game
- 08 A promotion to send in or enter the barcodes from non-winning tickets
- 09 Newly released
- 10 A game I haven't seen before
- 11 A new ticket roll was just added by the clerk
- 12 Tickets that have served me well in the past
- 13 Easy to play
- 14 Easier to play than most games of a specific price
- 15 More challenging to play than most games of a specific price
- 16 Looks like it will take more time to play
- 17 A game I won playing in the past
- 18 A popular game that has NOT been available for some time
- 19 A game that hasn't paid out much money at the store
- 20 A game that has paid out money at the store
- 21 Reviewing the 'Top Prizes Remaining' bulletin
- 22 Suggestion from the clerk
- 23 Suggestion from other Scratch players

MOST IMPORTANT

LEAST IMPORTANT



Segment 1

Segment 2

Segment 3

Segment 4

Segment 5

Dashed red line represents hypothetical equal proportionate share (4.3%).

7 Most Important Purchase Decision Factors for Scratch games

Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
Ticket price (24.98%)	Top prize (19.09%)	Looks like it will take more time to play (13.01%)	Top prize (15.52%)	Ticket price (16.84%)
Using a coupon for a free Scratch game (17.85%)	Reviewing the 'Top Prizes Remaining' bulletin (15.48%)	Using a coupon for a free Scratch game (12.68%)	Ticket price (13.11%)	Top prize (14.34%)
Top prize (10.76%)	Ticket price (11.52%)	Reviewing the 'Top Prizes Remaining' bulletin (9.35%)	Features other than price or top prize (8.12%)	Using a coupon for a free Scratch game (12.91%)
A game I won playing in the past (7.97%)	Using a coupon for a free Scratch game (9.88%)	More challenging to play than most games of a specific price (8.82%)	Reviewing the 'Top Prizes Remaining' bulletin (7.78%)	Tickets that have served me well in the past (10.25%)
Tickets that have served me well in the past (7.62%)	Tickets that have served me well in the past (7.45%)	Ticket price (8.50%)	Using a coupon for a free Scratch game (7.40%)	A game I won playing in the past (10.16%)
Reviewing the 'Top Prizes Remaining' bulletin (4.66%)	A game I won playing in the past (7.15%)	Features other than price or top prize (7.97%)	A game I won playing in the past (7.19%)	Reviewing the 'Top Prizes Remaining' bulletin (7.87%)
Returning winning ticket(s) (4.46%)	A promotion to send in or enter the barcodes from non-winning tickets (5.23%)	A game I won playing in the past (7.19%)	Tickets that have served me well in the past (6.72%)	A promotion to send in or enter the barcodes from non-winning tickets (6.09%)

7 Most Important Ticket Attributes

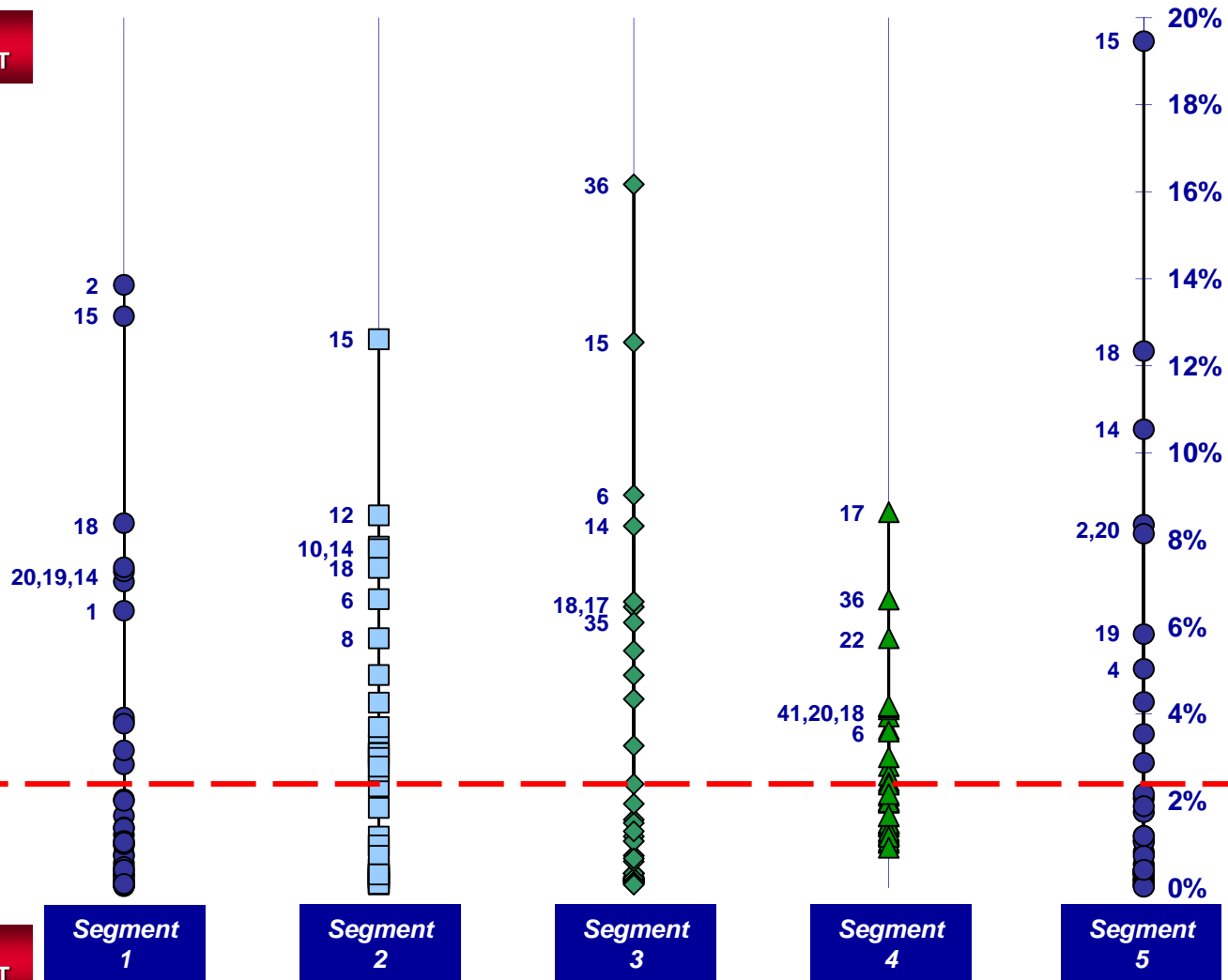
Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
Costs \$1 to play - top prize between \$3,000 and \$5,000 (13.86%)	The odds of winning any prize is better than most other Scratch games at that price (12.61%)	Crossword' is the primary play style (16.17%)	Has an appealing theme that IS tied to a familiar product like Monopoly (8.63%)	The odds of winning any prize is better than most other Scratch games at that price (19.46%)
The odds of winning any prize is better than most other Scratch games at that price (13.14%)	Costs \$15 to play- top prize between \$125,000 and \$200,000 (8.56%)	The odds of winning any prize is better than most other Scratch games at that price (12.54%)	Crossword' is the primary play style (6.63%)	Has a feature where I might double or triple my prize (12.34%)
Has a feature where I might double or triple my prize (8.38%)	Costs \$10 to play top prize between \$80,000 and \$100,000 (7.85%)	Costs \$3 to play- top prize between \$30,000 and \$35,000 (9.03%)	The ticket consists of more than one play area (5.74%)	Has considerably more prizes of between \$26 and \$500 (10.54%)
Has a bonus play area where I might win a set amount of money instantly (7.37%)	Has considerably more prizes of between \$26 and \$500 (7.79%)	Has considerably more prizes of between \$26 and \$500 (8.32%)	The name of the ticket appeals to me (4.18%)	Costs \$1 to play - top prize between \$3,000 and \$5,000 (8.35%)
Has a feature where I might win a set amount of money instantly (7.28%)	Has a feature where I might double or triple my prize (7.36%)	Has a feature where I might double or triple my prize (6.58%)	Has a bonus play area where I might win a set amount of money instantly (4.15%)	Has a bonus play area where I might win a set amount of money instantly (8.14%)
Has considerably more prizes of between \$26 and \$500 (7.04%)	Costs \$3 to play- top prize between \$30,000 and \$35,000 (6.64%)	Has an appealing theme that IS tied to a familiar product like Monopoly (6.46%)	Has a feature where I might double or triple my prize (4.11%)	Has a feature where I might win a set amount of money instantly (5.83%)
Costs \$1 to play - top prize between \$500 and \$2,000 (6.37%)	Costs \$5 to play - top prize between \$40,000 and \$50,000 (5.74%)	Bingo' is the primary play style (6.10%)	Costs \$3 to play- top prize between \$30,000 and \$35,000 (3.94%)	Costs \$2 to play - top prize between \$15,000 and \$17,000 (5.04%)

Most Important Ticket Attributes

01. \$1 and top prize of \$500-\$2,000
 02. \$1 and top prize of \$3,000-\$5,000
 04. \$2 and top prize of \$15,000-\$17,000
 06. \$3 and top prize of \$30,000-\$35,000
 08. \$5 and top prize of \$40,000-\$50,000
 10. \$10 and top prize of \$80,000-\$100,000
 12. \$15 and top prize of \$125,000-\$200,000
 14. Has considerably more prizes of \$26 - \$500 than the average game
 15. The odds of winning any prize is better than most other Scratch games at that price
 17. Has an appealing theme that is tied to a familiar product like Monopoly, Trucks & Bucks, Harley Davidson, Orange County Choppers, World Series of Poker, Battleship, etc.
 18. Has a feature where I might double or triple my prize
 19. Has a feature where I might win a set amount of money instantly
 20. Has a bonus play area where I might win a set amount of money instantly
 22. The ticket consists of more than one play area
 35. "Bingo" is the primary play style on the ticket
 36. "Crossword" is the primary play style on the ticket
 41. The name of the ticket appeals to me

**MOST
IMPORTANT**

**LEAST
IMPORTANT**



**Segment
1**

**Segment
2**

**Segment
3**

**Segment
4**

**Segment
5**

— Dashed red line represents hypothetical equal proportionate share (2.4%).

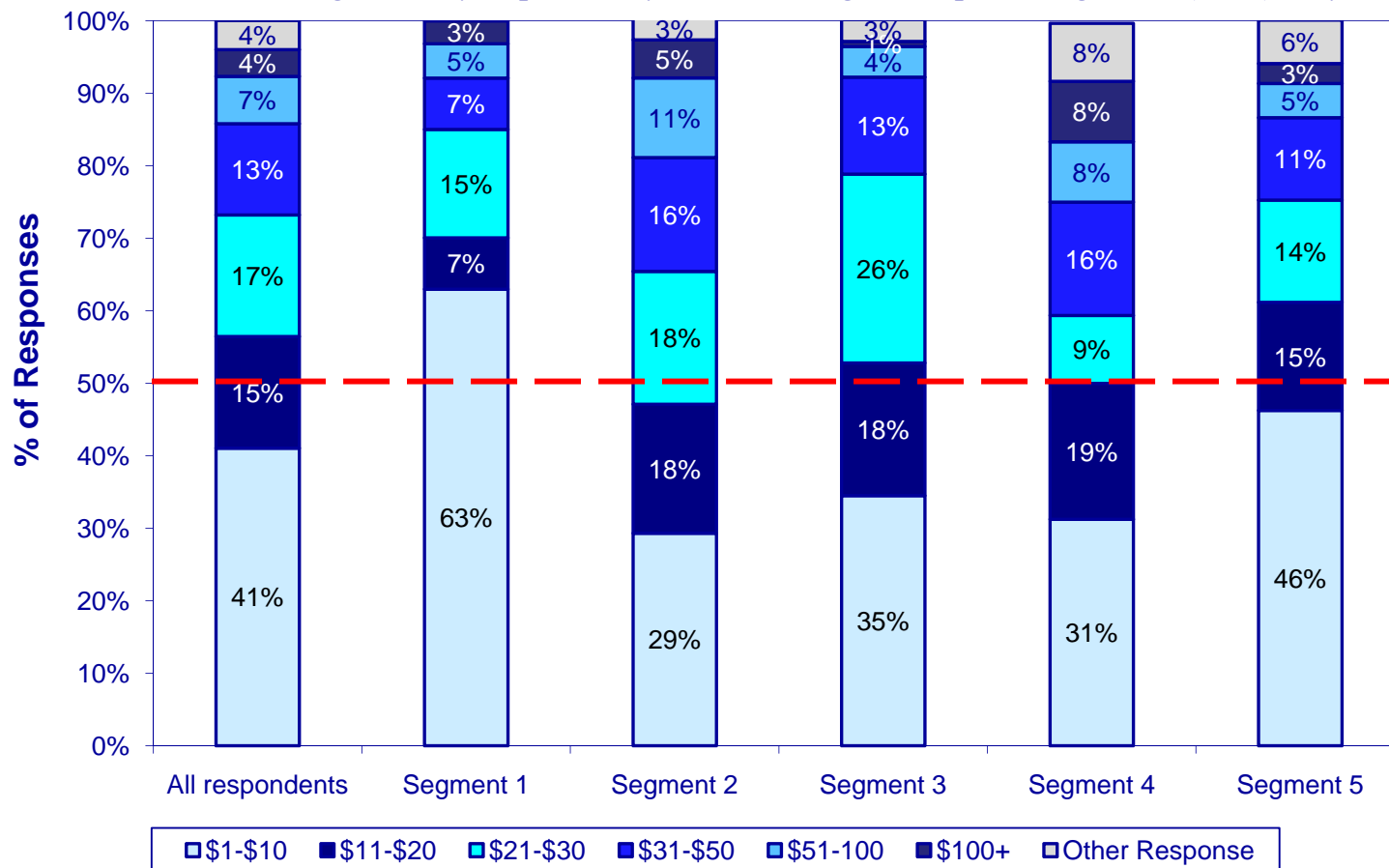
2010 Scratch Segments

Scratch Game Outcome Assessment



Outcome Assessment by Scratch Segments

D6. At what \$ amount won on a Scratch game do you personally start thinking about pocketing some (or all) of your winnings?



Other Outcome Assessment

Observations by Scratch Segment

- B4. What result do you consider to be a “win” on a [INSERT PRICE] Scratch game? [OPEN-END]
 - Free tickets mentioned most by Segment 1 (lightest spending segment) at \$1 (16%), \$2 (13%) and \$3 (13%)
- D4. Which statement best describes what you do if you won \$X playing a Scratch game?
 - No consistent or noteworthy differences by Scratch Segment
- D5. When you use your winnings to purchase more Scratch Games, do you typically purchase the game that you just played and won?
 - No consistent or noteworthy differences by Scratch Segment

Win Scenarios for \$5 on a Scratch Game

	Total	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
		(B)	(C)	(D)	(E)	(F)
Use ALL to purchase Scratch	31%	22%	33% B	39% BF	33%	28%
Use ALL to purchase Lotto	3%	2%	4%	1%	4%	3%
Use ALL to purchase both	15%	17%	16%	13%	10%	16%
Pocket all of my winnings	12%	13%	11%	11%	10%	13%
Pocket some, use rest to purchase Scratch	18%	21% C	10%	20% C	25% C	18% C
Pocket some, use rest to purchase Lotto	5%	9% D	5% D	1%	4%	6% D
Pocket some, use rest to purchase both	17%	16%	21%	15%	13%	17%

Win Scenarios for \$8 on a Scratch Game

	Total	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
		(B)	(C)	(D)	(E)	(F)
Use ALL to purchase Scratch	21%	13%	22%	26% B	25% B	20%
Use ALL to purchase Lotto	2%	2%	2%	1%	5%	2%
Use ALL to purchase both	14%	9% C	19%	15%	11%	13%
Pocket all of my winnings	11%	13%	10%	10%	10%	12%
Pocket some, use rest to purchase Scratch	24%	28% C	18%	25%	29% C	23%
Pocket some, use rest to purchase Lotto	7%	9%	5%	4%	7%	7%
Pocket some, use rest to purchase both	21%	25% E	24% E	18%	11%	22% E

Win Scenarios for \$25 on a Scratch Game

	Total	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
		(B)	(C)	(D)	(E)	(F)
Use ALL to purchase Scratch	5%	1%	8% BF	6% BF	9% BF	2%
Use ALL to purchase Lotto	1%	1%			5% CDF	
Use ALL to purchase both	5%	2%	7% B	6%	3%	5%
Pocket all of my winnings	18%	25% CD	14%	12%	25% CD	20%
Pocket some, use rest to purchase Scratch	29%	31% C	21%	39% C	27%	29% C
Pocket some, use rest to purchase Lotto	7%	9%	7%	4%	5%	8%
Pocket some, use rest to purchase both	35%	31%	43% BE	33%	25%	36%

Moving Forward



Moving Forward

- The value of this segmentation compared to the 2006 state-wide Gaming Segmentation
 - Product-specific and therefore more actionable
 - Could be used to customize information within the MVP Club and IQ mailouts
- Immediately:
 - Name the segments
 - Will provide segment codes for each of the survey respondents to IQ
 - Consider whether to incorporate a segment classification tool in the MVP Club registration process (4 boards, 5 options per board)

Segment Classification Tool

★ Favorites May 2010 Scratch Survey Research

nebraska LOTTERY AXIOM CONSUMER RESEARCH

Which **ticket attribute** do you feel is the **MOST** and **LEAST** important to you personally when deciding which Scratch game to purchase at a Nebraska lottery retailer?

MOST Important		LEAST Important
<input type="radio"/>	Costs \$1 to play and has a top prize of between \$3,000 and \$5,000	<input type="radio"/>
<input type="radio"/>	The ticket colors appeal to me	<input type="radio"/>
<input type="radio"/>	"Add Up & Win" is the primary play style on the ticket	<input type="radio"/>
<input type="radio"/>	Has a feature where I might double or triple my prize	<input type="radio"/>
<input type="radio"/>	Has a bonus play area where I might win a set amount of money instantly	<input type="radio"/>
<input type="radio"/>	"Match 3 Anywhere" is the primary play style on the ticket	<input type="radio"/>
<input type="radio"/>	"Match 3 In A Row" is the primary play style on the ticket	<input type="radio"/>

Next »

(1 of 18)

REMEMBER: Do not use the Back Button on your Internet Browser as your survey answers may be lost.
Questions? Contact survey2@axiom-research.com

Moving Forward

- The value of this segmentation compared to the 2006 Gaming Segmentation
 - Product-specific and therefore more actionable
 - Could be used to customize information within the MVP Club and IQ mailouts
- Immediately:
 - Name the segments
 - Will provide segment codes for each of the survey respondents to IQ
 - Consider whether to incorporate a segment classification tool in the MVP Club registration process (4 boards, 5 options per board)

Moving Forward

- Immediately (continued):
 - Incorporate the required segment classification tool in the upcoming \$2 & \$5 Ticket Attribute Survey
 - Incorporate the required segment classification tool in the next Choice-based Ticket Testing Research
- Future:
 - Axiom CR proposes creating a similar type of survey for the Lotto category
 - Size the Scratch segments within the general population during the next state-wide tracking survey

Segment Profile Summaries

Includes Possible Segment Names



Segment Profile Summaries

	SEG 1: Price-sensitive Dabblers	SEG 2: Top Prize Monitoring Players	SEG 3: Extended-play Enthusiasts	SEG 4: Feature-focused Players	SEG 5: Odds-driven Players
Avg Annualized Scratch Spending	\$286.39	\$1,361.21	\$895.61	\$1,145.22	\$564.70
Avg Annualized Lotto Spending	\$358.84	\$1,054.03	\$558.42	\$861.24	\$607.07
3 Most Important Ticket Attributes*	<ol style="list-style-type: none"> 1. Costs \$1 to play - top prize between \$3,000 and \$5,000 (13.86%) 2. The odds of winning any prize is better than most other Scratch games at that price (13.14%) 3. Has a feature where I might double or triple my prize (8.38%) 	<ol style="list-style-type: none"> 1. The odds of winning any prize is better than most other Scratch games at that price (12.61%) 2. Costs \$15 to play-top prize between \$125,000 and \$200,000 (8.56%) 3. Costs \$10 to play top prize between \$80,000 and \$100,000 (7.85%) 	<ol style="list-style-type: none"> 1. Crossword' is the primary play style (16.17%) 2. The odds of winning any prize is better than most other Scratch games at that price (12.54%) 3. Costs \$3 to play-top prize between \$30,000 and \$35,000 (9.03%) 	<ol style="list-style-type: none"> 1. Has an appealing theme that IS tied to a familiar product like Monopoly (8.63%) 2. Crossword' is the primary play style (6.63%) 3. The ticket consists of more than one play area (5.74%) 	<ol style="list-style-type: none"> 1. The odds of winning any prize is better than most other Scratch games at that price (19.46%) 2. Has a feature where I might double or triple my prize (12.34%) 3. Has considerably more prizes of between \$26 and \$500 (10.54%)

Segment Profile Summaries

	SEG 1: Price-sensitive Dabblers	SEG 2: Top Prize Monitoring Players	SEG 3: Extended-play Enthusiasts	SEG 4: Feature-focused Players	SEG 5: Odds-driven Players
Play Style Preference	Quick Play	No Preference	Extended Play	No Preference	Quick Play
Price Played Most Often	\$1 Games	\$1 & \$5 Games	\$3 Games	\$1 Games	\$1 Games
Scratch Spending Index Values (Average = 1.0)	\$1 Games = 0.90 \$2 Games = 0.36 \$3 Games = 0.19 \$5 Games = 0.17 \$10 Games = 0.23 \$15 Games = 0.21	\$1 Games = 1.03 \$2 Games = 1.38 \$3 Games = 1.19 \$5 Games = 1.92 \$10 Games = 2.52 \$15 Games = 2.31	\$1 Games = 0.84 \$2 Games = 1.12 \$3 Games = 2.13 \$5 Games = 0.89 \$10 Games = 0.38 \$15 Games = 0.31	\$1 Games = 1.22 \$2 Games = 1.31 \$3 Games = 1.30 \$5 Games = 1.14 \$10 Games = 1.62 \$15 Games = 2.22	\$1 Games = 1.04 \$2 Games = 0.85 \$3 Games = 0.52 \$5 Games = 0.73 \$10 Games = 0.35 \$15 Games = 0.34
3 Most Important Purchase Decision Factors*	1. Ticket price (24.98%) 2. Using a coupon for a free Scratch game (17.85%) 3. Top prize (10.76%)	1. Top prize (19.09%) 2. Reviewing the 'Top Prizes Remaining' bulletin (15.48%) 3. Ticket price (11.52%)	1. Looks like it will take more time to play (13.01%) 2. Using a coupon for a free Scratch game (12.68%) 3. Reviewing the 'Top Prizes Remaining' bulletin (9.35%)	1. Top prize (15.52%) 2. Ticket price (13.11%) 3. Features other than price or top prize (8.12%)	1. Ticket price (16.84%) 2. Top prize (14.34%) 3. Using a coupon for a free Scratch game (12.91%)

*Note: Had each item received an equal proportion of "most important" selections, the proportionate share of each item would have been 4.3%.

Share of Wallet Analysis

	Total	SEG 1: Price- sensitive Dabblers	SEG 2: Top Prize Monitoring Players	SEG 3: Extended- play Enthusiasts	SEG 4: Feature- focused Players	SEG 5: Odds- driven Players
Avg Annual. Lottery \$	1,529.95	\$645.24	\$2,415.24	\$1,454.03	\$2,006.46	\$1,171.77
% on Lotto games	45%	56%	44%	38%	43%	52%
% on Scratch games	55%	44%	56%	62%	57%	48%
% on \$1 Games	16%	42%	10%	13%	14%	25%
% on \$2 Games	20%	21%	17%	20%	19%	25%
% on \$3 Games	21%	12%	15%	42%	20%	16%
% on \$5 Games	22%	11%	25%	18%	18%	23%
% on \$10 Games	14%	9%	21%	5%	16%	7%
% on \$15 Games	8%	5%	11%	2%	13%	4%

Share of
Scratch Wallet

Price Point Cross Play by Segment

	All Respondents	SEG 1: Price-sensitive Dabblers	SEG 2: Top Prize Monitoring Players	SEG 3: Extended-play Enthusiasts	SEG 4: Feature-focused Players	SEG 5: Odds-driven Players
		(B)	(C)	(D)	(F)	(G)
All price points	25%	6%	51% BDEF	23% BF	32% BF	15% B
Only \$1, \$2, \$3, \$5	20%	13%	13%	29% BCE	17%	26% BC
Only \$1 & \$2	12%	29% CDEF	3%	1%	9% D	18% CDE
Only \$1, \$2, \$3, \$5, \$10	12%	3%	9% B	22% BCF	15% B	11% B
Only \$1	8%	26% CDEF	4% D		5% D	9% DC
Only \$1, \$2, \$3	8%	10% C	3%	8%	11% C	8% C
Only \$1, \$2, \$5	3%	7% CDE	2%	1%	0%	5% E

Segment Profile Summaries - Outcome Assessment

D6. At what \$ amount won on a Scratch game do you personally start thinking about pocketing some (or all) of your winnings?

