Market Landscape Explorer

Nebraska Lottery Tracking Study
March/April 2013

- Draft report -

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CONSUMER RESEARCH

Report Overview

- **Methodology**

- **Key Findings**
    - Attitudes towards Gambling and the Nebraska Lottery
    - Nebraska Lottery Beneficiaries
    - Past Year Gaming Participation
    - Casino & Lottery Participation and Spending
    - Days Games Are Typically Played
    - Category Cross Play
    - Cross Play of Lotto Games
    - Multi-state Games
    - Nebraska Pick 5
    - Scratch Games
    - Hypothetical Retail Visit to purchase Scratch Games
    - Favorite Game
    - MVP Club Membership
    - Sources used for specific lottery-related information
    - Media habits

Methodology

Study Overview

- **1000 adult Nebraskans completed the survey.**
    - General population survey of adults (19+) in Nebraska
    - Sampling identical to previous tracking studies - proportionate to regional (Douglas/Sarpy, Lancaster, and Rest), gender, and age breakdowns in Nebraska
    - Until the last wave, the data was collected by way of telephone interviews. This is the second wave in which data was collected over 2 phases:
        - Phase 1 - Web survey using ResearchNow panelists (n=833)
        - Phase 2 - Interviews were conducted by Omaha-based Wiese Research Associates (n=167) to fill the remaining sampling quotas.
    - Only those who are not employed by the Lottery (or its vendors) or a market research company were eligible to complete the survey.

- **The survey covered:**
    - Attitudes towards gambling and lotteries
    - Beneficiary awareness & unaided recall
    - Typical participation & spending for casino games & lottery games
    - Additional questions specific to Scratch games
    - Additional questions specific to Lotto games
    - Sources used for specific lottery-related information
    - Media habits
    - Standard demographics

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Sample Profile Comparisons (by Wave)

		3/05 n=1,204	2/06 n=1,213	2/07 n=803	2/08 n=806	2010** n=939	2013** n=1,000
GENDER	Male	49%	48%	47%	47%	49%	49%
	Female	51%	52%	53%	53%	51%	51%
AGE GROUP	19 – 24	11%	11%	10%	9%	13%	12%
	25 – 34	19%	19%	19%	20%	18%	18%
	35 – 44	22%	22%	18%	19%	17%	17%
	45 – 54	18%	18%	20%	19%	19%	19%
	55 – 64	12%	12%	14%	14%	15%	16%
	65+	18%	18%	19%	20%	18%	18%
EDUCATION	Less Than High School	4%	3%	5%	5%	2%	2%
	High School Graduate	24%	24%	24%	23%	16%	16%
	Some College Or Tech Training	30%	32%	33%	30%	32%	35%
	College Graduate Or Beyond	41%	40%	38%	41%	50%	46%
	Refused	1%	1%	0%	1%	0%	0%

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** Data was collected over 2 phases (Phase 1 by web survey; Phase 2 by telephone survey). Data from previous waves was collected entirely by phone.

Sample Profile Comparisons (by Wave)

		3/05 n=1,204	2/06 n=1,213	2/07 n=803	2/08 n=806	FY11** n=939	2013** n=1,000
RACE/ETHNICITY	White	91%	92%	92%	91%	95%	94%
	African-American	2%	3%	2%	3%	1%	2%
	Hispanic	2%	1%	1%	1%	2%	2%
	Other	4%	2%	4%	5%	3%	3%
	Refused	1%	2%	1%	0%	0%	0%
HOUSEHOLD INCOME	Under $20,000	*	*	12%	11%	10%	10%
	$20,000 to just under $30,000	*	*	11%	10%	11%	11%
	$30,000 to just under $40,000	*	*	12%	12%	12%	12%
	$40,000 to just under $50,000	*	*	11%	10%	10%	12%
	$50,000 to just under $70,000	*	*	17%	18%	20%	20%
	$70,000 to just under $100,000	*	*	12%	16%	20%	17%
	Over $100,000	*	*	13%	12%	16%	17%
	Refused	14%	12%	10%	12%	1%	1%
COUNTY	Douglas/Sarpy	34%	34%	35%	35%	37%	36%
	Lancaster	15%	15%	15%	16%	16%	16%
	Balance	51%	51%	50%	50%	47%	48%

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* Different categories used

** Data was collected over 2 phases (Phase 1 by web survey; Phase 2 by telephone survey). Data from previous waves was collected entirely by phone.)

Key Findings

Attitudes towards
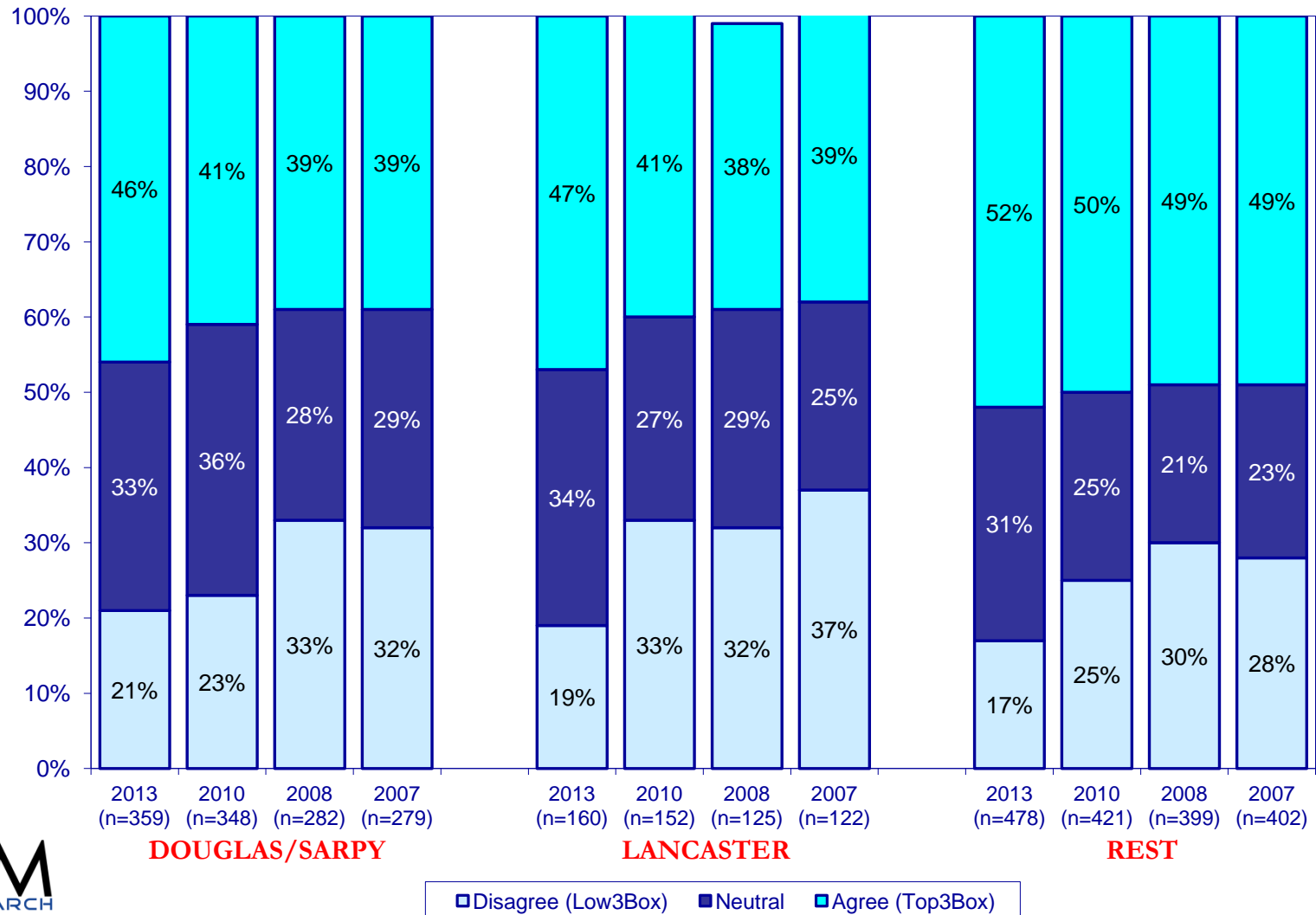## Gambling and the Lottery
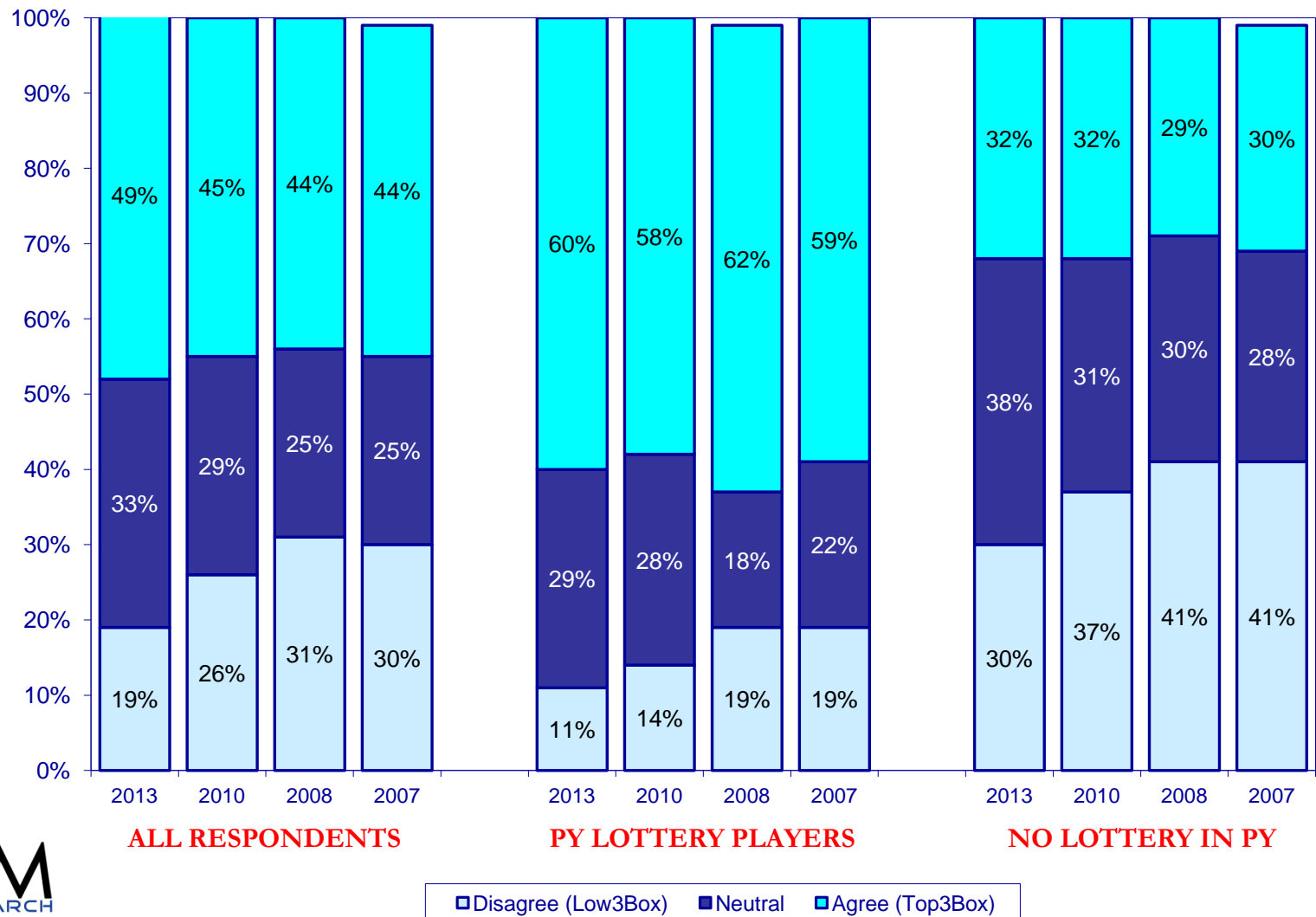
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"The Lottery makes a positive contribution to the State of Nebraska."

Base: All Respondents
n=1000 in 2013
n=939 in 2010
n=806 in 2008
n=803 in 2007

ALL RESPONDENTS

	2013	2010	2008	2007
Agree (Top3Box)	49%	45%	44%	44%
Neutral	33%	29%	25%	25%
Disagree (Low3Box)	19%	26%	31%	30%

PY LOTTERY PLAYERS

	2013	2010	2008	2007
Agree (Top3Box)	60%	58%	62%	59%
Neutral	29%	28%	18%	22%
Disagree (Low3Box)	11%	14%	19%	19%

NO LOTTERY IN PY

	2013	2010	2008	2007
Agree (Top3Box)	32%	32%	29%	30%
Neutral	38%	31%	30%	28%
Disagree (Low3Box)	30%	37%	41%	41%

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☐ Disagree (Low3Box)   ■ Neutral   ■ Agree (Top3Box)

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"The Lottery makes a positive contribution to the State of Nebraska." (by Region)

Base: All Respondents

	DOUGLAS/SARPY				LANCASTER				REST			
	2013 (n=359)	2010 (n=348)	2008 (n=282)	2007 (n=279)	2013 (n=160)	2010 (n=152)	2008 (n=125)	2007 (n=122)	2013 (n=478)	2010 (n=421)	2008 (n=399)	2007 (n=402)
Agree (Top3Box)	46%	41%	39%	39%	47%	41%	38%	39%	52%	50%	49%	49%
Neutral	33%	36%	28%	29%	34%	27%	29%	25%	31%	25%	21%	23%
Disagree (Low3Box)	21%	23%	33%	32%	19%	33%	32%	37%	17%	25%	30%	28%

Legend: □ Disagree (Low3Box) ■ Neutral ■ Agree (Top3Box)

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"The Lottery makes a positive contribution to the State of Nebraska." (by Age)

Base: All Respondents

19-29 YEARS   30-39 YEARS   40-49 YEARS   50-59 YEARS   60+ YEARS

☐ Disagree (Low3Box) ■ Neutral/DK ■ Agree (Top3Box)
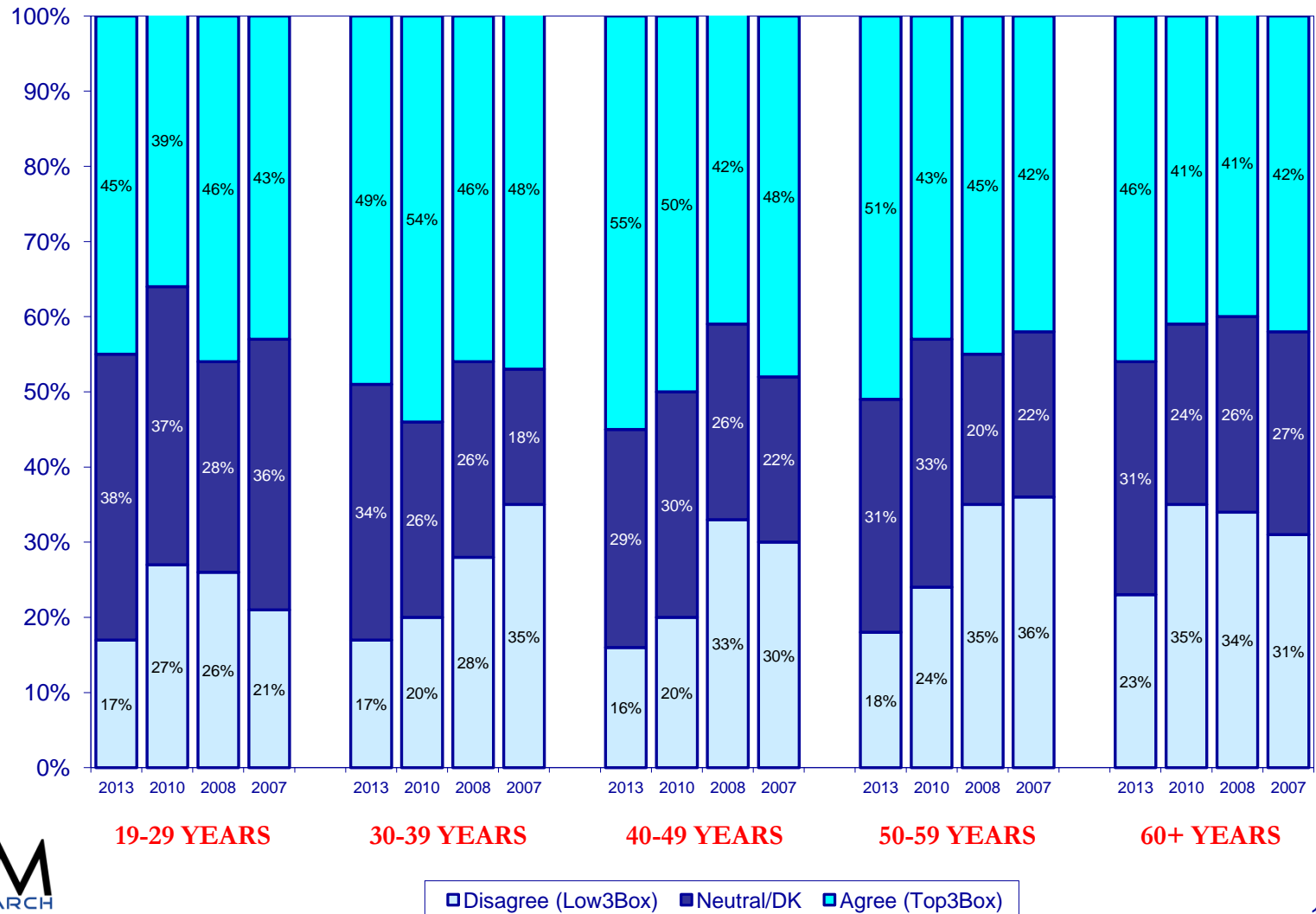
Opposition to Lotteries and Gambling in General

THE NOTEWORTHY PROPORTIONATE INCREASE (IN 2010 & 2013) OF THOSE WHO STATED "NOT SURE" IS ATTRIBUTABLE TO SURVEY DESIGN DIFFERENCES. SPECIFICALLY, "NOT SURE" IS NOT AN INITIAL TELEPHONE RESPONSE OPTION. RATHER, THE INTERVIEWER RECORDS THIS RESPONSE OPTION IF THE RESPONDENT COULD NOT PROVIDE A YES/NO RESPONSE AND INSTEAD STATES "NOT SURE". IN CONTRAST, THE WEB SURVEY OFFERS "YES", "NO", AND "NOT SURE" AS RESPONSE OPTIONS.
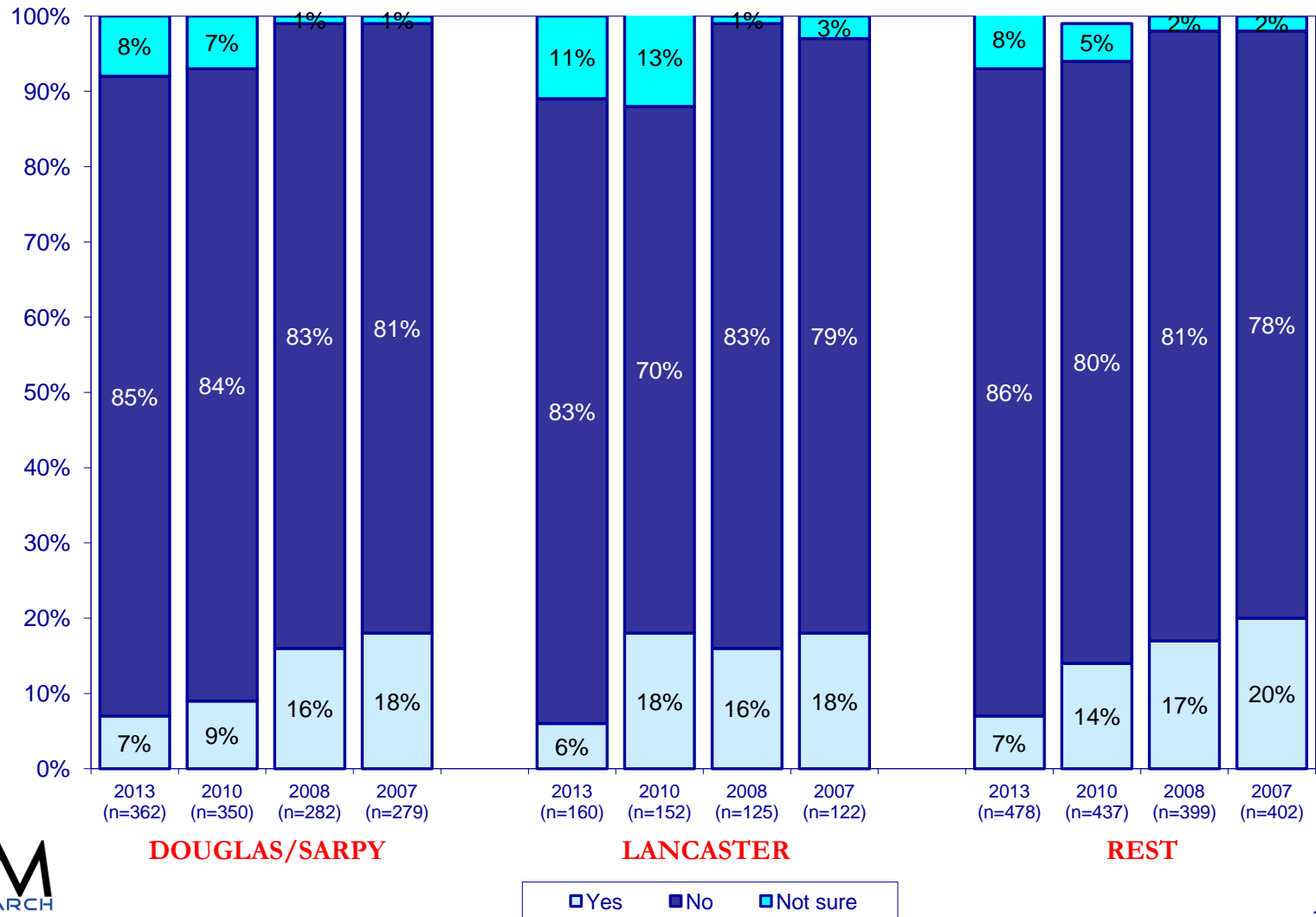

Chart: Stacked bar chart with legend: Yes, No, Not sure.
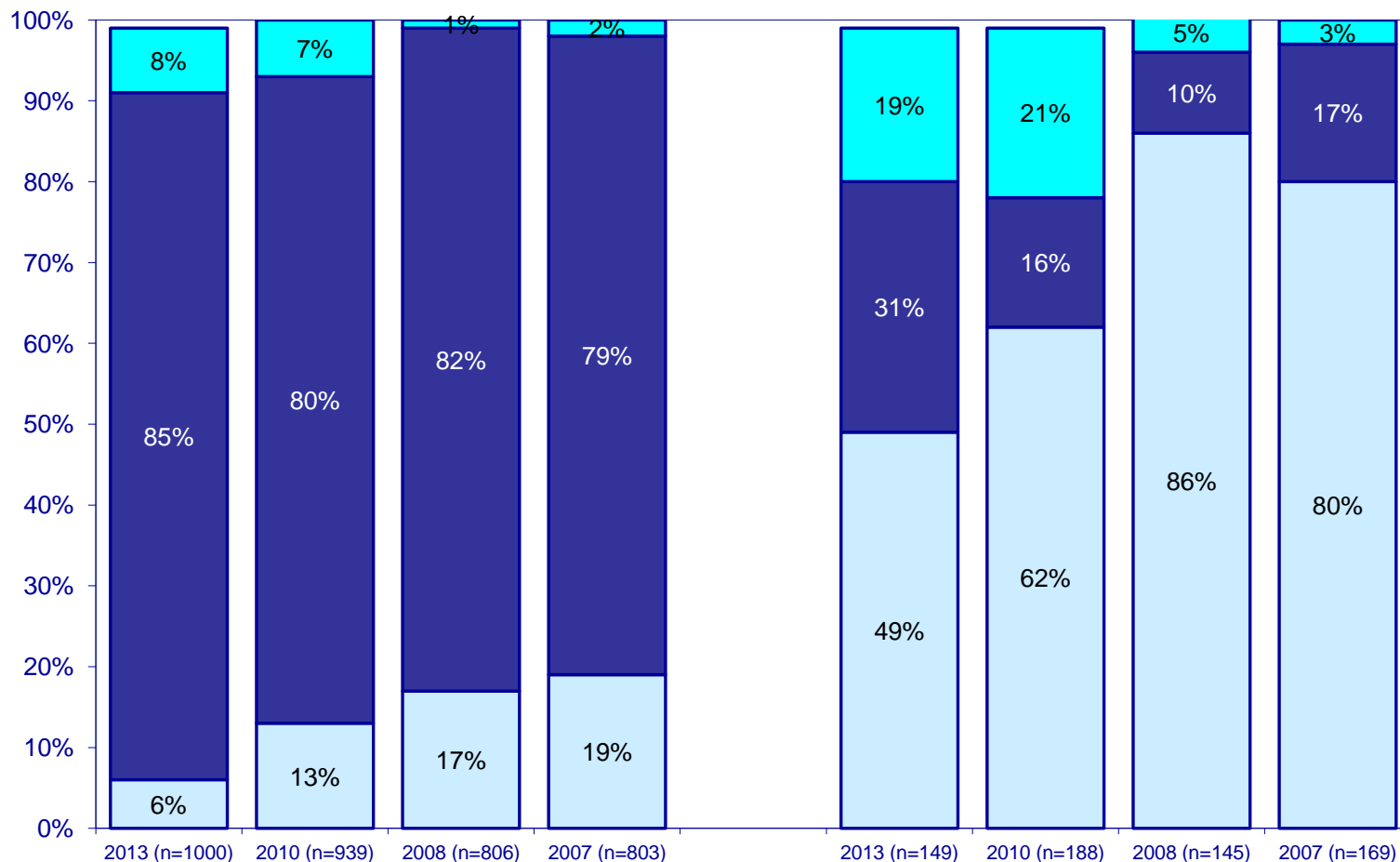
Opposed to state lotteries (among All Respondents):
- 2013 (n=1000): Yes 6%, No 85%, Not sure 8%
- 2010 (n=939): Yes 13%, No 80%, Not sure 7%
- 2008 (n=806): Yes 17%, No 82%, Not sure 1%
- 2007 (n=803): Yes 19%, No 79%, Not sure 2%

Opposed to gambling in general (among those opposed or not sure):
- 2013 (n=149): Yes 49%, No 31%, Not sure 19%
- 2010 (n=188): Yes 62%, No 16%, Not sure 21%
- 2008 (n=145): Yes 86%, No 10%, Not sure 5%
- 2007 (n=169): Yes 80%, No 17%, Not sure 3%
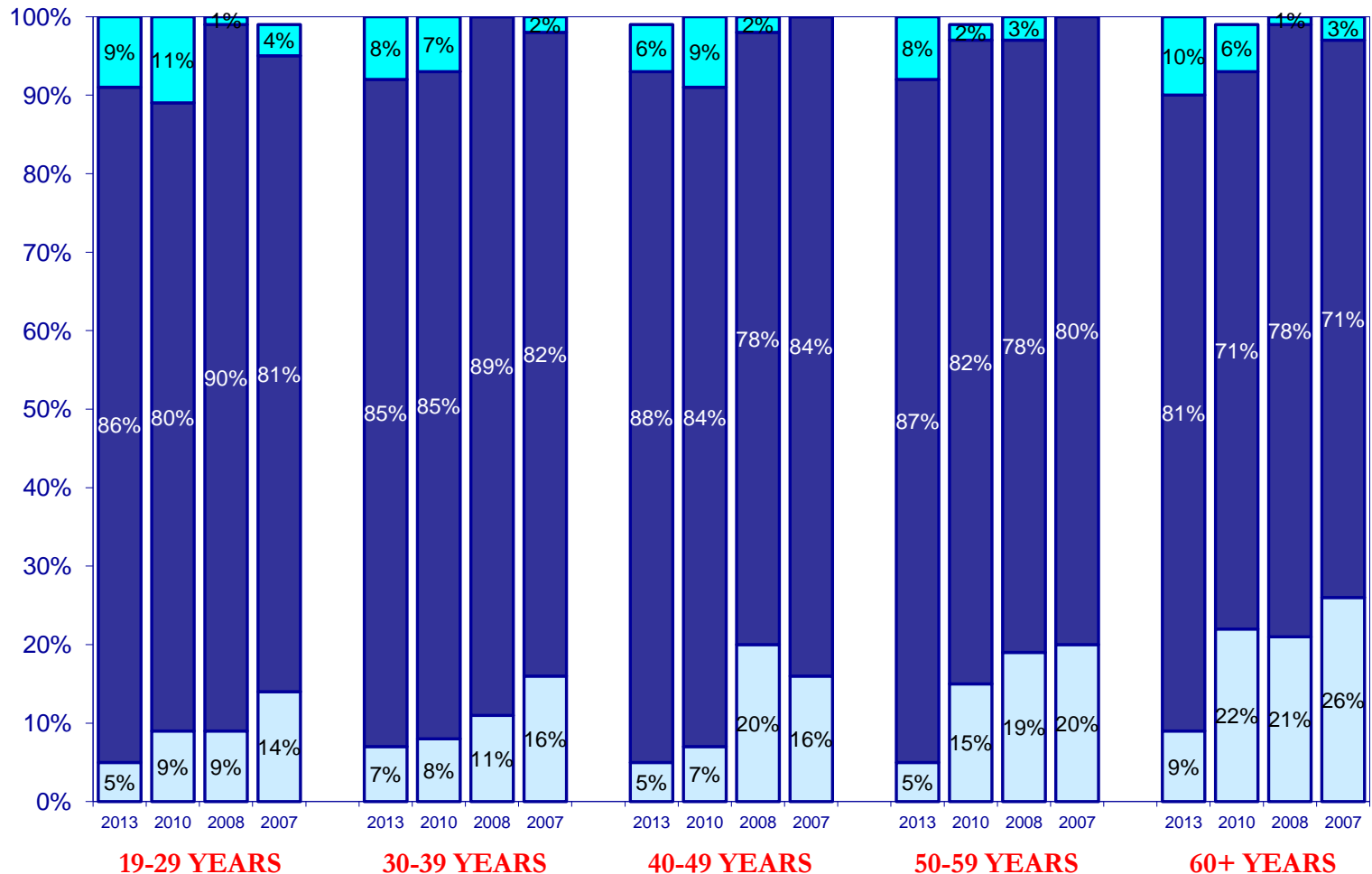
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Opposition to Lotteries (by Region)

THE NOTEWORTHY PROPORTIONATE INCREASE (IN 2010 & 2013) OF THOSE WHO STATED "NOT SURE" IS ATTRIBUTABLE TO SURVEY DESIGN DIFFERENCES. SPECIFICALLY, "NOT SURE" IS NOT AN INITIAL TELEPHONE RESPONSE OPTION. RATHER, THE INTERVIEWER RECORDS THIS RESPONSE OPTION IF THE RESPONDENT COULD NOT PROVIDE A YES/NO RESPONSE AND INSTEAD STATES "NOT SURE". IN CONTRAST, THE WEB SURVEY OFFERS "YES", "NO", AND "NOT SURE" AS RESPONSE OPTIONS.

Base: All Respondents

DOUGLAS/SARPY
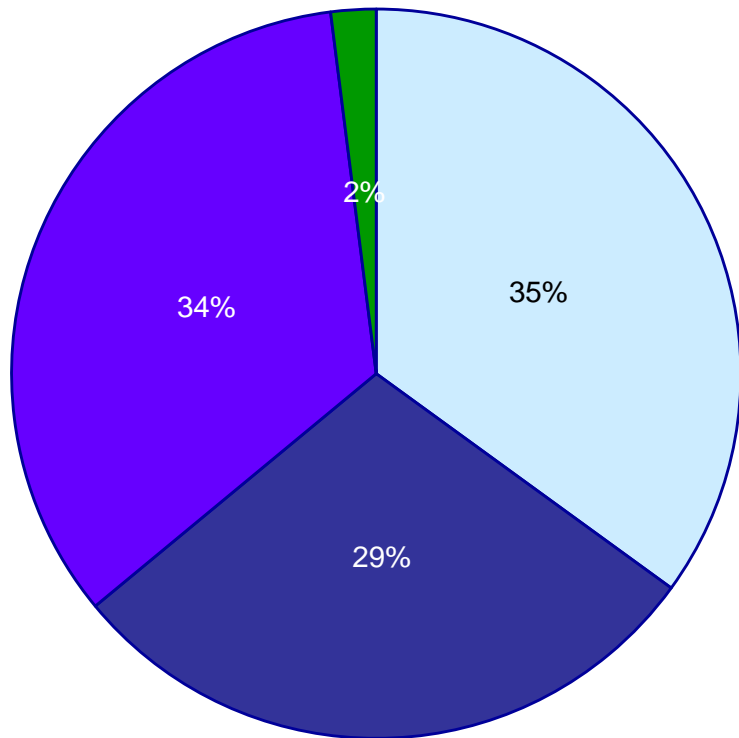
Year (n)	Yes	No	Not sure
2013 (n=362)	7%	85%	8%
2010 (n=350)	9%	84%	7%
2008 (n=282)	16%	83%	1%
2007 (n=279)	18%	81%	1%

LANCASTER

Year (n)	Yes	No	Not sure
2013 (n=160)	6%	83%	11%
2010 (n=152)	18%	70%	13%
2008 (n=125)	16%	83%	1%
2007 (n=122)	18%	79%	3%

REST

Year (n)	Yes	No	Not sure
2013 (n=478)	7%	86%	8%
2010 (n=437)	14%	80%	5%
2008 (n=399)	17%	81%	2%
2007 (n=402)	20%	78%	2%

Legend: ☐ Yes ■ No ☐ Not sure

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Opposition to Lotteries (by Age)

THE NOTEWORTHY PROPORTIONATE INCREASE (IN 2010 & 2013) OF THOSE WHO STATED "NOT SURE" IS ATTRIBUTABLE TO SURVEY DESIGN DIFFERENCES. SPECIFICALLY, "NOT SURE" IS NOT AN INITIAL TELEPHONE RESPONSE OPTION. RATHER, THE INTERVIEWER RECORDS THIS RESPONSE OPTION IF THE RESPONDENT COULD NOT PROVIDE A YES/NO RESPONSE AND INSTEAD STATES "NOT SURE". IN CONTRAST, THE WEB SURVEY OFFERS "YES", "NO", AND "NOT SURE" AS RESPONSE OPTIONS.

Age Group	Year	Yes	No	Not sure
19-29 YEARS	2013	5%	86%	9%
	2010	9%	80%	11%
	2008	9%	90%	1%
	2007	14%	81%	4%
30-39 YEARS	2013	7%	85%	8%
	2010	8%	85%	7%
	2008	11%	89%	
	2007	16%	82%	2%
40-49 YEARS	2013	5%	88%	6%
	2010	7%	84%	9%
	2008	20%	78%	2%
	2007	16%	84%	
50-59 YEARS	2013	5%	87%	8%
	2010	15%	82%	2%
	2008	19%	78%	3%
	2007	20%	80%	
60+ YEARS	2013	9%	81%	10%
	2010	22%	71%	6%
	2008	21%	78%	1%
	2007	26%	71%	3%

Base: All Respondents

Legend: Yes — No — Not sure

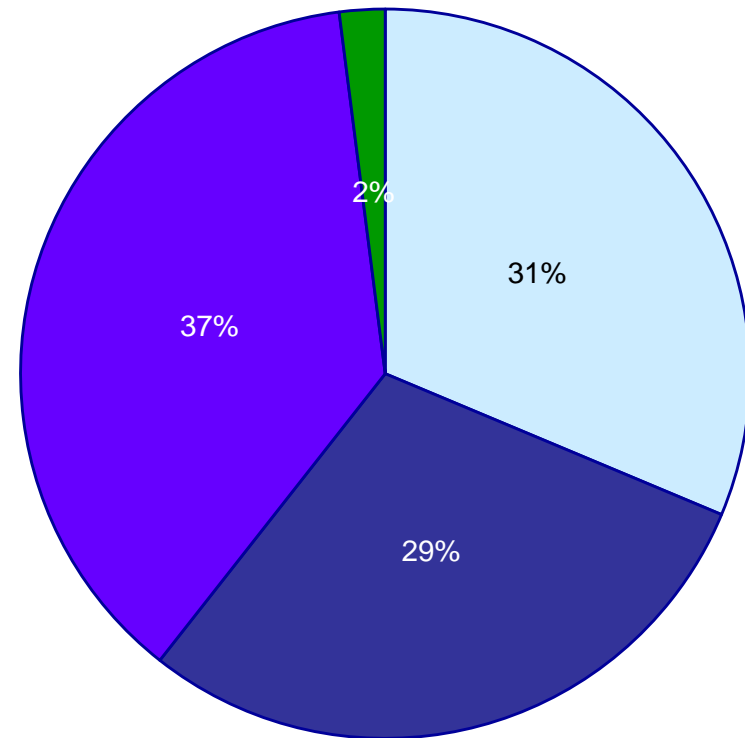AXIOM CONSUMER RESEARCH

Key Findings

Lottery Beneficiaries

Beneficiary Awareness

How familiar are you with where the proceeds from the Nebraska Lottery go?
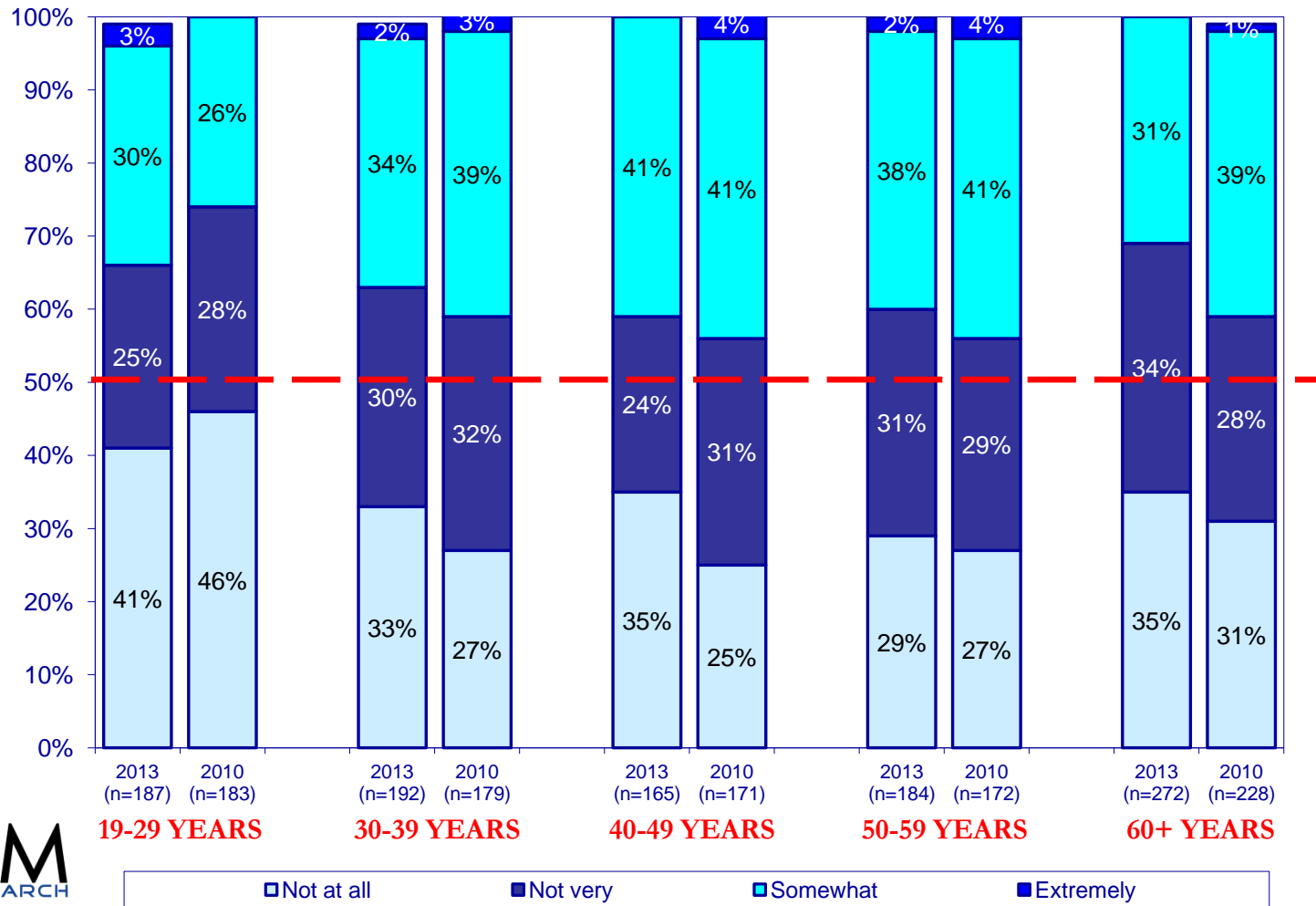
2013 (n=1000)

- Not at all: 35%
- Not very: 29%
- Somewhat: 34%
- Extremely: 2%

2010 (n=939)

- Not at all: 31%
- Not very: 29%
- Somewhat: 37%
- Extremely: 2%

Legend:
- □ Not at all
- ■ Not very
- ■ Somewhat
- ■ Extremely

Base: All Respondents

Beneficiary Awareness (by Age)

How familiar are you with where the proceeds from the Nebraska Lottery go?
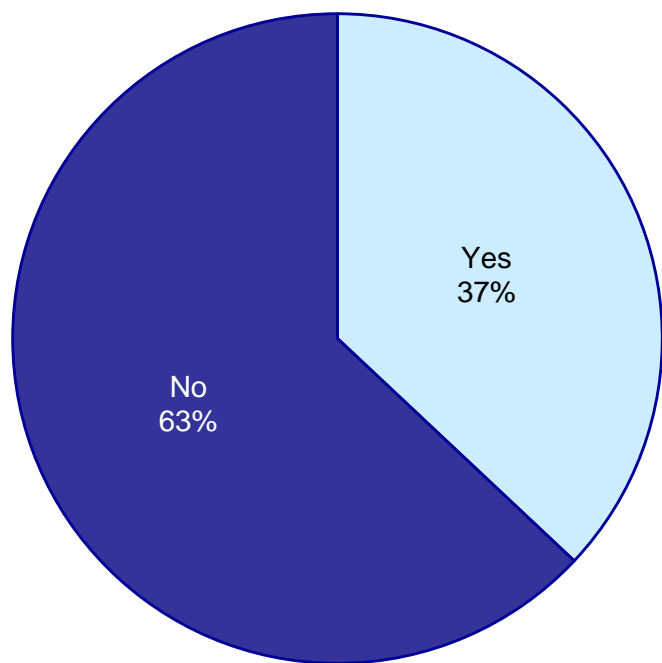

Base: All Respondents

	Not at all	Not very	Somewhat	Extremely
19-29 YEARS				
2013 (n=187)	41%	25%	30%	3%
2010 (n=183)	46%	28%	26%	
30-39 YEARS				
2013 (n=192)	33%	30%	34%	2%
2010 (n=179)	27%	32%	39%	3%
40-49 YEARS				
2013 (n=165)	35%	24%	41%	
2010 (n=171)	25%	31%	41%	4%
50-59 YEARS				
2013 (n=184)	29%	31%	38%	2%
2010 (n=172)	27%	29%	41%	4%
60+ YEARS				
2013 (n=272)	35%	34%	31%	
2010 (n=228)	31%	28%	39%	1%

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Beneficiary Awareness (by Region)

How familiar are you with where the proceeds from the Nebraska Lottery go?

Base: All Respondents

Legend: ☐ Not at all ■ Not very ☐ Somewhat ■ Extremely

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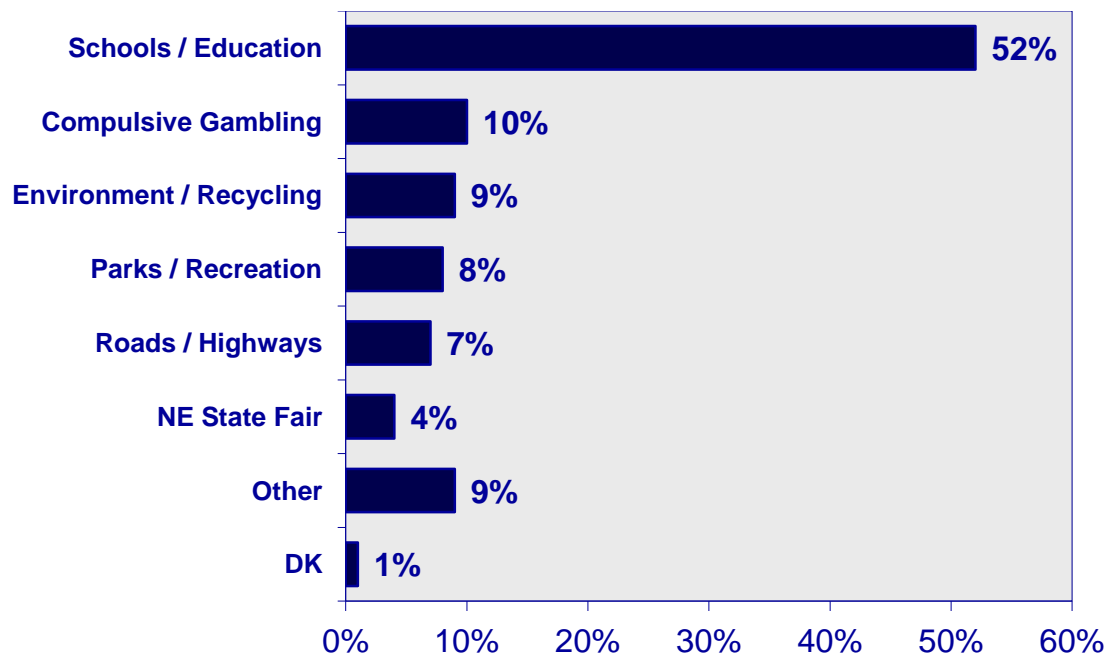
Beneficiary Recall (All Respondents)

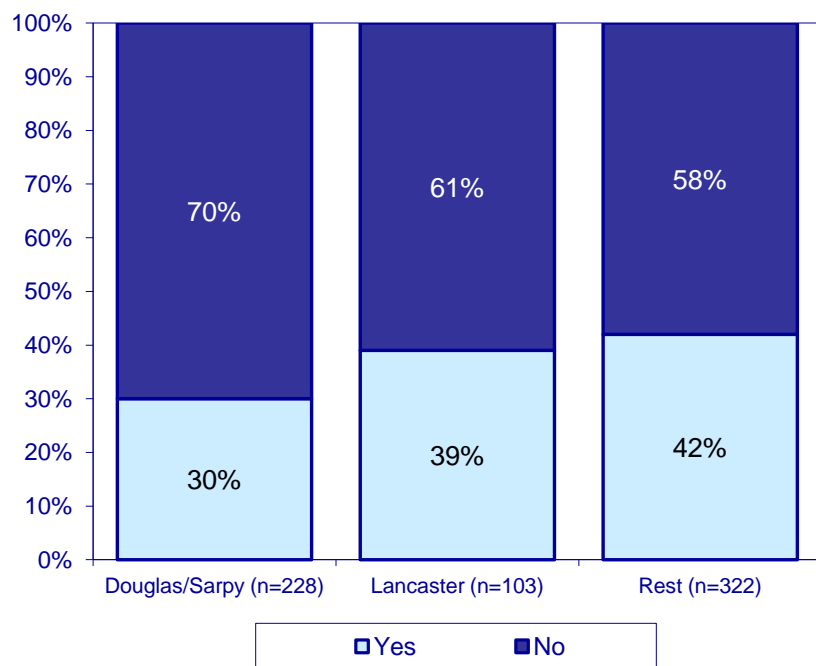Can you name any of the specific groups or programs that benefit from lottery proceeds in Nebraska?

Pie chart:
- No 63%
- Yes 37%

Bar chart:
- Schools / Education — 52%
- Compulsive Gambling — 10%
- Environment / Recycling — 9%
- Parks / Recreation — 8%
- Roads / Highways — 7%
- NE State Fair — 4%
- Other — 9%
- DK — 1%

(x-axis: 0% 10% 20% 30% 40% 50% 60%)

Base: Nebraskans who are "Not very familiar", "Somewhat familiar", or "Extremely familiar" with where the proceeds from the Nebraska Lottery go.
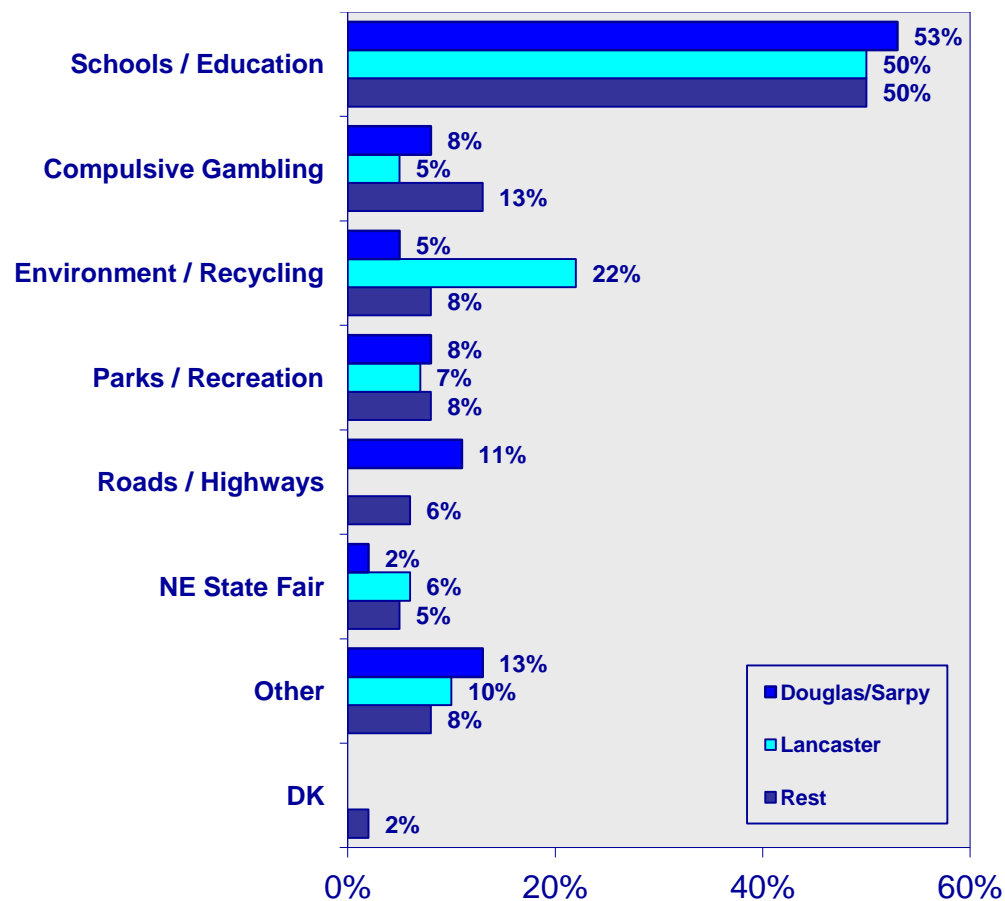
Base: Total mentions from those who are "Not very familiar", "Somewhat familiar", or "Extremely familiar" with where the proceeds from the Nebraska Lottery go (n=379)

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Beneficiary Recall (By Region)

Can you name any of the specific groups or programs that benefit from lottery proceeds in Nebraska?

Douglas/Sarpy (n=228): Yes 30%, No 70%
Lancaster (n=103): Yes 39%, No 61%
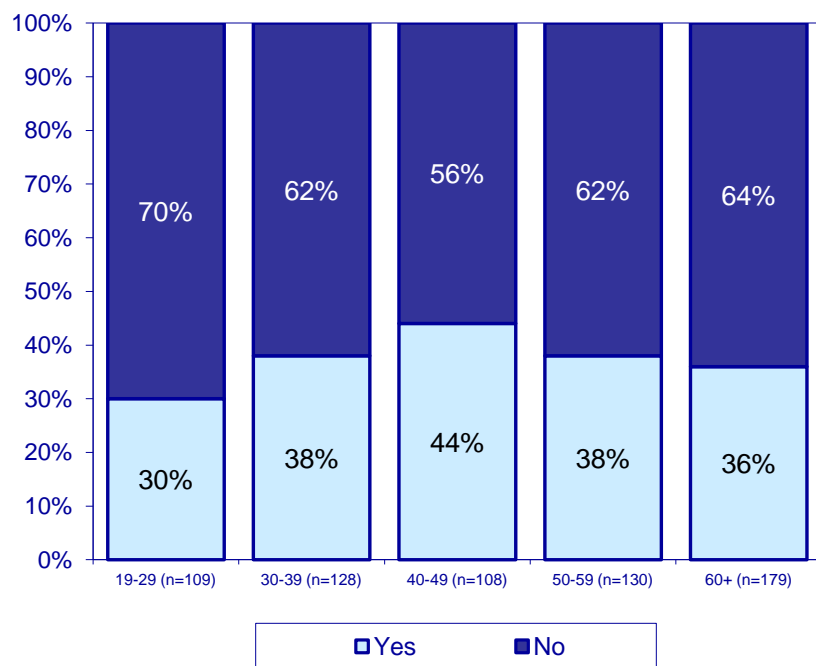**Rest (n=322):** Yes 42%, No 58%

☐ Yes   ■ No

Base: Respondents who are "Not very familiar", "Somewhat familiar", or "Extremely familiar" with where the proceeds from the Nebraska Lottery go


Schools / Education — 53% Douglas/Sarpy, 50% Lancaster, 50% Rest
Compulsive Gambling — 8% Douglas/Sarpy, 5% Lancaster, 13% Rest
Environment / Recycling — 5% Douglas/Sarpy, 22% Lancaster, 8% Rest
Parks / Recreation — 8% Douglas/Sarpy, 7% Lancaster, 8% Rest
Roads / Highways — 11% Douglas/Sarpy, 6% Rest
NE State Fair — 2% Douglas/Sarpy, 6% Lancaster, 5% Rest
Other — 13% Douglas/Sarpy, 10% Lancaster, 8% Rest
DK — 2% Rest

■ Douglas/Sarpy
☐ Lancaster
■ Rest

Base: Respondents who are "Not very familiar", "Somewhat familiar", or "Extremely familiar" with where the proceeds from the Nebraska Lottery go

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Beneficiary Recall (By Age)

Can you name any of the specific groups or programs that benefit from lottery proceeds in Nebraska?

Base: Respondents who are "Not very familiar", "Somewhat familiar", or "Extremely familiar" with where the proceeds from the Nebraska Lottery go

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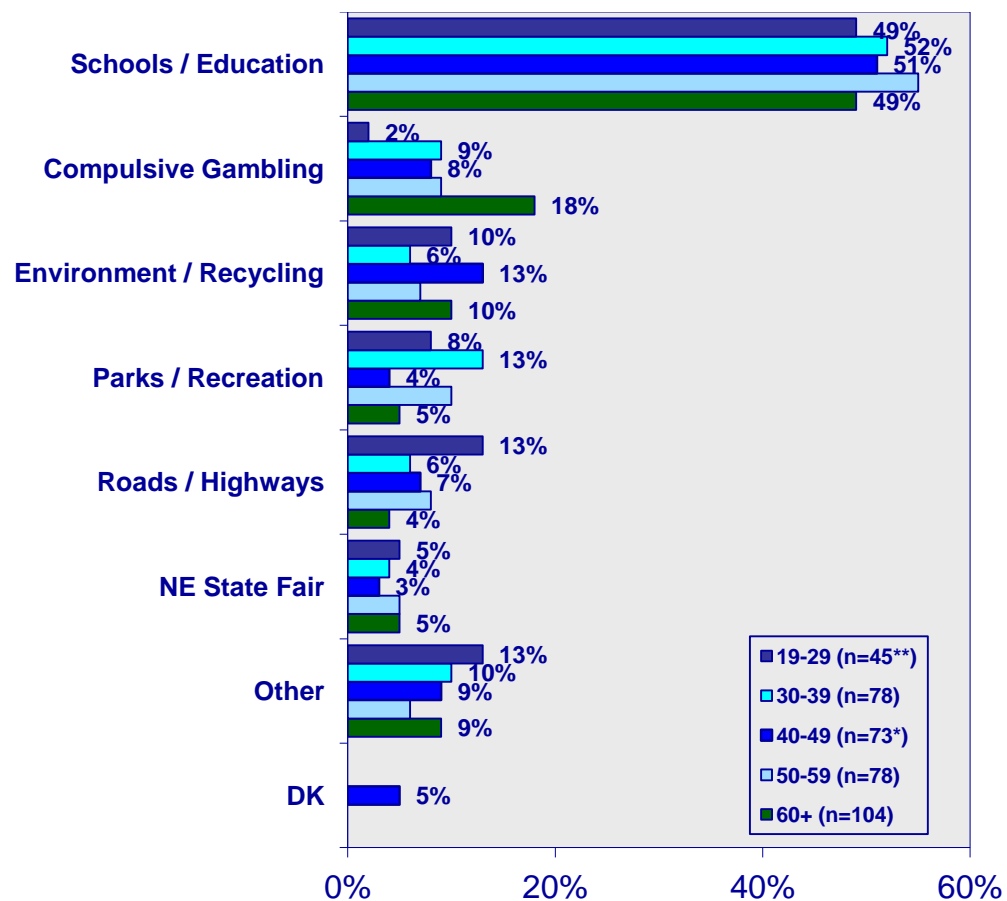
Base: Respondents who are "Not very familiar", "Somewhat familiar", or "Extremely familiar" with where the proceeds from the Nebraska Lottery go
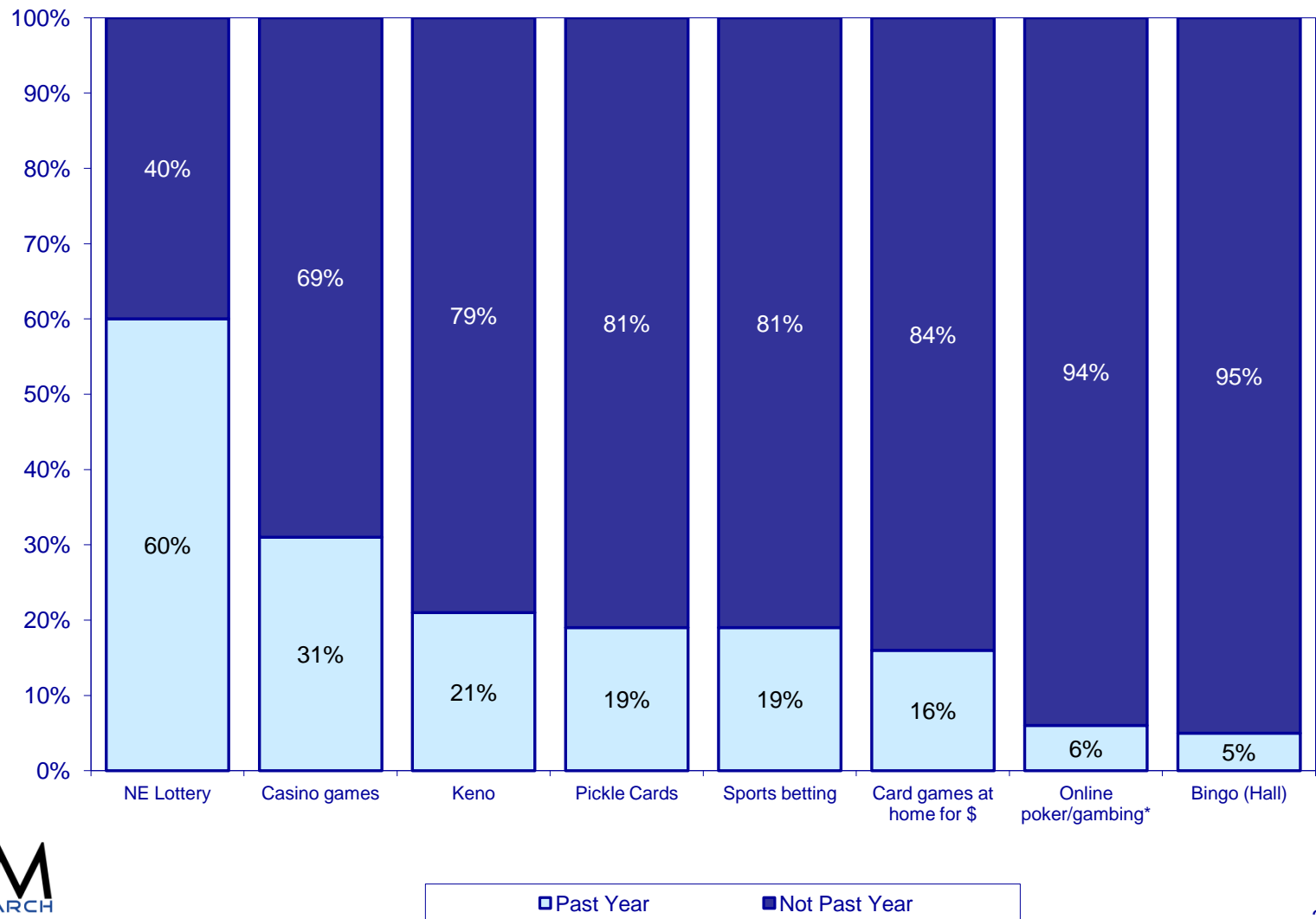
Key Findings

Past Year Gaming Participation

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Past Year Gaming Participation

* Online poker / gambling was mistakenly not asked during the telephone survey

Base: All Respondents
n=1000 in 2013

	NE Lottery	Casino games	Keno	Pickle Cards	Sports betting	Card games at home for $	Online poker/gambing*	Bingo (Hall)
Not Past Year	40%	69%	79%	81%	81%	84%	94%	95%
Past Year	60%	31%	21%	19%	19%	16%	6%	5%

☐ Past Year ■ Not Past Year

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Past Year Gaming Participation (by Age)

	All Respondents (n=1000)		19-29 years (n=187)	30-39 years (n=192)	40-49 years (n=165)	50-59 years (n=184)	60+ years (n=272)
Nebraska Lottery	60%		50%	56%	73%	69%	55%
Casino	31%		32%	27%	38%	29%	31%
Keno	21%		27%	22%	25%	21%	13%
Pickles	19%		20%	22%	26%	18%	11%
Sports betting	19%		26%	21%	22%	16%	12%
Card games for $	16%		29%	15%	17%	11%	9%
Online poker/gambling*	6%		13%	7%	8%	4%	2%
Bingo (Hall)	5%		5%	8%	6%	5%	3%

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Past Year Gaming Participation (by Region)

	All Respondents (n=1000)		Douglas/Sarpy (n=362)	Lancaster (n=160)	Rest of State (n=478)
Nebraska Lottery	60%		61%	60%	59%
Casino	31%		41%	30%	24%
Keno	21%		21%	23%	21%
Pickles	19%		20%	23%	16%
Sports betting	19%		18%	22%	18%
Card games for $	16%		19%	16%	13%
Online poker/gambling*	6%		6%	6%	5%
Bingo (Hall)	5%		7%	7%	4%

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* Online poker / gambling was mistakenly not asked during the telephone survey

Past Year Gaming Participation (by Lottery Cross Play)

	All Respondents (n=1000)		Lotto only (n=184)	Scratch only (n=30**)	Lotto & Scratch (n=382)
Casino	31%		24%	33%	51%
Keno	21%		16%	30%	38%
Pickles	19%		6%	25%	37%
Sports betting	19%		12%	9%	29%
Card games for $	16%		10%	9%	24%
Online poker/gambling*	6%		2%	4%	8%
Bingo (Hall)	5%		1%	6%	11%

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* Online poker / gambling was mistakenly not asked during the telephone survey

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Past Year Gaming Participation (by Annualized Lottery Spending)
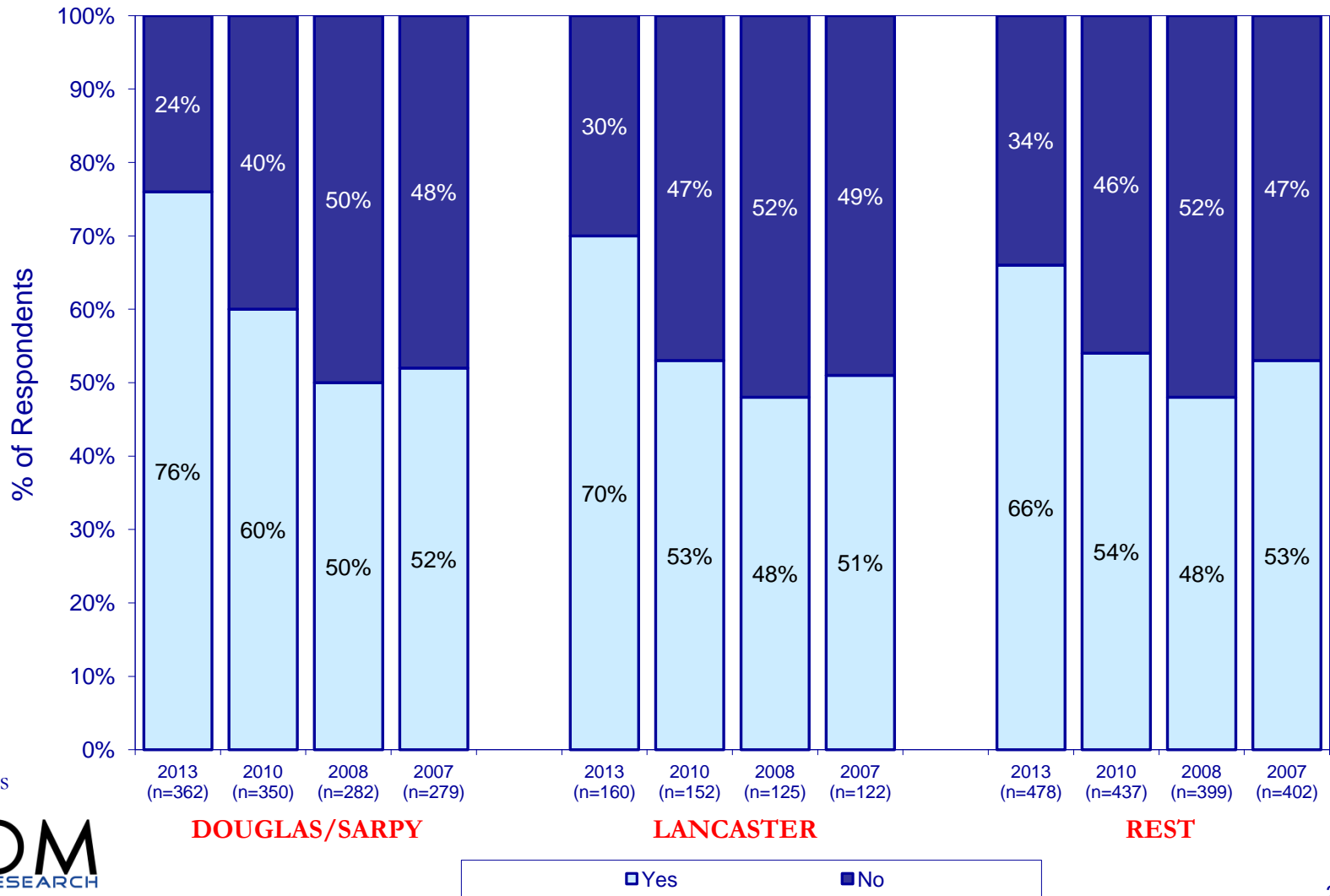
	All Respondents (n=1000)		Non-spenders (n=406)	Peripheral ($1-$103) (n=204)	Light ($104-$519) (n=221)	Moderate ($520-$1039) (n=78)	Heavy ($1040+) (n=92)
Casino	31%		15%	28%	41%	51%	67%
Keno	21%		6%	19%	25%	56%	51%
Pickles	19%		7%	9%	27%	52%	47%
Sports betting	19%		12%	13%	20%	38%	36%
Card games for $	16%		11%	10%	17%	24%	40%
Online poker/gambling*	6%		6%	2%	3%	5%	19%
Bingo (Hall)	5%		2%	3%	3%	12%	26%

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*Online poker / gambling was mistakenly not asked during the telephone survey

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Past Year Gaming Participation (by MVP Club Membership)

	All Respondents (n=1000)		Member (n=98)	Non-member (n=465)	Not sure (n=34**)
Casino	31%		45%	40%	52%
Keno	21%		37%	29%	31%
Pickles	19%		32%	24%	48%
Sports betting	19%		24%	22%	26%
Card games for $	16%		19%	20%	11%
Online poker/gambling**	6%		6%	6%	6%
Bingo (Hall)	5%		9%	7%	11%

**Base size too small

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* Online poker / gambling was mistakenly not asked during the telephone survey

Past Year Gaming Participation (by Region)

% of Respondents

	2013 (n=362)	2010 (n=350)	2008 (n=282)	2007 (n=279)		2013 (n=160)	2010 (n=152)	2008 (n=125)	2007 (n=122)		2013 (n=478)	2010 (n=437)	2008 (n=399)	2007 (n=402)
No	24%	40%	50%	48%		30%	47%	52%	49%		34%	46%	52%	47%
Yes	76%	60%	50%	52%		70%	53%	48%	51%		66%	54%	48%	53%

DOUGLAS/SARPY   **LANCASTER**   **REST**

Base: All Respondents

☐ Yes   ■ No

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Past Year Gaming Participation (by Age)

Base: All Respondents

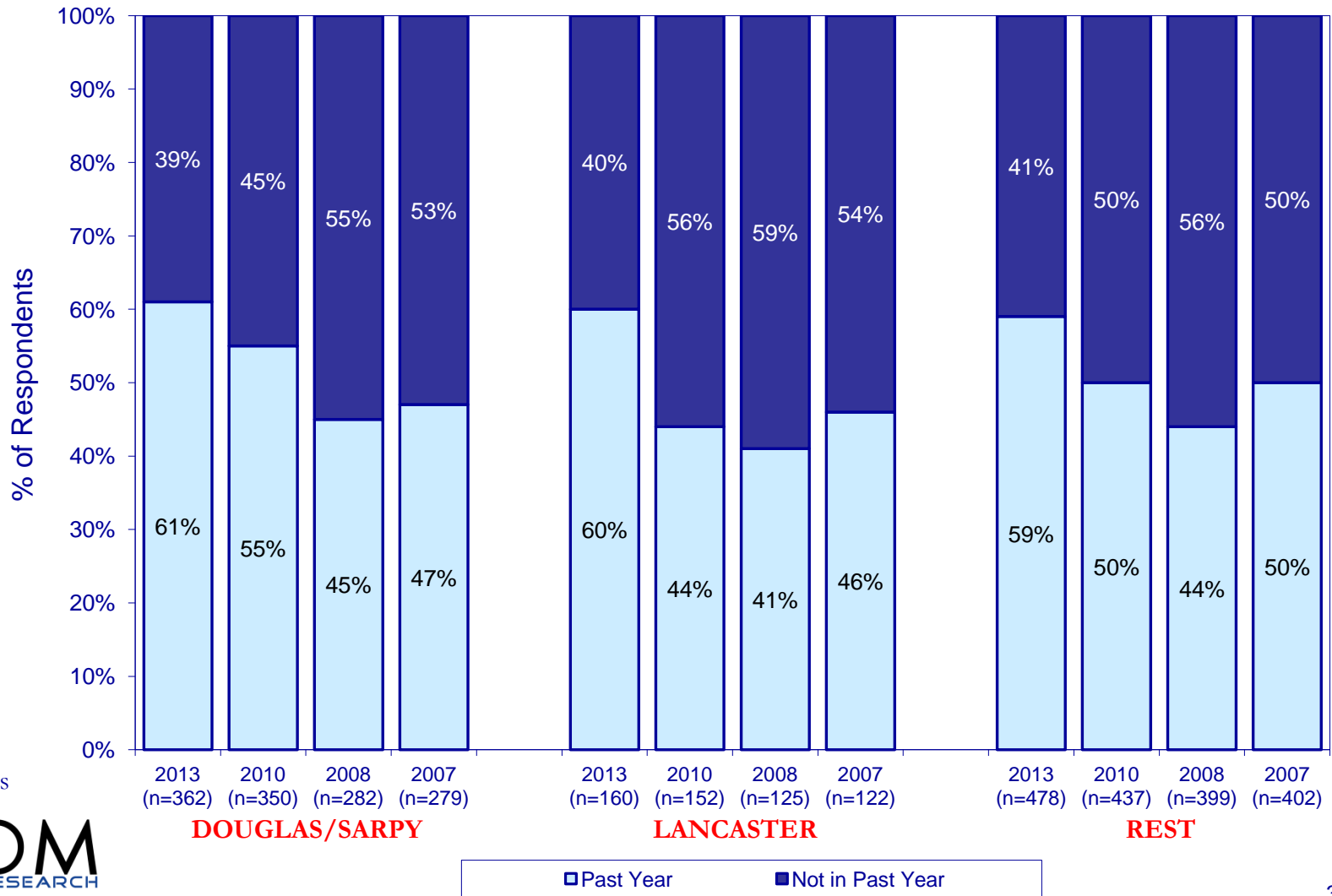☐ Yes ■ No

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Key Findings

Casino & Lottery
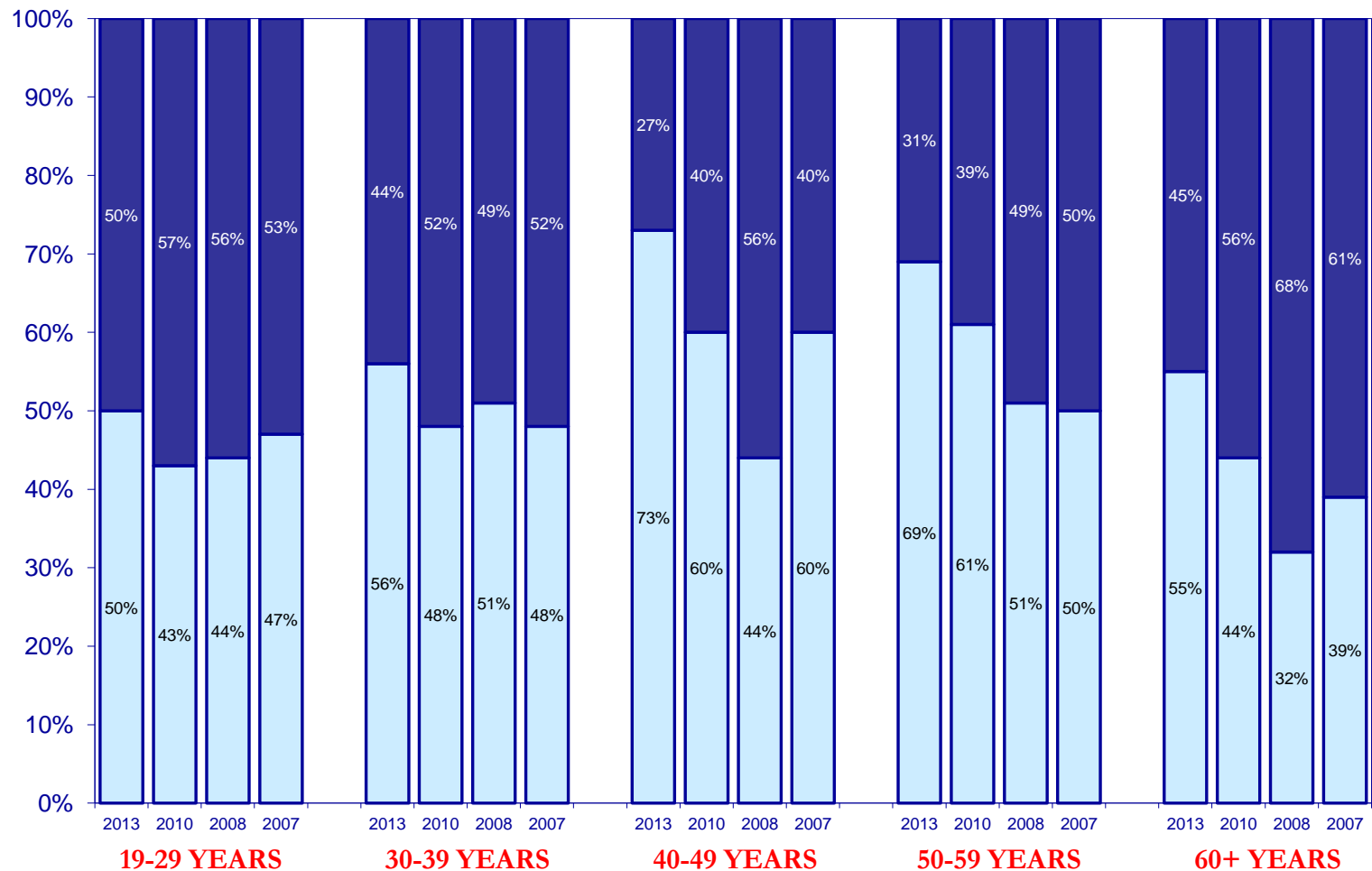Participation and Spending

Past Year Casino & Lottery Participation
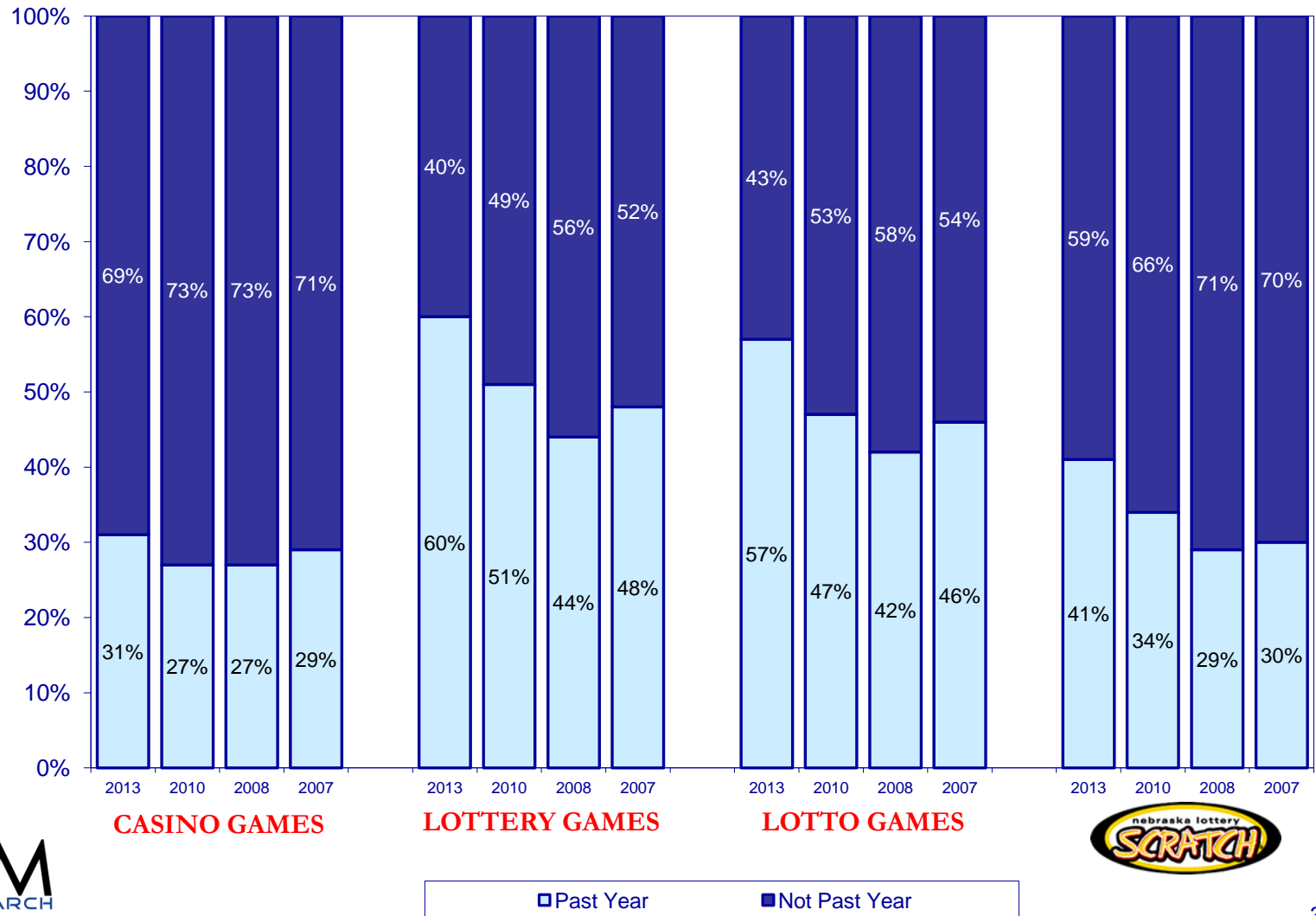
Base: All Respondents
n=1000 in 2013
n=939 in 2010
n=806 in 2008
n=803 in 2007

	CASINO GAMES				LOTTERY GAMES				LOTTO GAMES				SCRATCH			
Year	2013	2010	2008	2007	2013	2010	2008	2007	2013	2010	2008	2007	2013	2010	2008	2007
Not Past Year	69%	73%	73%	71%	40%	49%	56%	52%	43%	53%	58%	54%	59%	66%	71%	70%
Past Year	31%	27%	27%	29%	60%	51%	44%	48%	57%	47%	42%	46%	41%	34%	29%	30%

□ Past Year   ■ Not Past Year

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nebraska lottery SCRATCH

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Past Year Lottery Participation (by Region)

Base: All Respondents

DOUGLAS/SARPY — 2013 (n=362): Past Year 61%, Not in Past Year 39%; 2010 (n=350): 55% / 45%; 2008 (n=282): 45% / 55%; 2007 (n=279): 47% / 53%

LANCASTER — 2013 (n=160): Past Year 60%, Not in Past Year 40%; 2010 (n=152): 44% / 56%; 2008 (n=125): 41% / 59%; 2007 (n=122): 46% / 54%

REST — 2013 (n=478): Past Year 59%, Not in Past Year 41%; 2010 (n=437): 50% / 50%; 2008 (n=399): 44% / 56%; 2007 (n=402): 50% / 50%

Legend: ☐ Past Year ■ Not in Past Year

Y-axis: % of Respondents

Past Year Lottery Participation (by Age)

Base: All Respondents

Legend: □ Past Year ■ Not in Past Year

19-29 YEARS | **30-39 YEARS** | **40-49 YEARS** | **50-59 YEARS** | **60+ YEARS**

Past Year Lotto Participation

Base: All Respondents
n=1000 in 2013
n=939 in 2010
n=806 in 2008
n=803 in 2007

34
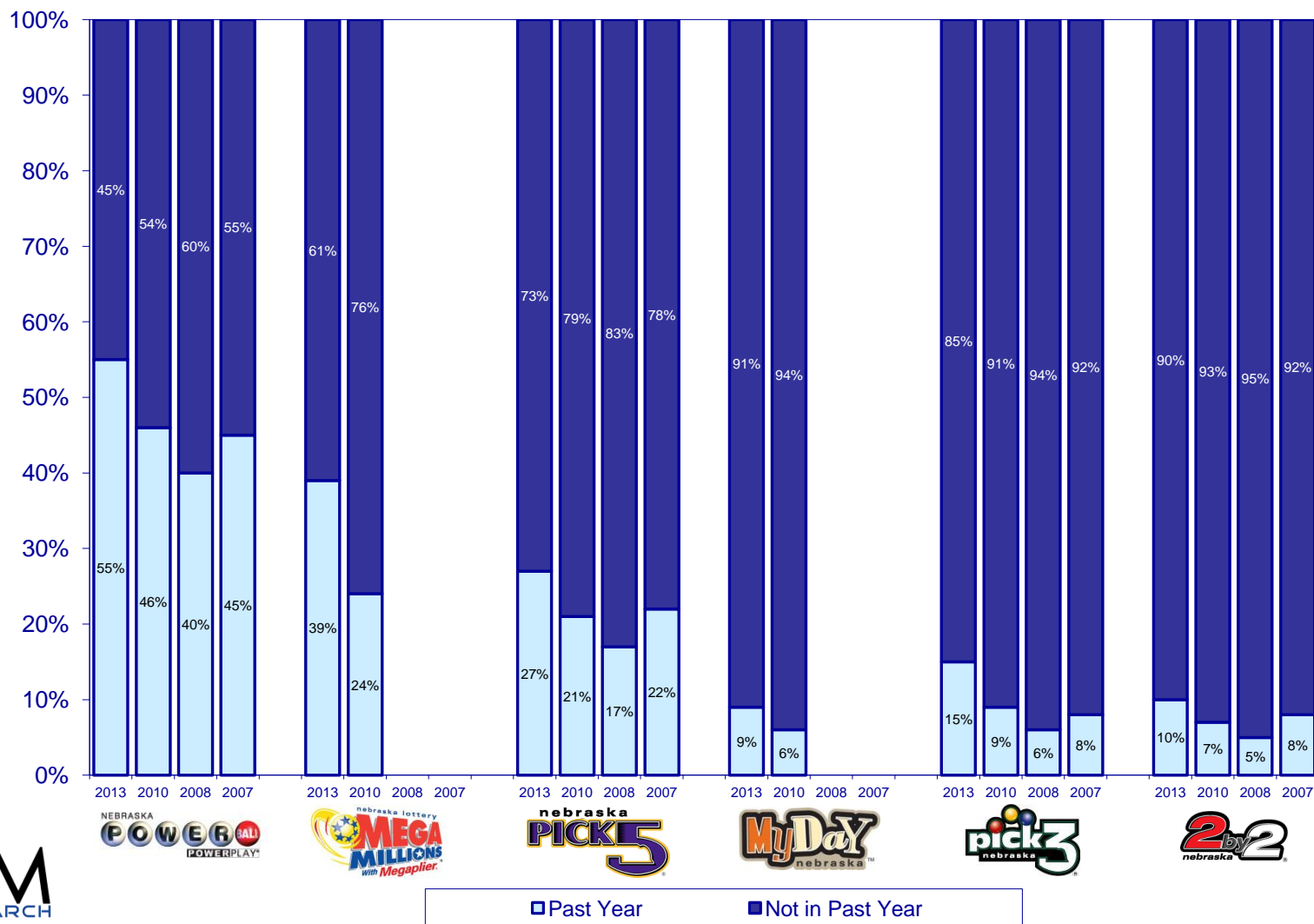
Participation among PY Lottery Players who do not feel "The Lottery makes a positive contribution to the state."

FREQUENCY DEFINITIONS

Regular: Every week

Occasional: Every couple of weeks, Every month

Infrequent: Every couple months, Every six months, Once a year

Little to No Involvement: Less than once a year, Never

PY Lottery Players who Disagreed with statement
n=60* in 2013
n=67* in 2010
n=69* in 2008
n=72* in 2007

* Small Base Size

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Legend: □Regular ■Occasional □Infrequent ■Non-player ■DK/Varies

35
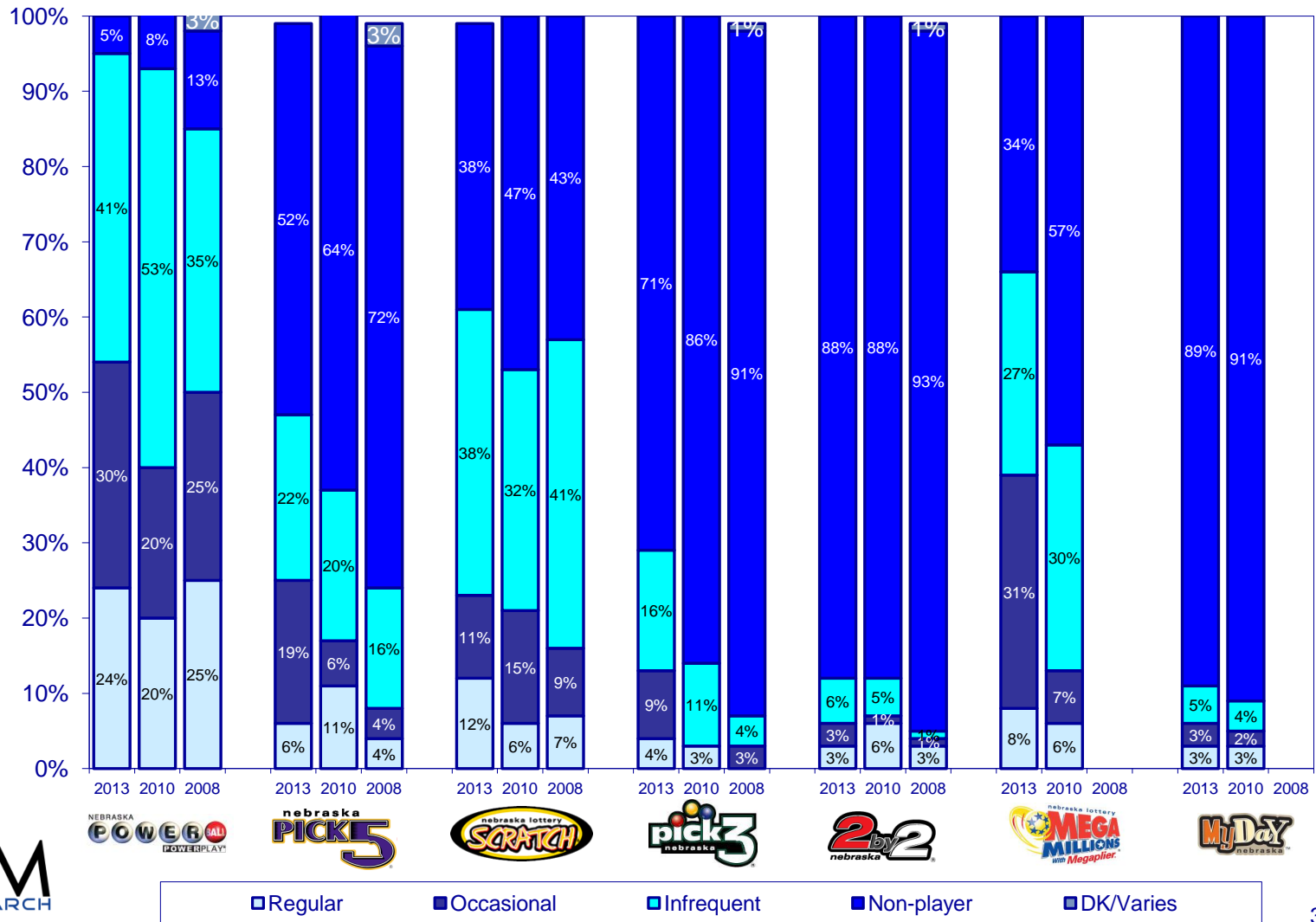
Lottery Spending Groups

SPENDING DEFINITIONS
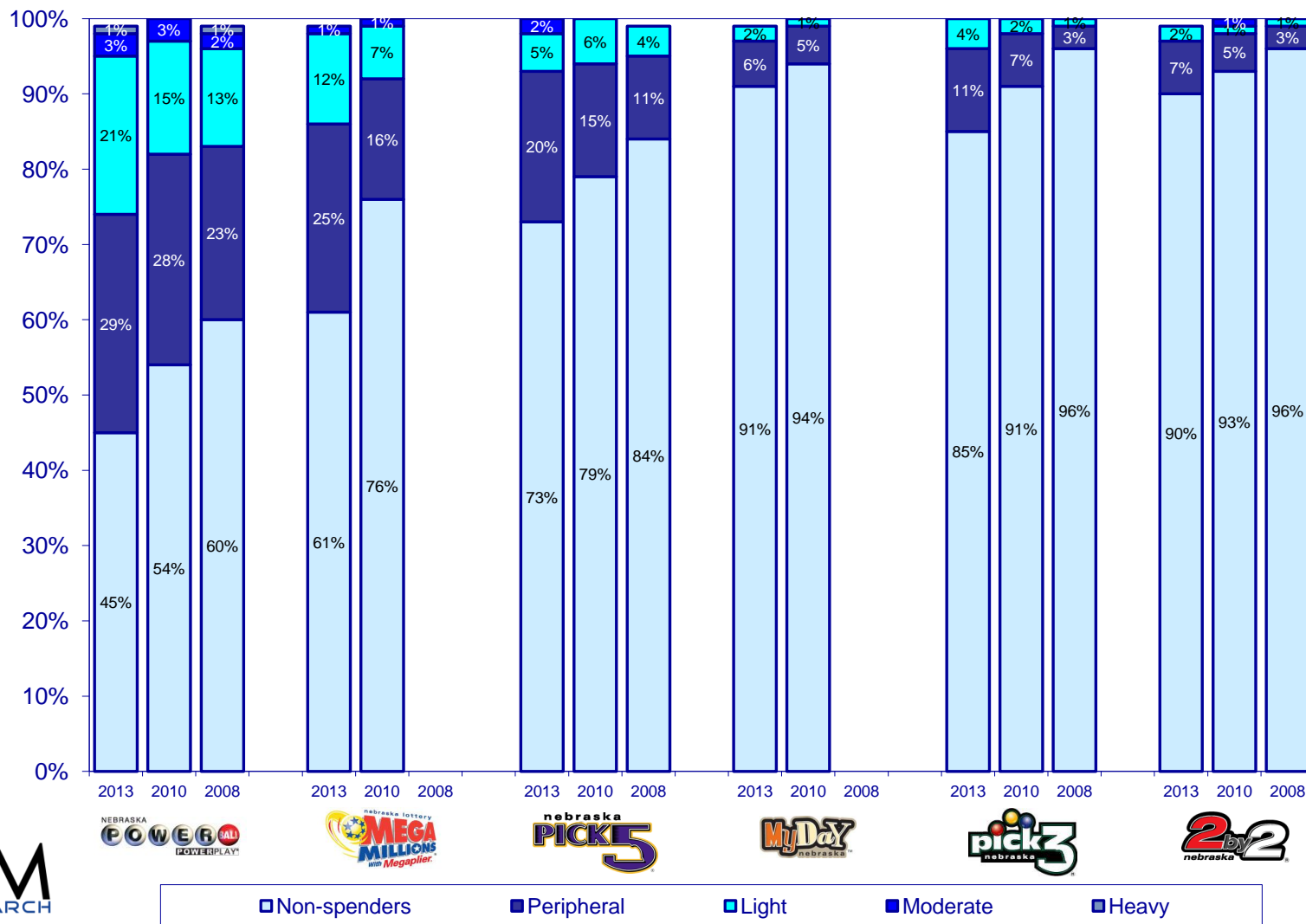
Non-spender: Spend 0 annually

Peripheral: Spend $1-103 annually

Light: Spend $104-519 annually

Moderate: Spend $520-1039 annually

Heavy: Spend $1040+ annually

Base: All Respondents
n=1000 in 2013
n=939 in 2010
n=806 in 2008
n=803 in 2007

ALL LOTTERY GAMES

	2013	2010	2008	2007
Heavy	9%	5%	2%	3%
Moderate	8%	5%	4%	4%
Light	22%	19%	17%	17%
Peripheral	20%	21%	20%	23%
Non-spenders	41%	50%	57%	53%

SCRATCH GAMES

	2013	2010	2008	2007
Heavy	5%	2%	1%	1%
Moderate	4%	3%	2%	2%
Light	13%	11%	7%	6%
Peripheral	19%	17%	17%	21%
Non-spenders	59%	67%	73%	70%

LOTTO GAMES

	2013	2010	2008	2007
Heavy	4%	3%	1%	1%
Moderate	5%	3%	3%	3%
Light	22%	17%	15%	16%
Peripheral	25%	24%	22%	25%
Non-spenders	44%	53%	59%	55%

Legend: □ Non-spenders ■ Peripheral □ Light ■ Moderate ■ Heavy

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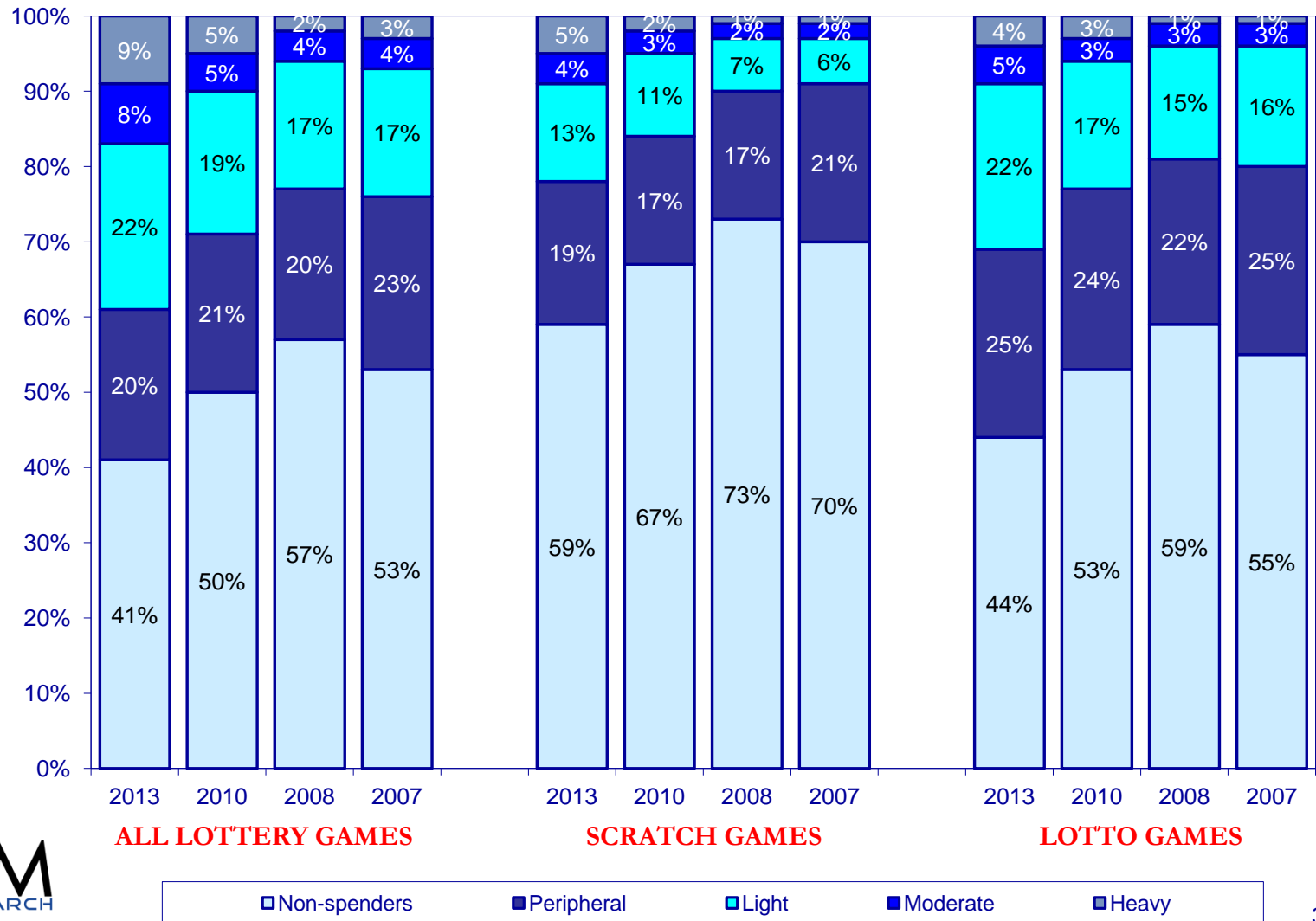
Lottery Spending Groups among All Respondents

SPENDING DEFINITIONS

Non-spender: Spend 0 annually

Peripheral: Spend $1-103 annually

Light: Spend $104-519 annually

Moderate: Spend $520-1039 annually

Heavy: Spend $1040+ annually

Base: All Respondents
n=1000 in 2013
n=939 in 2010
n=806 in 2008
n=803 in 2007

Powerball
- 2013: Non-spenders 45%, Peripheral 29%, Light 21%, Moderate 3%, Heavy 1%
- 2010: Non-spenders 54%, Peripheral 28%, Light 15%, Moderate 3%
- 2008: Non-spenders 60%, Peripheral 23%, Light 13%, Moderate 2%, Heavy 1%

Mega Millions
- 2013: Non-spenders 61%, Peripheral 25%, Light 12%, Moderate 1%
- 2010: Non-spenders 76%, Peripheral 16%, Light 7%, Moderate 1%

Pick 5
- 2013: Non-spenders 73%, Peripheral 20%, Light 5%, Moderate 2%
- 2010: Non-spenders 79%, Peripheral 15%, Light 6%
- 2008: Non-spenders 84%, Peripheral 11%, Light 4%

My Day
- 2013: Non-spenders 91%, Peripheral 6%, Light 2%
- 2010: Non-spenders 94%, Peripheral 5%, Light 1%

Pick 3
- 2013: Non-spenders 85%, Peripheral 11%, Light 4%
- 2010: Non-spenders 91%, Peripheral 7%, Light 2%
- 2008: Non-spenders 96%, Peripheral 3%, Light 1%

2 by 2
- 2013: Non-spenders 90%, Peripheral 7%, Light 2%
- 2010: Non-spenders 93%, Peripheral 5%, Light 1%
- 2008: Non-spenders 96%, Peripheral 3%, Light 1%

Legend: □ Non-spenders ■ Peripheral □ Light ■ Moderate □ Heavy

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Key Findings

Days Games Are Typically Played

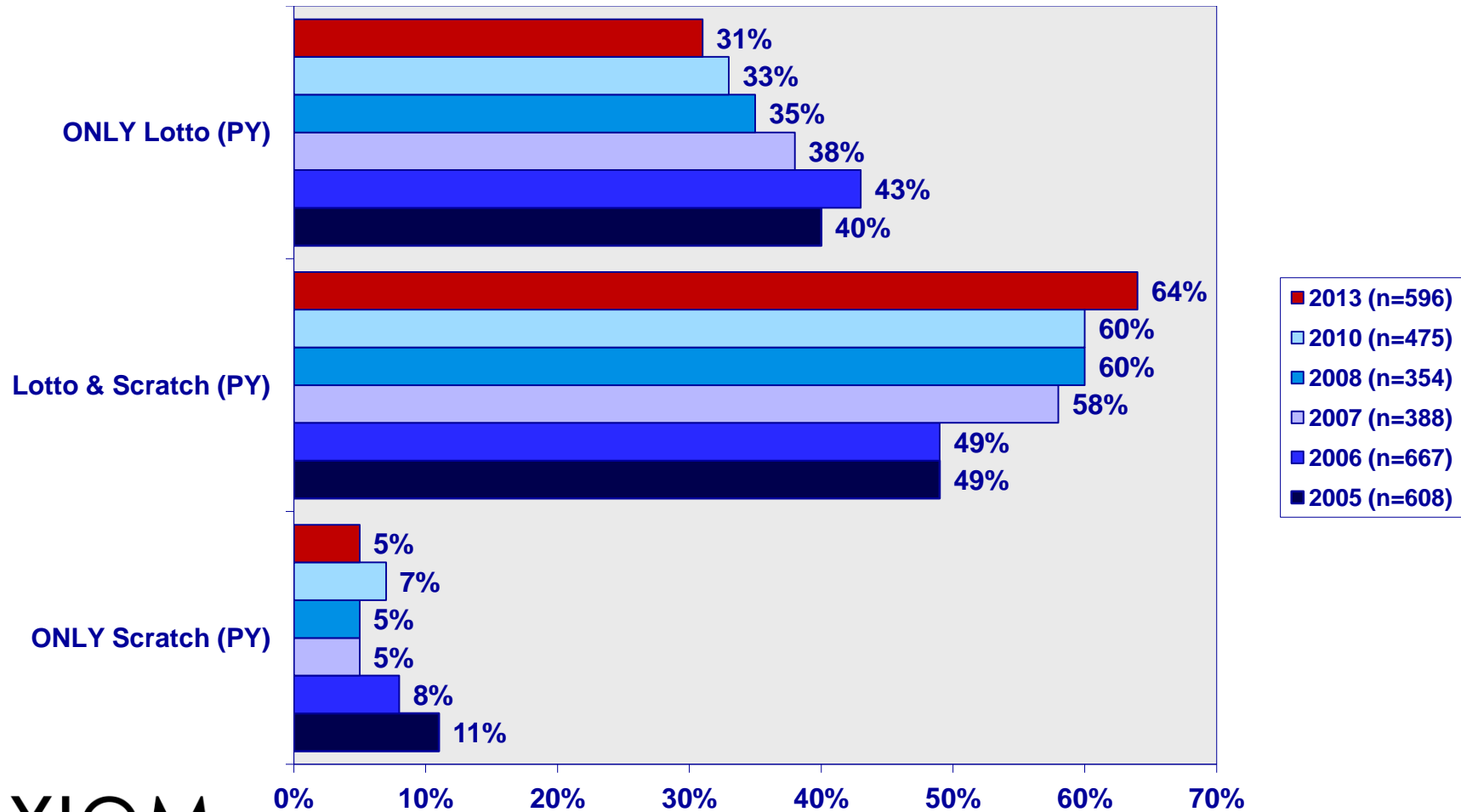# Days Games Are Typically Played (2013)

	Powerball (n=443) (Wed/Sat)	Mega Millions (n=270) (Tue/Fri)	NE Pick 5 (n=183) (Mon-Sat)	MyDaY (n=60*) (Mon-Sat)	NE Pick 3 (n=97) (Mon-Sat)	2by2 (n=67*) (Mon-Sun)	Scratch games (n=295)
Monday	7%	11%	14%	18%	15%	21%	8%
Tuesday	13%	20%	20%	21%	17%	20%	10%
Wednesday	34%	13%	25%	19%	23%	18%	13%
Thursday	4%	11%	11%	11%	9%	14%	8%
Friday	16%	27%	22%	18%	24%	22%	19%
Saturday	32%	11%	18%	11%	4%	14%	18%
Sunday	2%	2%	4%	1%	3%	7%	6%
It Varies	37%	39%	41%	43%	38%	46%	60%

* Small Base Size

Base: Play specific game "Every Week" to "Every Couple Months"

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Days Games Are Typically Played (2010)

	Powerball (n=350) (Wed/Sat)	Mega Millions (n=165) (Tue/Fri)	NE Pick 5 (n=134) (Mon-Sat)	MyDaY (n=37**) (Mon-Sat)	NE Pick 3 (n=52*) (Mon-Sat)	2by2 (n=39**) (Mon-Sun)	Scratch games (n=238)
Monday	7%	10%	12%	13%	13%	9%	6%
Tuesday	12%	25%	15%	8%	13%	8%	7%
Wednesday	36%	15%	22%	28%	20%	20%	15%
Thursday	5%	11%	11%	16%	18%	22%	9%
Friday	14%	22%	13%	16%	11%	7%	13%
Saturday	36%	13%	21%	19%	19%	18%	19%
Sunday	2%	2%	2%	3%	4%	7%	4%
It Varies	37%	38%	29%	41%	49%	38%	61%

* Small Base Size
**Base size too small
Base: Play specific game "Every Week" to "Every Couple of Months"

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Key Findings

Category Cross Play

Trends in Lottery Cross Play

ONLY Lotto (PY)
- 2013: 31%
- 2010: 33%
- 2008: 35%
- 2007: 38%
- 2006: 43%
- 2005: 40%

Lotto & Scratch (PY)
- 2013: 64%
- 2010: 60%
- 2008: 60%
- 2007: 58%
- 2006: 49%
- 2005: 49%

ONLY Scratch (PY)
- 2013: 5%
- 2010: 7%
- 2008: 5%
- 2007: 5%
- 2006: 8%
- 2005: 11%

Legend:
- 2013 (n=596)
- 2010 (n=475)
- 2008 (n=354)
- 2007 (n=388)
- 2006 (n=667)
- 2005 (n=608)

Base: PY Lottery Players

Cross Play Analysis by Age

Base: PY Lottery Players

* Small Base Size
** Base Too Small

19-29 YEARS   30-39 YEARS   40-49 YEARS   50-59 YEARS   60+ YEARS

ONLY Scratch (PY)   Lotto & Scratch (PY)   ONLY Lotto (PY)

Cross Play Analysis by Region

Base: PY Lottery Players

* Small Base Size
** Base Too Small

Legend: ONLY Scratch (PY) | Lotto & Scratch (PY) | ONLY Lotto (PY)

DOUGLAS/SARPY

	2013 (n=220)	2010 (n=191)	2008 (n=127)	2007 (n=130)
ONLY Lotto	36%	39%	38%	51%
Lotto & Scratch	60%	55%	57%	46%
ONLY Scratch	4%	6%	5%	3%

LANCASTER

	2013 (n=96)	2010 (n=67*)	2008 (n=51*)	2007 (n=56*)
ONLY Lotto	27%	22%	39%	34%
Lotto & Scratch	72%	72%	55%	64%
ONLY Scratch	1%	6%	6%	2%

REST

	2013 (n=280)	2010 (n=217)	2008 (n=176)	2007 (n=202)
ONLY Lotto	28%	30%	31%	30%
Lotto & Scratch	65%	61%	64%	63%
ONLY Scratch	7%	8%	5%	6%

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of Lottery Games Played in PY

Category	Percentage
1 Lottery game	14%
2 Lottery games	18%
3 Lottery games	12%
4 Lottery games	12%
5 Lottery games	11%
6 Lottery games	8%
7 Lottery games	8%
8 Lottery games	5%
9 Lottery games	5%
10 Lottery games	3%
11 Lottery games	2%
12 Lottery games	
Every Lottery game	3%

Base: PY Lottery players (n=594)

Only 1 Lottery Game Played in PY
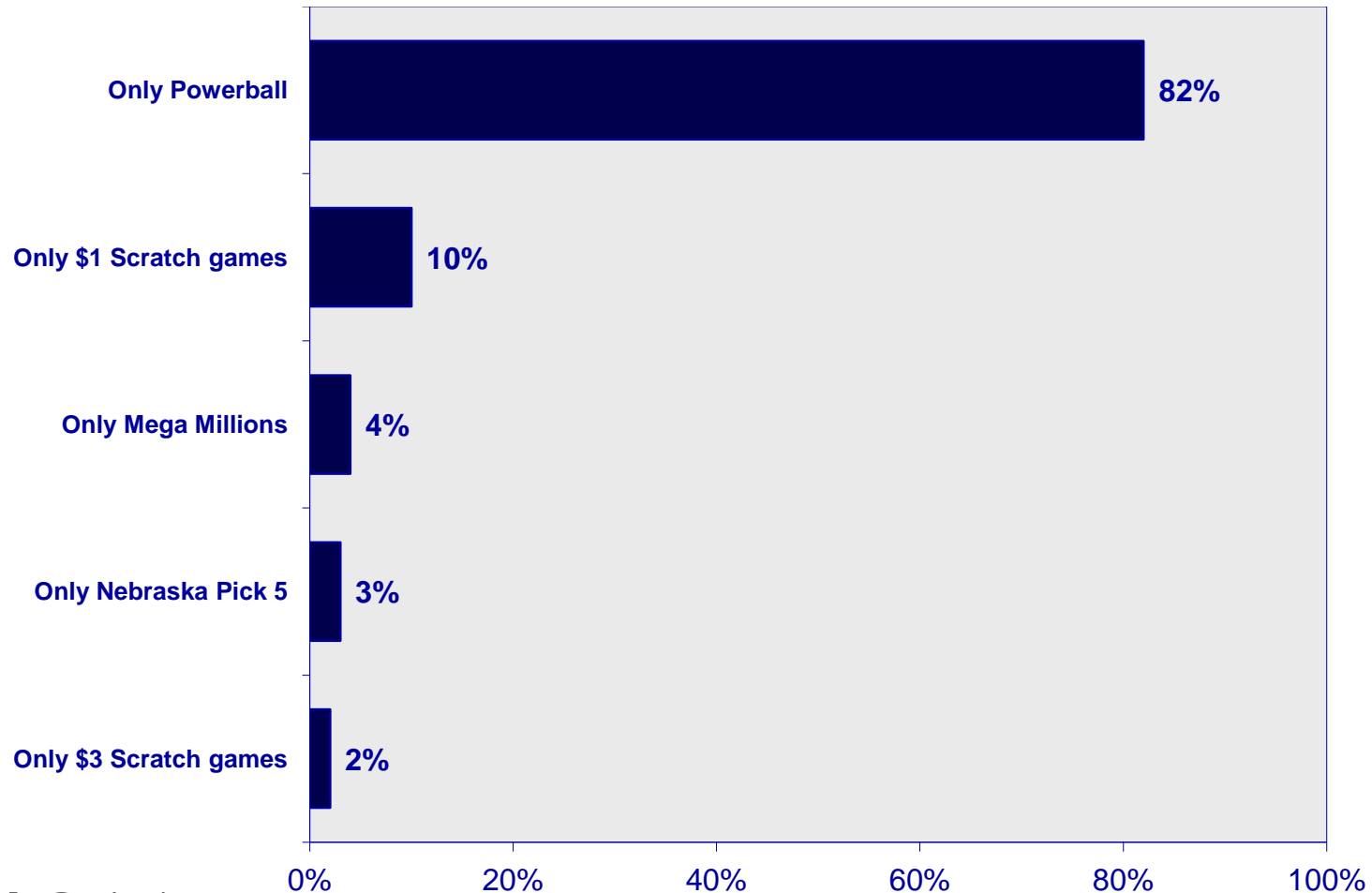
Base: Lottery players who only played 1 Lottery game in the PY (n=82)

Only 2 Lottery Games Played in PY

Category	Percentage
Only Powerball and Mega Millions	65%
Only Powerball and $1 Scratch	21%
Only Powerball and NE Pick 5	4%
Only Powerball and NE Pick 3	2%
Only Powerball and $2 Scratch	2%
Only $1 Scratch and $2 Scratch	2%
Only Mega Millions and $1 Scratch	1%
Only NE Pick 5 and $1 Scratch	1%
Only $1 Scratch and $3 Scratch	1%

Base: Lottery players who only played 2 Lottery games in the PY (n=101 out of 108)
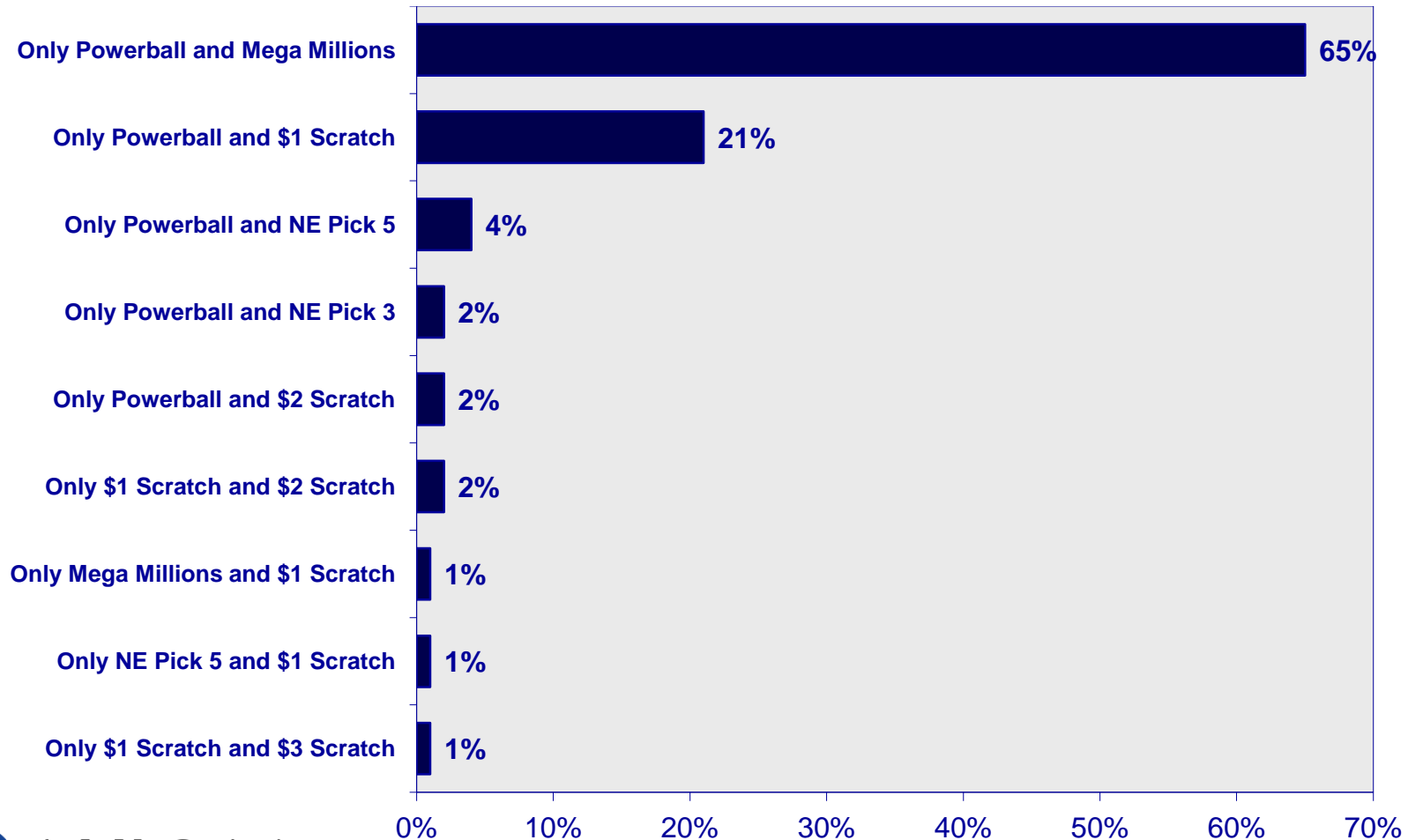
of Lottery Games Played in PY by Annualized Lottery Spending

	PY Lottery Players		Peripheral Spenders	Light Spenders	Moderate Spenders	Heavy Spenders
	n=594		n=204	n=221	n=78	n=92
Played 1 Lottery Game	14%		31%	8%		1%
Played 2 Lottery Games	18%		28%	18%	9%	2%
Played 3 Lottery Games	12%		13%	16%	7%	4%
Played 4 Lottery Games	12%		14%	16%	4%	3%
Played 5 Lottery Games	11%		6%	16%	14%	3%
Played 6 Lottery Games	8%		4%	9%	18%	5%
Played 7 Lottery Games	8%		2%	8%	13%	15%
Played 8 Lottery Games	5%		1%	4%	16%	6%
Played 9 Lottery Games	5%			3%	11%	19%
Played 10 Lottery Games	3%			1%	8%	11%
Played 11 Lottery Games	2%					10%
Played 12 Lottery Games	0%				1%	2%
Played EVERY Lottery Game	3%					18%
Median # of Lottery Games	4 games		2 games	4 games	6 games	9 games

SPENDING DEFINITIONS

Peripheral: Spend $1-103 annually
Light: Spend $104-519 annually
Moderate: Spend $520-1039 annually
Heavy: Spend $1040+ annually

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Base: PY Lottery Players

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Key Findings

Cross Play of Lotto Games

of Lotto Games Played in PY

1 Lotto game	25%
2 Lotto games	30%
3 Lotto games	19%
4 Lotto games	10%
5 Lotto games	6%
Every Lotto game	10%

0%   5%   10%   15%   20%   25%   30%   35%

Base: PY Lotto players (n=566)
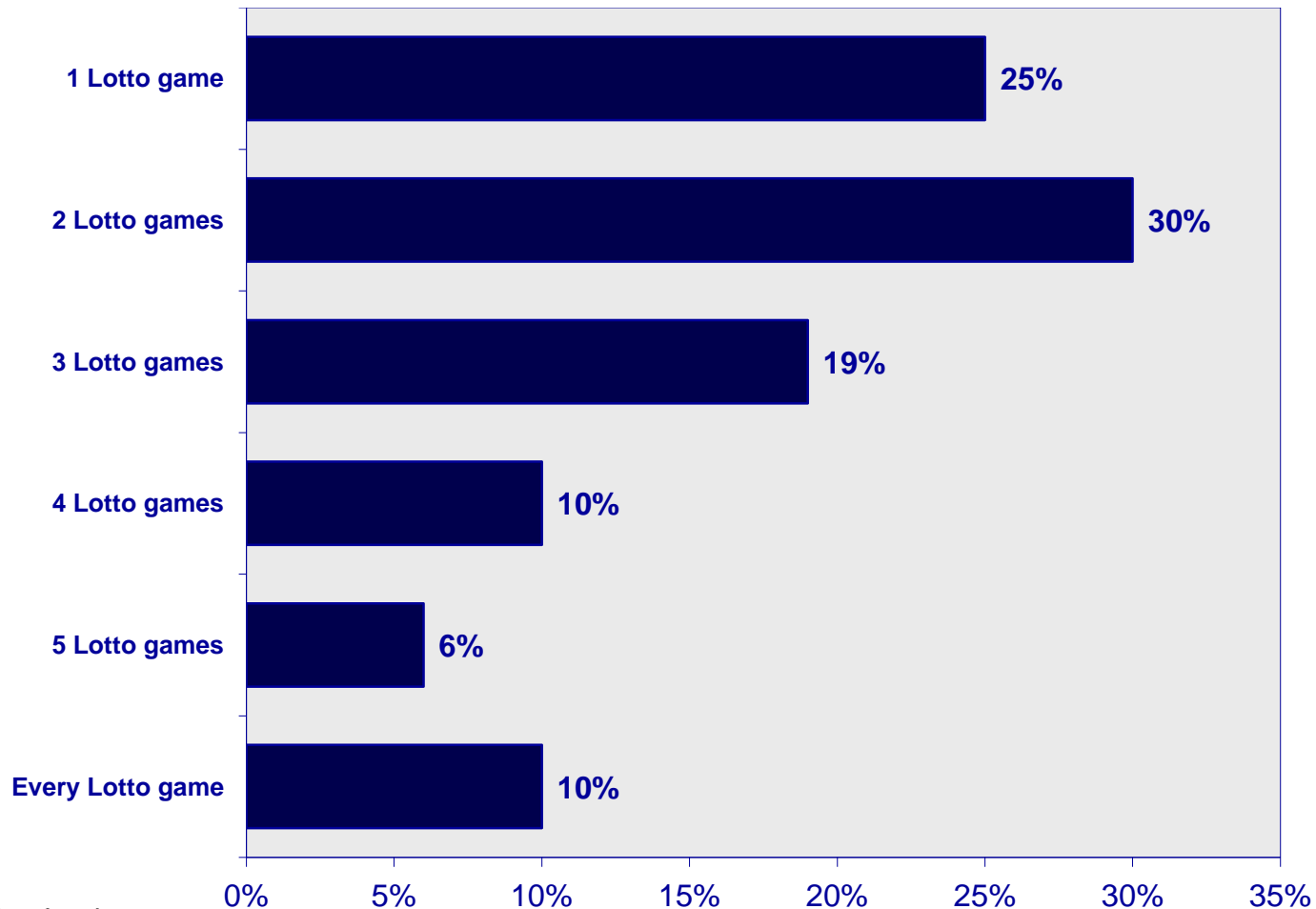
of Lotto Games Played in PY by Annualized Lotto Spending

	PY Lotto Players		Peripheral Spenders	Light Spenders	Moderate Spenders	Heavy Spenders
	n=566		n=247	n=220	n=54*	n=42**
Played 1 Lotto Game	25%		41%	16%	2%	2%
Played 2 Lotto Games	30%		32%	33%	27%	5%
Played 3 Lotto Games	19%		17%	23%	18%	16%
Played 4 Lotto Games	10%		6%	12%	11%	18%
Played 5 Lotto Games	6%		2%	7%	18%	14%
Played EVERY Lotto Games	10%		3%	8%	24%	45%
Median # of Lotto Games	2 games		2 games	3 games	4 games	5 games

SPENDING DEFINITIONS

Peripheral: Spend $1-103 annually
Light: Spend $104-519 annually
Moderate: Spend $520-1039 annually
Heavy: Spend $1040+ annually

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* Small Base Size
**Base size too small
Base: PY Lotto Players

51

Only 1 Lotto Game Played in PY

Only Powerball — 91%
Only Mega Millions — 4%
Only Nebraska Pick 5 — 4%
Only MyDaY
Only Nebraska Pick 3 — 1%
Only 2by2

0%   20%   40%   60%   80%   100%

Base: Lotto players who only played 1 Lotto game in the PY (n=141)
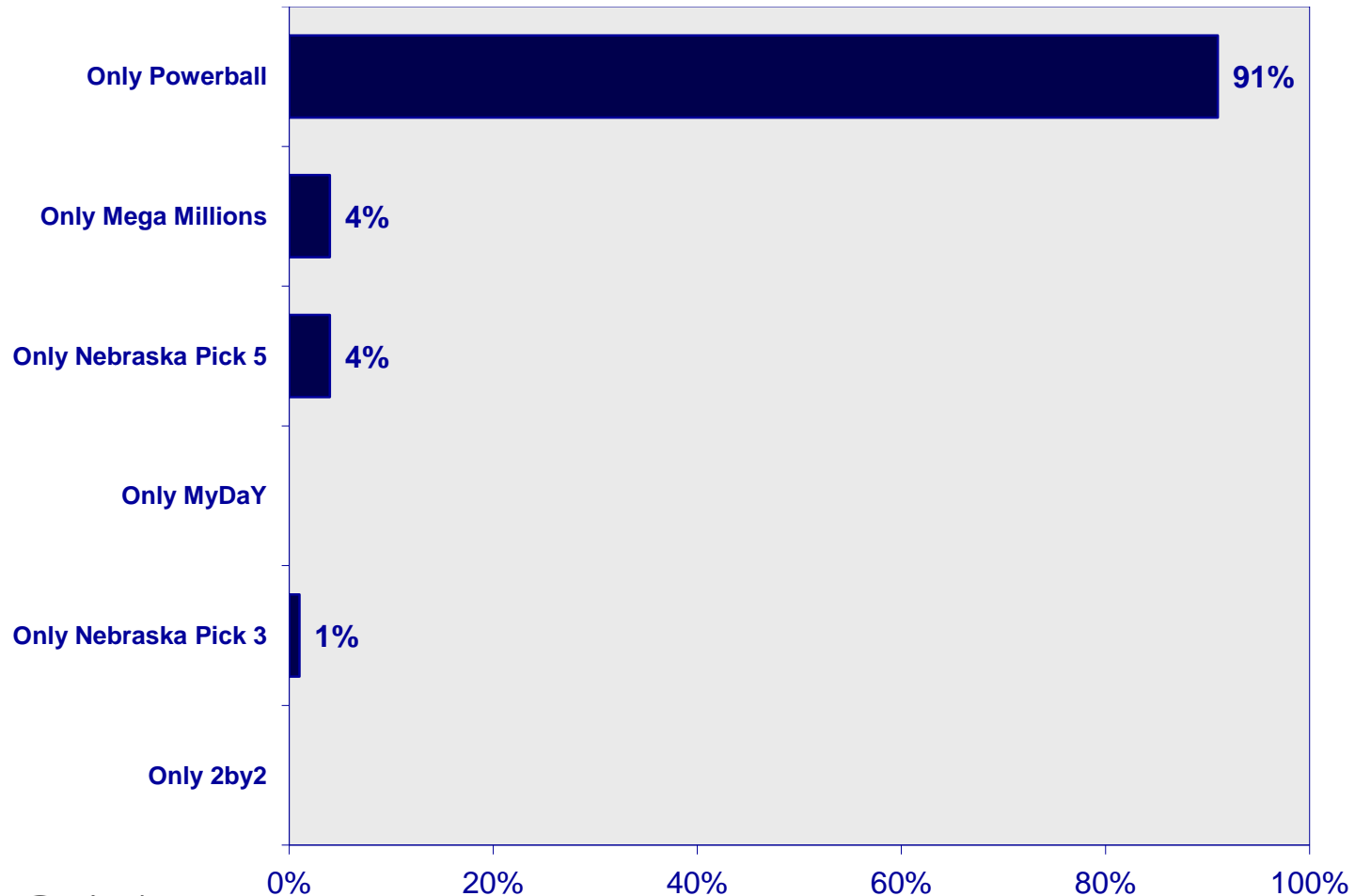
Only 1 Lotto Game Played in PY

	Only played 1 Lotto Game in PY		Peripheral Spenders	Light Spenders	Moderate Spenders	Heavy Spenders
	n=141		n=100	n=36**	n=1**	n=1**
Only played Powerball	91%		91%	92%	**	**
Only played Mega Millions	4%		3%	8%	**	**
Only played NE Pick 5	4%		5%		**	**
Only played 2by2					**	**
Only played NE Pick 3	1%		1%		**	**
Only played 2by2					**	**

SPENDING DEFINITIONS

Peripheral: Spend $1-103 annually
Light: Spend $104-519 annually
Moderate: Spend $520-1039 annually
Heavy: Spend $1040+ annually

* Small Base Size
**Base size too small
Base: PY Lotto Players

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Only 2 Lotto Games Played in PY

- Only Powerball and Mega Millions: 84%
- Only Powerball and NE Pick 5: 11%
- Only Powerball and NE Pick 3: 3%
- Only Powerball and 2by2: 1%
- Only Mega Millions and NE Pick 5: 1%
- Only Mega Millions and NE Pick 3: 1%

Base: Lotto players who only played 2 Lotto games in the PY (n=167)
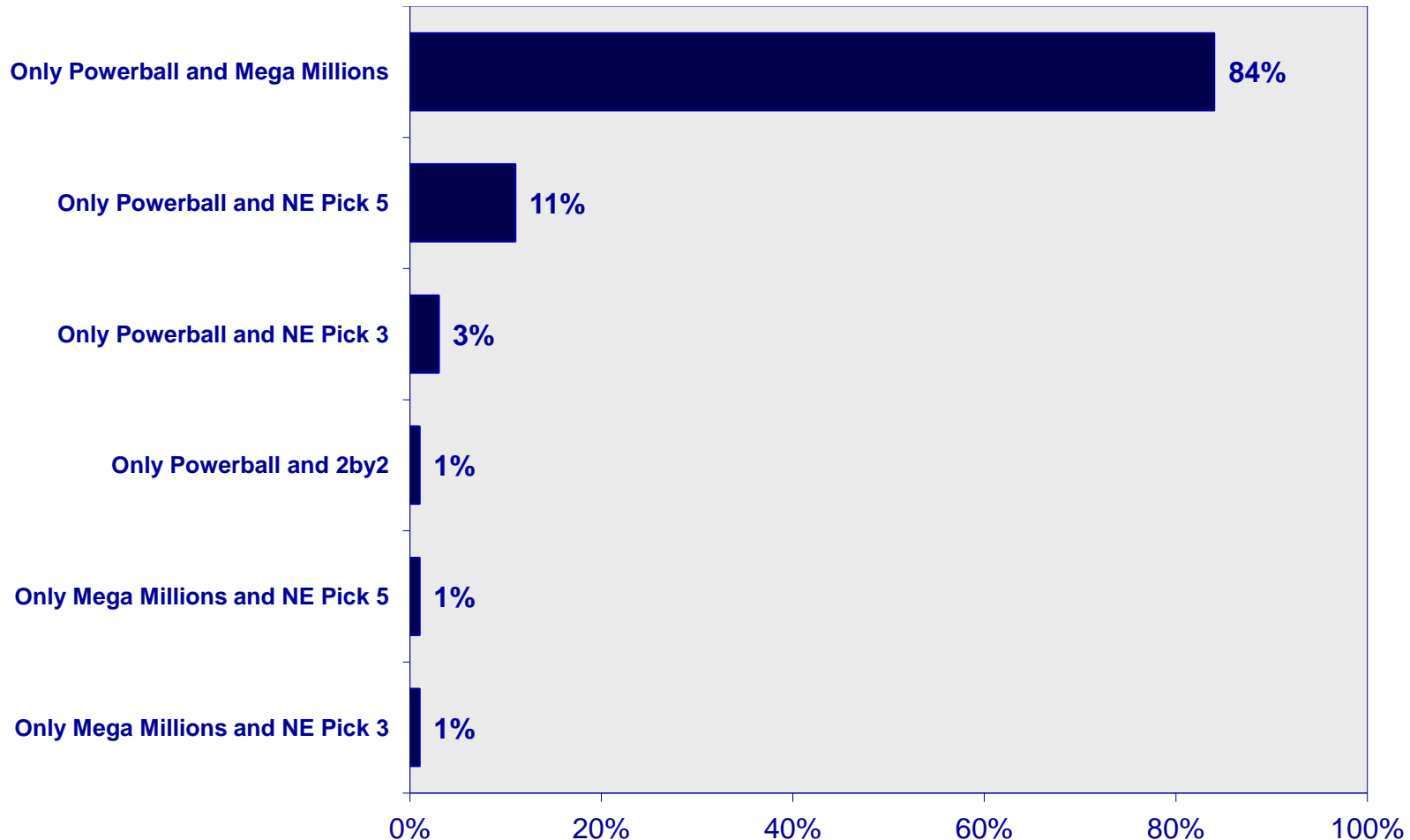
Only 2 Lotto Games Played in PY

	Only played 2 Lotto Games in PY		Peripheral Spenders	Light Spenders	Moderate Spenders	Heavy Spenders
	n=167		n=77	n=33**	n=15**	n=2**
Only Powerball and Mega Millions	84%		83%	90%	70%	**
Only Powerball and NE Pick 5	11%		13%	9%	14%	**
Only Powerball and NE Pick 3	3%			1%	16%	**
Only Powerball and 2by2	1%		1%			**
Only Mega Millions and NE Pick 5	1%		1%			**
Only Mega Millions and NE Pick 3	1%		1%			**

SPENDING DEFINITIONS

Peripheral: Spend $1-103 annually
Light: Spend $104-519 annually
Moderate: Spend $520-1039 annually
Heavy: Spend $1040+ annually

* Small Base Size
**Base size too small
Base: PY Lotto Players

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Only 3 Lotto Games Played in PY

Only Powerball, Mega Millions, and Nebraska Pick 5 — 91%

Only Powerball, Mega Millions, and Nebraska Pick 3 — 9%

Among Lotto players who only played 3 Lotto games in the PY (n=86)
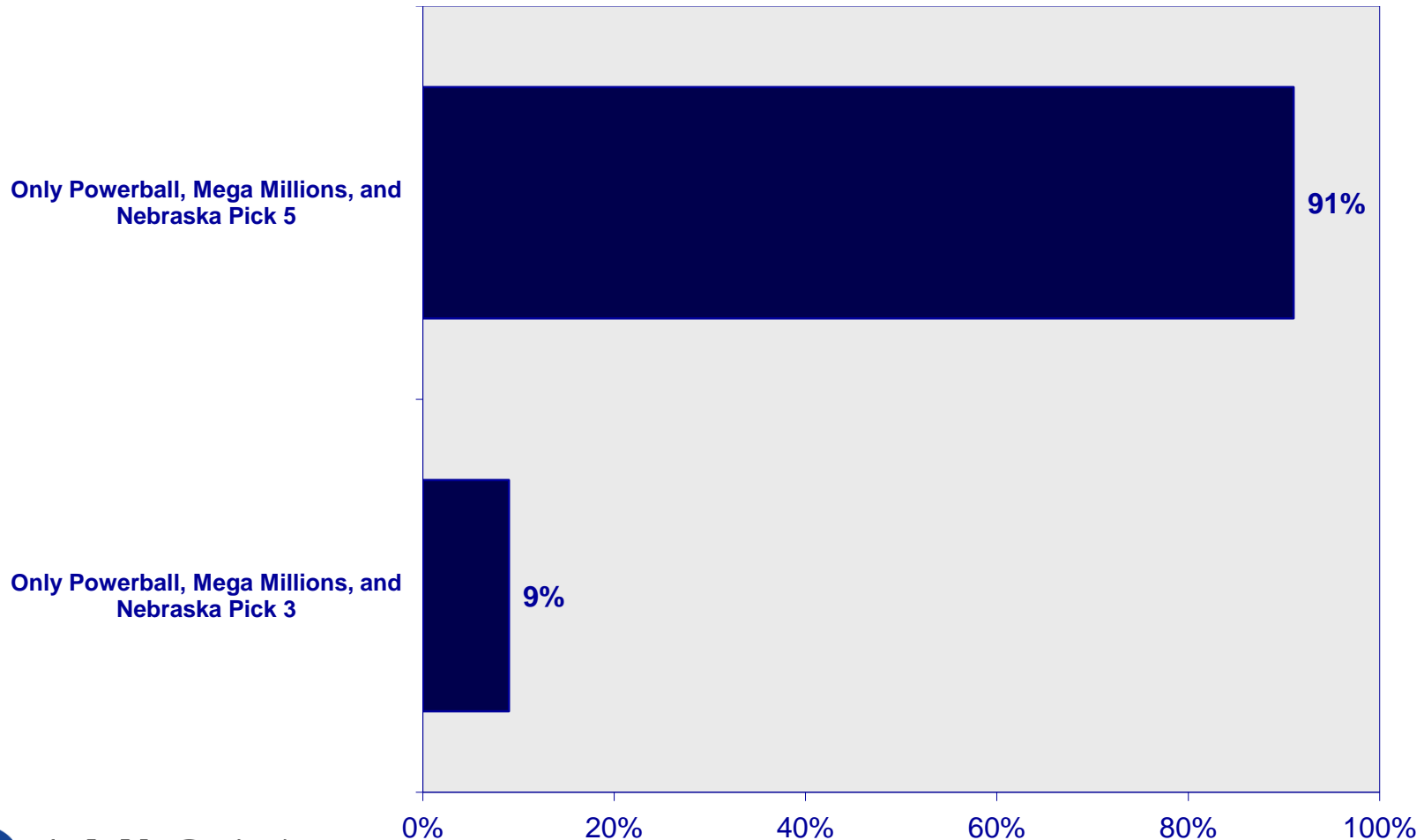
Key Findings

Multi-state Games

Frequency of Play – Power Play & Megaplier

Base: PY Players of Game

POWER PLAY   MEGAPLIER

☐ All of the time   ■ Most of the time   ☐ Some of the time   ■ Never

58
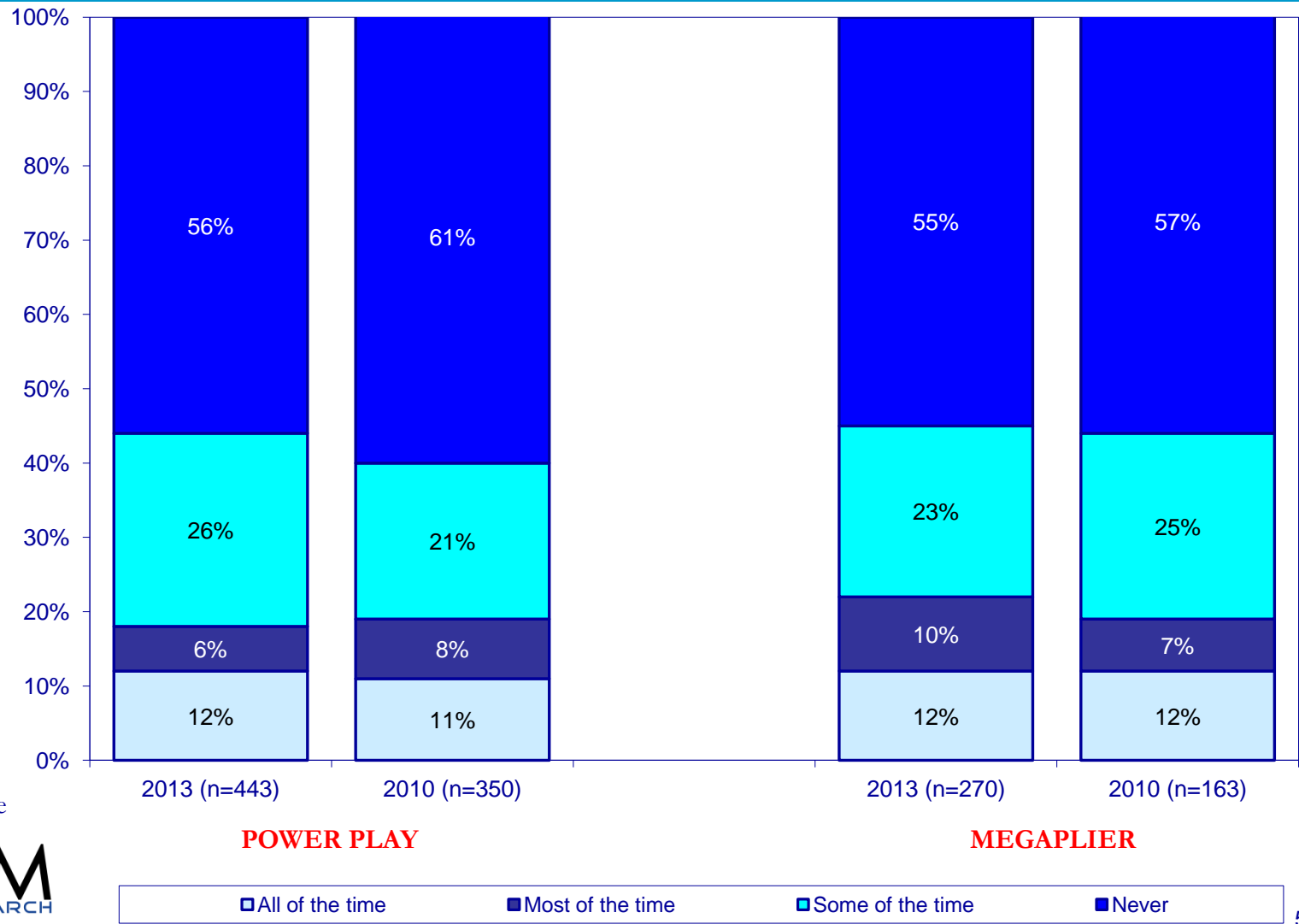
Impact of Power Play Promotions on Purchases

Over the past 12 months, approximately what percentage of all your Power Play purchases were the direct result of a Power Play promotion run by the Nebraska Lottery?

2013 (n=194)

- 46%
- 22%
- 9%
- 15%
- 3%
- 4%

2010 (n=134)

- 46%
- 26%
- 10%
- 8%
- 2%
- 8%

Legend:
- ☐ None
- ■ 1% to 24%
- ■ 25% to 49%
- ■ 50% to 74%
- ■ 75% to 99%
- ■ Every purchase

Base: Those who have previously played Power Play
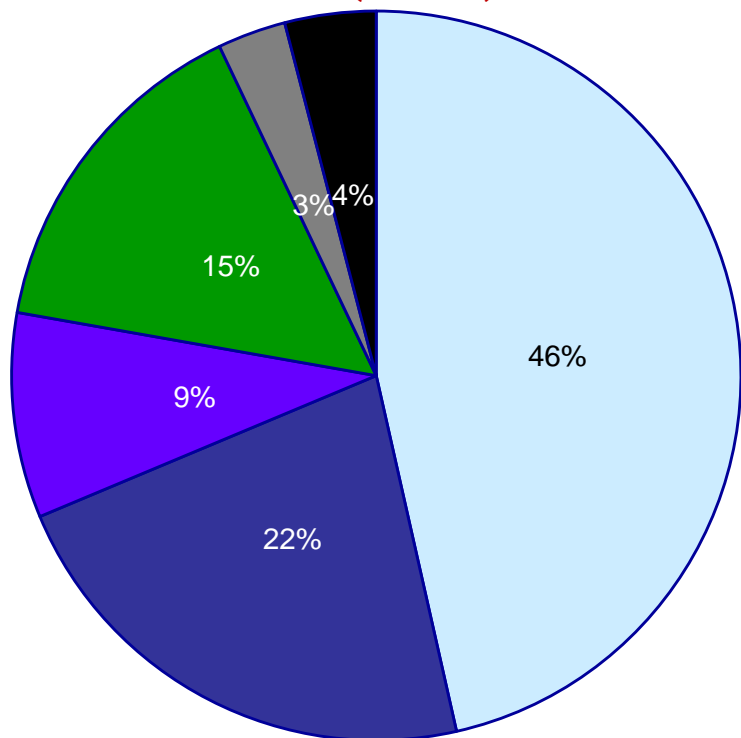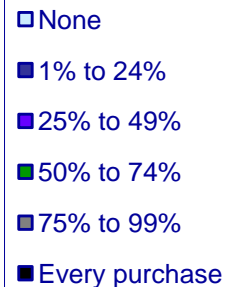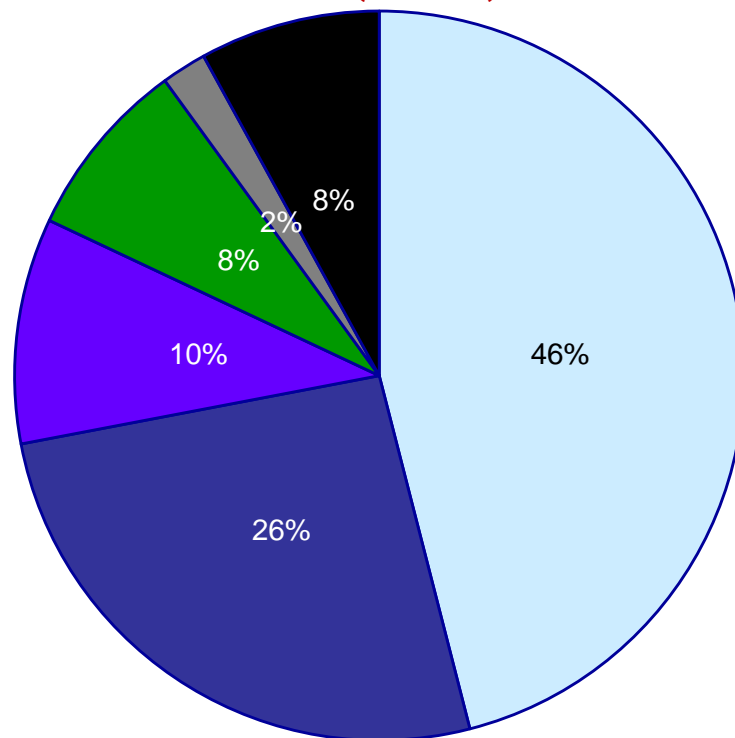
Impact of Megaplier Promotions on Purchases

Over the past 12 months, approximately what percentage of all your Megaplier purchases were the direct result of a Megaplier promotion run by the Nebraska Lottery?

2013 (n=121)
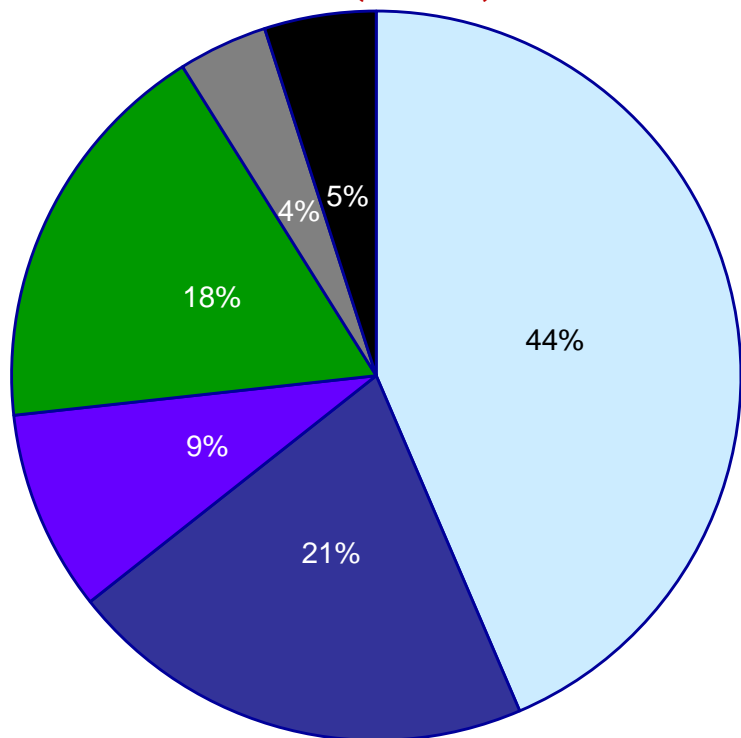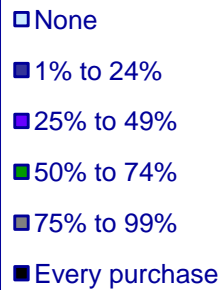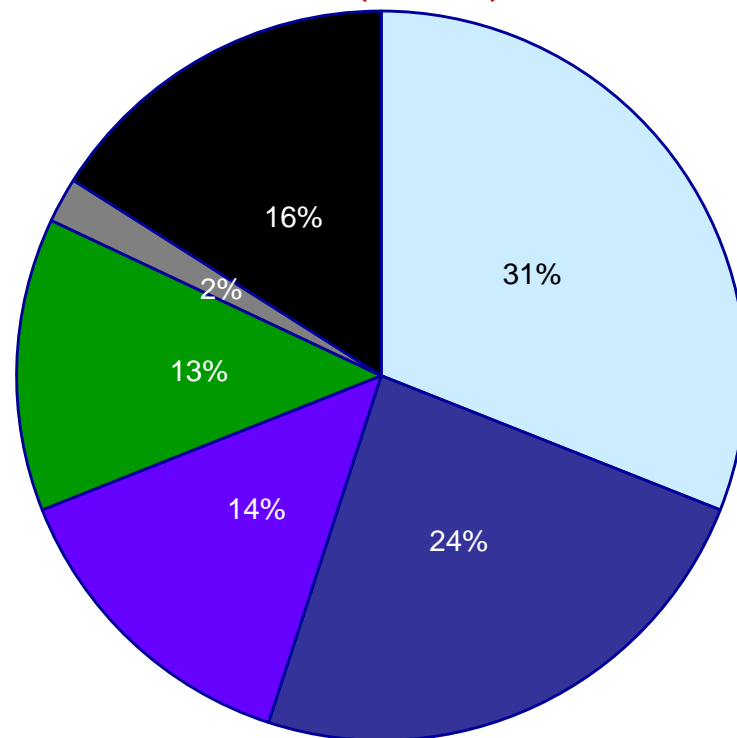
44%
21%
9%
18%
4%
5%

Legend:
- ☐ None
- ■ 1% to 24%
- ■ 25% to 49%
- ■ 50% to 74%
- ■ 75% to 99%
- ■ Every purchase

2010 (n=71*)

31%
24%
14%
13%
2%
16%

* Small Base Size

Base: Those who have previously played Megaplier

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Played Most Often – Powerball vs Mega Millions

Since changes were made to Powerball in January 2012, which multi-state lottery game have you played more often?

Since the launch of Mega Millions in March 2010, which multi-state lottery game have you played more often?

2013 (n=212)

2010 (n=128)
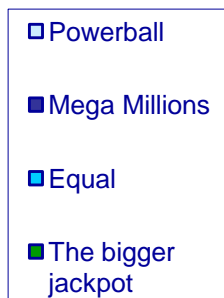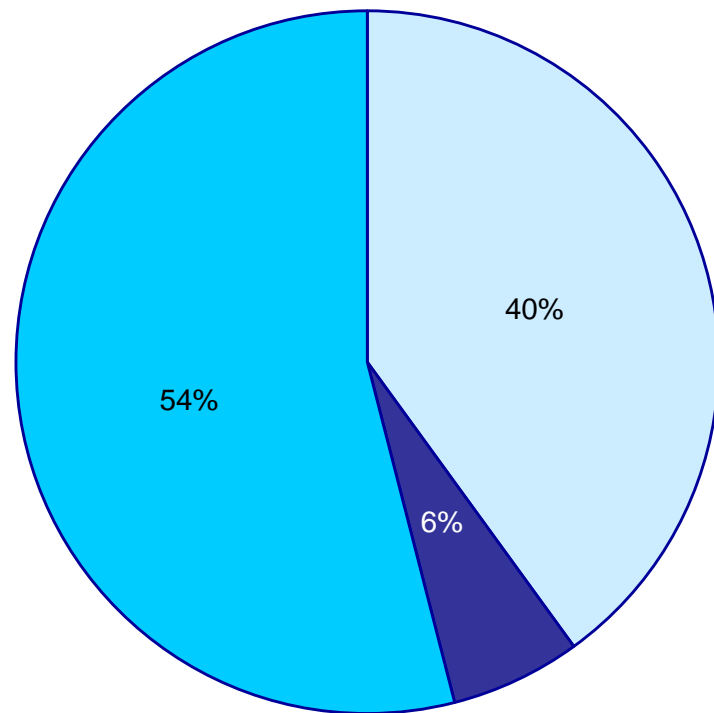
Legend:
- Powerball
- Mega Millions
- Equal
- The bigger jackpot

2013: 23%, 17%, 40%, 20%

2010: 40%, 6%, 54%

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Base: Those who have played both Powerball & Mega Millions

Played Most Often – Powerball vs Mega Millions

Since changes were made to Powerball in January 2012, which multi-state lottery game have you played more often?

Since the launch of Mega Millions in March 2010, which multi-state lottery game have you played more often?

2013 (n=169)
(excludes those who said "the bigger jackpot")
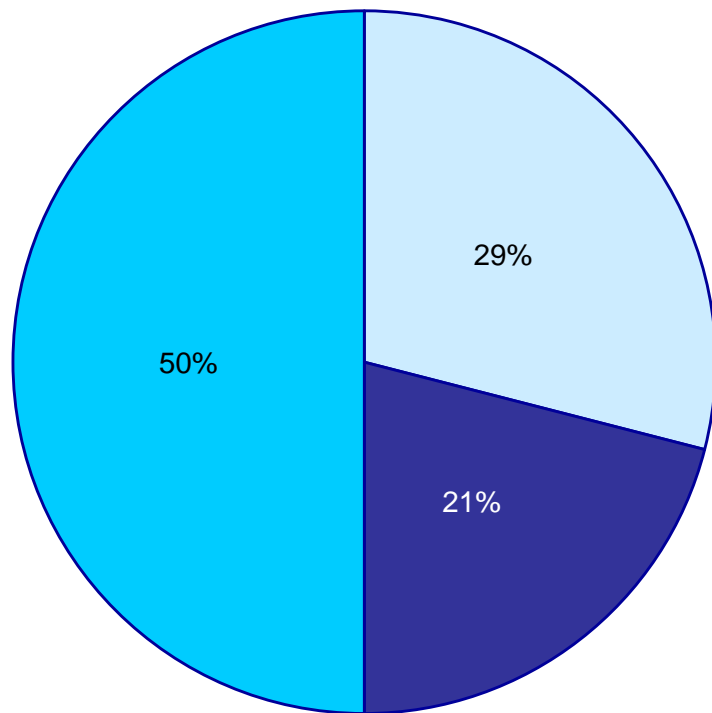
2010 (n=128)

2013 pie chart:
- 29% Powerball
- 21% Mega Millions
- 50% Equal

Legend:
- Powerball
- Mega Millions
- Equal

2010 pie chart:
- 40% Powerball
- 6% Mega Millions
- 54% Equal

Base: Those who have played both Powerball & Mega Millions
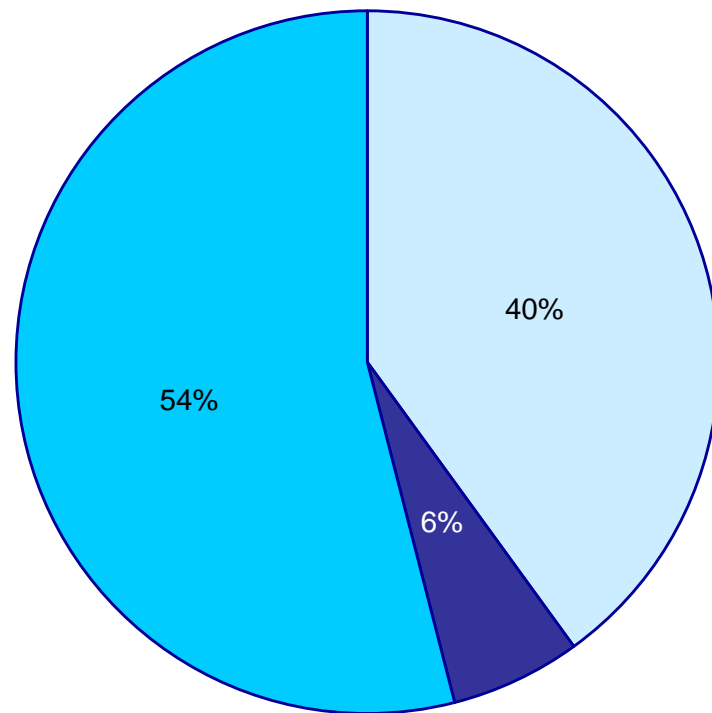
Factors that influence decision to purchase multi-state games

FREQUENCY DEFINITIONS

Regular: Every week

Occasional: Every couple of weeks, Every month

Infrequent: Every couple months, Every six months, Once a year

Little to No Involvement: Less than once a year, Never
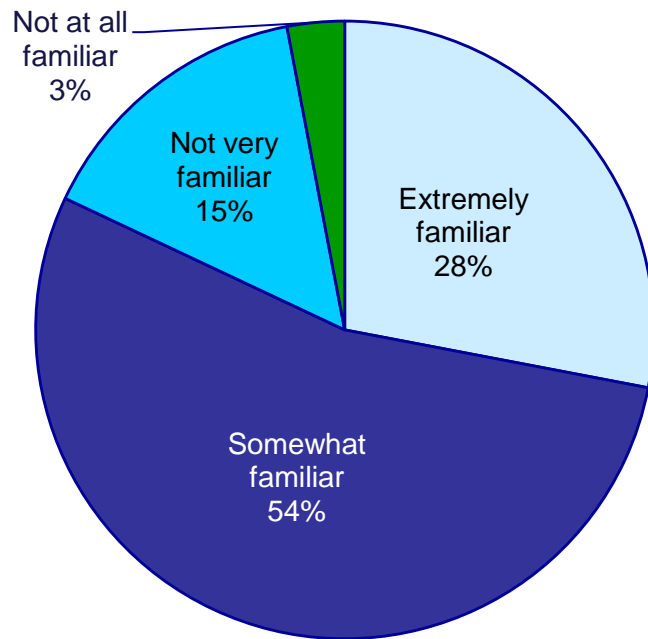

Once the jackpot hits a certain amount — **76%**

Once friends or co-workers start talking — **39%**

Once the media frenzy starts — **36%**

Once the social media frenzy starts — **21%**

■2013 (n=288)

0%   20%   40%   60%   80%   100%
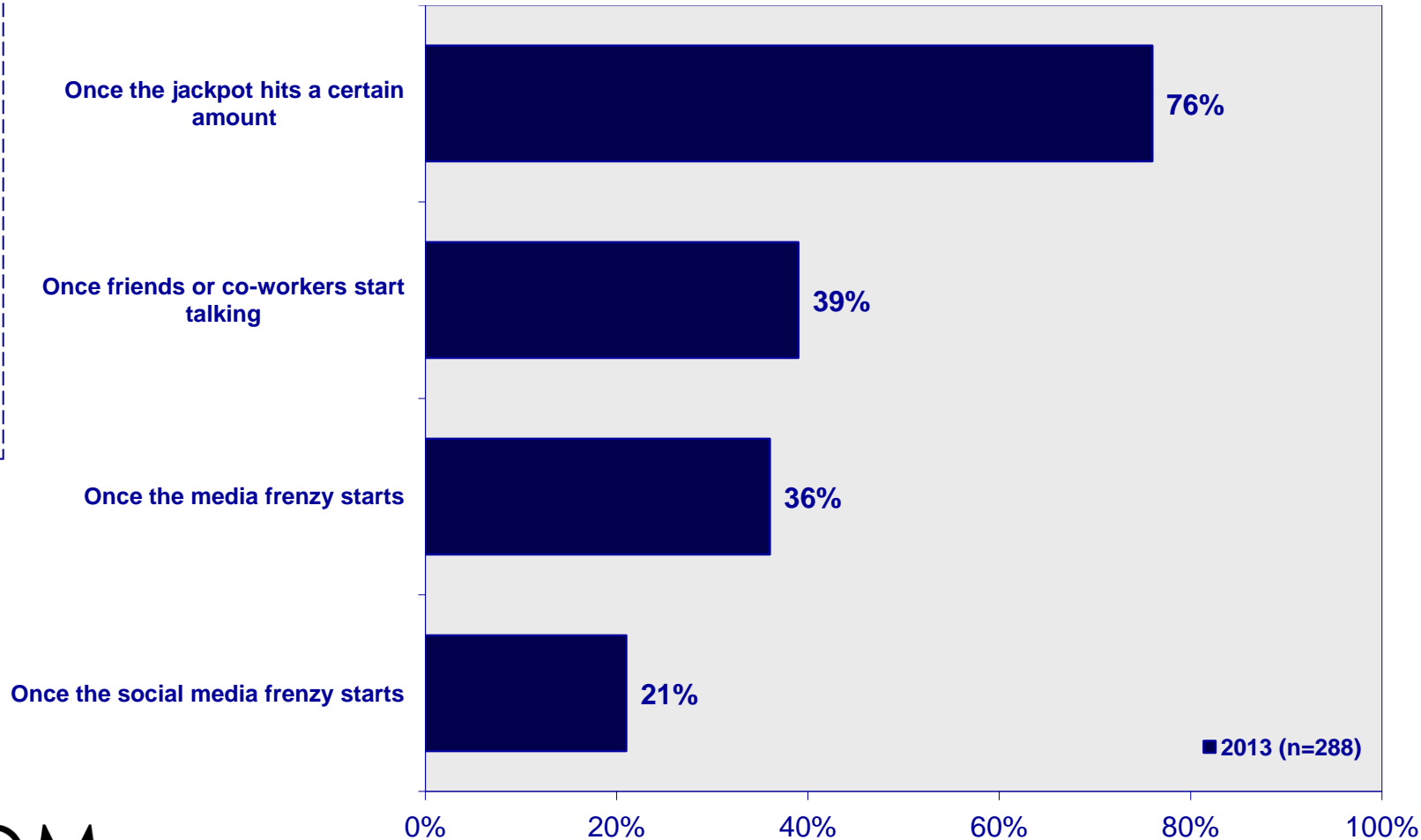
Jackpot level that peaks interest

Base: Infrequent players of Powerball or Mega Millions who stated "Once the jackpot hits a certain amount".
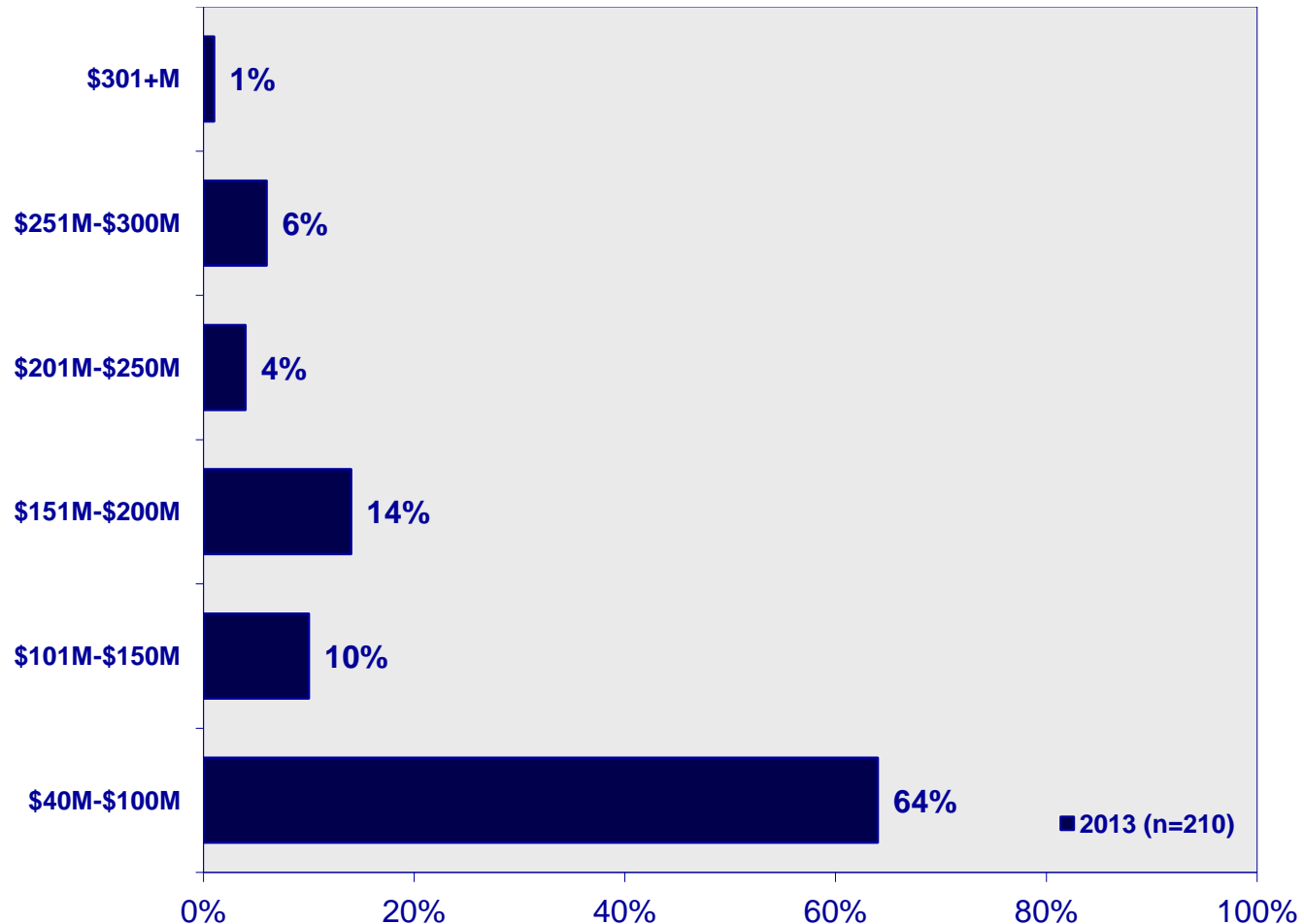
Key Findings

Nebraska Pick 5

Familiarity with Nebraska Pick 5

How familiar are you with how to play Nebraska Pick 5?

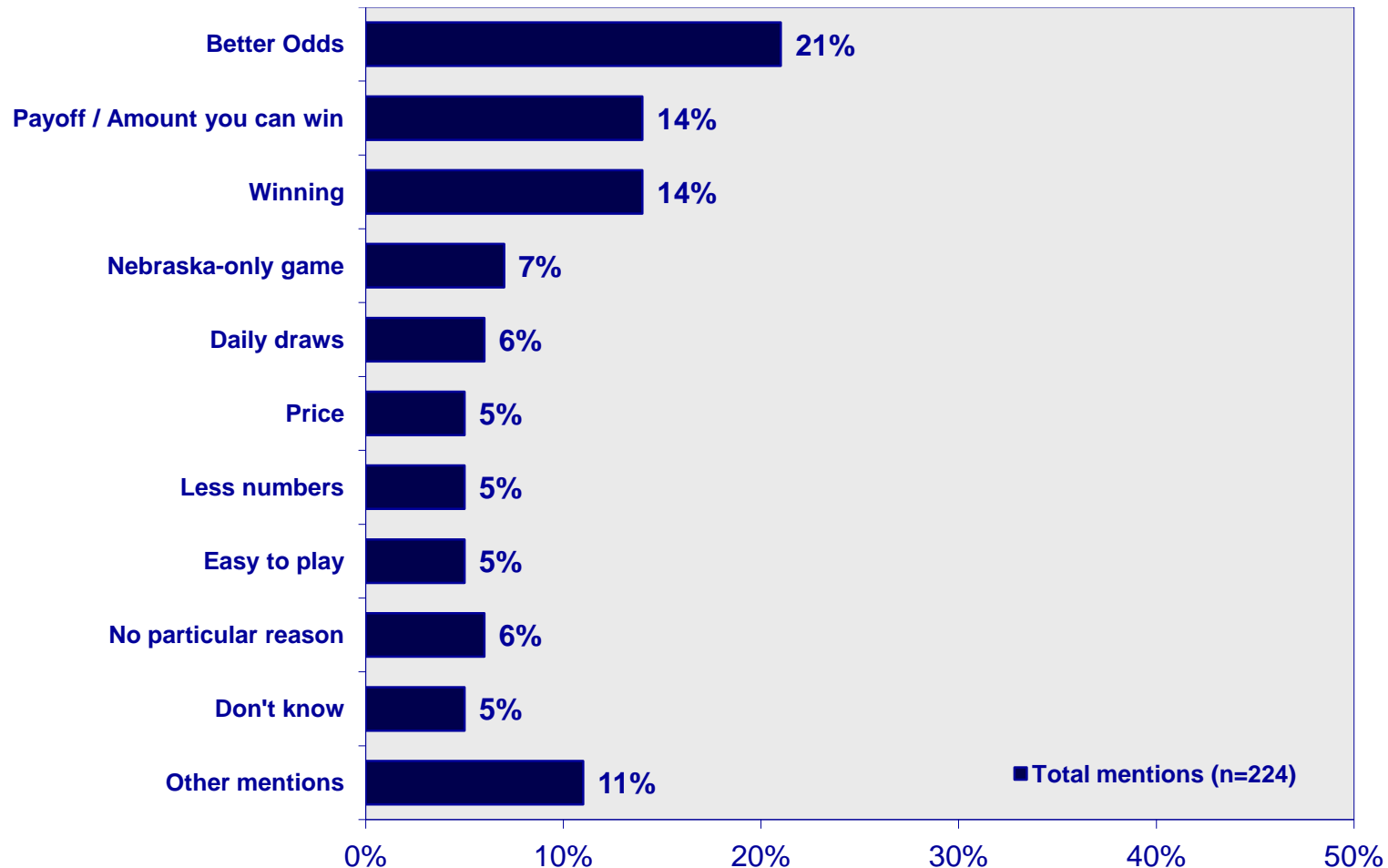Base: Those who have played Nebraska Pick 5 in the past year (n=268)
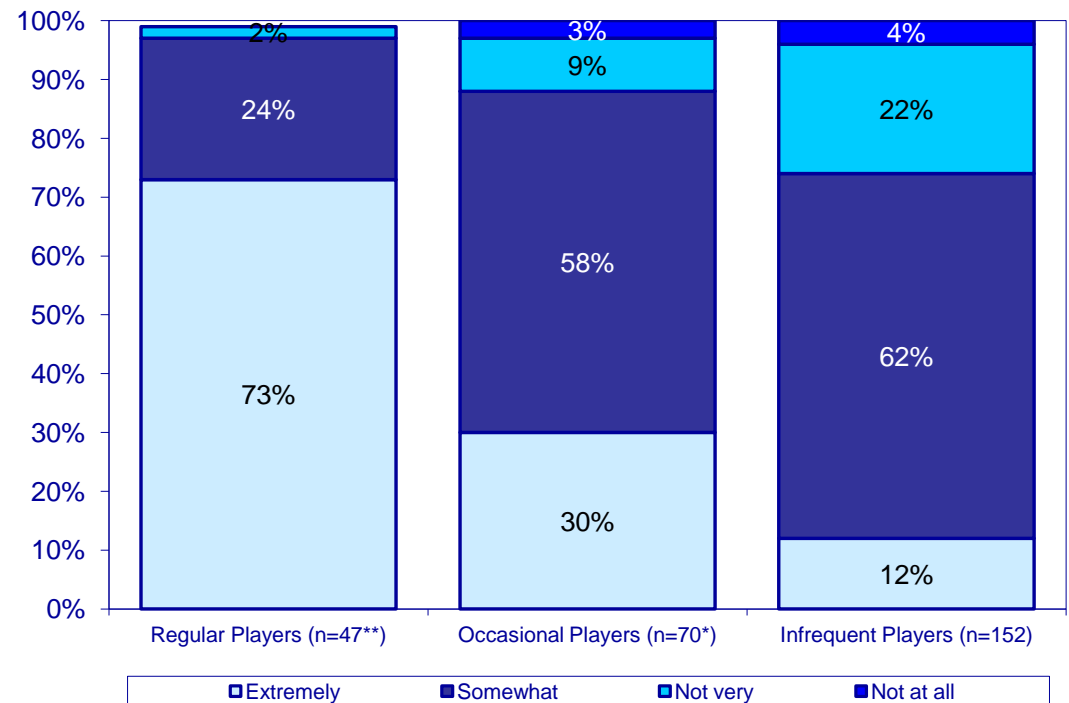
Regular Players (n=47**) Occasional Players (n=70*) Infrequent Players (n=152)

□ Extremely ■ Somewhat ■ Not very ■ Not at all

Regular: Every week
Occasional: Every couple of weeks, Every month
Infrequent: Every couple months, Every six months, Once a year

Not at all familiar 3%
Not very familiar 15%
Extremely familiar 28%
Somewhat familiar 54%

* Caution: Small Base Size
**Base size too small

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Most Appealing Feature of Nebraska Pick 5

Feature	Total mentions (n=224)
Better Odds	21%
Payoff / Amount you can win	14%
Winning	14%
Nebraska-only game	7%
Daily draws	6%
Price	5%
Less numbers	5%
Easy to play	5%
No particular reason	6%
Don't know	5%
Other mentions	11%

Base: PY Nebraska Pick 5 players who are "Extremely familiar" or "Somewhat familiar" with the game.

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Key Findings

Scratch Games

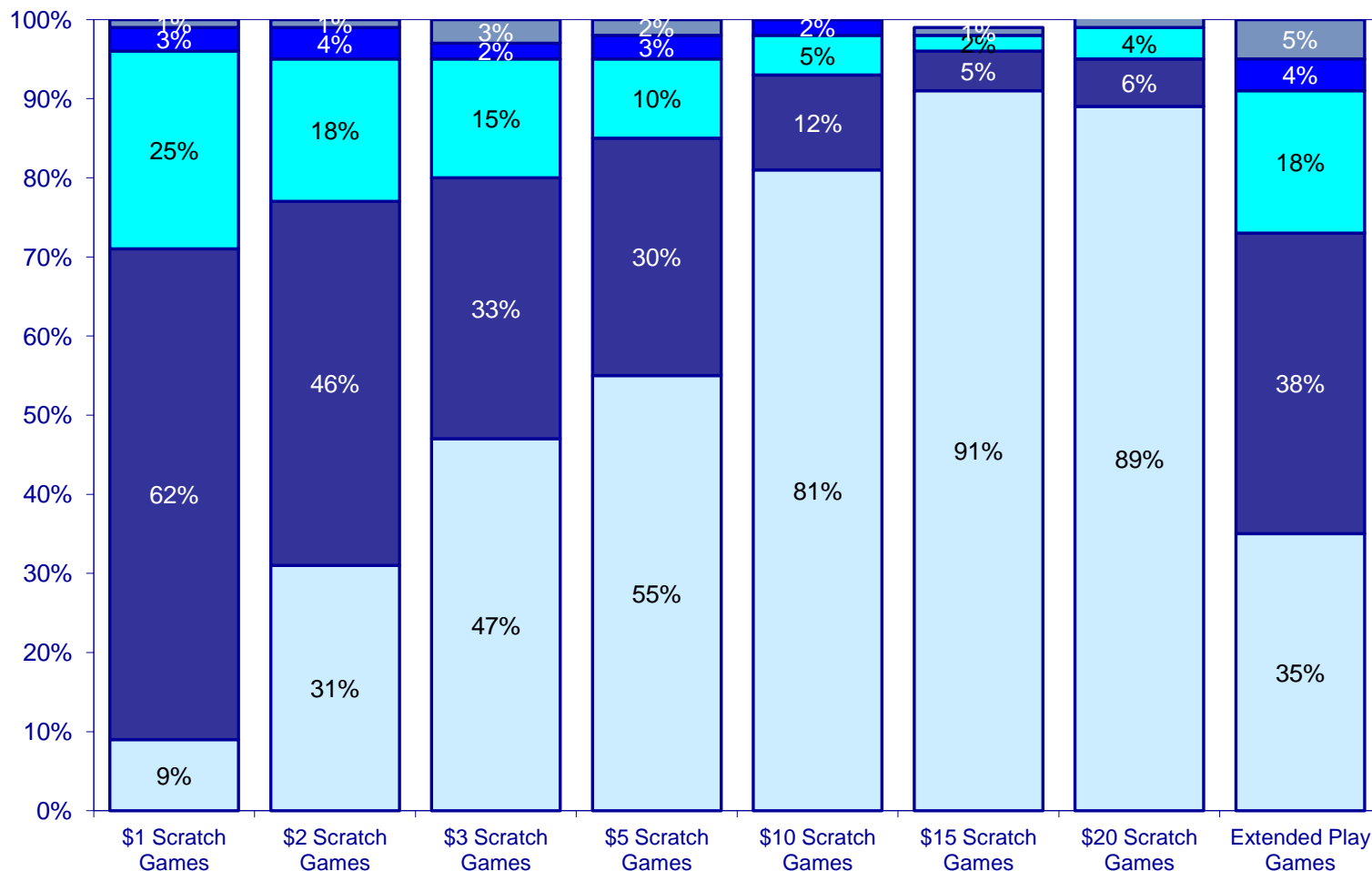# Scratch Spending Groups (All Respondents)

SPENDING DEFINITIONS

Non-spender: Spend 0 annually

Peripheral: Spend $1-103 annually

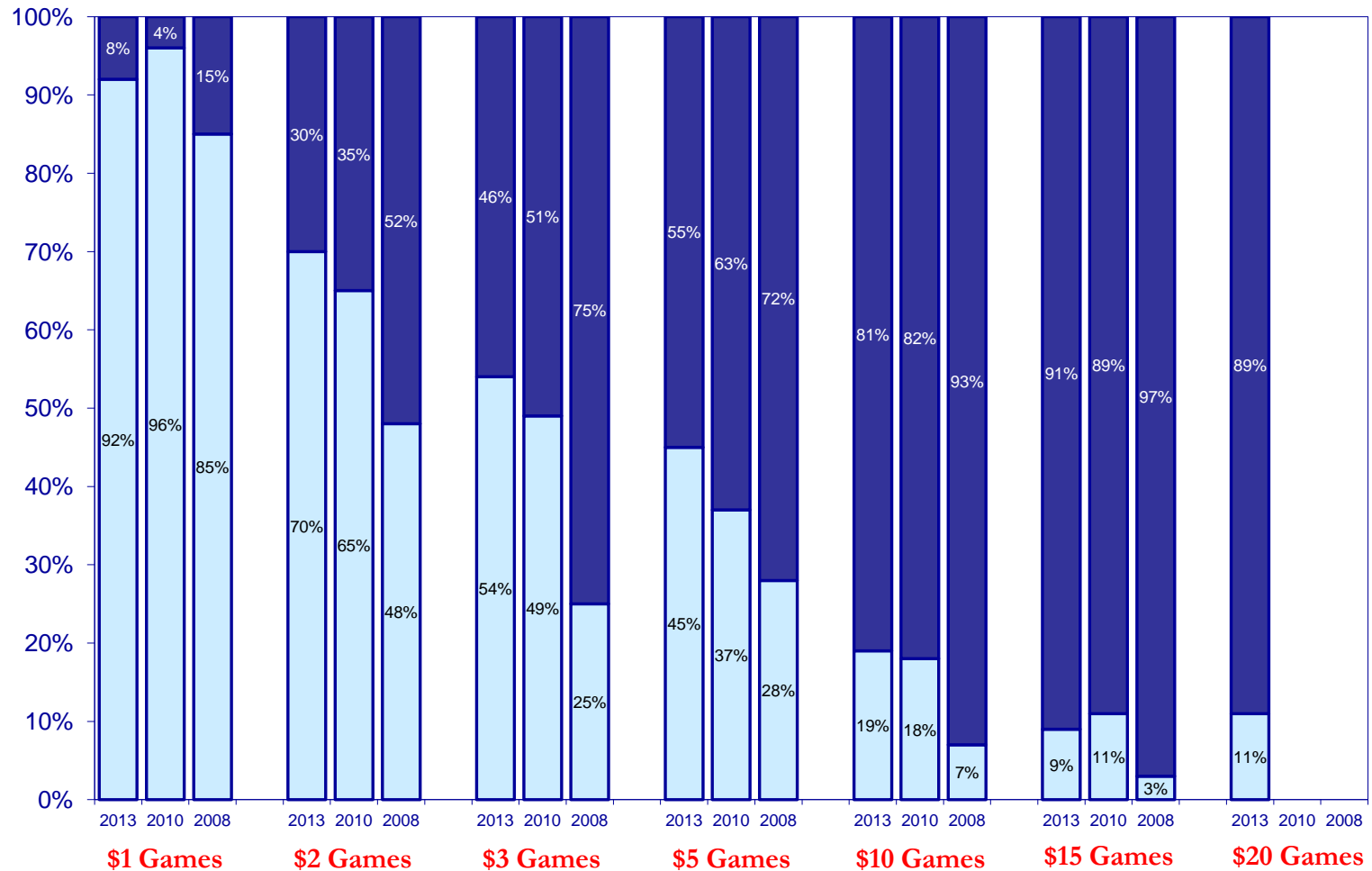**Light:** Spend $104-519 annually

Moderate: Spend $520-1039 annually

Heavy: Spend $1040+ annually

	$1 Scratch Games	$2 Scratch Games	$3 Scratch Games	$5 Scratch Games	$10 Scratch Games	$15 Scratch Games	$20 Scratch Games	Extended Play Games
Heavy	1%	2%	1%	1%	1%	1%	1%	2%
Moderate				1%				2%
Light	10%	7%	6%	4%	2%	2%	2%	7%
Peripheral	25%	19%	13%	12%	5%	2%	2%	16%
Non-spenders	63%	71%	78%	82%	92%	96%	95%	73%

Legend: ☐ Non-spenders ■ Peripheral ☐ Light ■ Moderate ☐ Heavy

Base: All Respondents

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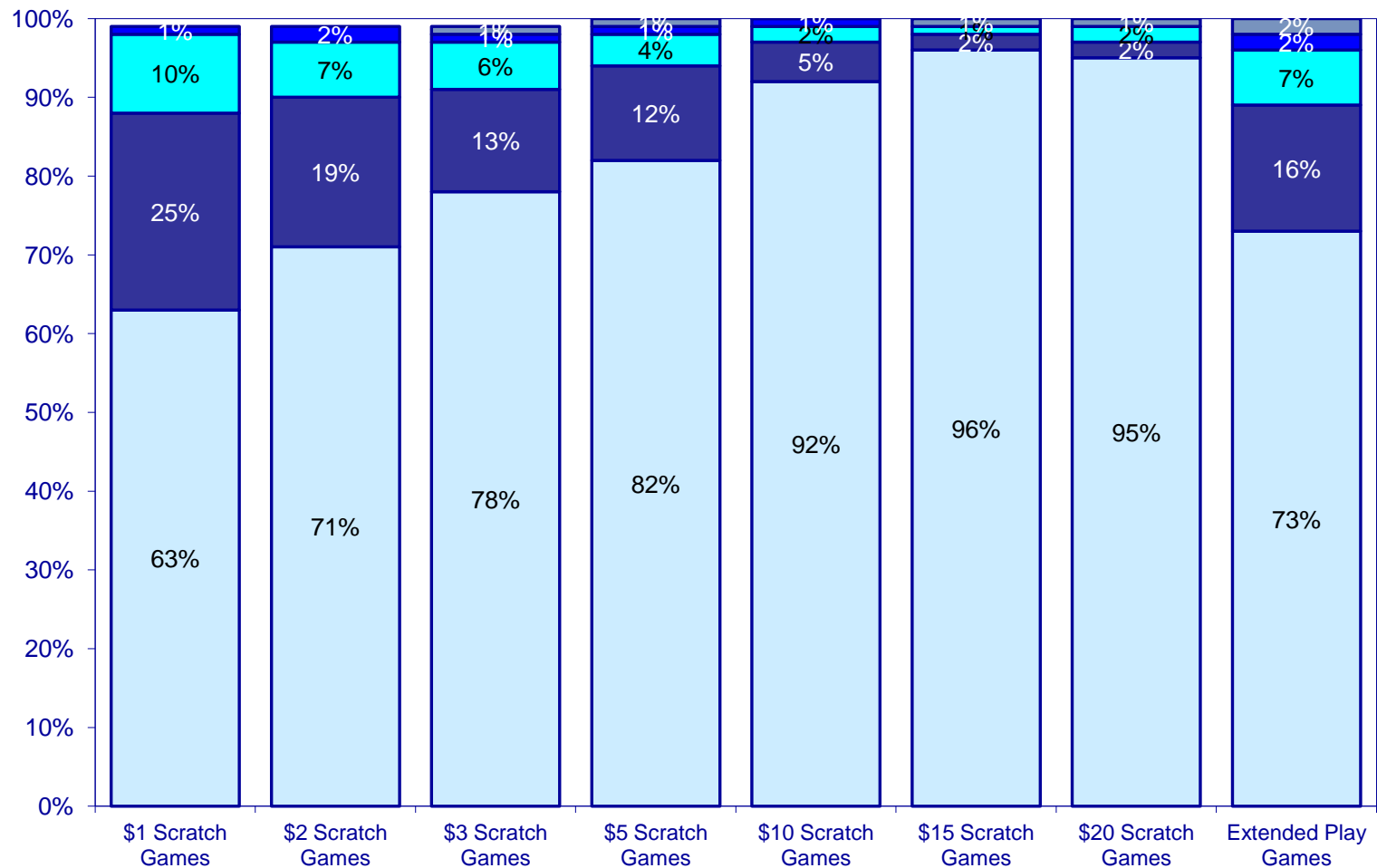
Scratch Spending Groups (PY Scratch Players)

SPENDING DEFINITIONS

Non-spender: Spend 0 annually

Peripheral: Spend $1-103 annually

Light: Spend $104-519 annually

Moderate: Spend $520-1039 annually

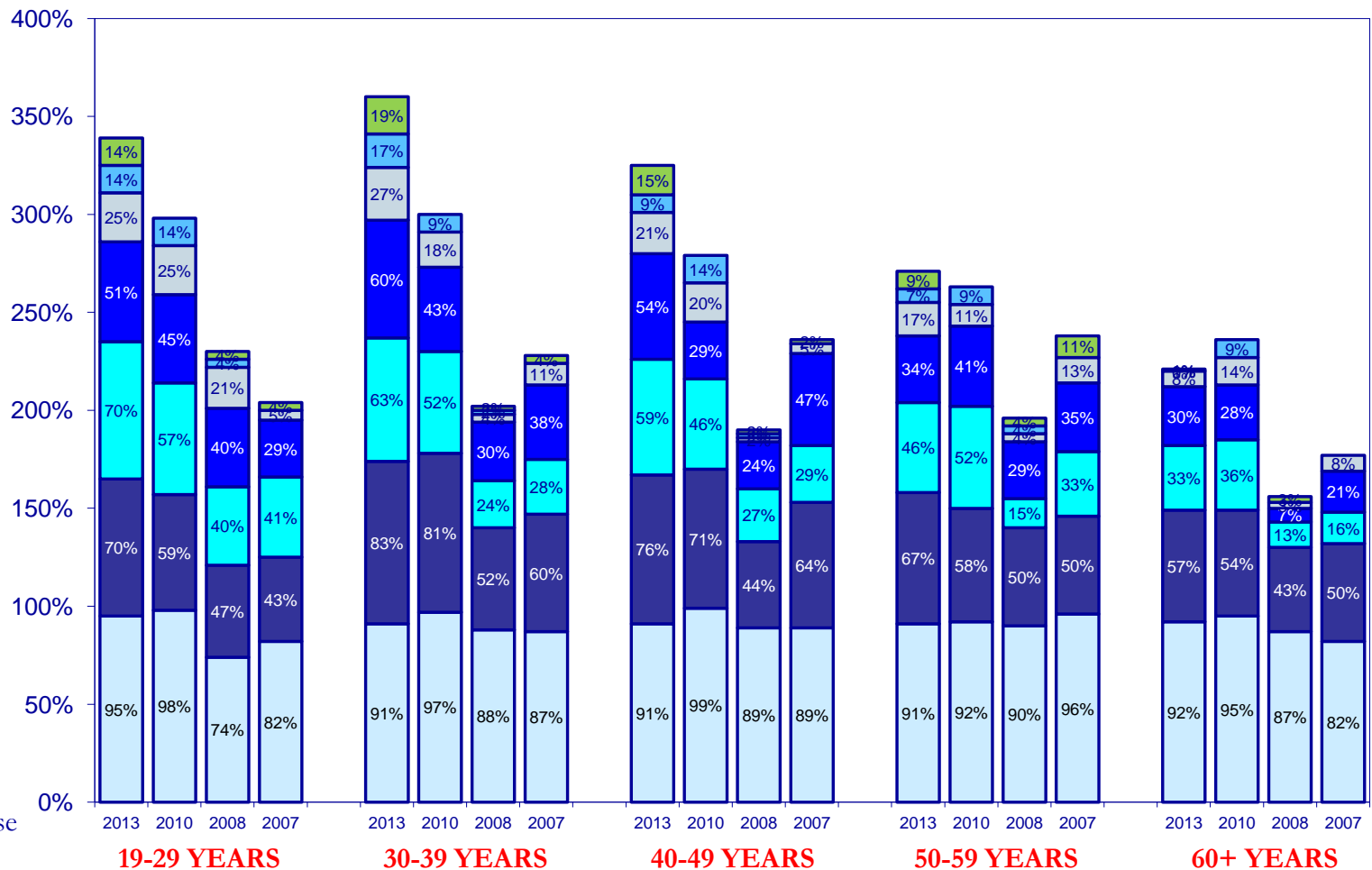**Heavy:** Spend $1040+ annually

Base: PY Scratch (n=412)

	$1 Scratch Games	$2 Scratch Games	$3 Scratch Games	$5 Scratch Games	$10 Scratch Games	$15 Scratch Games	$20 Scratch Games	Extended Play Games
Heavy	1%	1%	3%	2%	2%	1%		5%
Moderate	1%	1%	2%	3%	2%			4%
Light	3%	4%	15%	10%	5%	2%	4%	18%
Peripheral	25%	18%	33%	30%	12%	5%	6%	38%
Non-spenders	62% / 9%	46% / 31%	47%	55%	81%	91%	89%	35%

Legend: □ Non-spenders ■ Peripheral □ Light ■ Moderate □ Heavy

Price Points Played in Past Year (PY Scratch Players)

Note: Question asked differently prior to 2010

Base: PY Scratch Players
n=412 in 2013
n=320 in 2010
n=230 in 2008
n=242 in 2007

	$1 Games			$2 Games			$3 Games			$5 Games			$10 Games			$15 Games			$20 Games		
Year	2013	2010	2008	2013	2010	2008	2013	2010	2008	2013	2010	2008	2013	2010	2008	2013	2010	2008	2013	2010	2008
Did not purchase	8%	4%	15%	30%	35%	52%	46%	51%	75%	55%	63%	72%	81%	82%	93%	91%	89%	97%	89%		
Purchased	92%	96%	85%	70%	65%	48%	54%	49%	25%	45%	37%	28%	19%	18%	7%	9%	11%	3%	11%		

Legend: □ Purchased ■ Did not purchase

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Price Points Played among PY Scratch Players (by Age)

Base: PY Scratch Players

* Small Base Size
** Caution: Very small base

Legend: □ $1 Games ■ $2 Games ■ $3 Games ■ $5 Games □ $10 Games ■ $15 Game ■ $20 Games

Price Point Played Most Often

Base: PY Scratch Players

Legend: $1 Games, $2 Games, $3 Games, $5 Games, $10 Games, $15 Games, $20 Games

Categories: 2013 (n=410), 2010 (n=320), 2008 (n=216), 2007 (n=237)

2013: 59%, 18%, 16%, 4%, 1%, 1%
2010: 76%, 8%, 12%, 3%
2008: 74%, 8%, 11%, 5%
2007: 68%, 11%, 16%, 4%
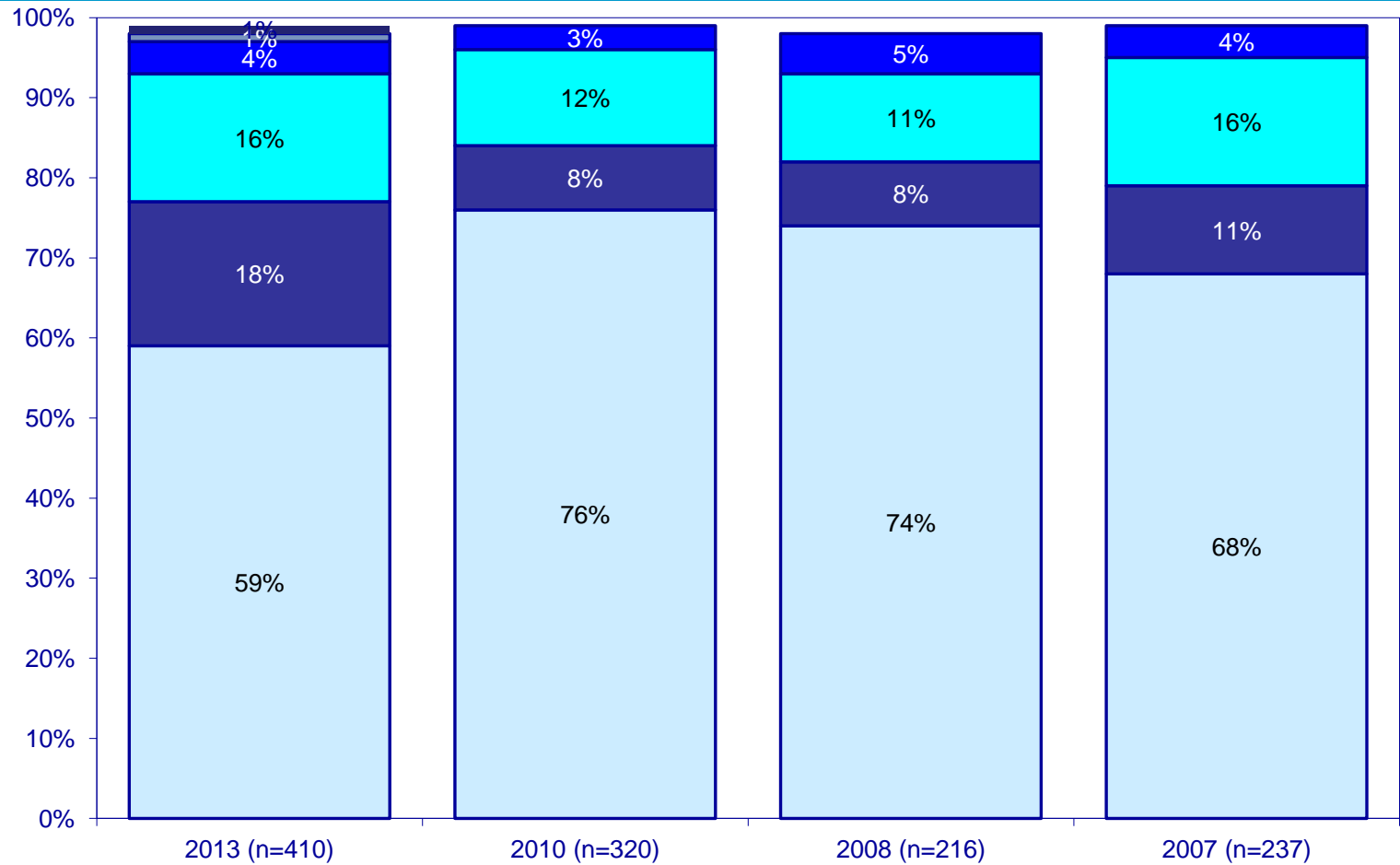
Price Points Played Most Often (by Age)

Base: PY Scratch Players

* Small Base Size
** Caution: Very small base

19-29 YEARS 30-39 YEARS 40-49 YEARS 50-59 YEARS 60+ YEARS

□ $1 Games ■ $2 Games □ $3 Games ■ $5 Games □ $10 Games ■ $15 Games □ $20 Games ■ DK/Varies

74
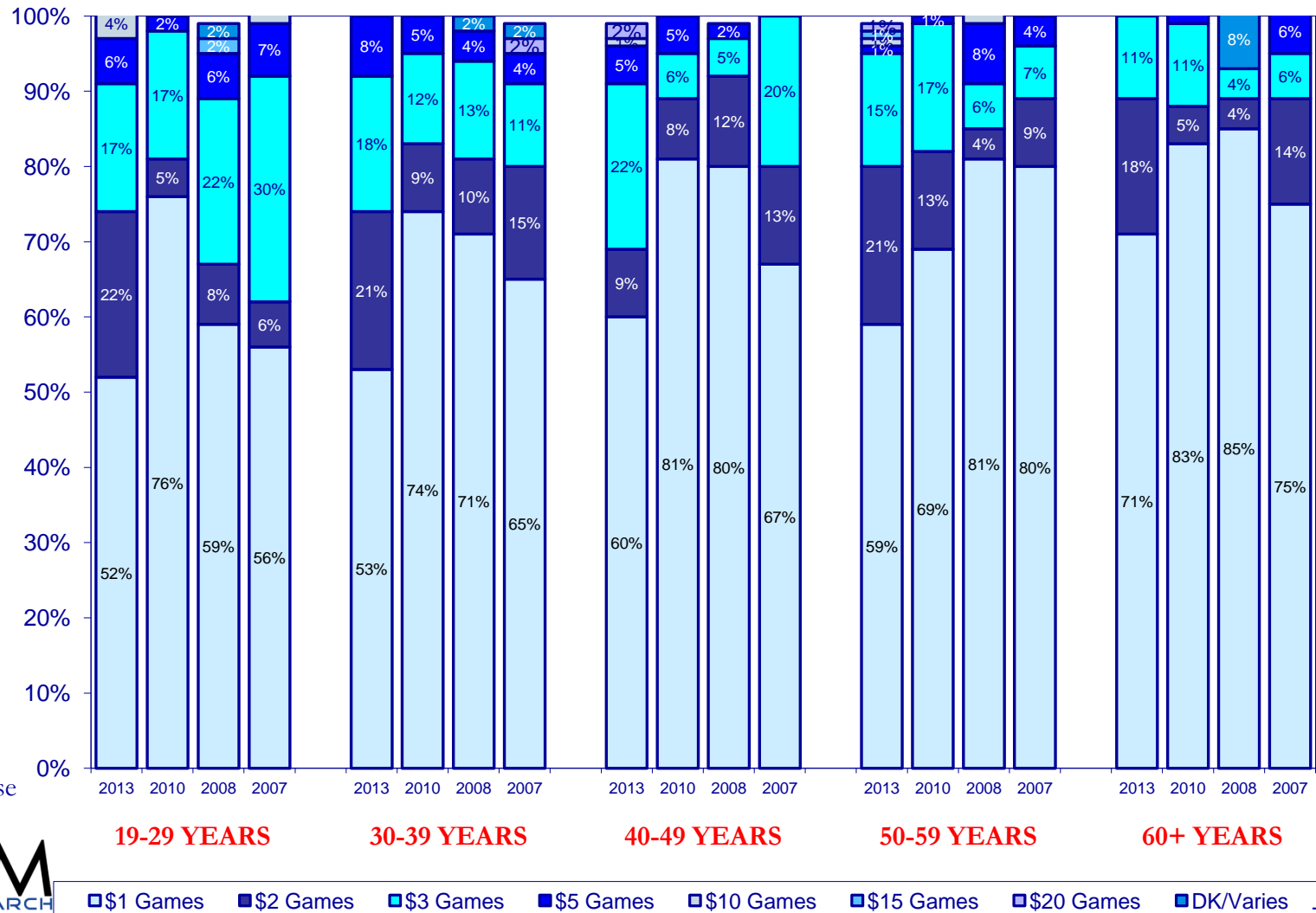
Price Point Played Most Often (by Segment)
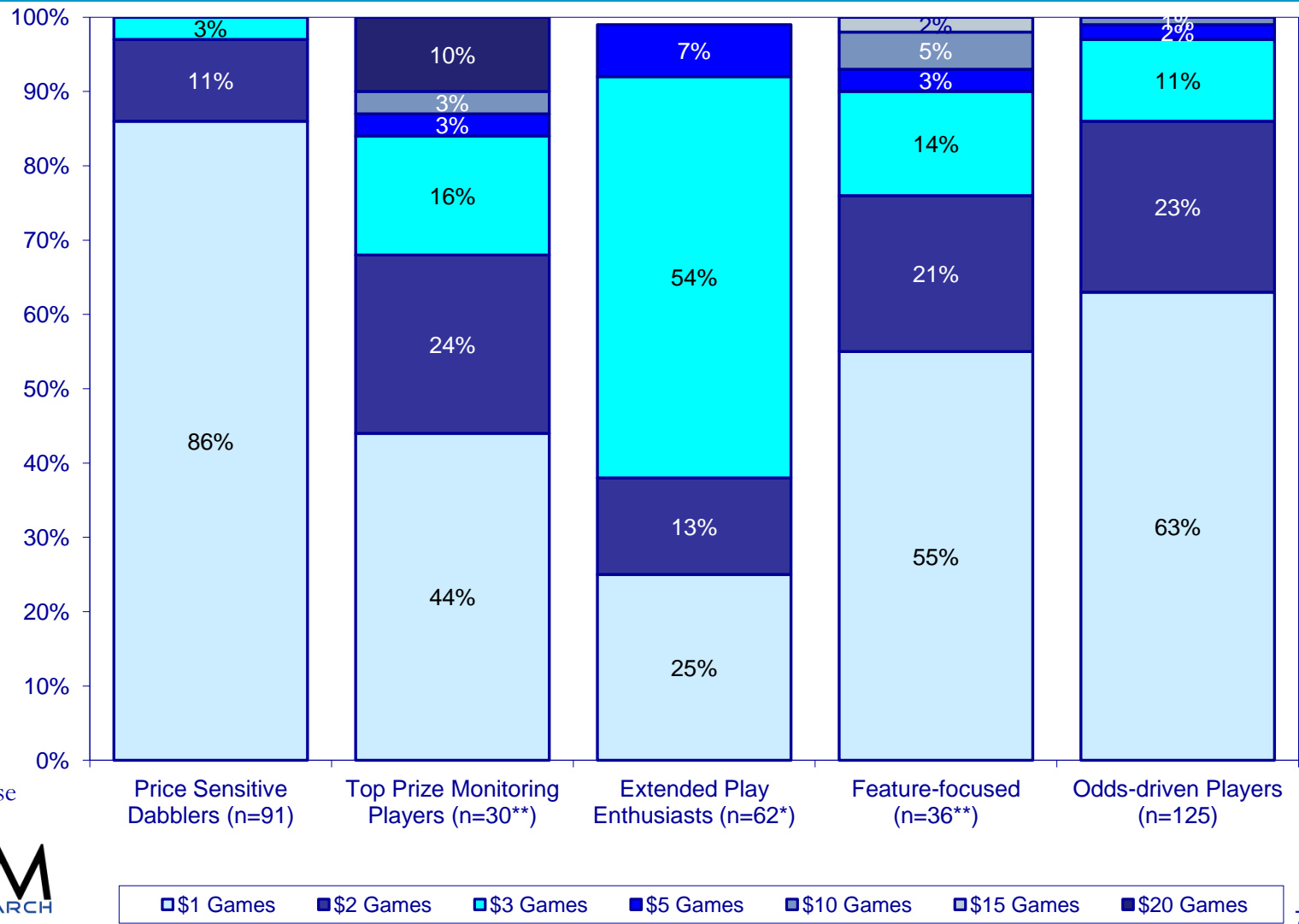
Base: PY Scratch Players

* Small Base Size

** Caution: Very small base

Play Style Preference

There are basically two types of Scratch game: (1) those with play styles that are straightforward to play like "Match 3 in a Row" or "Match Your Numbers to any of the Winning Numbers" and (2) those with play styles like Bingo and Crossword that are more involved and therefore take more time to play. Which type of Scratch game do you prefer to play?
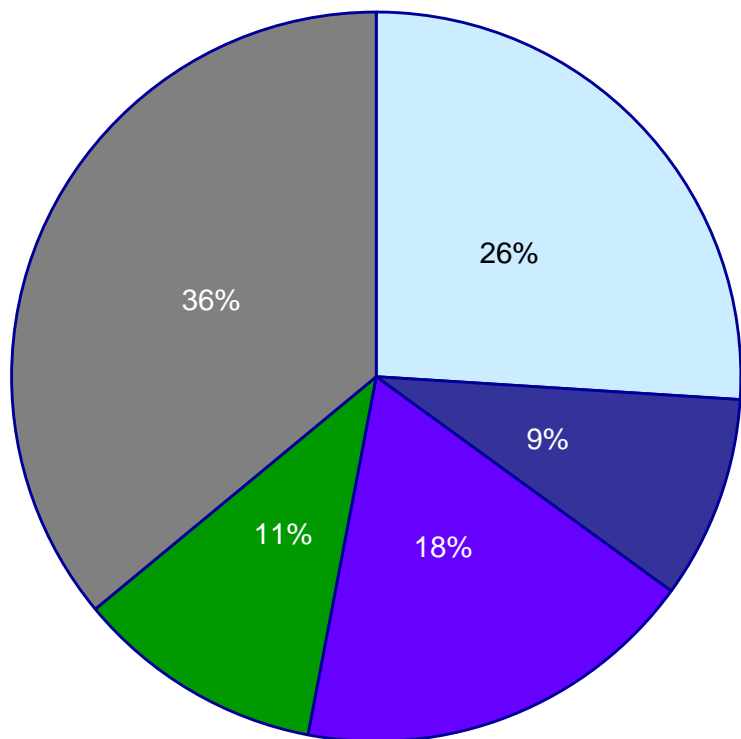
2013 (n=408)

No Preference, 21%
Quick Play, 52%
Extended Play, 28%

2010 (n=320)

No Preference, 27%
Quick Play, 46%
Extended Play, 27%
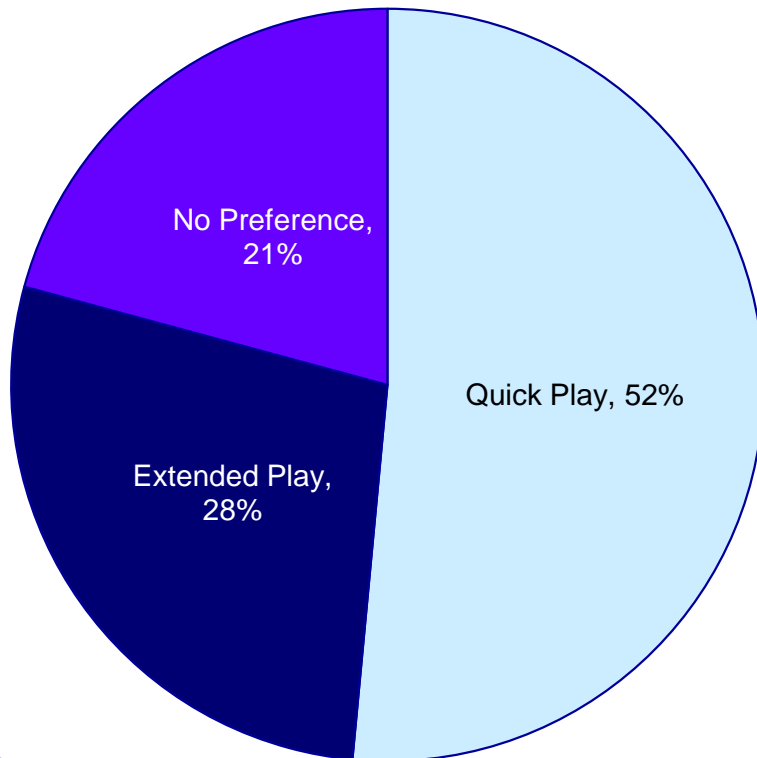
Base: PY Scratch Game Players
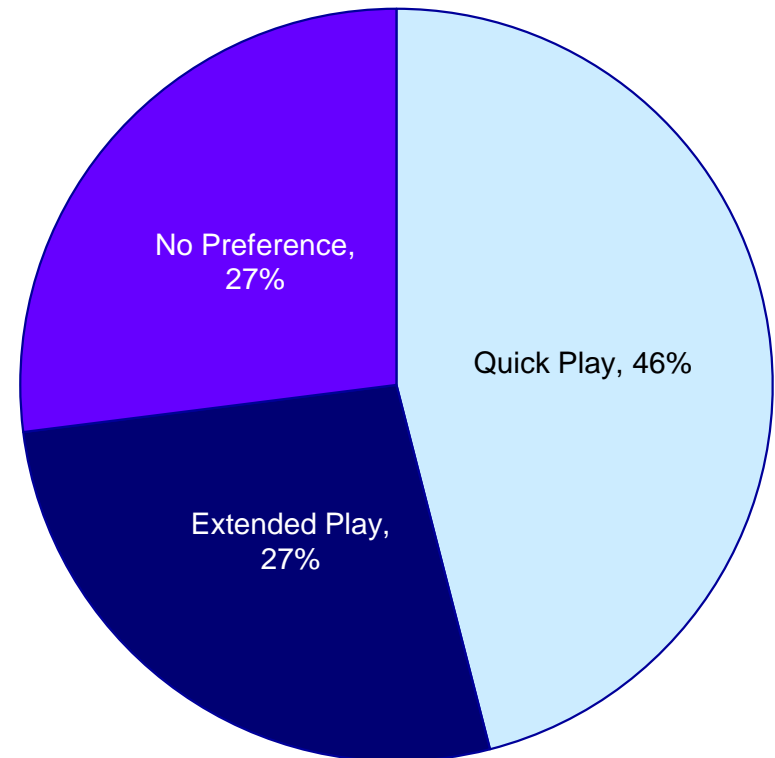
Play Style Preference (by Segment)

Base: PY Scratch Players

* Small Base Size

** Caution: Very small base

	Quick Play	Extended Play	No preference
Price Sensitive Dabblers (n=91)	69%	5%	25%
Top Prize Monitoring Players (n=31**)	51%	18%	31%
Extended Play Enthusiasts (n=62*)	3%	80%	17%
Feature-focused (n=37**)	42%	23%	34%
Odds-driven Players (n=125)	59%	20%	22%
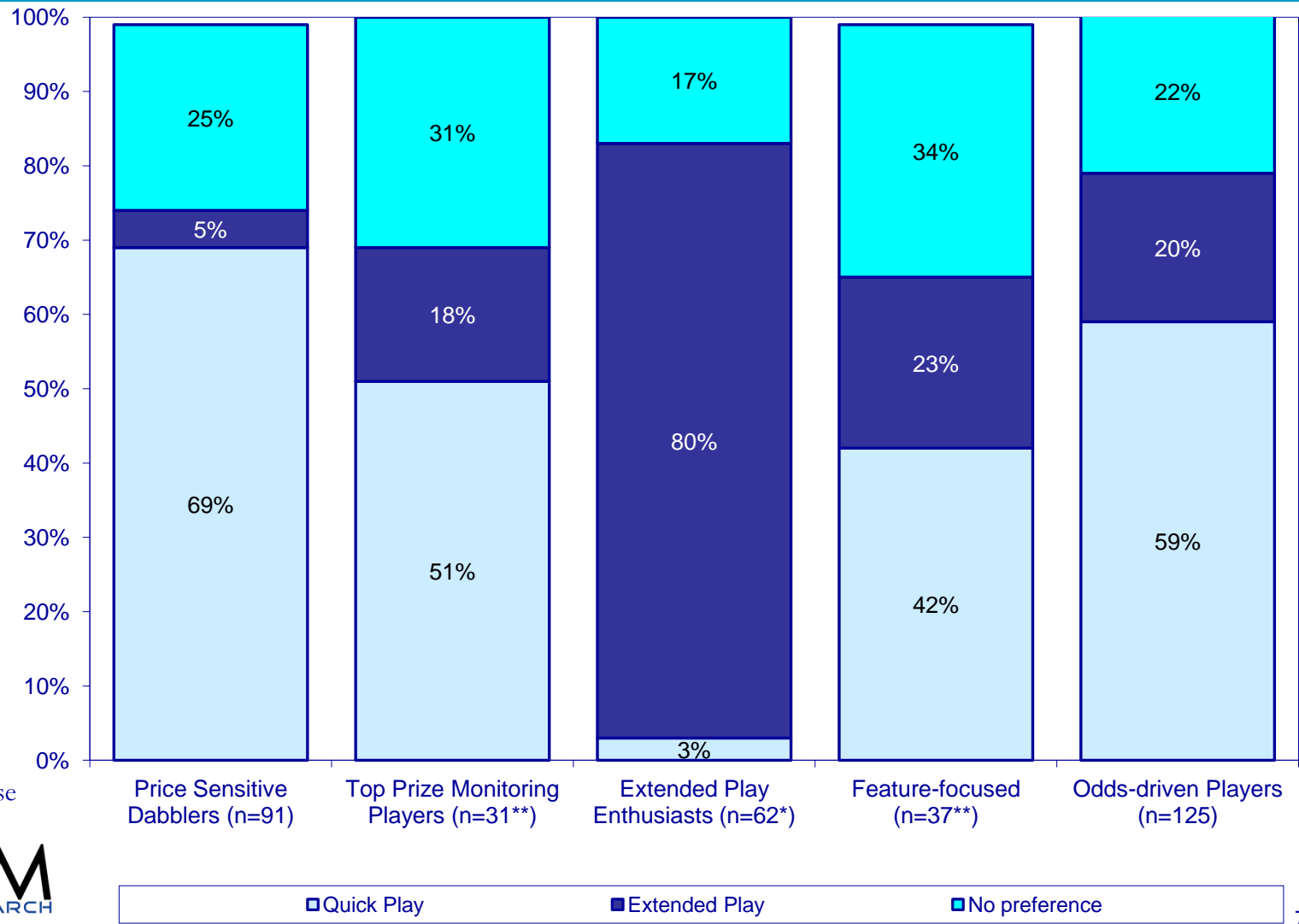
Changes in Scratch Segment Sizes

2013**

**2010 Updated Original Seg
(Classification Tool in Tracking Study)**

26%

36%

9%

11%

18%

- □ Price-senstive Dabblers
- ■ Top Prize Monitoring Players
- ■ Extended Play Enthusiasts
- ■ Feature-focused Players
- □ Odds-driven Players

31%

29%

11%

10%

19%

n=346

n=259

Base: PY Scratch Players
** Excludes telephone survey respondents (n=176)
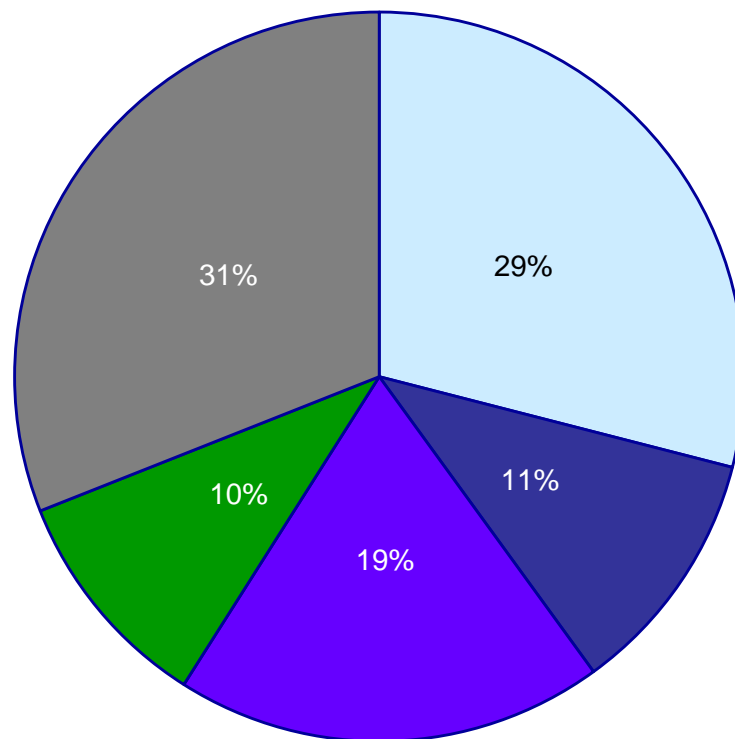
Key Findings

Hypothetical Retail Visit
to purchase Scratch Games

Hypothetical Retail Visit: # of Price Points Purchased

Category	Percentage
1 Price Point	55%
2 Price Points	21%
3 Price Points	14%
4 Price Points	7%
5 Price Points	1%
6 Price Points	
ALL Price Points	1%

Base: PY Scratch players (n=412)
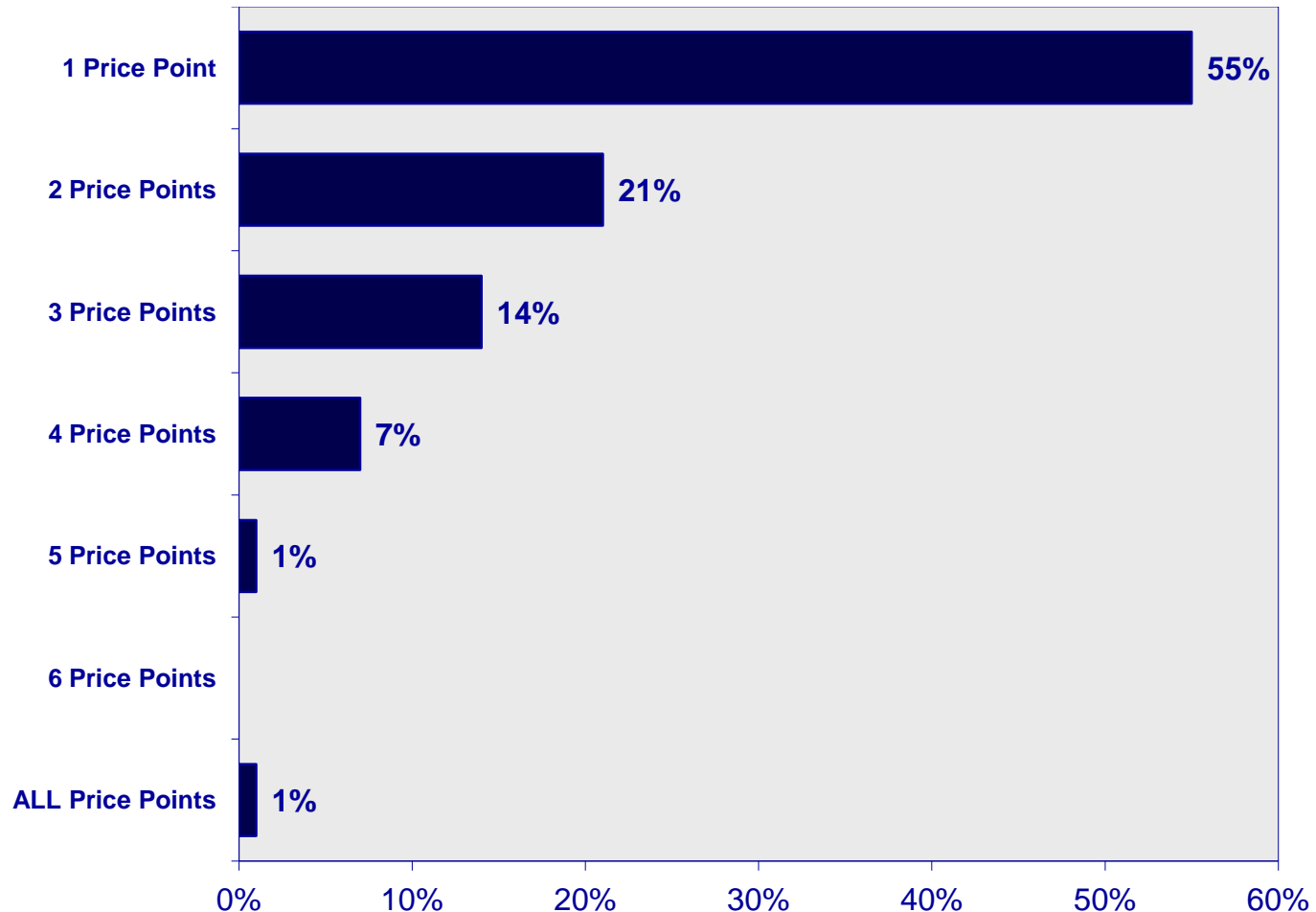
Hypothetical Retail Visit: # of Price Points Purchased

	PY Scratch Players		Price Sensitive Dabblers	Top Prize Monitoring Players	Extended Play Enthusiasts	Feature-focused Players	Odds-driven Players
	n=412		n=91	n=31**	n=62*	n=37**	n=125
Played 1 Price Point	55%		67%	43%	42%	69%	52%
Played 2 Price Points	21%		18%	12%	14%	15%	32%
Played 3 Price Points	14%		9%	23%	27%	11%	11%
Played 4 Price Points	7%		4%	19%	14%	5%	4%
Played 5 Price Points	1%		1%	3%	2%		1%
Played 6 Price Points			1%				
Played ALL Price Points	1%				1%		
Median # of Price Points	1 price point		1 price point	2 price points	2 price points	1 price point	1 price point

* Small Base Size
**Base size too small
Base: PY Scratch Players

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Hypothetical Retail Visit: Would only buy 1 Price Point

Price Point	Percentage
$1 Scratch games	63%
$2 Scratch games	17%
$3 Scratch games	11%
$5 Scratch games	6%
$10 Scratch games	1%
$15 Scratch games	1%
$20 Scratch games	1%

Base: PY Scratch players who indicated they would only purchase 1 price point (n=252)

Hypothetical Retail Visit: Would only buy 1 Price Point

	Would only buy 1 price point		Price Sensitive Dabblers	Top Prize Monitoring Players	Extended Play Enthusiasts	Feature-focused Players	Odds-driven Players
	n=252		n=61*	n=13**	n=26**	n=25**	n=65*
$1 Scratch games	63%		85%	56%	11%	64%	61%
$2 Scratch games	17%		10%	23%	23%	15%	20%
$3 Scratch games	11%		3%	7%	52%		12%
$5 Scratch games	6%		2%	7%	14%	7%	3%
$10 Scratch games	1%					7%	
$15 Scratch games	1%					7%	
$20 Scratch games	1%			7%			3%

* Small Base Size
**Base size too small
Base: PY Scratch players who indicated they would only purchase 1 price point

Hypothetical Retail Visit: Would only buy 2 Price Points

Horizontal bar chart:

Price Points	Percentage
$1 and $2	72%
$1 and $5	6%
$1 and $3	6%
$3 and $5	6%
$2 and $5	5%
$2 and $3	3%
$3 and $10	2%

Base: PY Scratch players who indicated they would only purchase 2 price points (n=87*)

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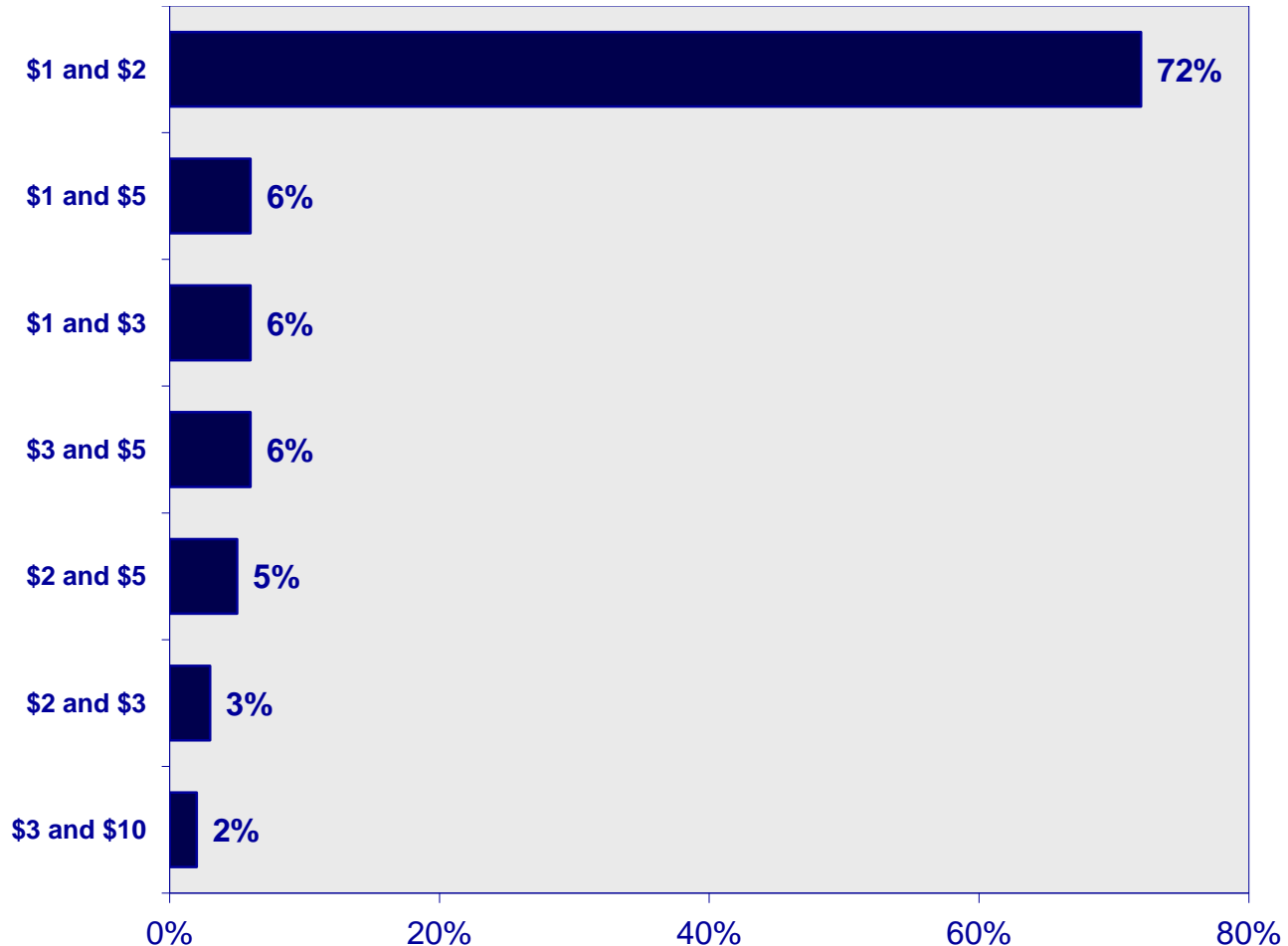
Key Findings

Favorite Lottery Game

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Favorite Lottery Game

Base: PY Lottery Players

Legend: Powerball · Mega Millions · NE Pick 5 · MyDaY · NE Pick 3 · 2by2 · Scratch games
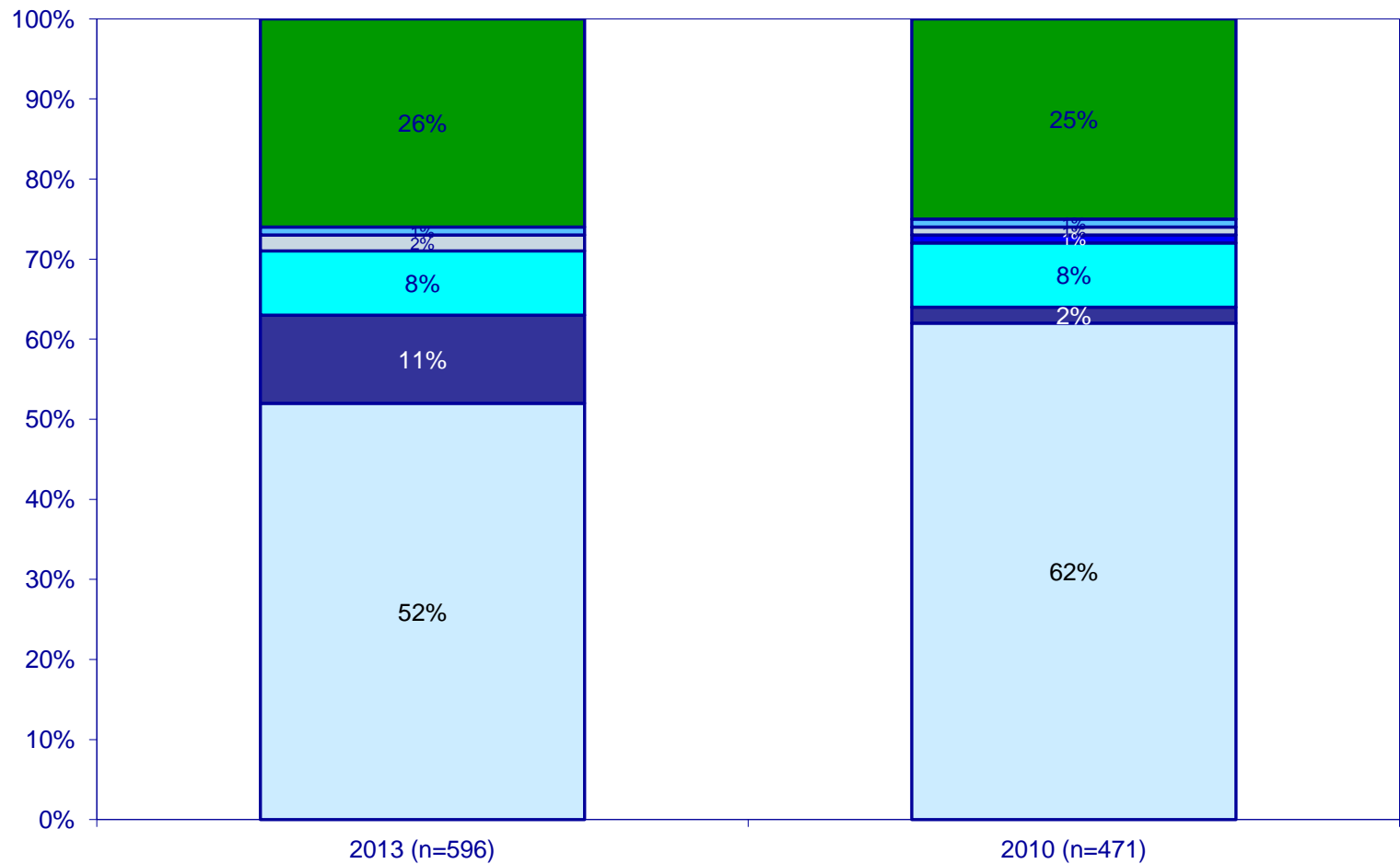
Favorite Lottery Game
(by Annualized Lottery Spending)

SPENDING DEFINITIONS

Peripheral: Spend $1-103 annually

Light: Spend $104-519 annually

Moderate: Spend $520-1039 annually

Heavy: Spend $1040+ annually

Base: PY Lottery Players

☐ Powerball ■ Mega Millions ☐ NE Pick 5 ■ MyDaY ☐ NE Pick 3 ☐ 2by2 ■ Scratch games

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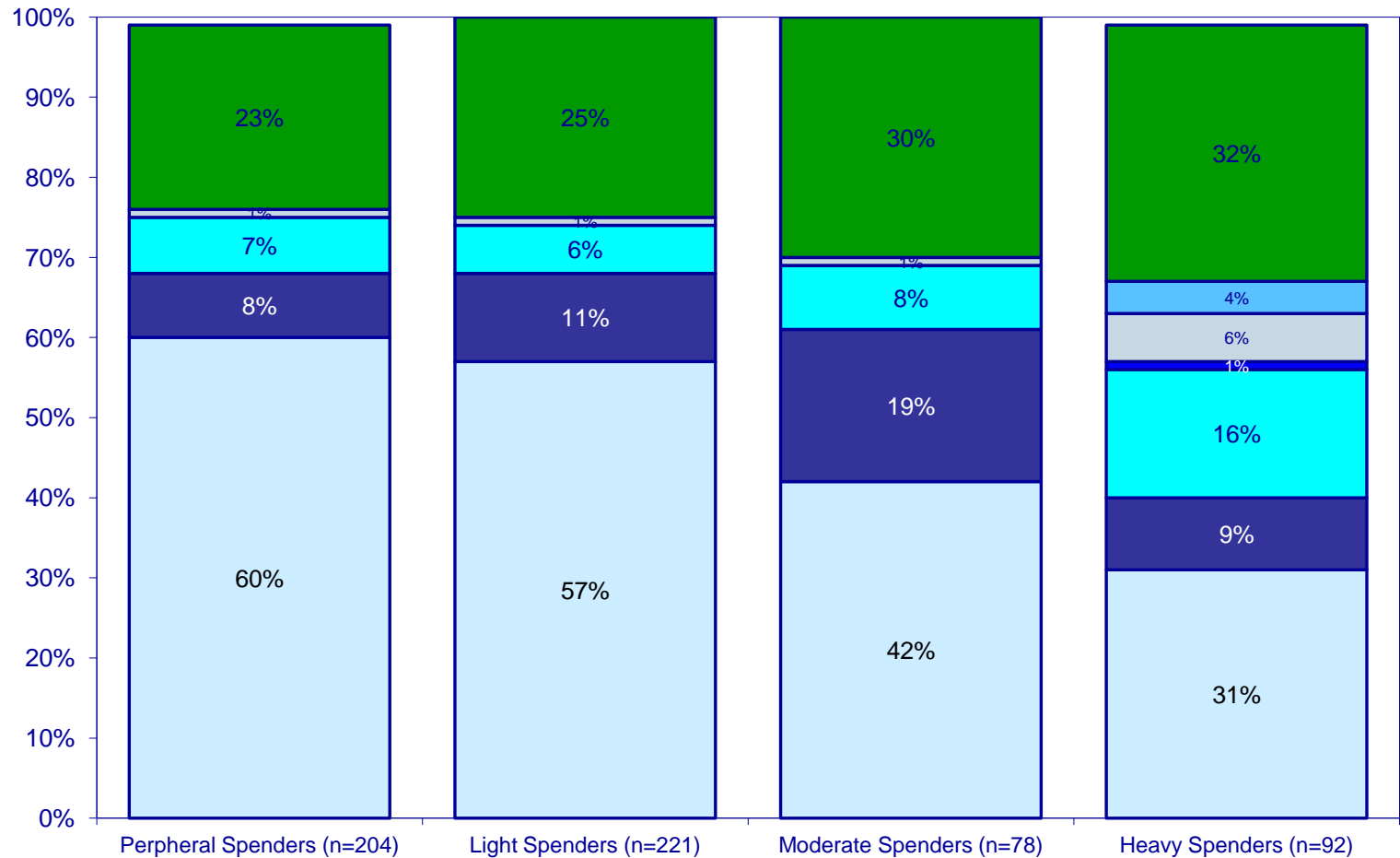
Reasons why specific lottery game is player's favorite

MEGA MILLIONS with Megaplier   n=85

1. It offers the largest jackpots of any lottery game. (24%)
2. It costs less. (17%)
3. It offers the best chance of winning a meaningful prize. (12%)
4. Fewer people play this game. (10%)
5. You don't have to wait long for the winning numbers to be drawn. (7%)
6. You don't have to wait long to find out if you have won a prize. (6%)
7. It's a Nebraska-only game. (6%)
8. I have been lucky playing this game. (6%)

NEBRASKA POWERBALL POWERPLAY   n=383

1. It offers the largest jackpots of any lottery game. (45%)
2. You don't have to wait long for the winning numbers to be drawn. (12%)
3. You don't have to wait long to find out if you have won a prize. (10%)
4. It offers the best chance of winning a meaningful prize. (9%)

nebraska PICK 5   n=106

1. It's a Nebraska-only game. (20%)
2. It offers the best odds of winning a prize. (15%)
3. You don't have to wait long for the winning numbers to be drawn. (13%)
4. It offers the best chance of winning a meaningful prize. (12%)
5. I win more often playing this game than on other games. (10%)
6. I have been lucky playing this game. (10%)
7. You don't have to wait long to find out if you have won a prize. (8%)

nebraska lottery SCRATCH   n=341

1. I win more often playing this game than on other games. (19%)
2. You don't have to wait long to find out if you have won a prize. (18%)
3. It's the most interactive game. (15%)
4. I have been lucky playing this game. (12%)
5. It offers the best odds of winning a prize. (11%)
6. It offers the most choices in terms of how to play. (6%)
7. It offers the best chance of winning a meaningful prize. (5%)

Base: Total Mentions

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Key Findings

MVP Club Membership
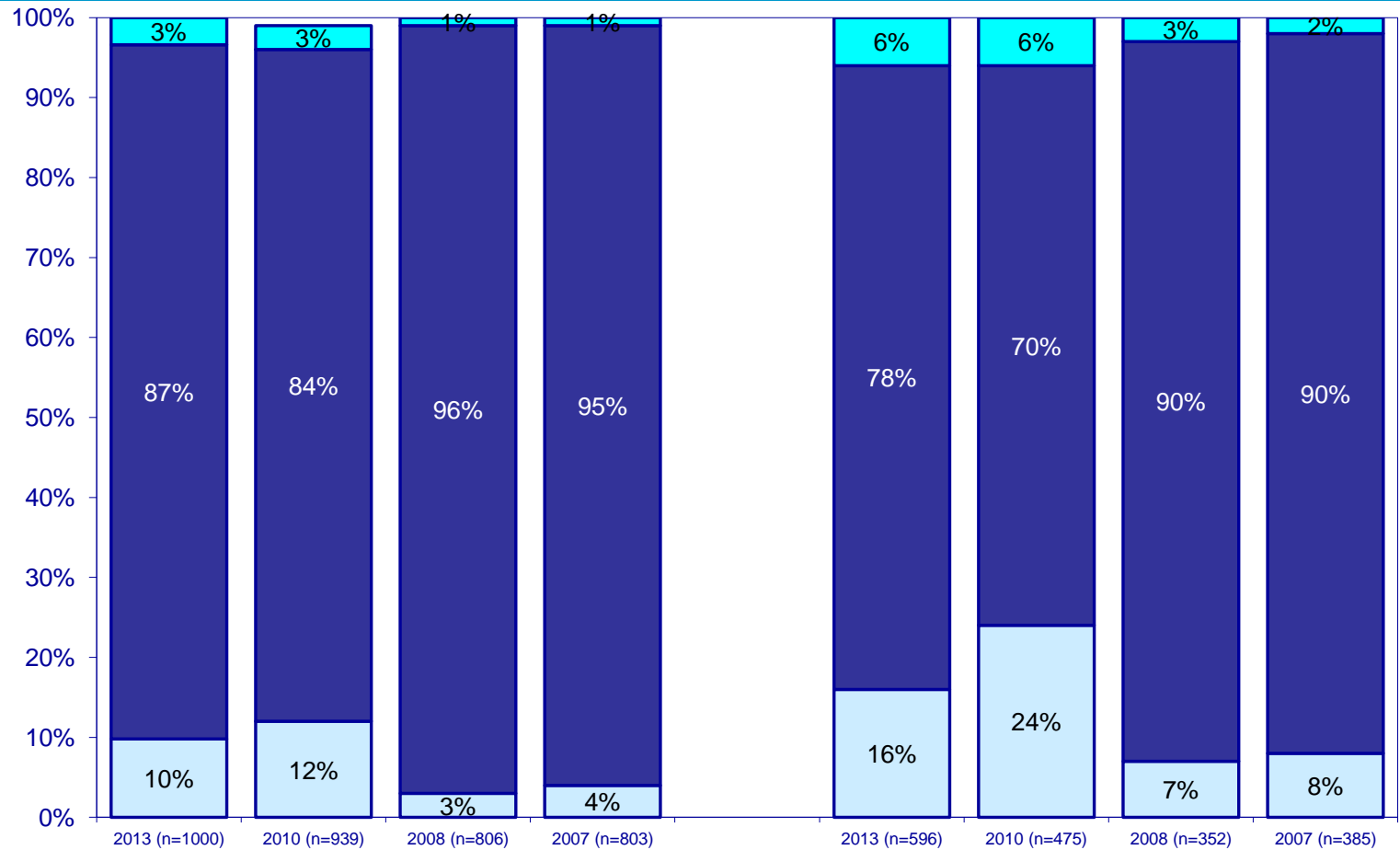
MVP Club Membership

MVP Club Membership
(PY Players by Age)

Base: PY Lottery Players

* Small Base Size
** Base Too Small

Legend: ☐ Member ■ Non-member ☐ DK/NS
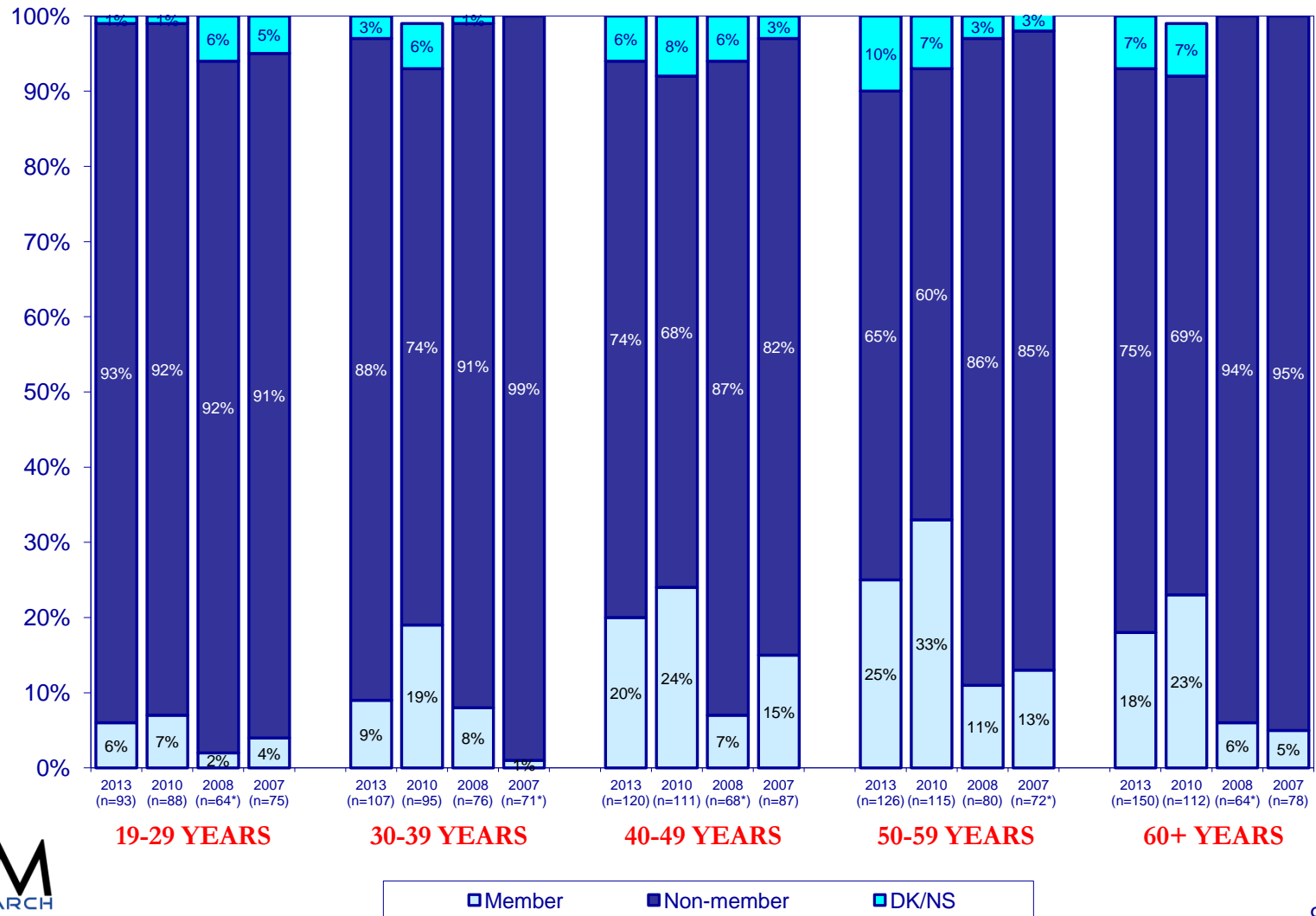
MVP Club Membership (PY Players by Region)
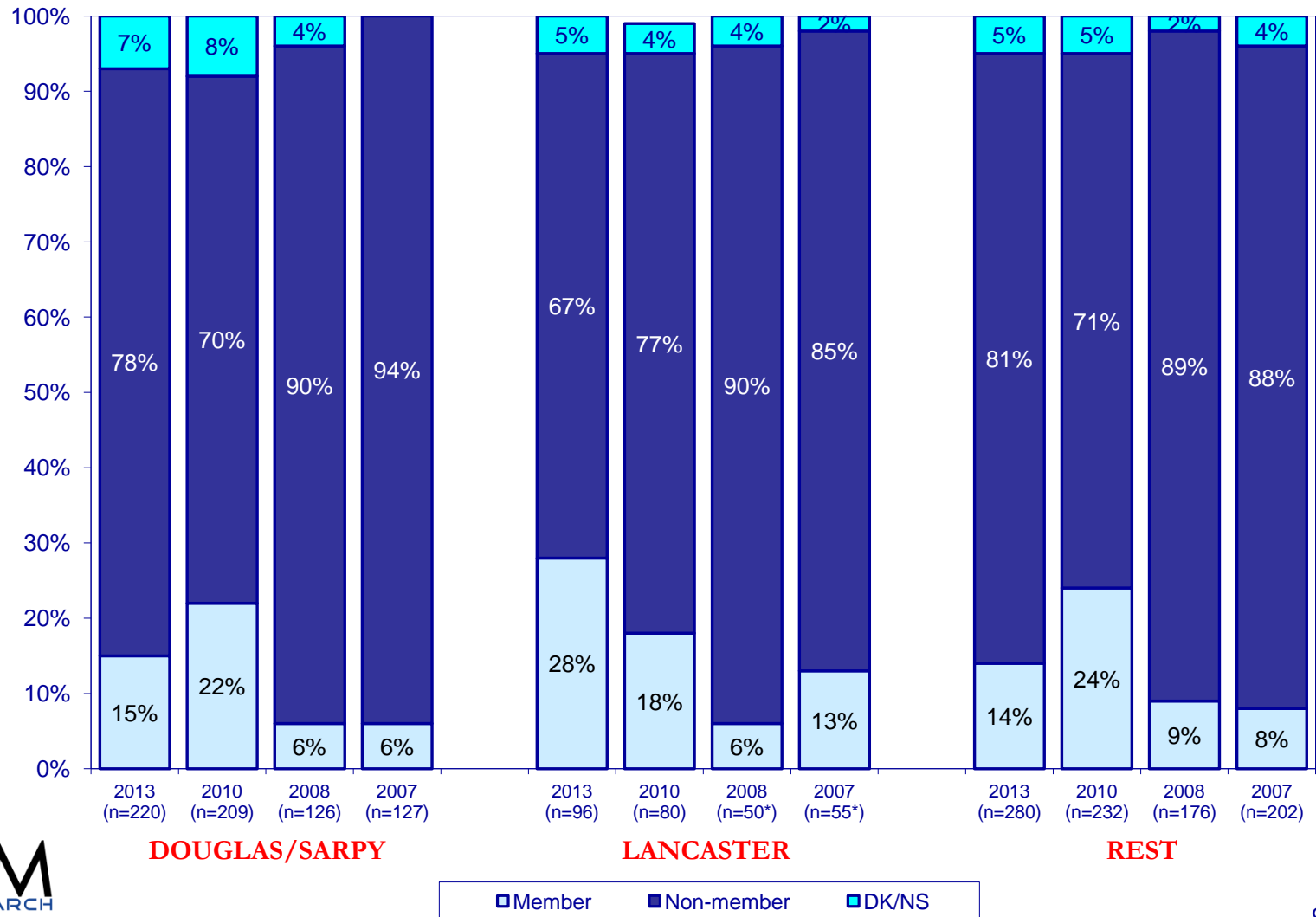
Base: PY Lottery Players
* Small Base Size
** Base Too Small

Legend: Member | Non-member | DK/NS

DOUGLAS/SARPY

	2013 (n=220)	2010 (n=209)	2008 (n=126)	2007 (n=127)
DK/NS	7%	8%	4%	
Non-member	78%	70%	90%	94%
Member	15%	22%	6%	6%

LANCASTER

	2013 (n=96)	2010 (n=80)	2008 (n=50*)	2007 (n=55*)
DK/NS	5%	4%	4%	2%
Non-member	67%	77%	90%	85%
Member	28%	18%	6%	13%

REST

	2013 (n=280)	2010 (n=232)	2008 (n=176)	2007 (n=202)
DK/NS	5%	5%	2%	4%
Non-member	81%	71%	89%	88%
Member	14%	24%	9%	8%

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Information Sources

What source do you use most to get your information regarding each of the following?

	Jackpots Base: PY Lotto Games	Winning Numbers Base: PY Lotto Games	Scratch Games Base: PY Scratch Games	NE Promotions Base: PY Lottery Games
	n=566	n=566	n=412	n=596
nelottery.com	23%	31%	10%	16%
Other website	3%	5%		1%
NE Lottery Facebook page	1%			1%
Retail clerk	7%	9%	26%	4%
Signs / POS	11%	6%	16%	7%
TV	16%	16%	4%	10%
Radio	2%			3%
Newspapers	8%	13%	1%	1%
Billboards	12%	1%	1%	1%
Friends and co-workers	4%	2%	4%	1%
Other lottery players at store			1%	
Don't keep up to date	11%	14%	31%	49%
Other (includes Don't Know)	2%	3%	6%	6%

Jackpot Info Sources (by Age)

What source do you use most to get your information regarding each of the following?

	19-29 years	30-39 years	40-49 years	50-59 years	60+ years
	n=76	n=103	n=118	n=124	n=145
nelottery.com	24%	24%	24%	28%	17%
Other website	1%	3%	4%	2%	2%
NE Lottery Facebook page	2%		2%		
Retail clerk	11%	9%	7%	6%	4%
Signs / POS	6%	8%	12%	13%	15%
TV	16%	18%	14%	14%	19%
Radio	2%	2%	2%	1%	3%
Newspapers	2%	4%	5%	8%	17%
Billboards	9%	15%	16%	14%	6%
Friends and co-workers	9%	6%	2%	4%	3%
Other lottery players at store	1%			1%	
Don't keep up to date	9%	8%	9%	9%	14%
Retailer (unspecified)	3%	2%			
Other (includes Don't Know)	5%	1%	3%		

Base: PY Lotto Players

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Winning Numbers Info Sources (by Age)

What source do you use most to get your information regarding each of the following?

	19-29 years	30-39 years	40-49 years	50-59 years	60+ years
	n=76	n=103	n=118	n=124	n=145
nelottery.com	27%	39%	41%	36%	16%
Other website	6%	6%	3%	6%	4%
NE Lottery Facebook page	2%				
Retail clerk	13%	11%	11%	7%	6%
Signs / POS	9%	4%	5%	6%	5%
TV	21%	17%	9%	13%	19%
Radio		1%		1%	
Newspapers	3%	5%	7%	15%	27%
Billboards	2%	1%	1%		
Friends and co-workers	1%	4%	2%	2%	1%
Other lottery players at store					
Don't keep up to date	9%	7%	15%	12%	22%
Retailer (unspecified)	1%	2%			
Other (includes Don't Know)	6%	3%	6%	2%	

Base: PY Lotto Players

Scratch Games Info Sources (by Age)

What source do you use most to get your information regarding each of the following?

	19-29 years	30-39 years	40-49 years	50-59 years	60+ years
	n=74*	n=81	n=83	n=84	n=90
nelottery.com	13%	9%	11%	13%	8%
Other website		1%		1%	
NE Lottery Facebook page		1%	1%		
Retail clerk	34%	27%	28%	19%	25%
Signs / POS	11%	19%	20%	16%	12%
TV	4%	8%	1%	1%	4%
Radio			1%		
Newspapers	2%	1%		1%	2%
Billboards	1%	1%	1%		
Friends and co-workers	9%	2%	2%	5%	1%
Other lottery players at store	2%	1%			
Don't keep up to date	11%	22%	31%	42%	48%
Retailer (unspecified)	13%	6%			
Other (includes Don't Know)		2%	4%	2%	

Base: PY Scratch Players

* Small Base Size

** Base Too Small

Promotions Info Sources (by Age)

What source do you use most to get your information regarding each of the following?

	19-29 years	30-39 years	40-49 years	50-59 years	60+ years
	n=93	n=107	n=120	n=126	n=150
nelottery.com	10%	16%	17%	22%	14%
Other website	3%	1%	1%		
NE Lottery Facebook page			2%	1%	1%
Retail clerk	12%	3%	5%		4%
Signs / POS	7%	5%	6%	8%	9%
TV	10%	18%	8%	8%	9%
Radio	4%	6%	4%	3%	1%
Newspapers	4%		2%	1%	1%
Billboards	4%	2%	1%		
Friends co-workers	1%	3%		1%	
Other lottery players at store		2%			
Don't keep up to date	36%	38%	49%	54%	60%
Retailer (unspecified)	3%	1%			
Other (includes Don't Know)	6%	5%	5%	2%	1%

Base: PY Lottery Players

Key Findings

Media Habits

Weekly Media Consumption (Overall by Age)

	All Respondents	19-29 years	30-39 years	40-49 years	50-59 years	60+ years
	n=1000	n=187	n=192	n=165	n=184	n=272
Watch TV	16.24 hrs	12.70 hrs	12.56 hrs	16.25 hrs	16.95 hrs	20.77 hrs
Listen to radio	9.58 hrs	8.15 hrs	12.84 hrs	11.36 hrs	8.73 hrs	7.75 hrs
Play internet-based games for fun	3.73 hrs	3.92 hrs	3.43 hrs	5.37 hrs	4.30 hrs	2.43 hrs
Corresponding with people on social networking sites	3.71 hrs	4.86 hrs	4.15 hrs	4.57 hrs	3.34 hrs	2.33 hrs
Read news online	3.16 hrs	2.66 hrs	3.46 hrs	3.84 hrs	3.58 hrs	2.81 hrs
Read printed newspaper	2.96 hrs	1.39 hrs	1.60 hrs	2.44 hrs	2.68 hrs	5.49 hrs
Watch movies/TV shows online	2.86 hrs	4.47 hrs	3.77 hrs	2.51 hrs	2.28 hrs	1.17 hrs

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Base: All Respondents

Weekly Media Consumption (PY Lottery Players by Age)

	All Respondents	19-29 years	30-39 years	40-49 years	50-59 years	60+ years
	n=596	n=93	n=107	n=120	n=126	n=150
Watch TV	17.33 hrs	13.40 hrs	15.47 hrs	16.12 hrs	17.92 hrs	21.57 hrs
Listen to radio	10.54 hrs	9.40 hrs	14.84 hrs	12.17 hrs	8.83 hrs	8.32 hrs
Play internet-based games for fun	4.24 hrs	3.73 hrs	4.53 hrs	6.39 hrs	4.15 hrs	2.69 hrs
Corresponding with people on social networking sites	4.12 hrs	5.07 hrs	5.47 hrs	5.12 hrs	3.55 hrs	2.26 hrs
Read news online	3.70 hrs	3.18 hrs	3.90 hrs	4.51 hrs	3.71 hrs	3.21 hrs
Read printed newspaper	3.23 hrs	1.42 hrs	1.83 hrs	2.60 hrs	3.03 hrs	6.04 hrs
Watch movies/TV shows online	2.83 hrs	4.88 hrs	3.52 hrs	2.53 hrs	2.42 hrs	1.66 hrs

Base: PY Lottery Players