



Marketing Landscape Explorer Research:
Lotto Games Player Segmentation
December 2021

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Lotto Games Player Segmentation

Study Overview & Methodology

Survey Topics

1. Screening Questions
2. Lotto Games
3. Scratch Games
4. Importance of Specific Purchase Decision Factors
5. Importance of Specific Lotto Game Features
6. General Questions
7. Demographics

Key Screening Questions

1. Personal opposition to state-run lotteries
2. Employed at any of the following:
 - A market research firm
 - The Nebraska Lottery or any of its contractors
3. Did not purchase Nebraska Lottery Lotto games in the past 12 months

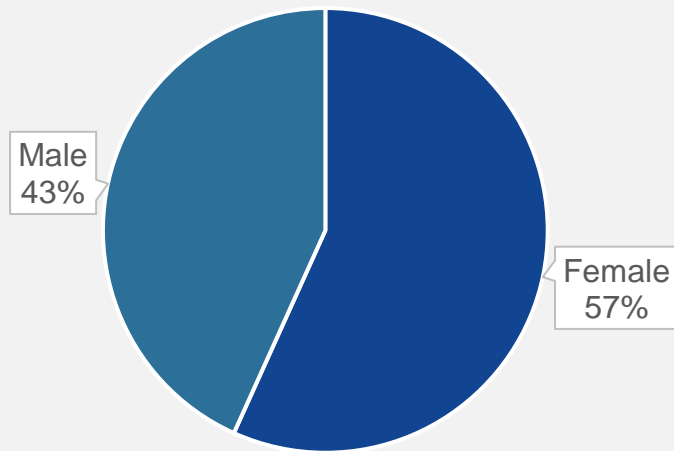
Survey Details

1778 completed surveys

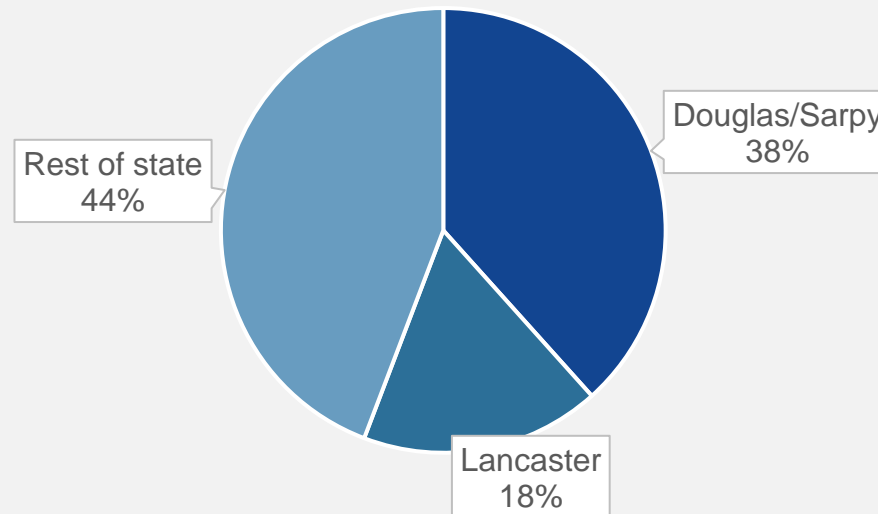
- 1288 surveys from MVP Club Members (Oct 7-Nov 3)
- 490 surveys from Dynata's purchased panel (Nov 9-25)

Data Details: “Unweighted” Data

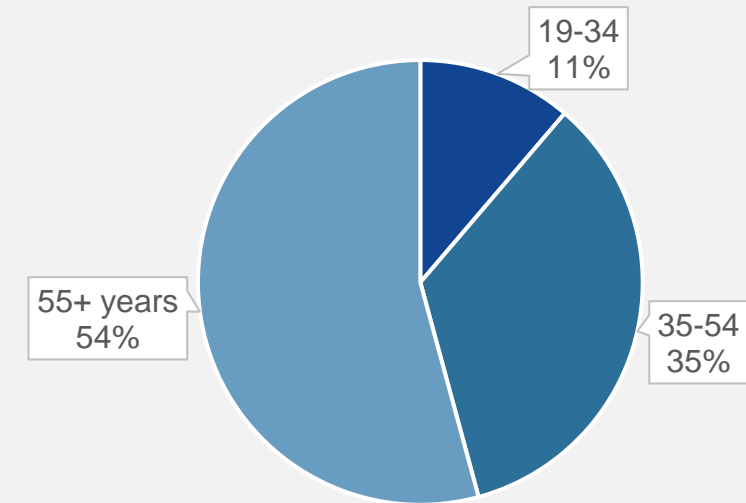
Gender



Region

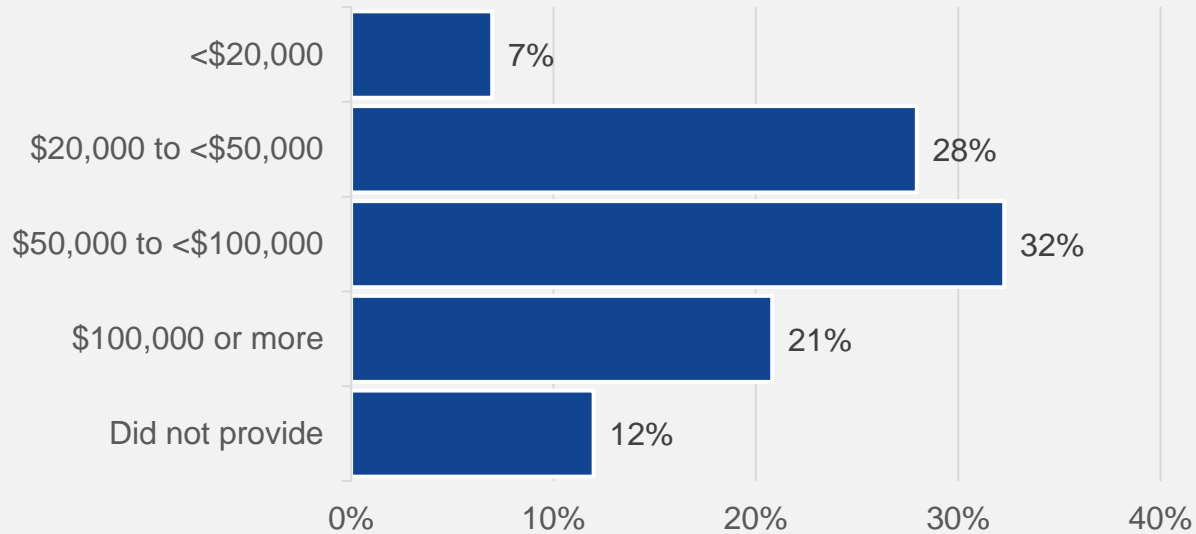


Age

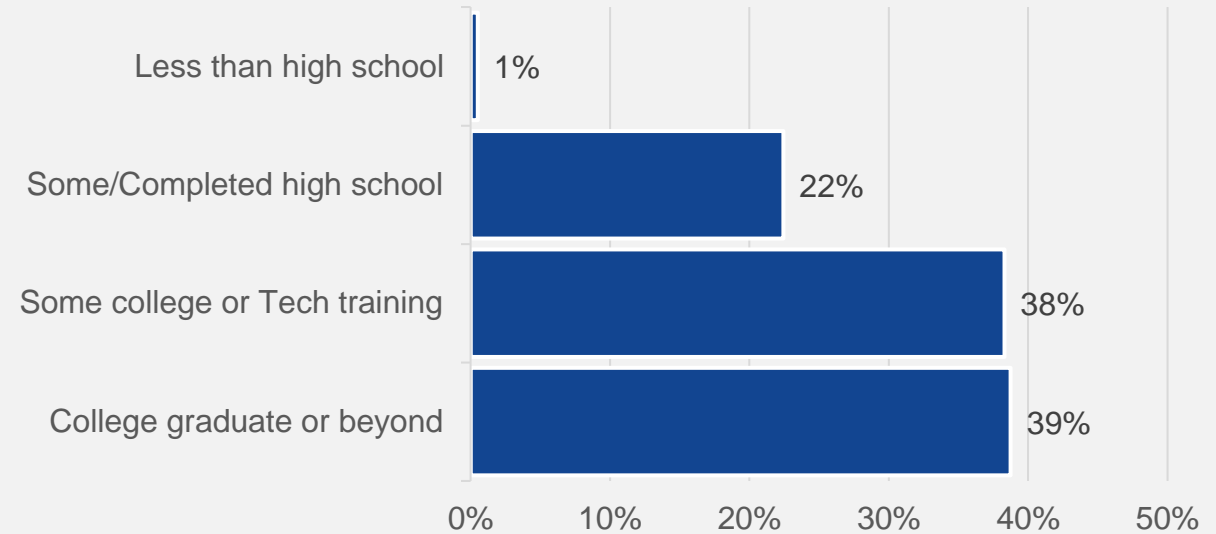


Data Details: “Unweighted” Data

Household Income

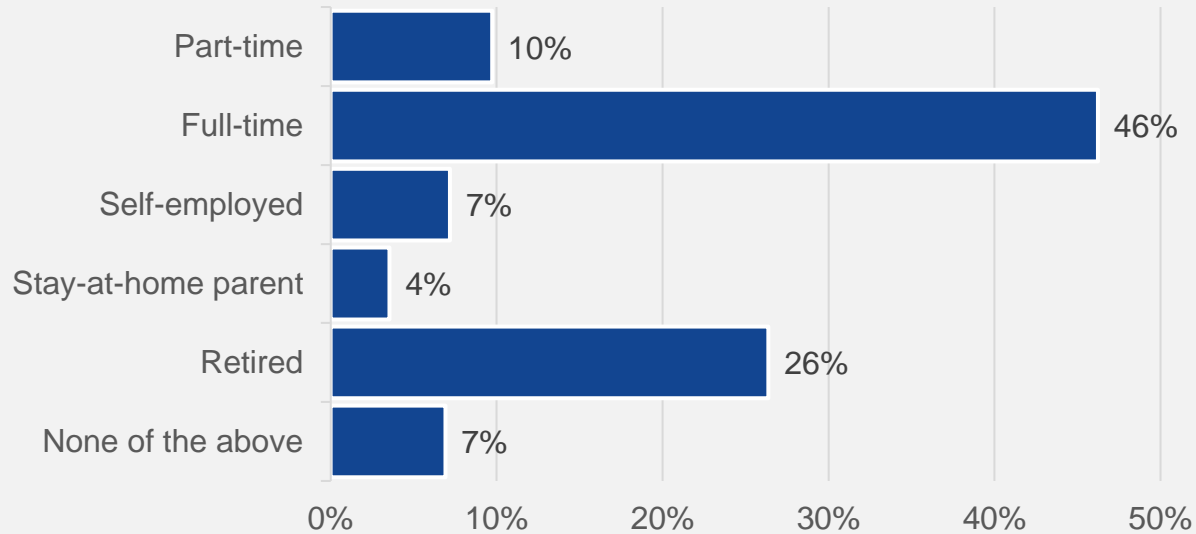


Education

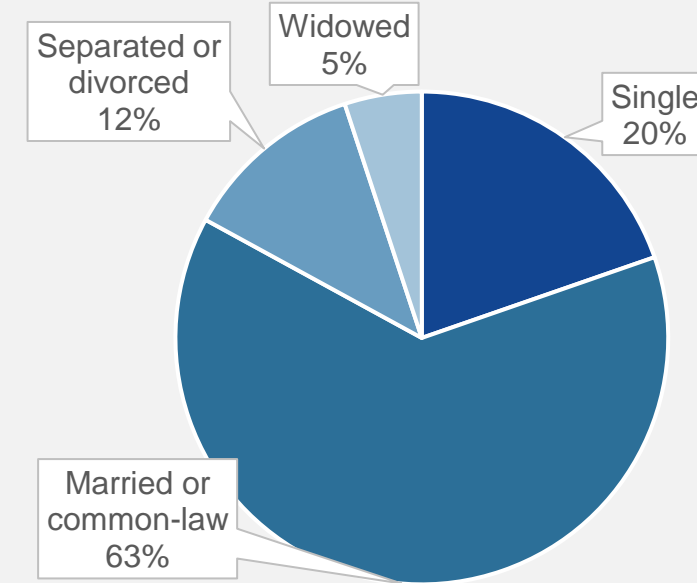


Data Details: “Unweighted” Data

Employment Status

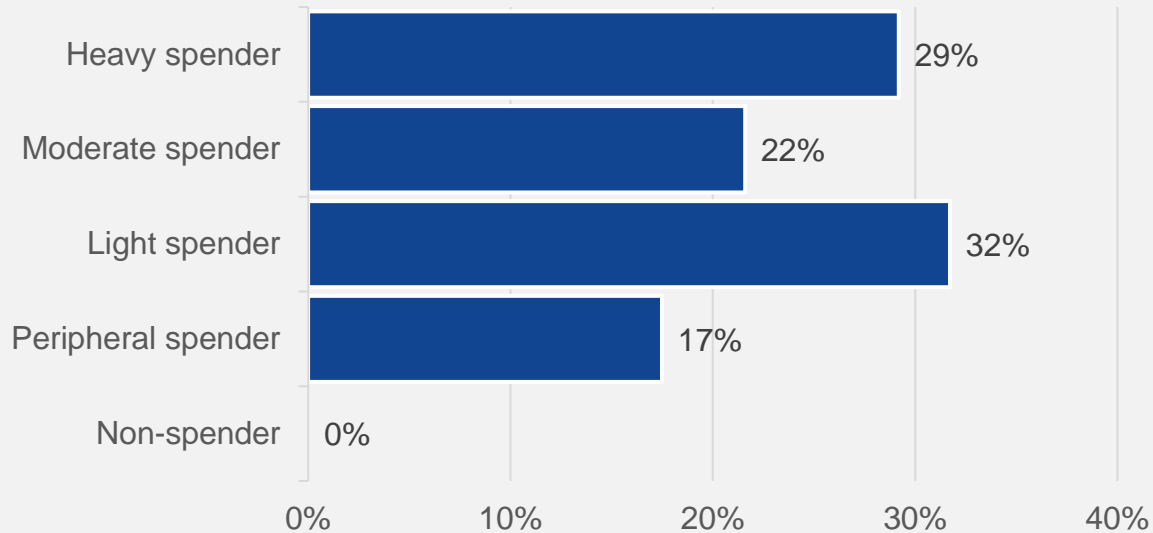


Marital Status

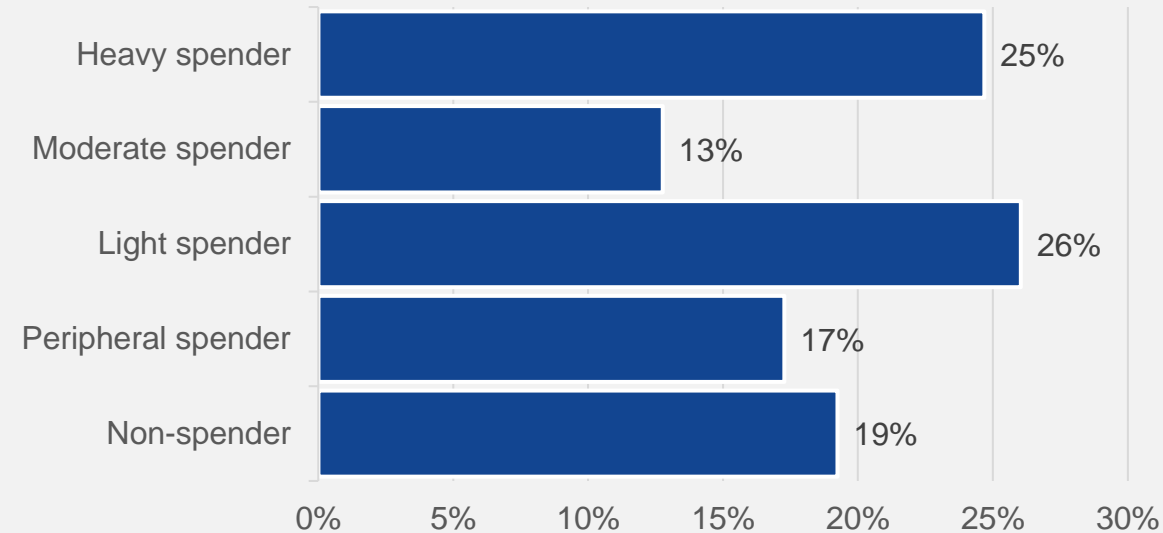


Data Details: “Unweighted” Data

Annualized **LOTTO** Spending



Annualized **SCRATCH** Spending



SPENDING DEFINITIONS

Non-spender = \$0 in a typical year
Peripheral = \$1-\$103 in a typical year (under \$2 a week)
Light = \$104-\$519 in a typical year (\$2-\$9 a week)
Moderate = \$520-\$1039 in a typical year (\$10-\$19 a week)
Heavy = \$1040+ in a typical a year (\$20+ a week)

Data Details: Weighting

UNWEIGHTED

GENDER

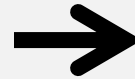
	Count	%
Female	1009	57%
Male	769	43%
	1778	100%

AGE

	Count	%
19-34	200	11%
35-54	614	35%
55+	964	54%
	1778	100%

LOTTO SPENDING

	Count	%
Heavy	519	29%
Moderate	384	22%
Light	564	32%
Peripheral	311	17%
	1778	100%



WEIGHTED

Weighting used to reflect PY Lotto Players
(using the proportions below from the 2021 Nebraska Tracking Study).

GENDER

	Count	%
Female	855	48%
Male	923	52%
	1778	100%

AGE

	Count	%
19-34	383	22%
35-54	687	39%
55+	708	40%
	1778	100%

LOTTO SPENDING

	Count	%
Heavy	505	28%
Moderate	205	12%
Light	556	31%
Peripheral	512	29%
	1778	100%

“Typical” Play Frequency Groups by Lotto Game

	Powerball	Mega Millions	NE Pick 5	Lucky for Life	NE Pick 3	2by2	MyDaY
Regular	26%	20%	22%	12%	5%	7%	5%
Occasional	26%	21%	17%	10%	8%	7%	6%
Infrequent	46%	44%	30%	27%	30%	28%	20%
Non-players	2%	15%	31%	50%	58%	58%	69%
	100%	100%	100%	100%	100%	100%	100%

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-Players = Less than once a year or Have never played

Avg. Annualized Spend by Play Frequency for that Game

	Played game in PY	Regular Players	Occasional Players	Infrequent Players
Powerball	\$291.74	\$734.70	\$286.47	\$47.20
Mega Millions	\$232.11	\$681.78	\$214.55	\$41.07
NE Pick 5	\$329.61	\$762.11	\$294.98	\$28.31
Lucky for Life	\$302.69	\$976.68	\$220.64	\$27.87
NE Pick 3	\$192.67	\$910.90	\$387.44	\$23.03
2by2	\$176.92	\$812.39	\$188.78	\$19.99
MyDaY	\$208.05	\$961.89	\$230.70	\$23.33

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-Players = Less than once a year or Have never played

Powerball	
Regular	26%
Occasional	26%
Infrequent	46%

Interpretation Example:

- Players of Powerball games, regardless of their typical play frequency, spend an **avg. of \$291.74 a year** (or the equivalent of **\$5.61 a week** on Powerball).
- “Regular” (i.e. Weekly) Players of Powerball spend an **avg. of \$734.70 a year** (or the equivalent of **\$14.13 a week** on Powerball).
- “Occasional” Players of Powerball games spend an **avg. \$286.47 a year** (or the equivalent of **\$5.51 a week** on Powerball)
- “Peripheral” Players of Powerball games spend an **avg. \$47.20 a year** (or the equivalent of **\$0.91 a week** on Powerball)

Lotto Game Player Segmentation

Segmentation Approach

Segmentation Studies

- Goal is to provide lotteries and vendors with a framework for understanding/conceptualizing the marketplace through the use of identified segments.
- The key to segmentation is incorporating statements that will discriminate the broader audience in question in to like-minded sub-audiences whose behaviors and attitudes are similar within groups but noticeably different, on some elements, across groups.
 - Demographics (Age, Gender)
 - Attitudes
 - Psychographics
 - Behavior
 - Needs-based / Product-based

Attitudinal Scratch Segmentation

[Randomize]	Does Not Describe Me At All											Describes Me Very Well
	[0]	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]	[10]	
I play just for fun	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I play when I'm feeling lucky	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Scratcher games are a special "treat" for me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I often buy Scratcher tickets as a gift for friends or family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I play Scratcher games because I like the excitement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I tend to play Scratcher games when I have some extra money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I tend to buy Scratcher games at stores where I know someone has won	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I tend to buy Scratcher tickets when I see others buying them	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I buy Scratcher games to make some easy money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I think Scratcher games are an inexpensive form of entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Scratcher games are an escape, or a special break in my day	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I often dream about winning a big Scratcher prize	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

About the Segmentation Approach for Lotto Games

- A hybrid product-based/attitudinal (multi-variable) segmentation model.
- The model is derived by how groups of PY Lotto players:
 - actually use Lotto Games; AND
 - what they want out of them.
- Segments are more “tangible” given they are primarily-derived from marketing/product-based variables.
- Study findings are more “actionable” than a traditional attitudinal/psychographic segmentation.
- People Principles uses responses from 2 key questions to derive the segmentation of Lotto game players
 - Question #1 pertains to Purchase Decision Factors
 - Question #2 pertains to Lotto Game Attributes

23 Items included as Purchase Decision Factors

1. The day of the week.
2. The size of the jackpot for the next draw.
3. The amount of cash I have on-hand to spend on Lotto games.
4. The game is drawn that evening, meaning I don't have to wait long to find out whether I've won a prize.
5. The cost to play that game.
6. My chances of winning the top prize / jackpot.
7. My chances of winning ANY prize amount.
8. My chances of winning a prize amount that is meaningful to me.
9. The game is being promoted inside the store.
10. I recall seeing/hearing a commercial for that game on TV or radio.
11. I recall seeing/hearing a commercial for that game on social media.
12. The game is being talked about in the news media.
13. The game is being talked about by friends, family, coworkers, or others I know.
14. There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: "get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games").
15. There is a limited in-store discount offer for a specific game (example: "purchase \$7 of 2by2 for \$4").
16. There is a limited statewide promotion of an entry into a drawing with a qualifying purchase (example: "purchase a \$1 Nebraska Pick 5 ticket and receive an entry for a chance to win Huskers football season tickets").
17. The game is easy to play.
18. A game I have played before.
19. A game that has served me well in the past.
20. Knowing other players have won money playing that game at that store.
21. A suggestion from the clerk.
22. A suggestion from other players.
23. A game that I play as part of a lottery pool with my friends, family, or coworkers.

Layout of the Purchase Decision Factors Exercise within the Survey (D1)

Which factor do you feel is the **MOST** and **LEAST important** to you personally when choosing a Lotto game to purchase **at the counter**?

MOST Important (select one)		LEAST Important (select one)
<input type="radio"/>	A suggestion from the clerk.	<input type="radio"/>
<input type="radio"/>	My chances of winning ANY prize amount.	<input type="radio"/>
<input type="radio"/>	There is a limited in-store discount offer for a specific game (example: "purchase \$7 of 2by2 for \$4").	<input type="radio"/>
<input type="radio"/>	The game is being promoted inside the store.	<input type="radio"/>
<input type="radio"/>	A game that I play as part of a lottery pool with my friends, family, or coworkers.	<input type="radio"/>
<input type="radio"/>	The amount of cash I have on-hand to spend on Lotto games.	<input type="radio"/>

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NEXT

Layout of the Purchase Decision Factors Exercise within the Survey (D1)

Which factor do you feel is the **MOST** and **LEAST important** to you personally when choosing a Lotto game to purchase **at the counter**?

MOST Important (select one)		LEAST Important (select one)
<input type="radio"/>	I recall seeing/hearing a commercial for that game on TV or radio.	<input type="radio"/>
<input type="radio"/>	The day of the week.	<input type="radio"/>
<input type="radio"/>	A game I have played before.	<input type="radio"/>
<input type="radio"/>	The game is being talked about by friends, family, coworkers, or others I know.	<input type="radio"/>
<input type="radio"/>	There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: "get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games").	<input type="radio"/>
<input type="radio"/>	There is a limited in-store discount offer for a specific game (example: "purchase \$7 of 2by2 for \$4").	<input type="radio"/>

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NEXT

22 Items included as Lotto Game Attributes Questions

1. The game offers the chance to win a jackpot that is at least \$20 million and can grow to over \$500 million.
2. The game offers the chance to win a jackpot that starts at \$50 thousand and can grow to over \$150 thousand.
3. The game offers the chance to win a fixed top prize of \$1000 or less.
4. The game is drawn 7 times a week.
5. The game is drawn 3 times a week.
6. The game is drawn 2 times a week.
7. The game is only played in Nebraska.
8. The game is played across most states.
9. The game is only played in a limited number of states.
10. A game that costs \$1 per play.
11. A game that costs \$2 per play.
12. A game with an appealing name.
13. The jackpot prize amount is split equally among multiple winners.
14. The Top Prize amount is fixed regardless of the number of winners.
15. The jackpot prize is paid all at once.
16. You choose whether you would want your jackpot prize in annual payments or one lump sum payment.
17. You can win a free play for that game by matching a specific number of balls.
18. The game provides more flexibility regarding how to play.
19. You select all your numbers from a single set of balls.
20. You select numbers from one set of balls plus a "special ball" from a second set of balls.
21. For \$1, you can purchase an add-on feature giving you the chance to multiply prize amounts other than the jackpot.
22. A game that promotes the chance to win a fixed prize amount "for life".

Layout of the Lotto Game Attributes Exercise within the Survey (E1)

Which Lotto game attribute do you feel is the **MOST** and **LEAST** important to you personally?

MOST Important (select one)		LEAST Important (select one)
<input type="radio"/>	You select numbers from ONE SET of balls PLUS a "special ball" from a SECOND SET of balls.	<input type="radio"/>
<input type="radio"/>	The game offers the chance to win a jackpot that is at least \$20 million and can grow to over \$500 million.	<input type="radio"/>
<input type="radio"/>	The game is only played in a LIMITED NUMBER of states.	<input type="radio"/>
<input type="radio"/>	You CAN WIN A FREE PLAY for that game by matching a specific number of balls.	<input type="radio"/>
<input type="radio"/>	The game is played across MOST states.	<input type="radio"/>
<input type="radio"/>	For \$1, you can purchase an ADD-ON FEATURE giving you the chance to multiply prize amounts other than the jackpot.	<input type="radio"/>

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NEXT

Layout of the Lotto Game Attributes Exercise within the Survey (E1)

Which Lotto game attribute do you feel is the **MOST** and **LEAST important** to you personally?

MOST Important (select one)		LEAST Important (select one)
<input type="radio"/>	The game provides MORE FLEXIBILITY regarding how to play.	<input type="radio"/>
<input type="radio"/>	The game is drawn 3 times a week.	<input type="radio"/>
<input type="radio"/>	A game with an appealing name.	<input type="radio"/>
<input type="radio"/>	You select ALL your numbers from a SINGLE SET of balls.	<input type="radio"/>
<input type="radio"/>	For \$1, you can purchase an ADD-ON FEATURE giving you the chance to multiply prize amounts other than the jackpot.	<input type="radio"/>
<input type="radio"/>	The game is only played in a LIMITED NUMBER of states.	<input type="radio"/>

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NEXT

Lotto Game Player Segmentation

Most Important...

Purchase Decision Factors & Lotto Game Attributes

8 Most Important Purchase Decision Factors (Among All Respondents)

MOST IMPORTANT PURCHASE DECISION FACTORS	
My chances of winning ANY prize amount	(13.0%)
The size of the jackpot for the next draw	(12.4%)
My chances of winning a prize amount that is meaningful to me	(10.9%)
My chances of winning the top prize / jackpot	(9.7%)
The cost to play that game	(8.2%)
The amount of cash I have on hand to spend on Lotto games	(7.1%)
A game that has served me well in the past	(6.5%)
The game is easy to play	(5.8%)
8 (out of 23) most important purchase decision factors account for 73.6% of choice share.	

7 Most Important Lotto Game Attributes (Among All Respondents)

MOST IMPORTANT LOTTO GAME ATTRIBUTES
The game offers the chance to win a jackpot that is at least \$20 million and can grow to over \$500 million (16.1%)
The game is only played in Nebraska (12.1%)
You can choose whether you would want your jackpot prize in annual payments or one lump sum payment (12.0%)
A game that costs \$1 per play (11.2%)
A game that promotes the chance to win a fixed prize amount 'For Life' (8.2%)
The jackpot prize is paid all at once (7.0%)
The game offers the chance to win a jackpot that starts at \$50 thousand and can grow to over \$150 thousand (5.2%)
7 (out of 22) most important Lotto game attributes account for 71.8% of choice share.

Lotto Game Player Segmentation

Introduction to the Segments

8 Most Important (Overall) Purchase Decision Factors

PURCHASE DECISION FACTORS	SEGMENT 1	SEGMENT 2	SEGMENT 3	SEGMENT 4	SEGMENT 5
My chances of winning ANY prize amount (13.0%)	15.3%	13.2%	7.1%	14.1%	13.5%
The size of the jackpot for the next draw (12.4%)	9.5%	15.3%	11.7%	12.9%	11.8%
My chances of winning a prize amount that is meaningful to me (10.9%)	11.4%	11.1%	5.3%	11.6%	13.9%
My chances of winning the top prize / jackpot (9.7%)	9.0%	9.3%	5.7%	9.6%	14.9%
The cost to play that game (8.2%)	10.2%	11.8%	6.4%	7.3%	2.9%
The amount of cash I have on hand to spend on Lotto games (7.1%)	7.4%	8.5%	6.8%	6.9%	5.2%
A game that has served me well in the past (6.5%)	7.6%	6.6%	6.7%	4.9%	6.9%
The game is easy to play (5.8%)	4.7%	10.7%	7.4%	3.4%	1.1%
8 (out of 23) most important purchase decision factors account for 73.6% of choice share.	75.1%	86.7%	57.0%	70.7%	70.1%

LEGEND

■ = More important than Avg

■ = Less important than Avg

Other Noteworthy Purchase Decision Factors for Specific Segments

SEGMENT 1

- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (7.8%)

SEGMENT 2

- There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: 'get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games') (0.4%)
- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (0.3%)

SEGMENT 4

- There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: 'get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games') (9.1%)
- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (9.0%)

SEGMENT 5

- There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: 'get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games') (8.4%)
- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (8.4%)
- There is a limited statewide promotion of an entry into a drawing with a qualifying purchase (example: 'purchase a \$1 Nebraska Pick 5 ticket and receive an entry for a chance to win Huskers football season tickets') (6.0%)

LEGEND

X = Top 8 Item

X = Less important than Avg

Other Noteworthy Purchase Decision Factors for Specific Segments

SEGMENT 3

- A game I have played before (5.7%)
- There is a limited statewide promotion of an entry into a drawing with a qualifying purchase (example: 'purchase a \$1 Nebraska Pick 5 ticket and receive an entry for a chance to win Huskers football season tickets') (4.7%)
- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (4.5%)
- There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: 'get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games') (4.1%)
- Knowing other players have won money playing that game at that store (3.4%)
- A game that I play as part of a lottery pool with my friends, family or coworkers (3.1%)
- The game is being talked about in the news media (2.3%)
- A suggestion from the clerk (2.2%)
- The game is being talked about by friends, family, coworkers, or others I know (2.1%)

LEGEND

- ✖ = Top 8 Item
- ✖ = Add'l items to reach 73.6% share
- ✖ = Noteworthy

7 Most Important (Overall) Lotto Game Attributes

LOTTO GAME ATTRIBUTES	SEGMENT 1	SEGMENT 2	SEGMENT 3	SEGMENT 4	SEGMENT 5
The game offers the chance to win a jackpot that is at least \$20 million and can grow to over \$500 million (16.1%)	7.7%	19.1%	8.5%	24.4%	18.0%
The game is only played in Nebraska (12.1%)	32.6%	4.4%	8.4%	0.3%	16.8%
You can choose whether you would want your jackpot prize in annual payments or one lump sum payment (12.0%)	5.2%	14.8%	7.7%	16.5%	14.6%
A game that costs \$1 per play (11.2%)	16.4%	14.8%	10.1%	10.7%	0.5%
A game that promotes the chance to win a fixed prize amount 'For Life' (8.2%)	6.1%	7.1%	5.9%	9.2%	13.2%
The jackpot prize is paid all at once (7.0%)	4.7%	9.0%	5.6%	7.2%	8.0%
The game offers the chance to win a jackpot that starts at \$50 thousand and can grow to over \$150 thousand (5.2%)	4.0%	4.8%	4.0%	6.3%	6.8%
7 (out of 22) most important Lotto game attributes account for 71.8% of choice share.	76.6%	74.0%	50.1%	74.6%	77.9%

LEGEND

■ = More important than Avg

■ = Less important than Avg

Additional Important Lotto Game Attribute(s) for Specific Segments

SEGMENT 3

- You can win a FREE PLAY for that game by matching a specific number of balls (6.0%)
- The game gives you more flexibility regarding how to play (4.0%)
- A game that costs \$2 per play (4.0%)
- For \$1, you can purchase an add-on feature giving you the chance to multiply prize amounts other than the jackpot (3.8%)
- You select ALL your numbers from SINGLE set of balls (3.7%)
- The Top Prize amount is fixed regardless of the number of winners (3.5%)
- A game with an appealing name (3.4%)

LEGEND

- ✖ = Top 7 Item
- ✖ = Add'l item to reach 71.8% share
- ✖ = Noteworthy

Additional Important Lotto Game Attribute(s) for Specific Segments

SEGMENT 4

- You can win a FREE PLAY for that game by matching a specific number of balls (5.5%)

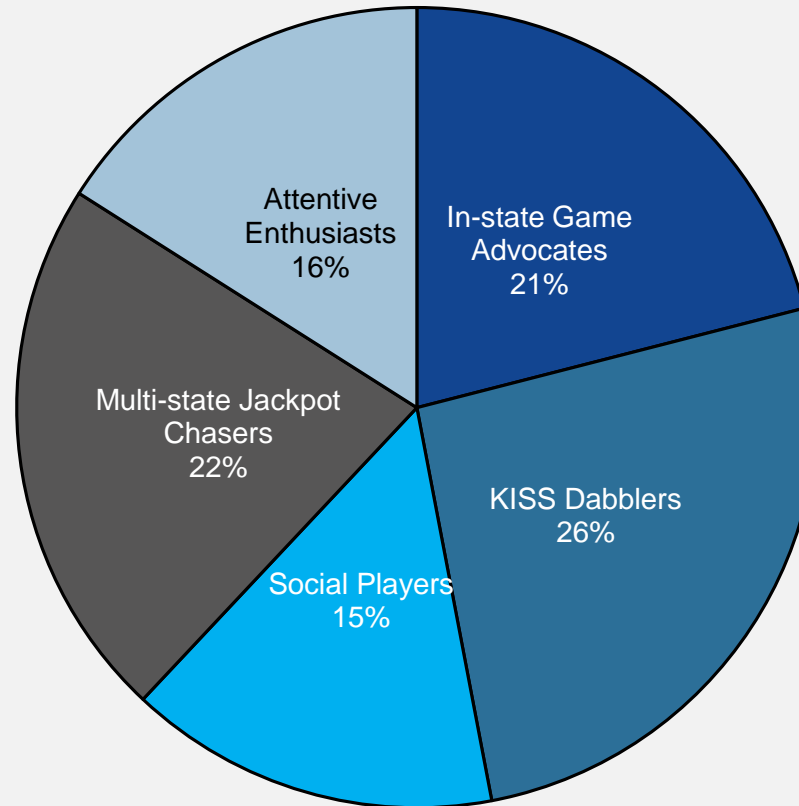
SEGMENT 5

- For \$1, you can purchase an add-on feature giving you the chance to multiply prize amounts other than the jackpot (4.5%)

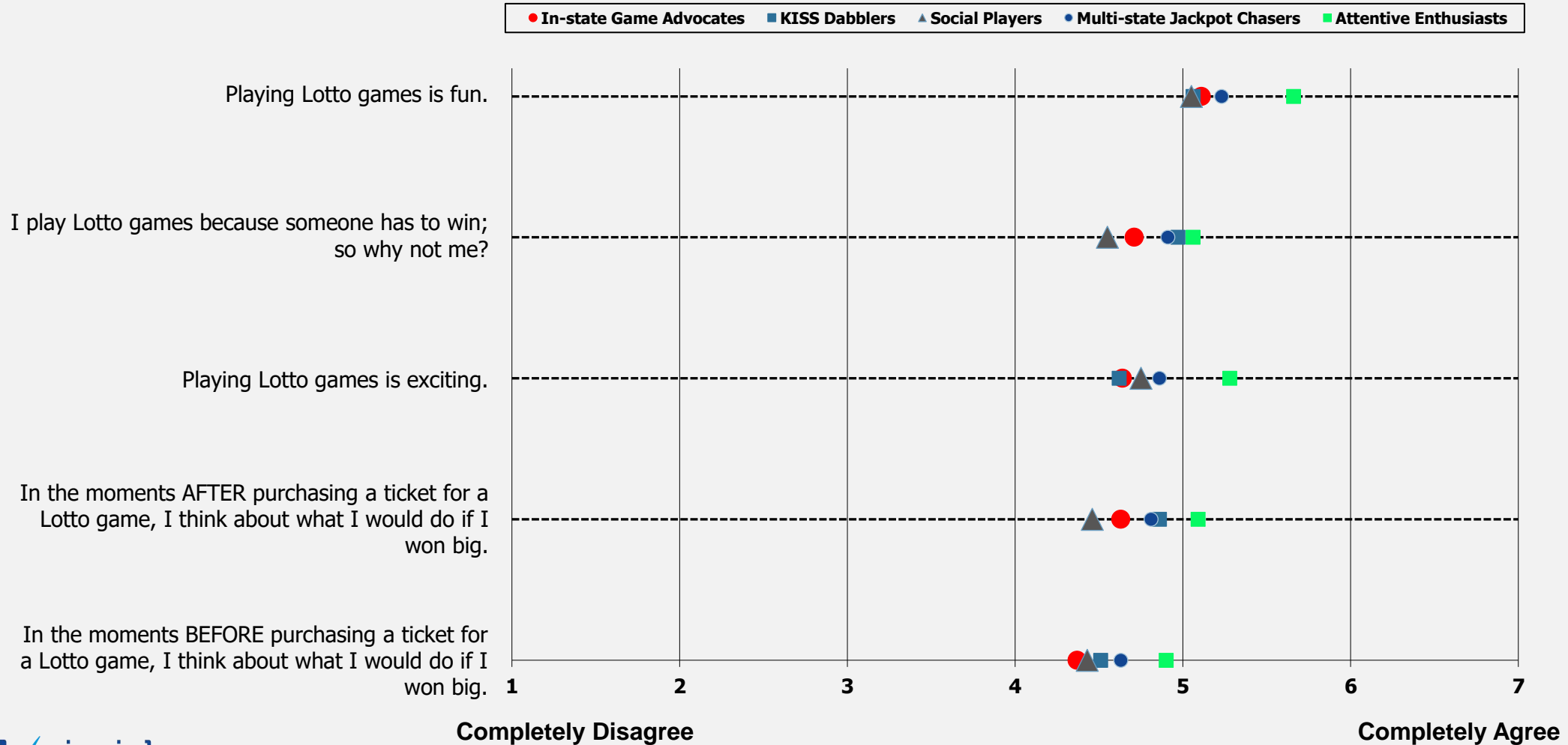
LEGEND

X = Top 7 Item

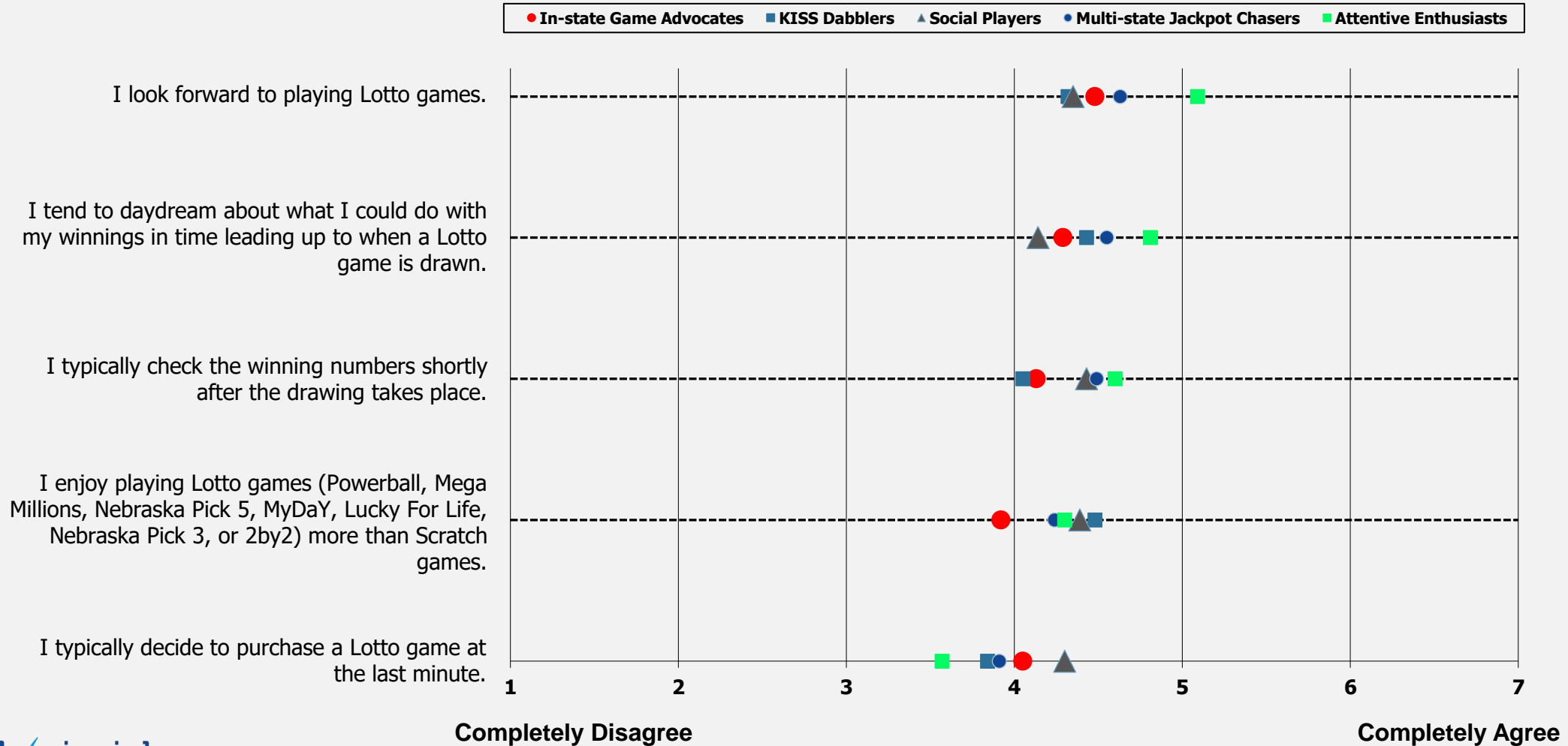
Lotto Game Player Segments



Attitudes Towards Lottery Games



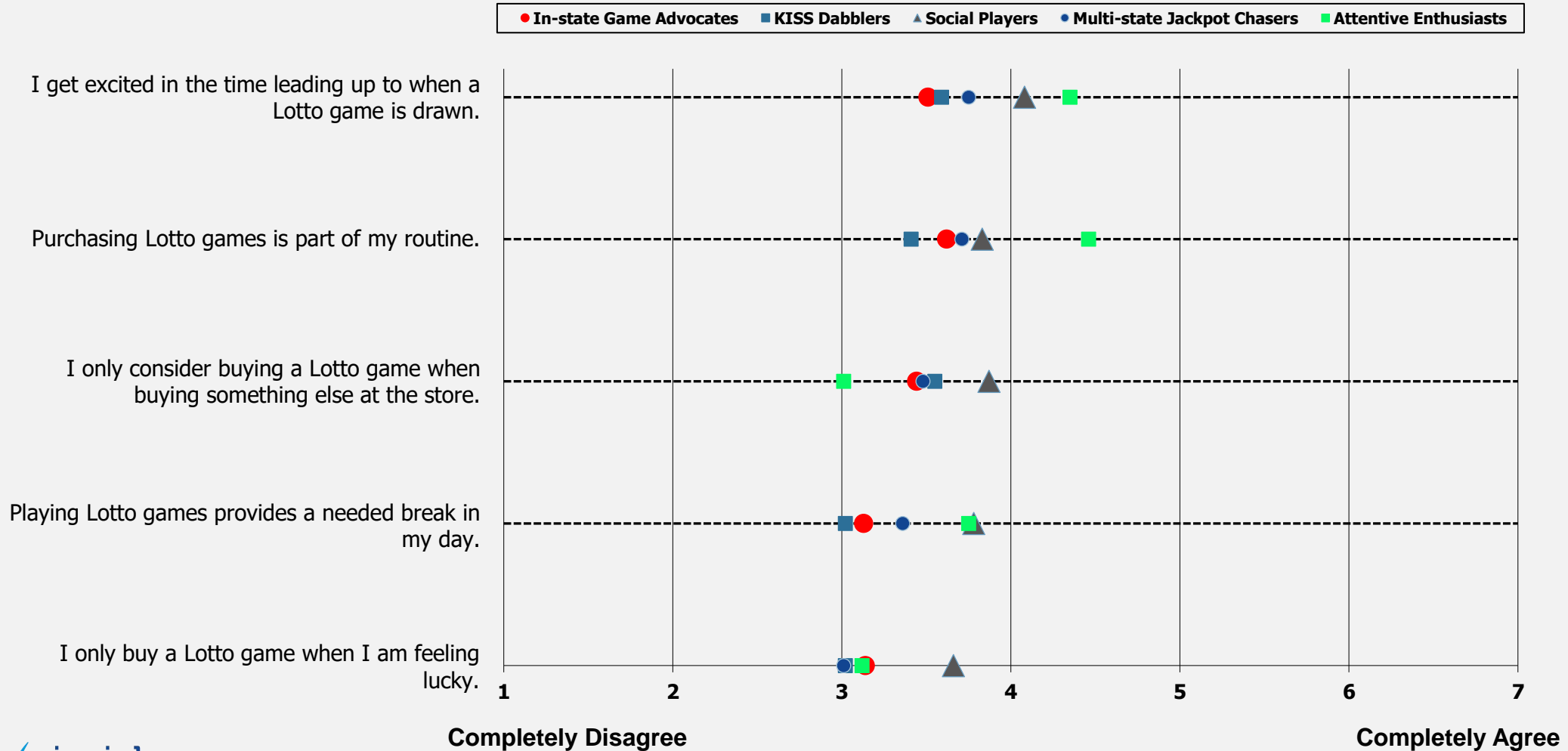
Attitudes Towards Lottery Games



Base: All Respondents (n=1778)

Confidential

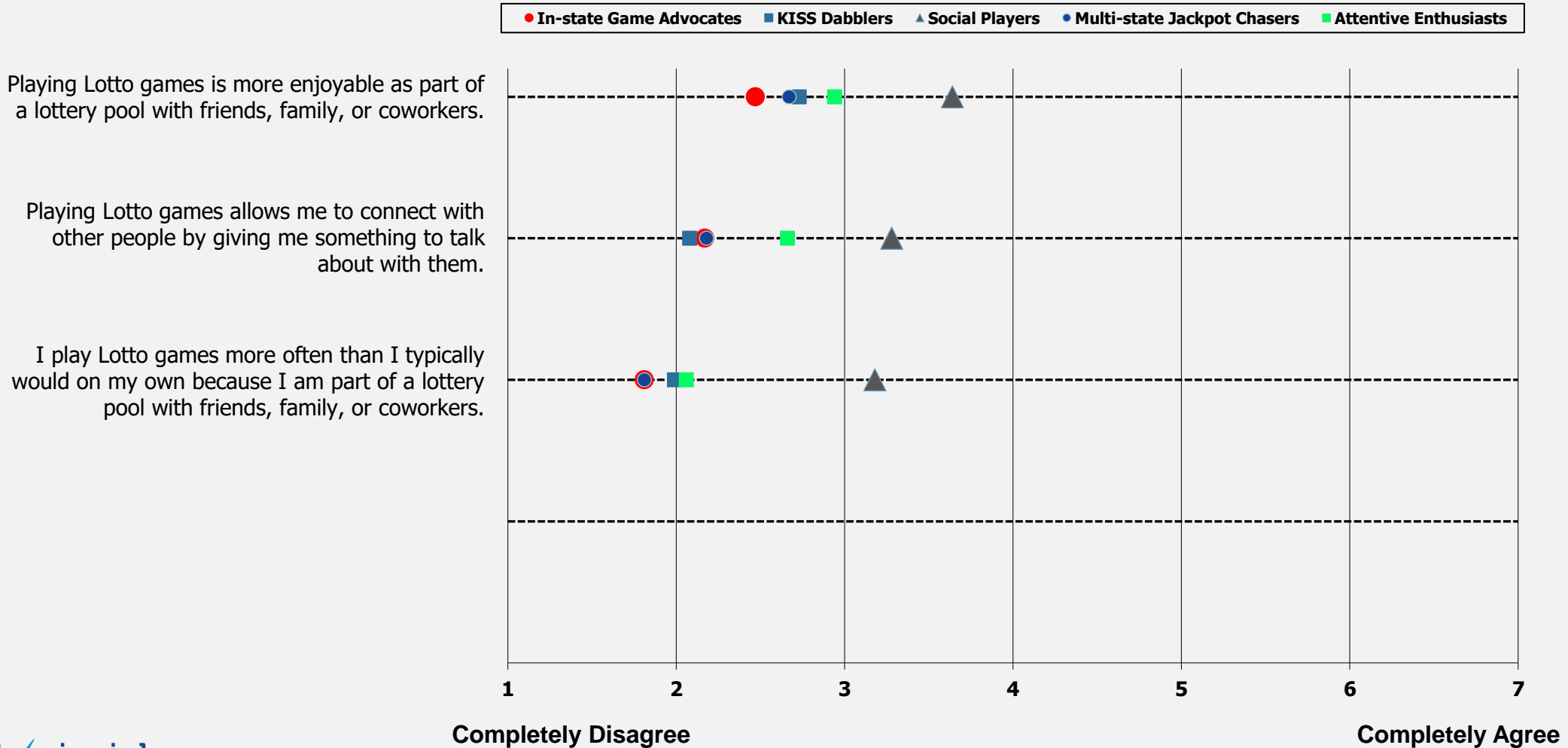
Attitudes Towards Lottery Games



Base: All Respondents (n=1778)

Confidential

Attitudes Towards Lottery Games



Segment Comparisons

PY Gaming Participation

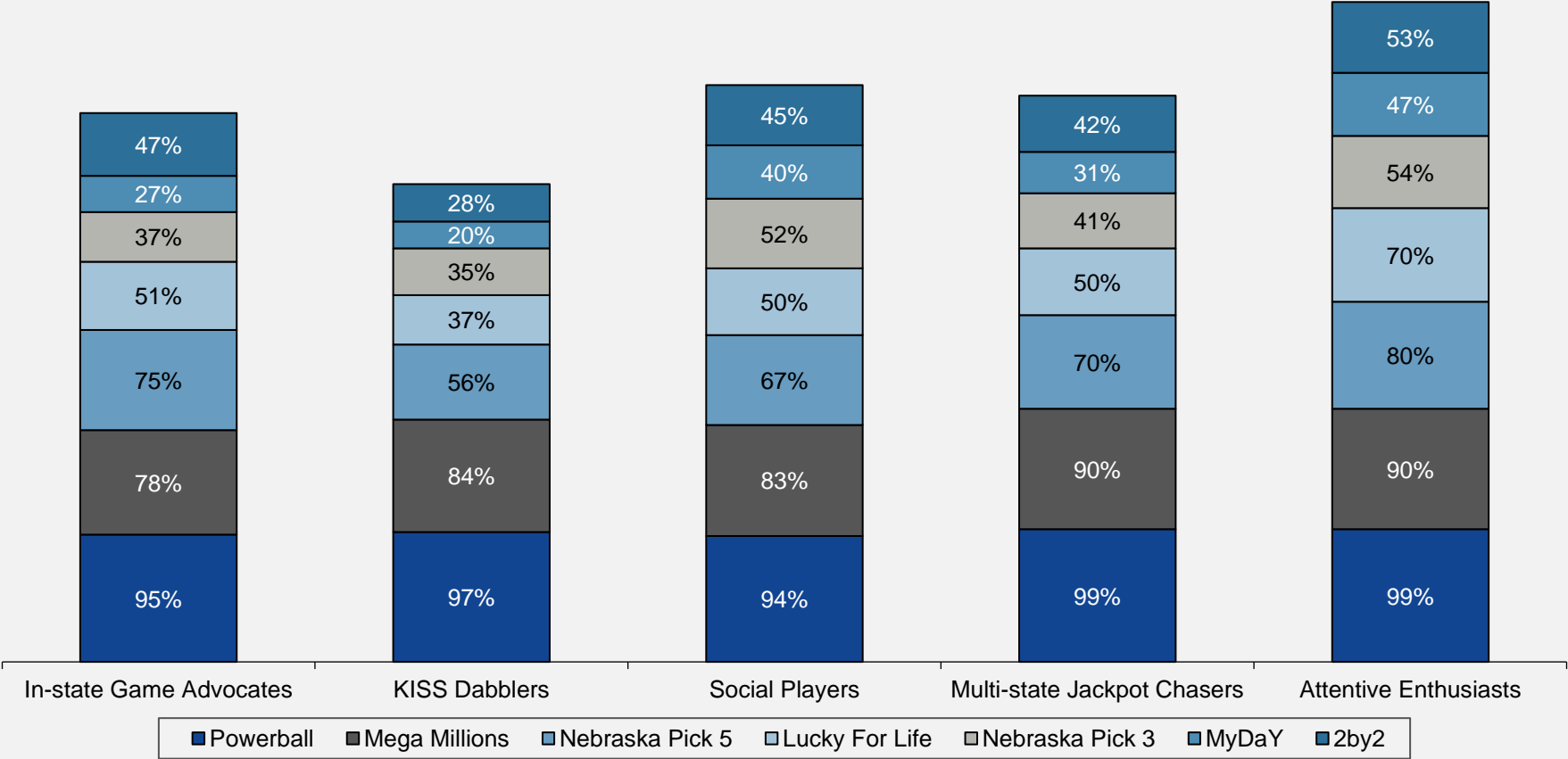
Played in Past Year

	ALL RESPONDENTS	IN-STATE GAME ADVOCATES (21%)	KISS DABLERS (26%)	SOCIAL PLAYERS (15%)	MULTI-STATE JACKPOT CHASERS (22%)	ATTENTIVE ENTHUSIASTS (16%)
Scratch games (Nebraska Lottery)	81%	88%	74%	77%	85%	95%
Casino Games	36%	31%	32%	37%	38%	47%
Keno	35%	36%	32%	38%	30%	43%
Pickle Cards	28%	27%	28%	29%	24%	34%
Sports wagers with friends	15%	11%	17%	19%	17%	11%
Cash devices	14%	8%	11%	24%	11%	22%
Card games for money at home with friends	13%	8%	12%	19%	15%	12%
Sports betting (online or at a sportsbook)	12%	9%	13%	16%	12%	10%
Online poker or gambling sites	7%	2%	6%	17%	5%	9%
Bingo (at a Bingo Hall)	7%	6%	6%	12%	5%	8%

Segment Comparisons

Lottery Participation

Played in Past Year



% Regular Players of each Lotto Game

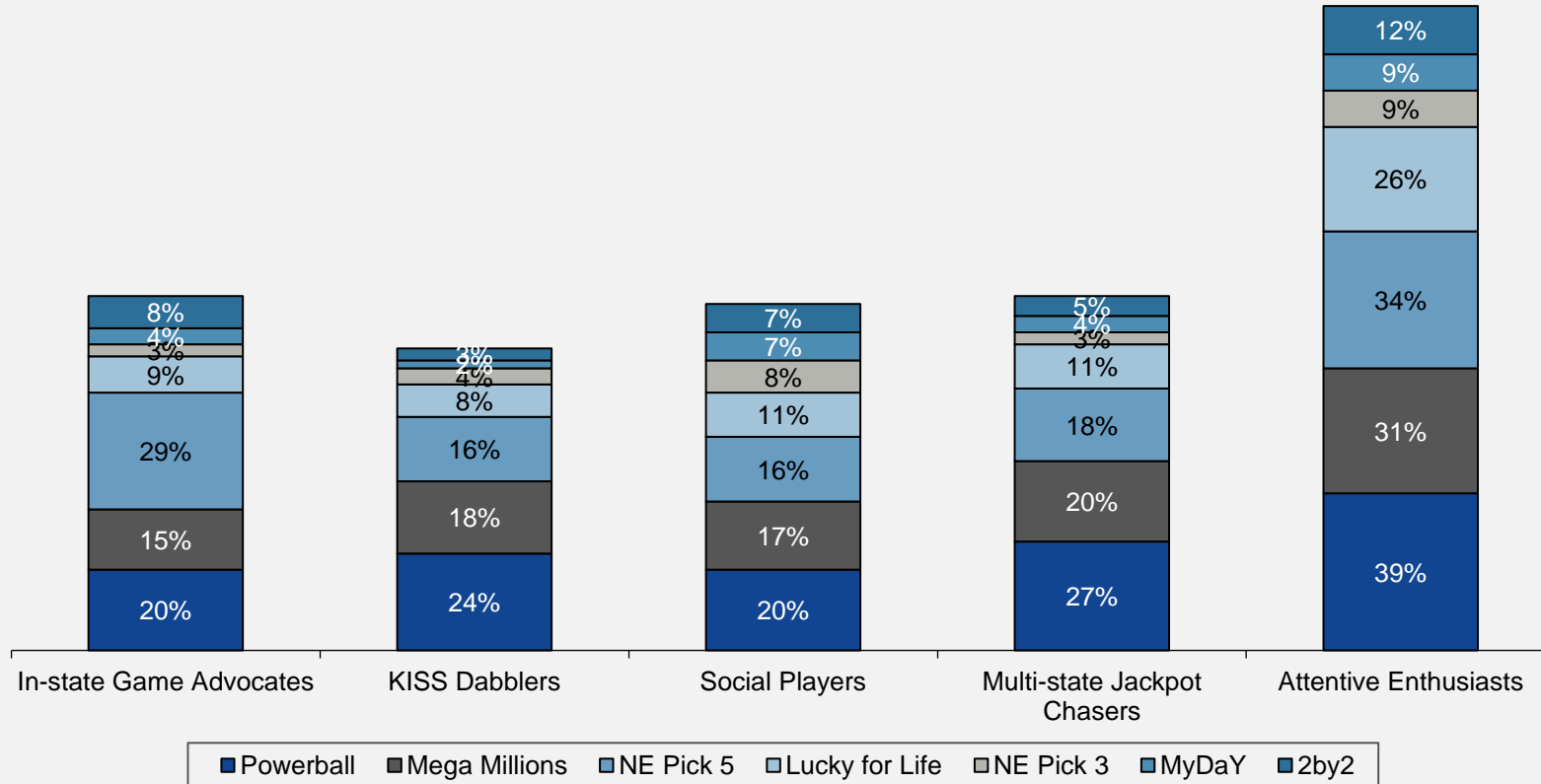
PLAY FREQUENCY DEFINITIONS

Regular - Every week

Occasional - Every couple of weeks or Every month

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

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



% Occasional Players of each Lotto Game

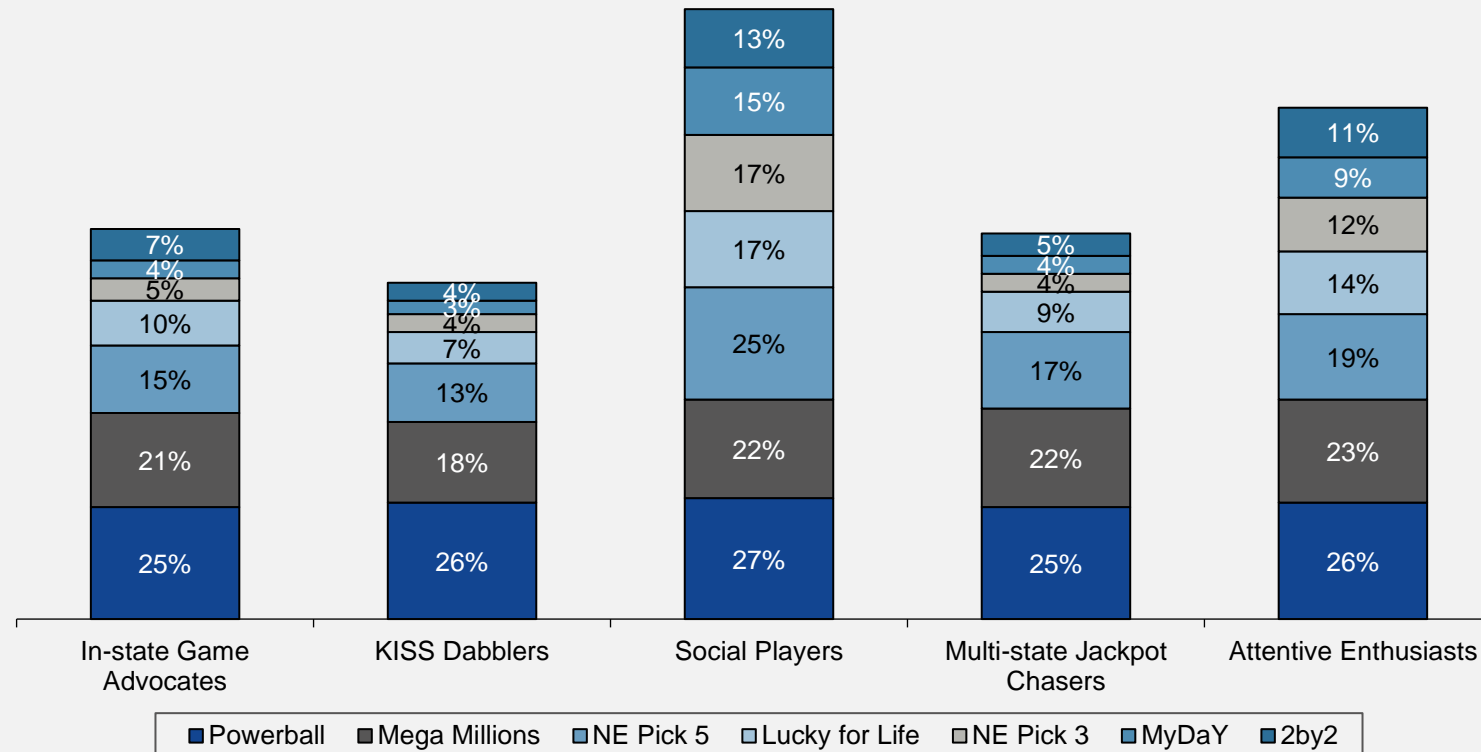
PLAY FREQUENCY DEFINITIONS

Regular - Every week

Occasional - Every couple of weeks or Every month

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

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



% Infrequent Players of each Lotto Game

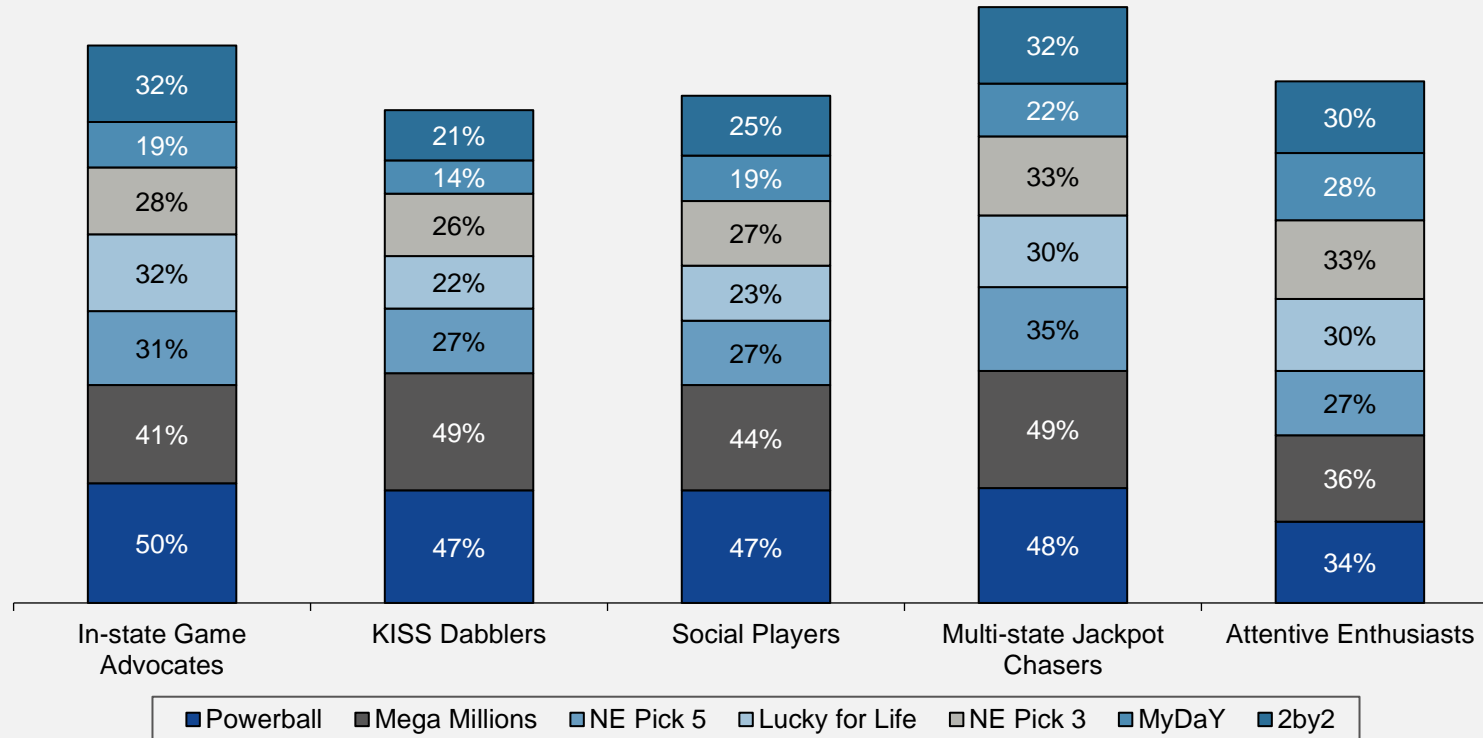
PLAY FREQUENCY DEFINITIONS

Regular - Every week

Occasional - Every couple of weeks or Every month

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

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



% Non-Player Players of each Lotto Game

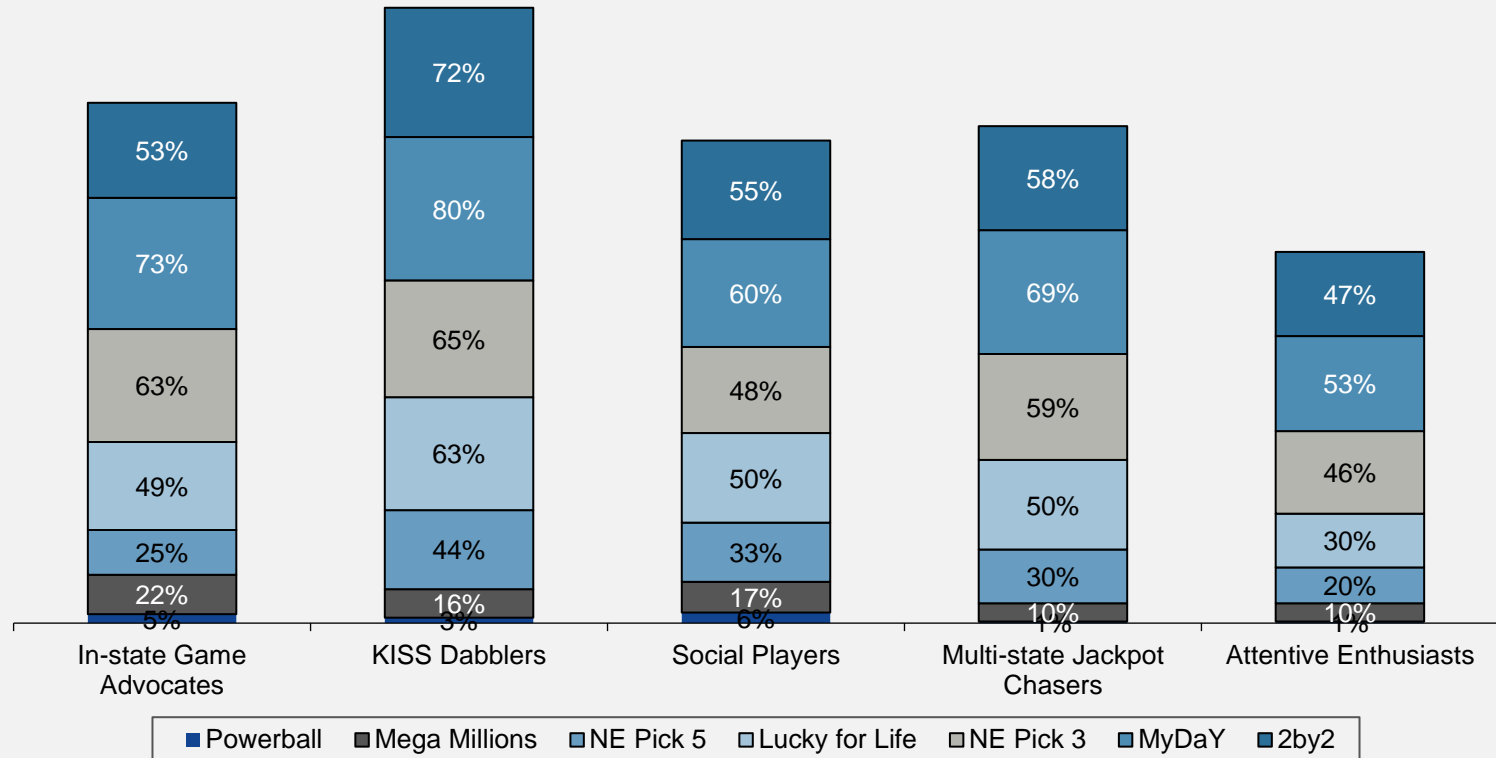
PLAY FREQUENCY DEFINITIONS

Regular - Every week

Occasional - Every couple of weeks or Every month

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

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



Segment Comparisons

Annualized Spending Analysis

Overall Lottery Game Spending

SPENDING DEFINITIONS

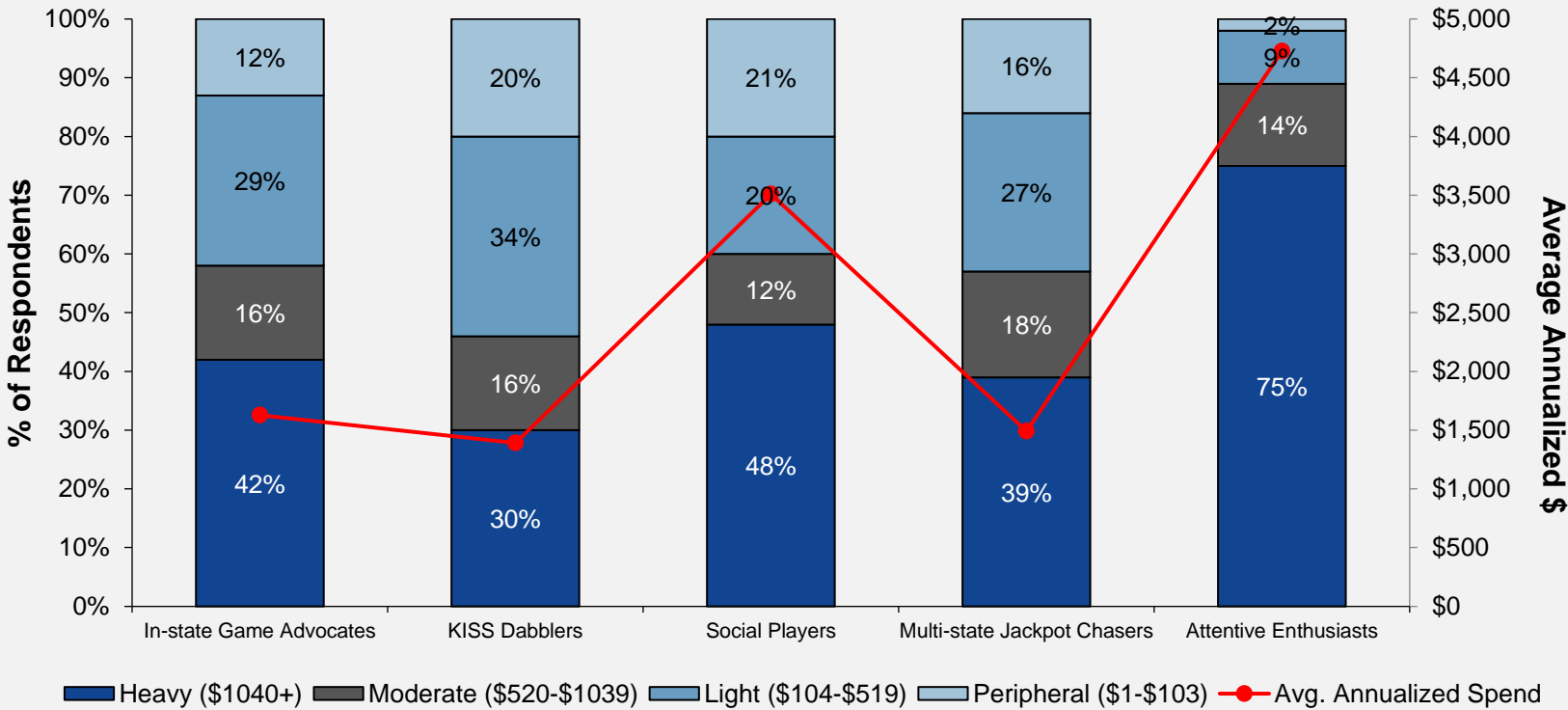
Non-spender = \$0 in a typical year

Peripheral = \$1-\$103 in a typical year (under \$2 a week)

Light = \$104-\$519 in a typical year (\$2-\$9 a week)

Moderate = \$520-\$1039 in a typical year (\$10-\$19 a week)

Heavy = \$1040+ in a typical a year (\$20+ a week)



	In-state Game Advocates	KISS Dabblers	Social Players	Multi-state Jackpot Chasers	Attentive Enthusiasts
Avg. Annualized Spend	\$1,627.42	\$1,391.40	\$3,509.61	\$1,491.20	\$4,727.44

Base: All Respondents (n=1778)

Confidential

Lotto Game Spending

SPENDING DEFINITIONS

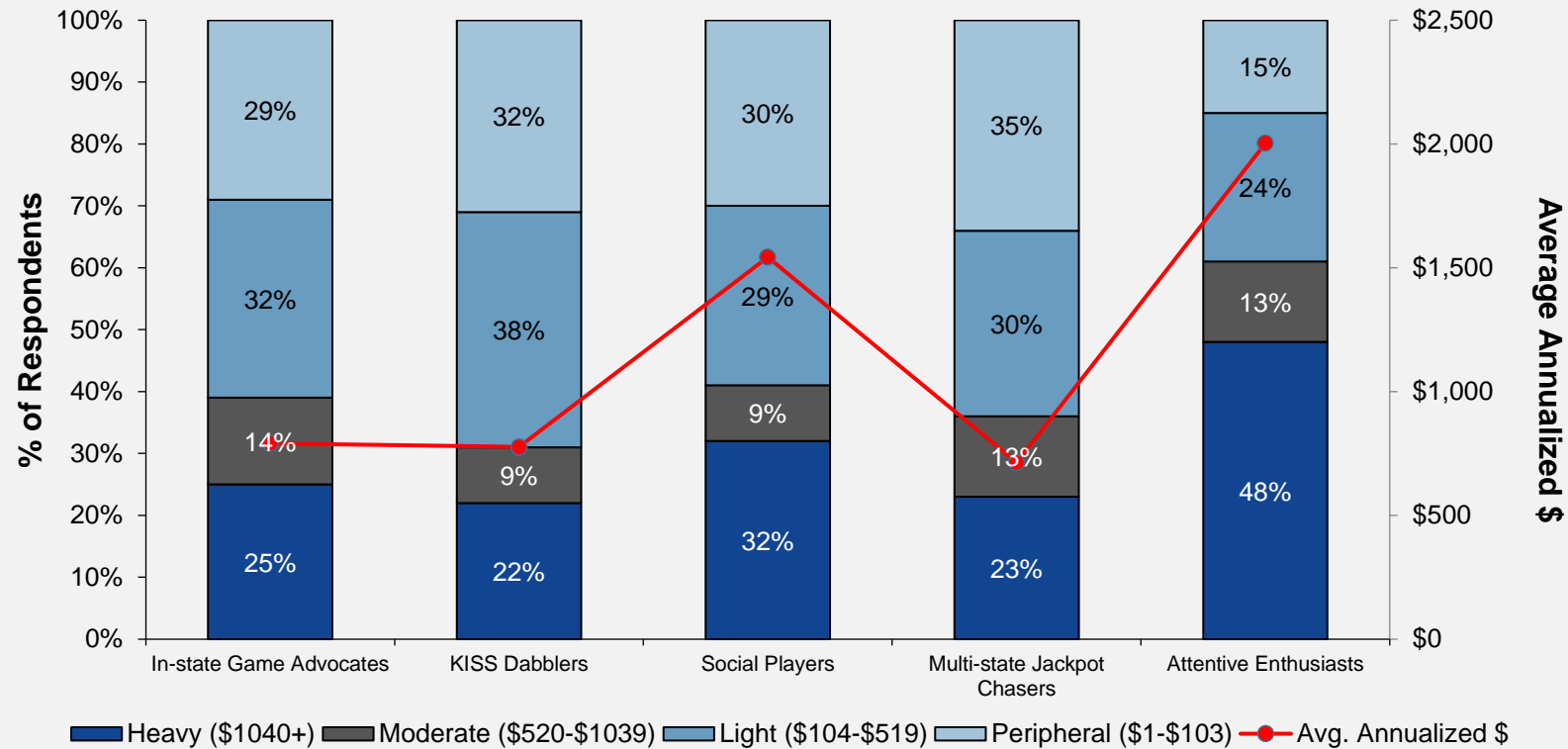
Non-spender = \$0 in a typical year

Peripheral = \$1-\$103 in a typical year (under \$2 a week)

Light = \$104-\$519 in a typical year (\$2-\$9 a week)

Moderate = \$520-\$1039 in a typical year (\$10-\$19 a week)

Heavy = \$1040+ in a typical year (\$20+ a week)



	In-state Game Advocates	KISS Dabblers	Social Players	Multi-state Jackpot Chasers	Attentive Enthusiasts
Avg. Annualized Spend	\$791.08	\$776.07	\$1,542.76	\$713.79	\$2,003.15

Scratch Game Spending

SPENDING DEFINITIONS

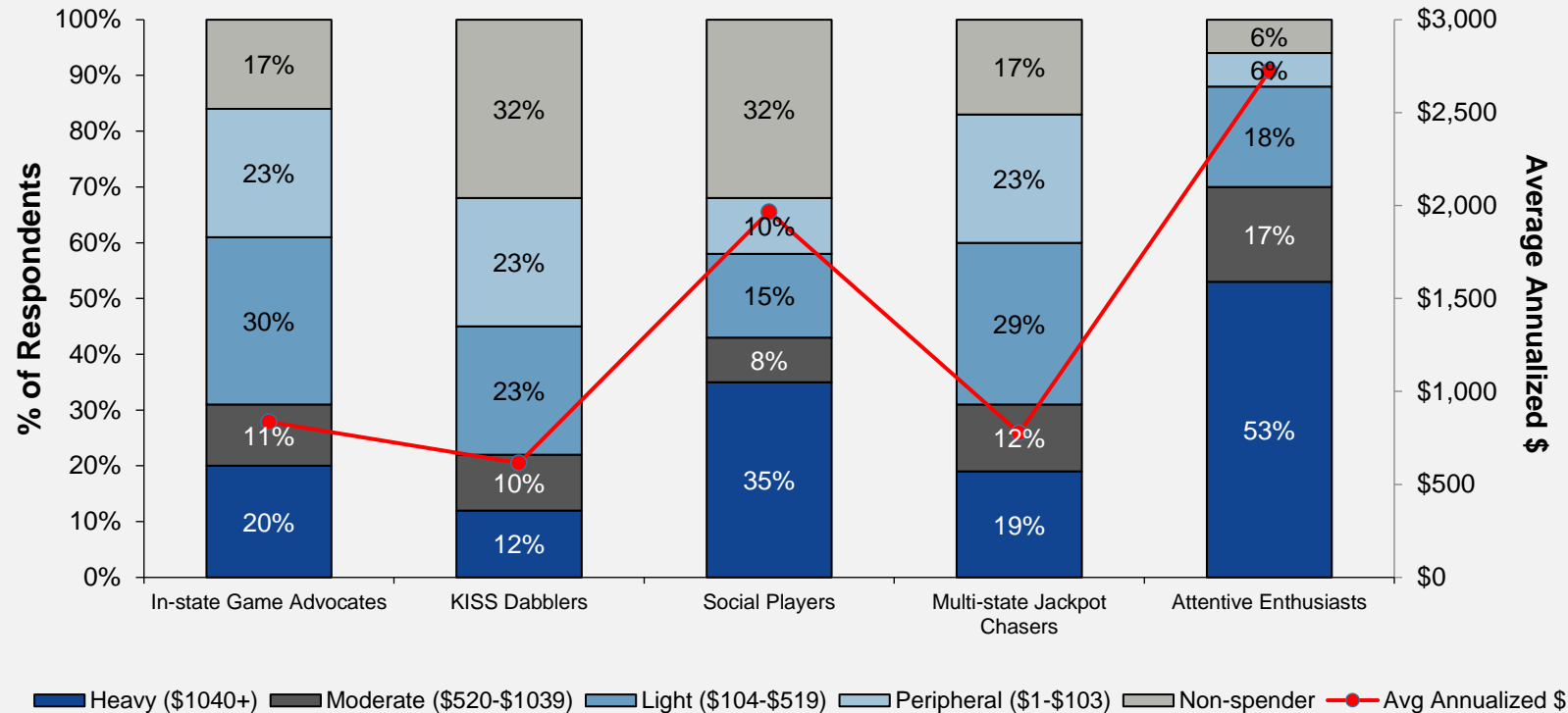
Non-spender = \$0 in a typical year

Peripheral = \$1-\$103 in a typical year (under \$2 a week)

Light = \$104-\$519 in a typical year (\$2-\$9 a week)

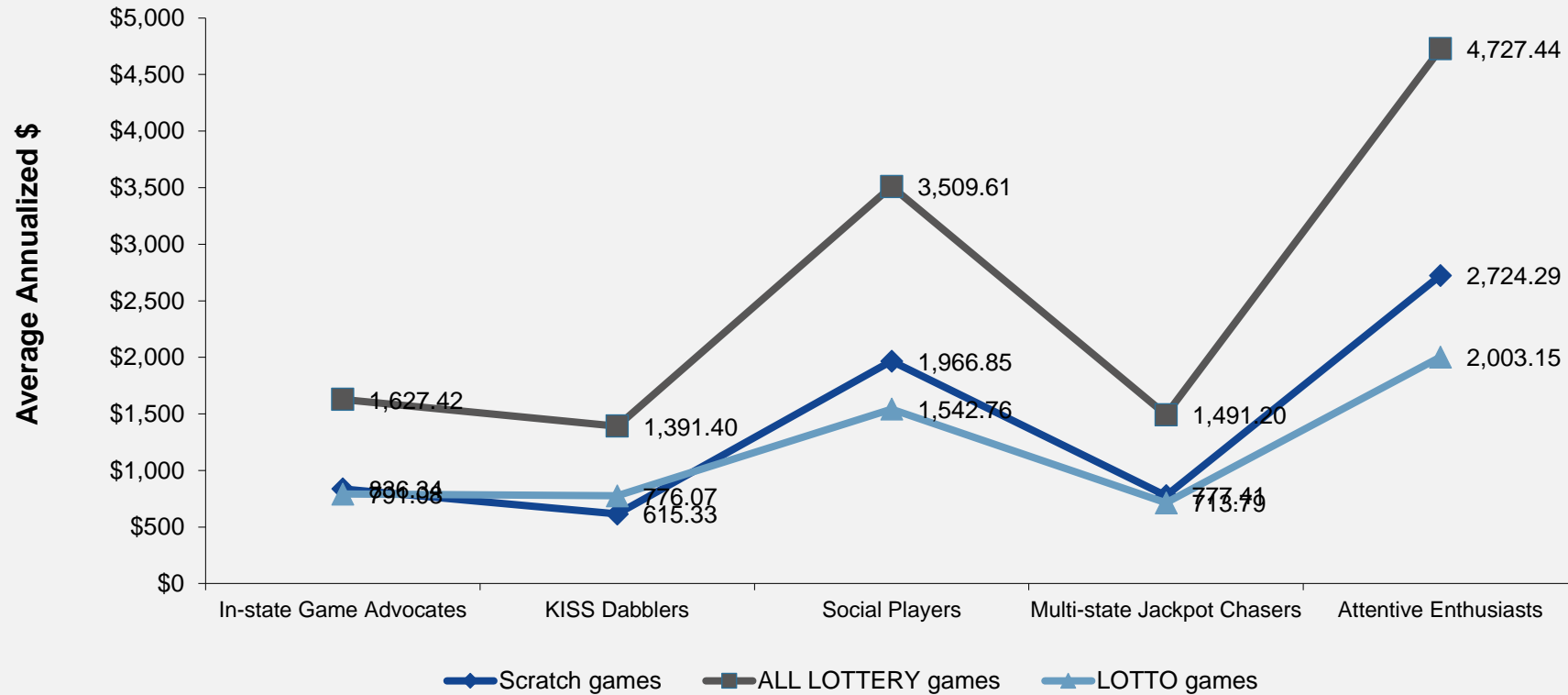
Moderate = \$520-\$1039 in a typical year (\$10-\$19 a week)

Heavy = \$1040+ in a typical year (\$20+ a week)

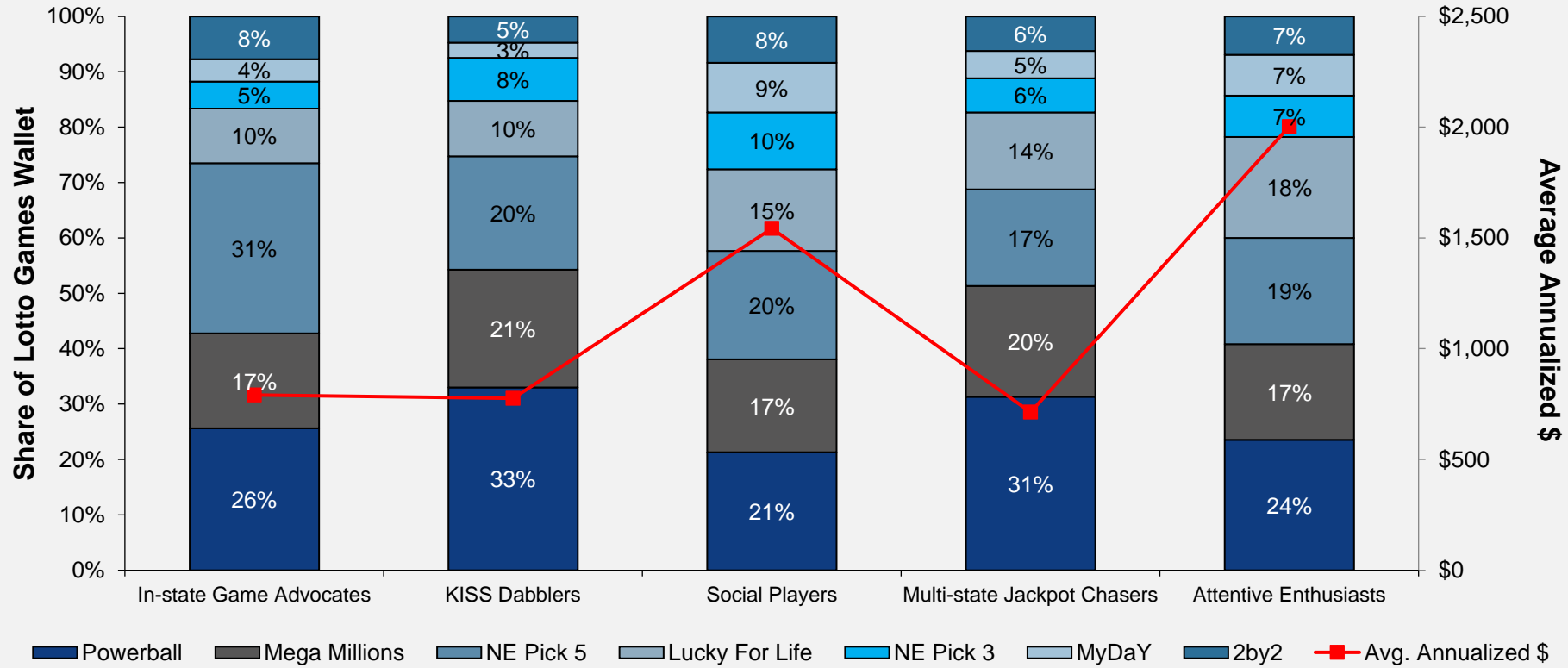


	In-state Game Advocates	KISS Dabblers	Social Players	Multi-state Jackpot Chasers	Attentive Enthusiasts
Avg. Annualized Spend	\$836.34	\$615.33	\$1,966.85	\$777.41	\$2,724.29

Lottery Game Spending Analysis



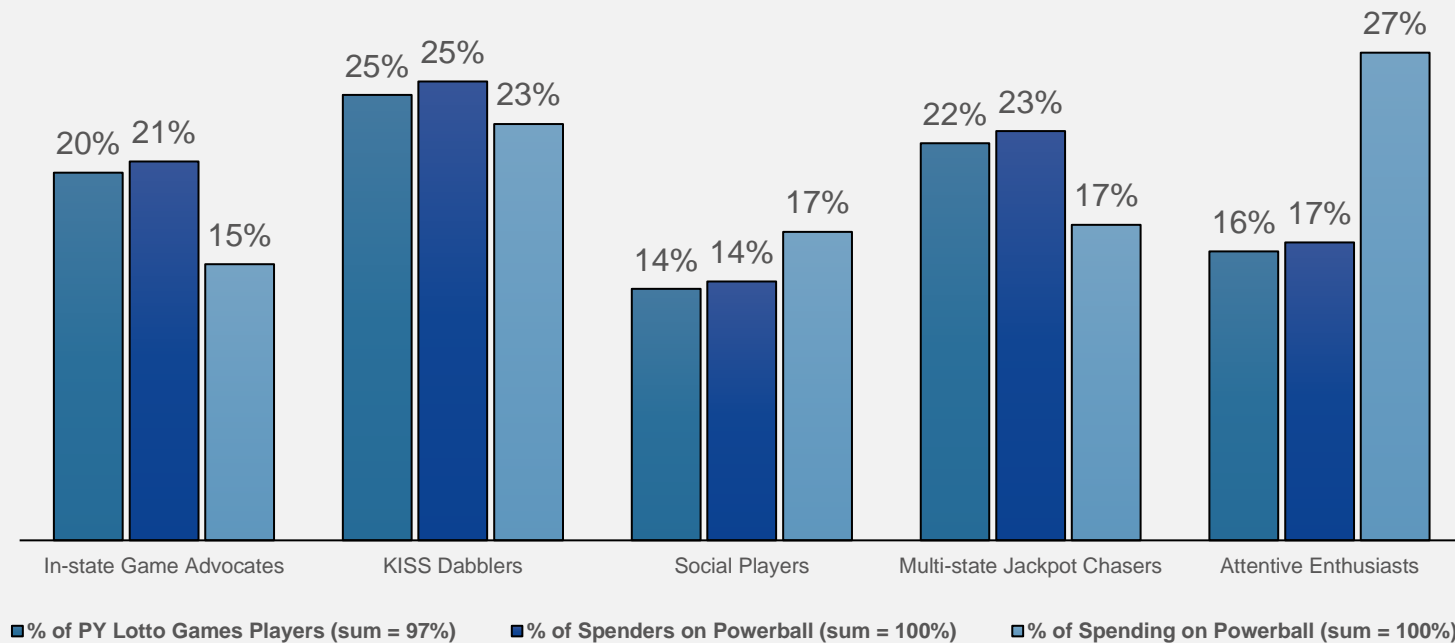
Share of Lotto Games Wallet



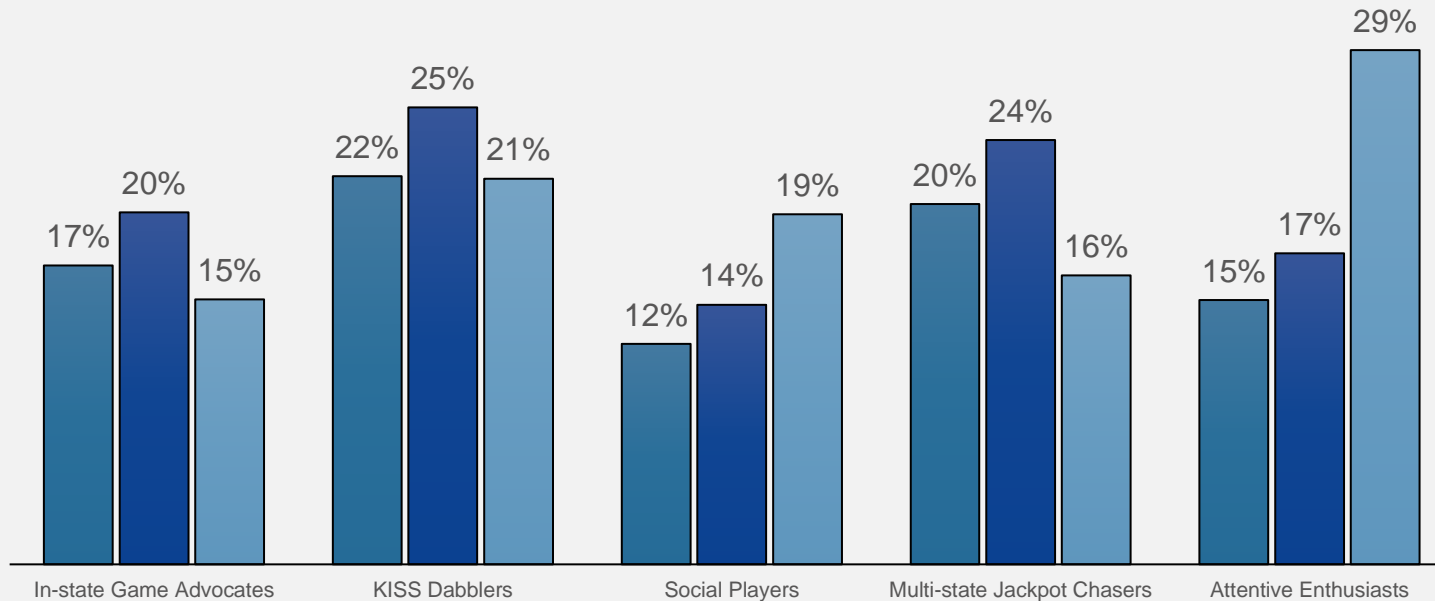
Segment Comparisons

Relative Size and Importance
for each Lotto Game

Relative Sizes and Importance: Powerball



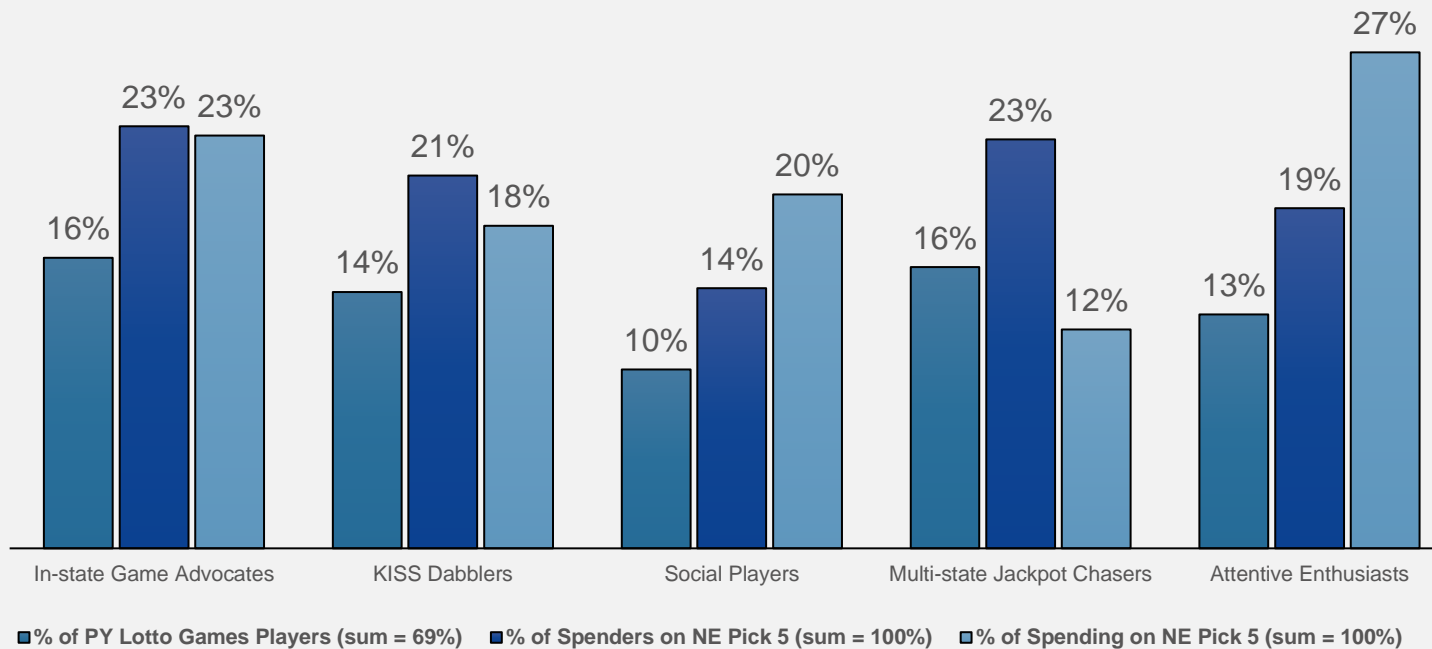
Relative Sizes and Importance: Mega Millions



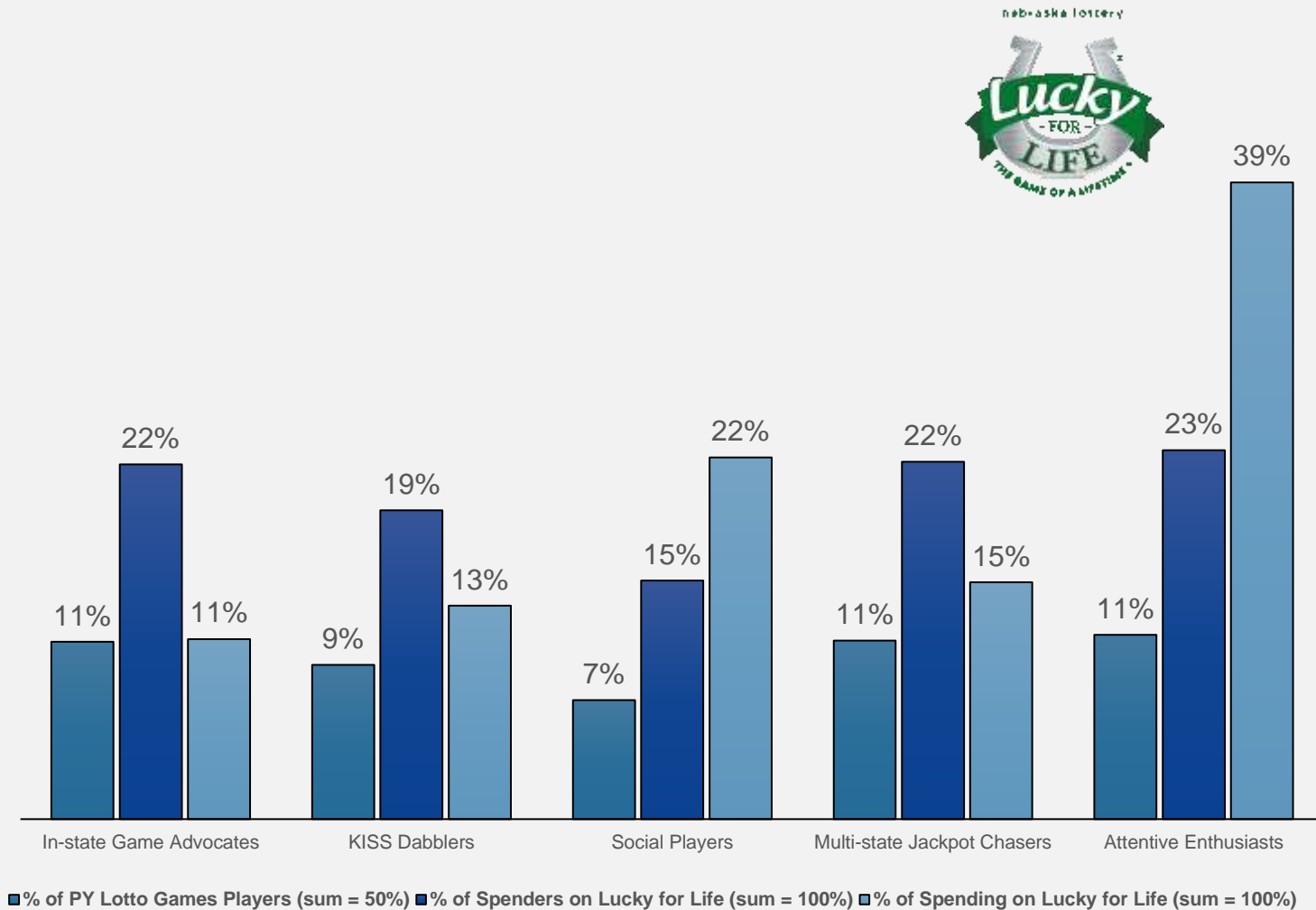
■ % of PY Lotto Games Players (sum = 85%) ■ % of Spenders on Mega Millions (sum = 100%) ■ % of Spending on Mega Millions (sum = 100%)

Confidential

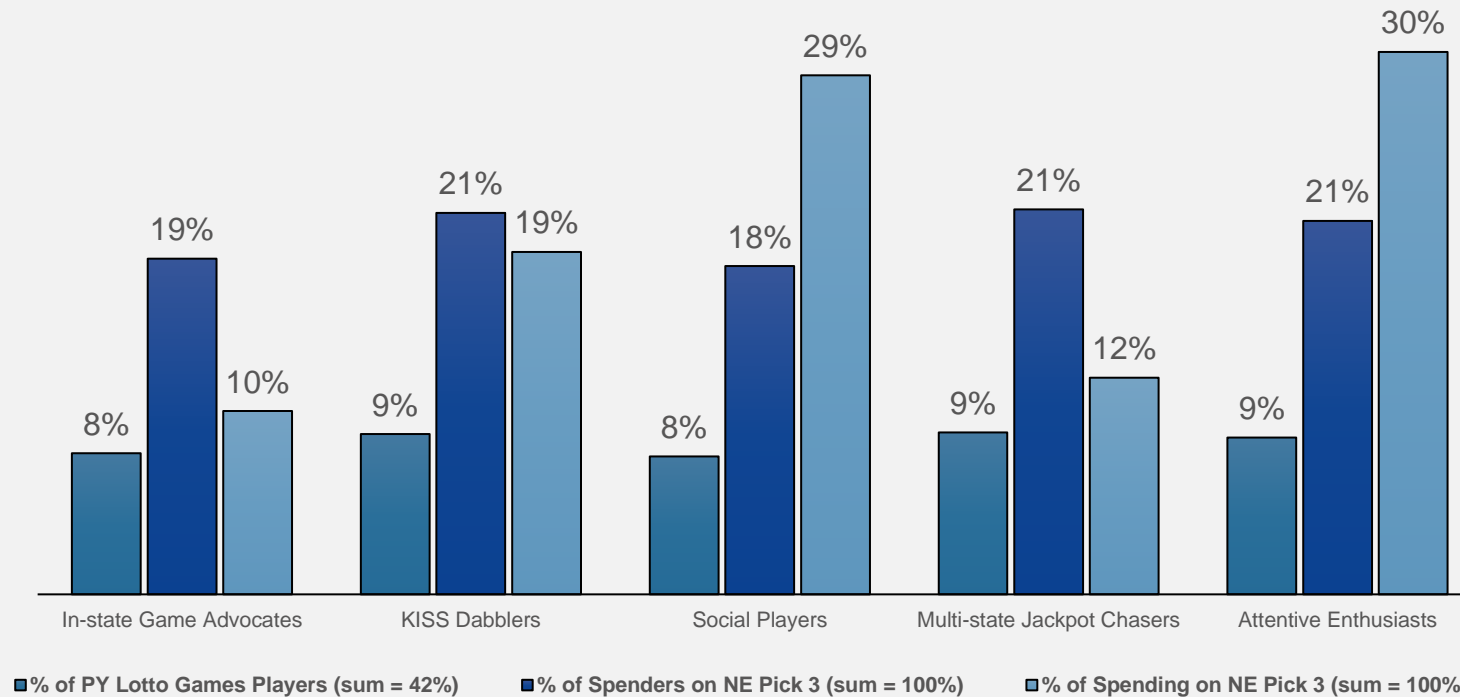
Relative Sizes and Importance: Nebraska Pick 5



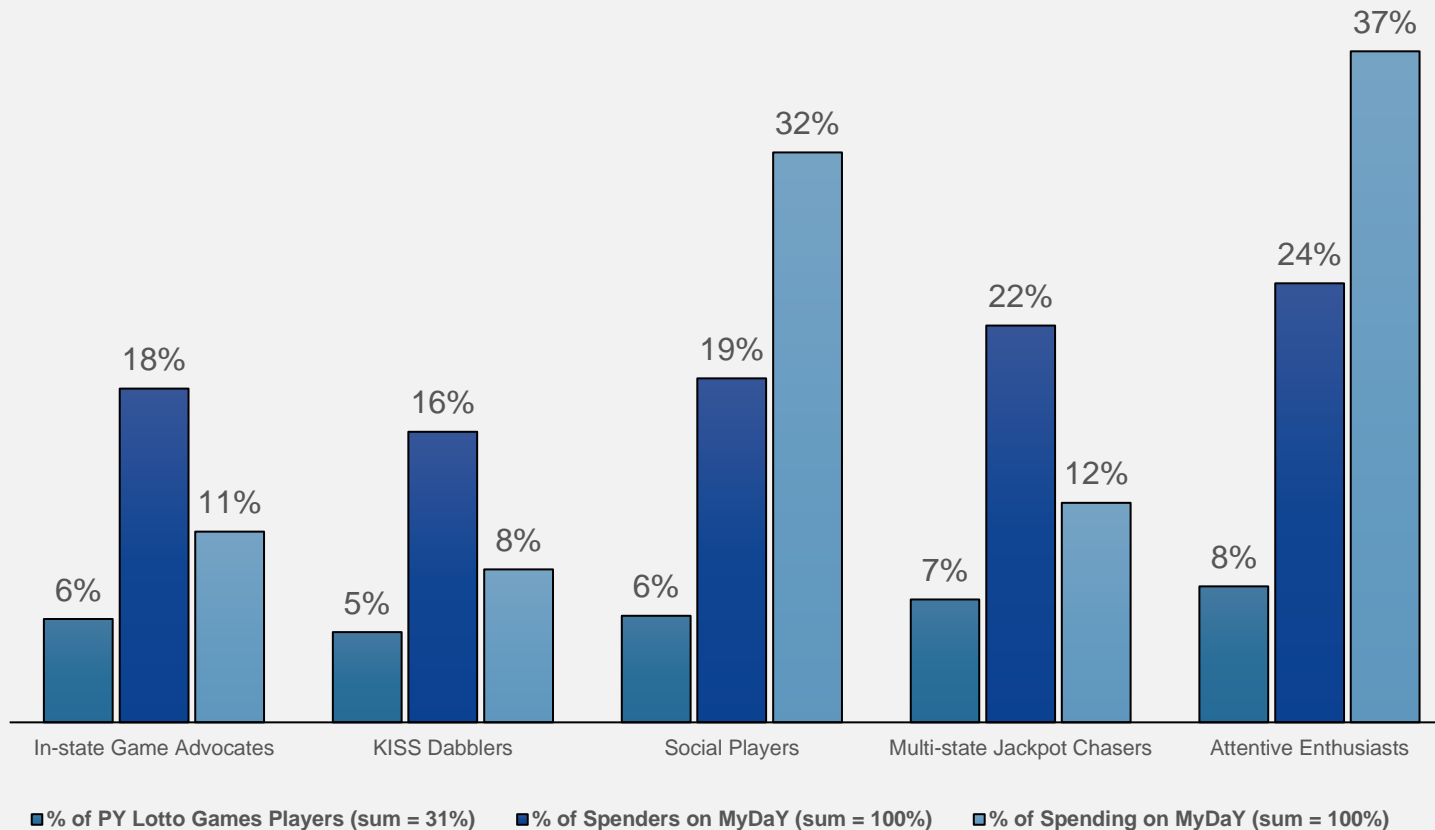
Relative Sizes and Importance: Lucky for Life



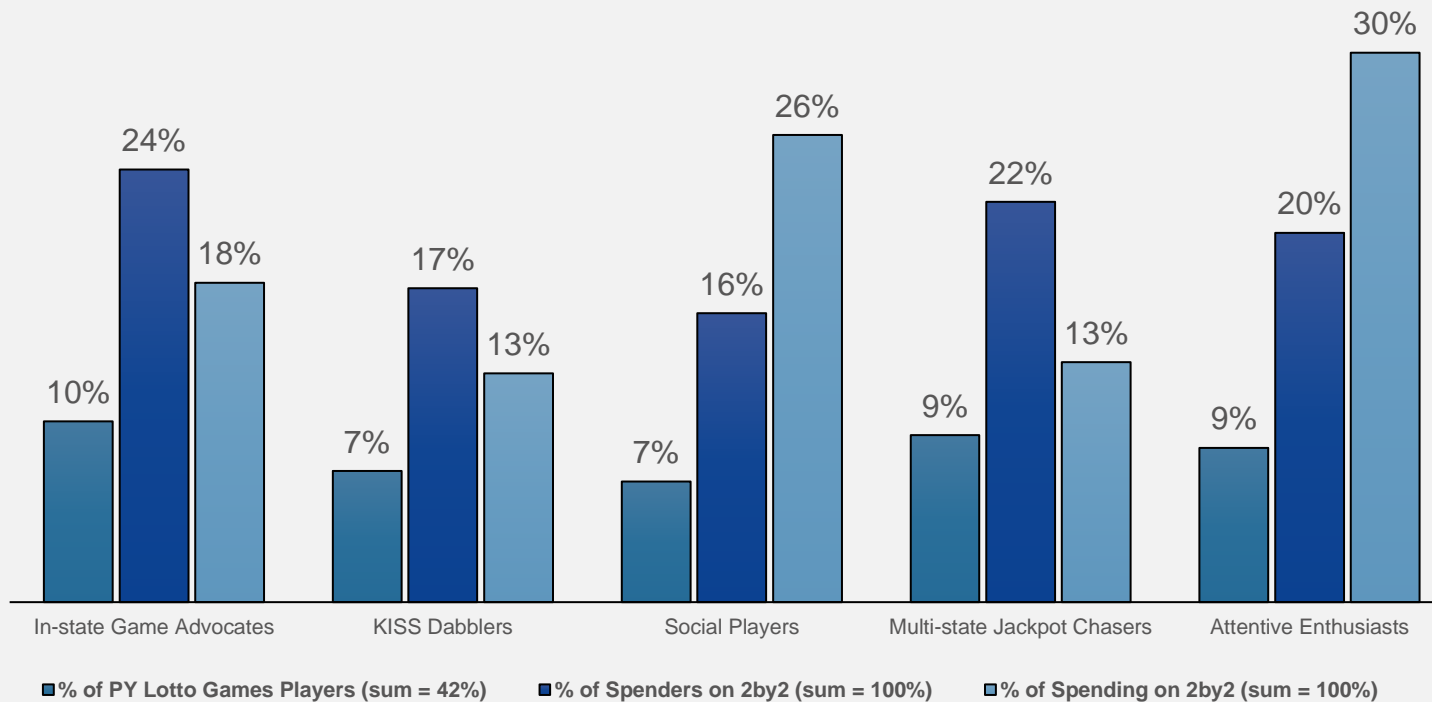
Relative Sizes and Importance: Nebraska Pick 3



Relative Sizes and Importance: MyDaY

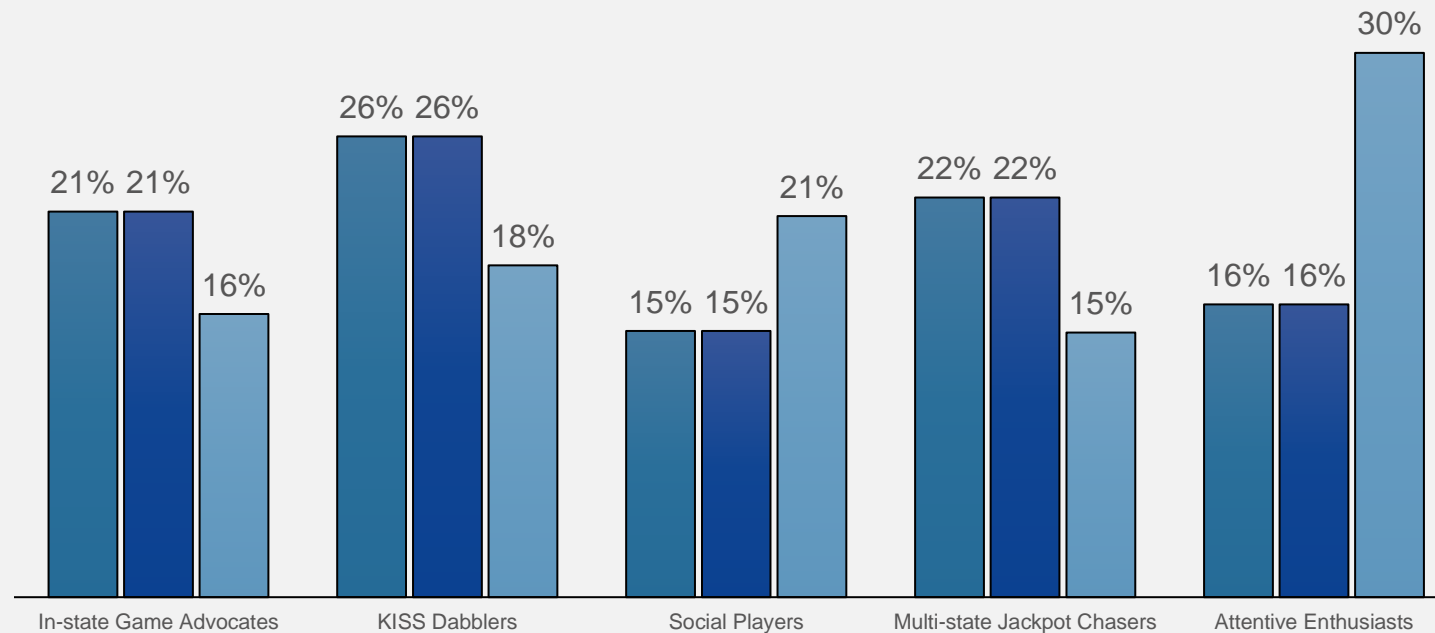


Relative Sizes and Importance: 2by2



Confidential

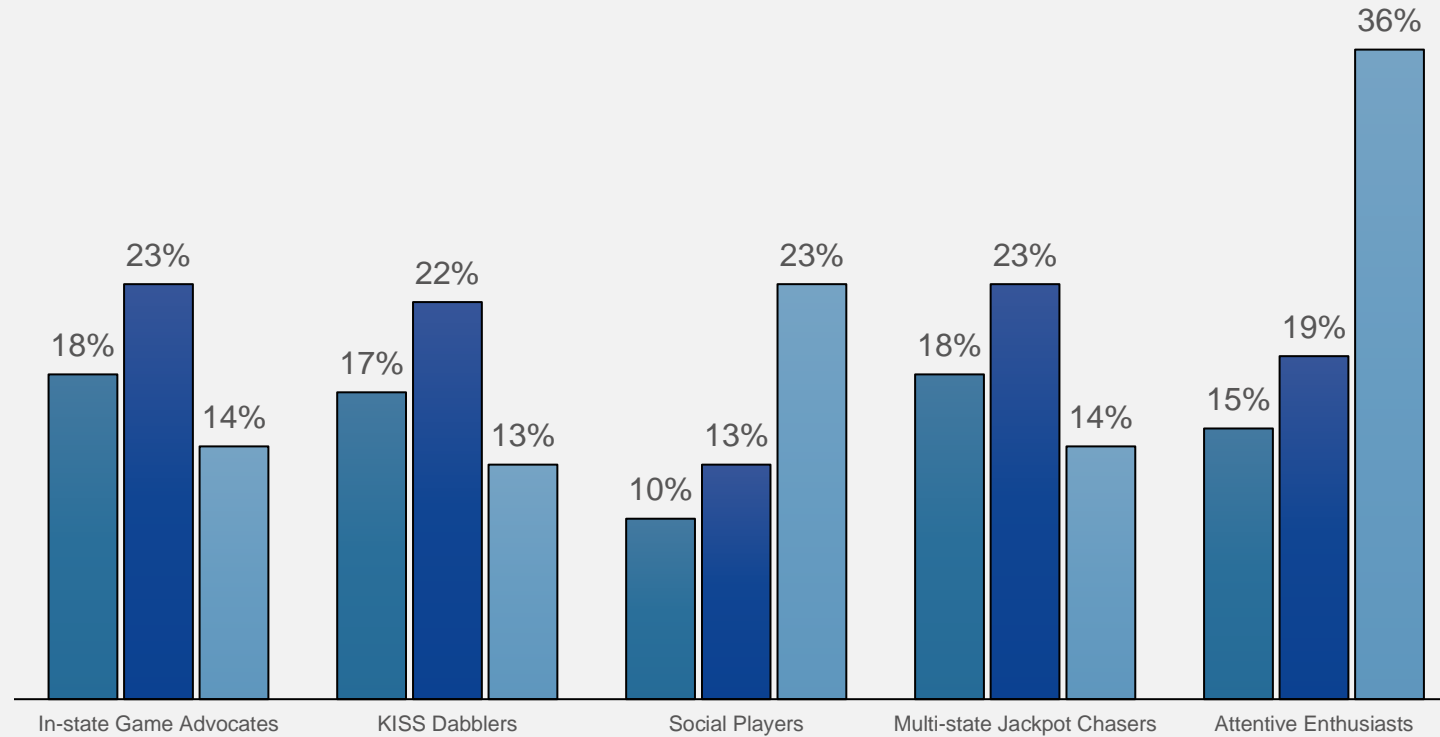
Relative Sizes and Importance: Lotto Games



■ % of PY Lotto Games Players (sum = 100%) ■ % of Spenders on Lotto games (sum = 100%) ■ % of Spending on Lotto games (sum = 100%)

Confidential

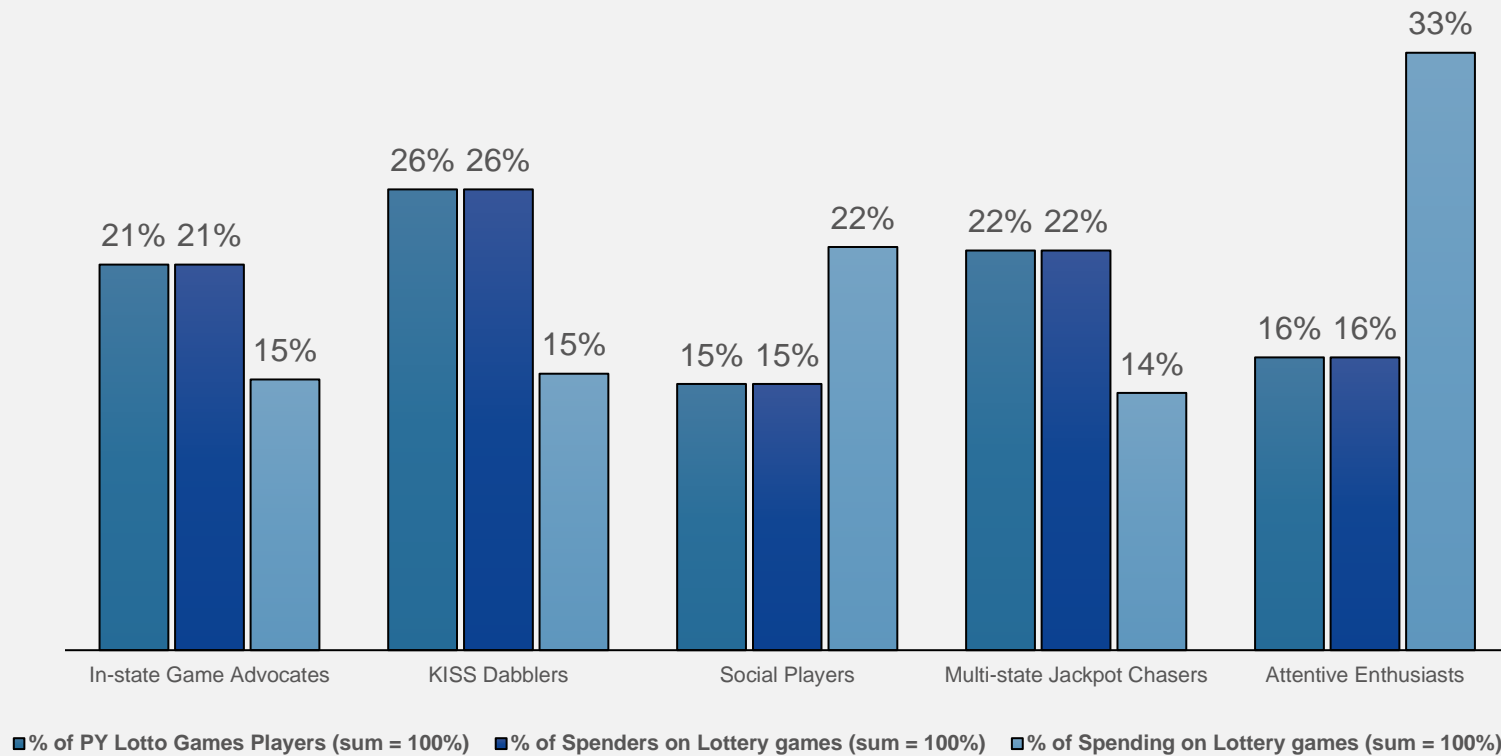
Relative Sizes and Importance: Scratch Games



■ % of PY Lotto Games Players (sum = 79%) ■ % of Spenders on Scratch games (sum = 100%) ■ % of Spending on Scratch games (sum = 100%)

Confidential

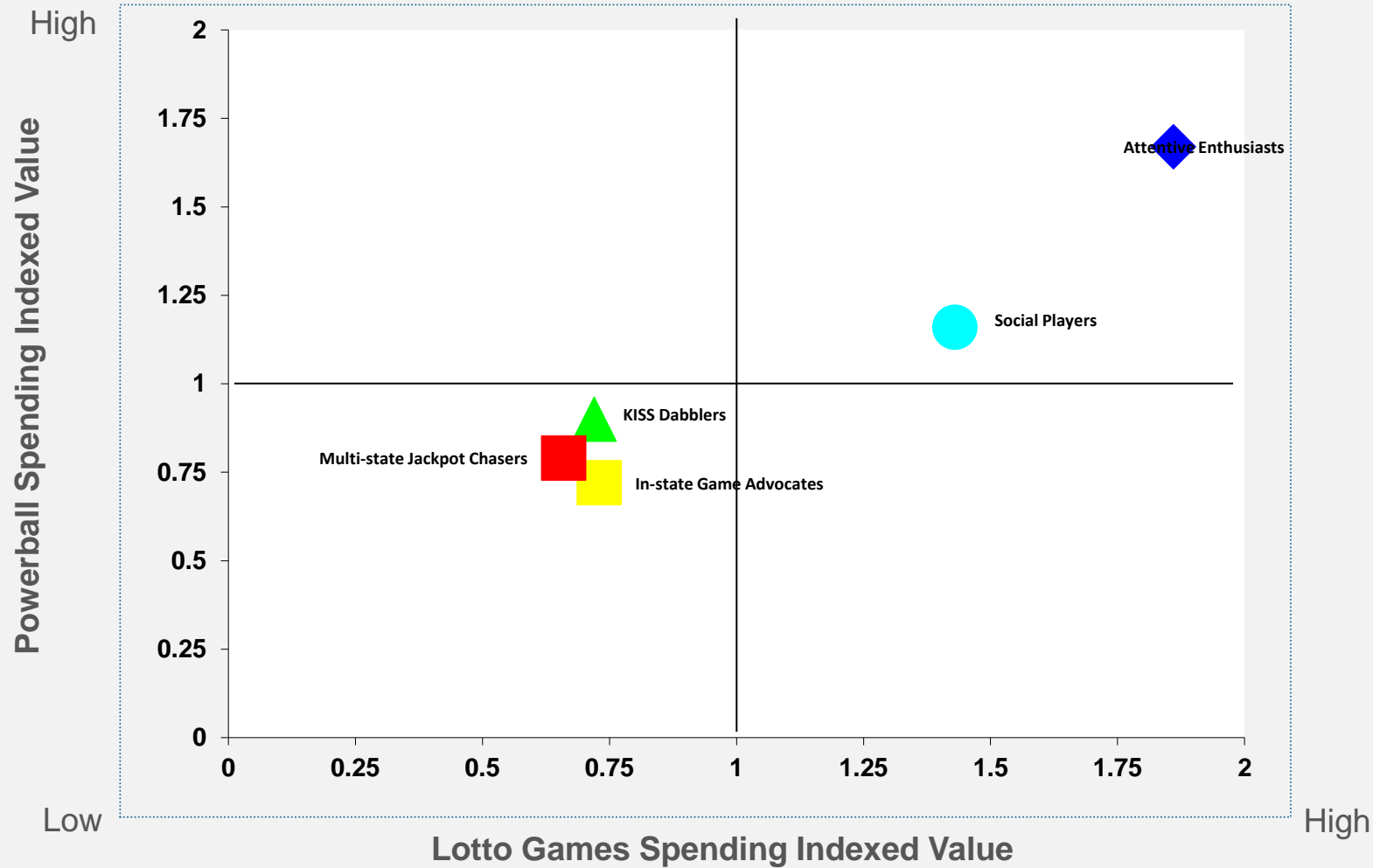
Relative Sizes and Importance: Lottery Games



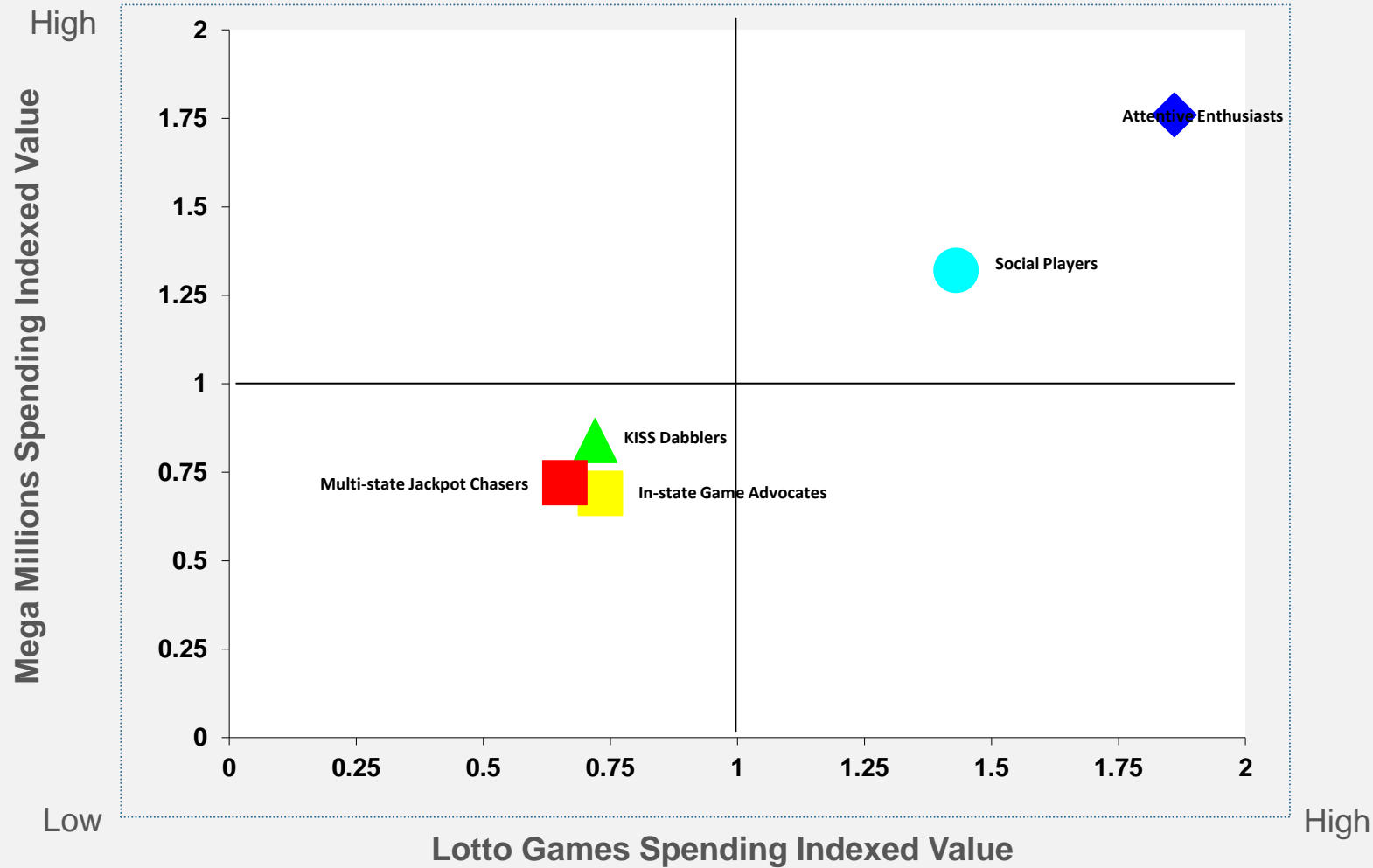
Segment Comparisons

Index Value by Segment

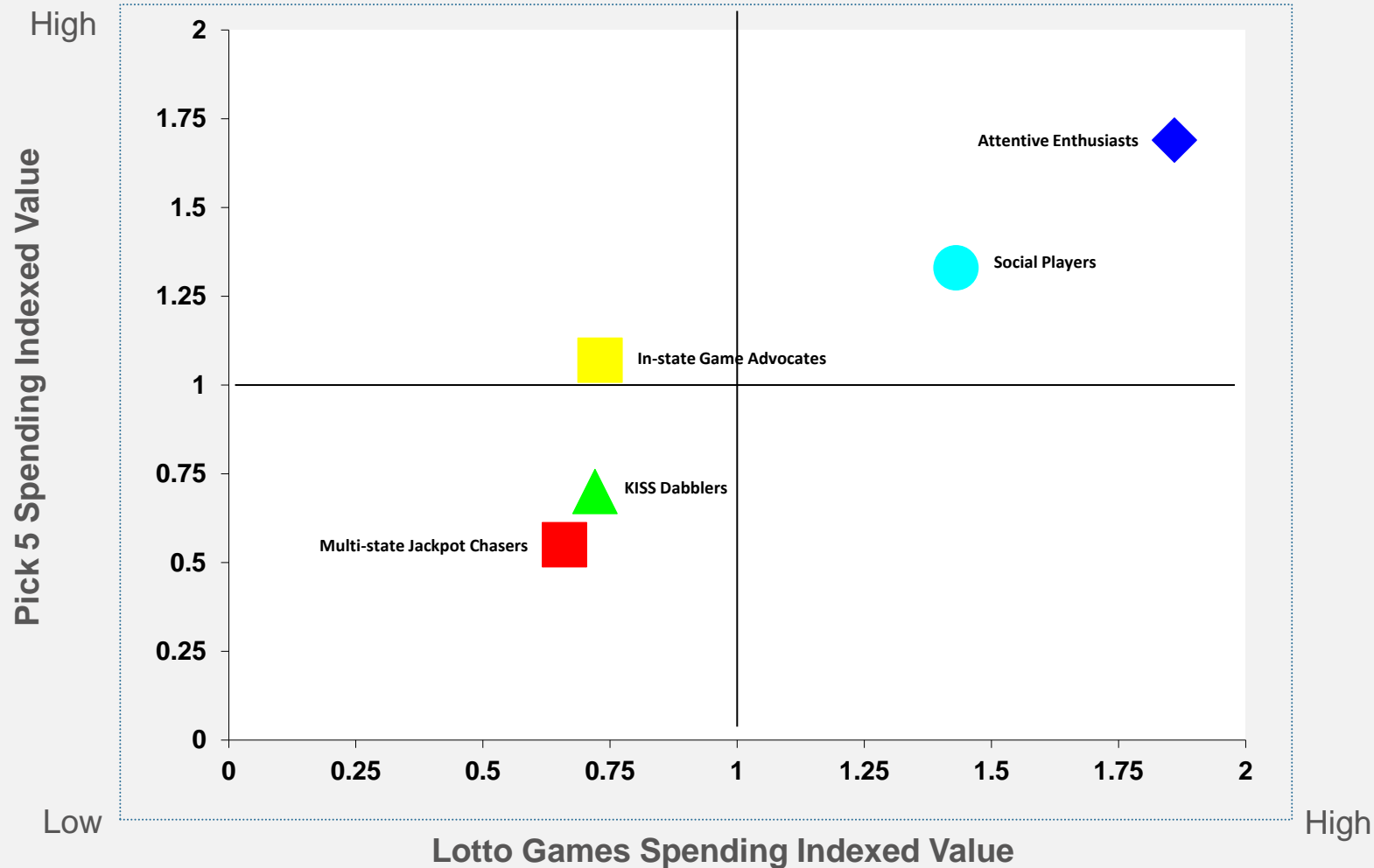
Indexed Value of Each Segment: Lotto Games vs Powerball



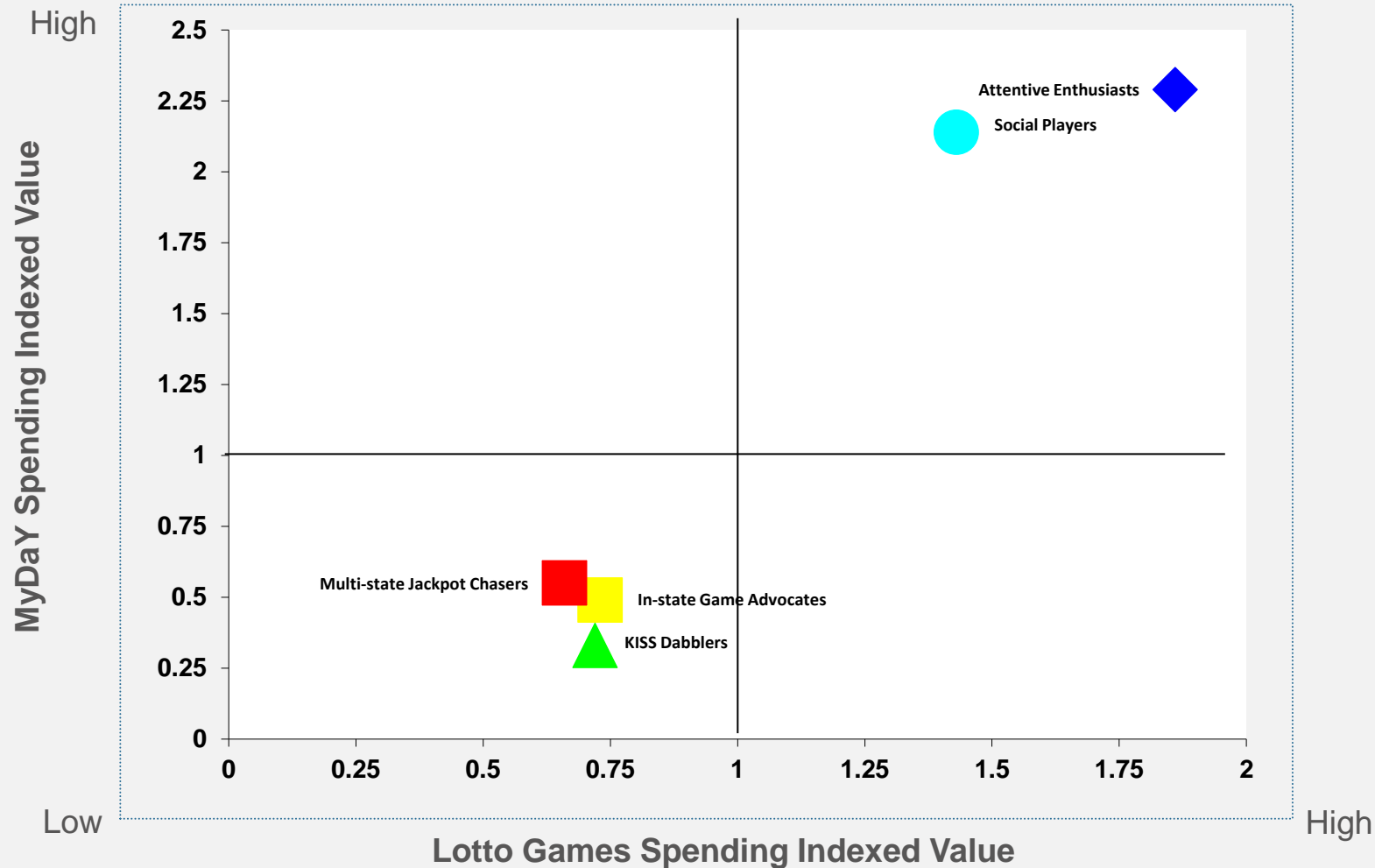
Indexed Value of Each Segment: Lotto Games vs Mega Millions



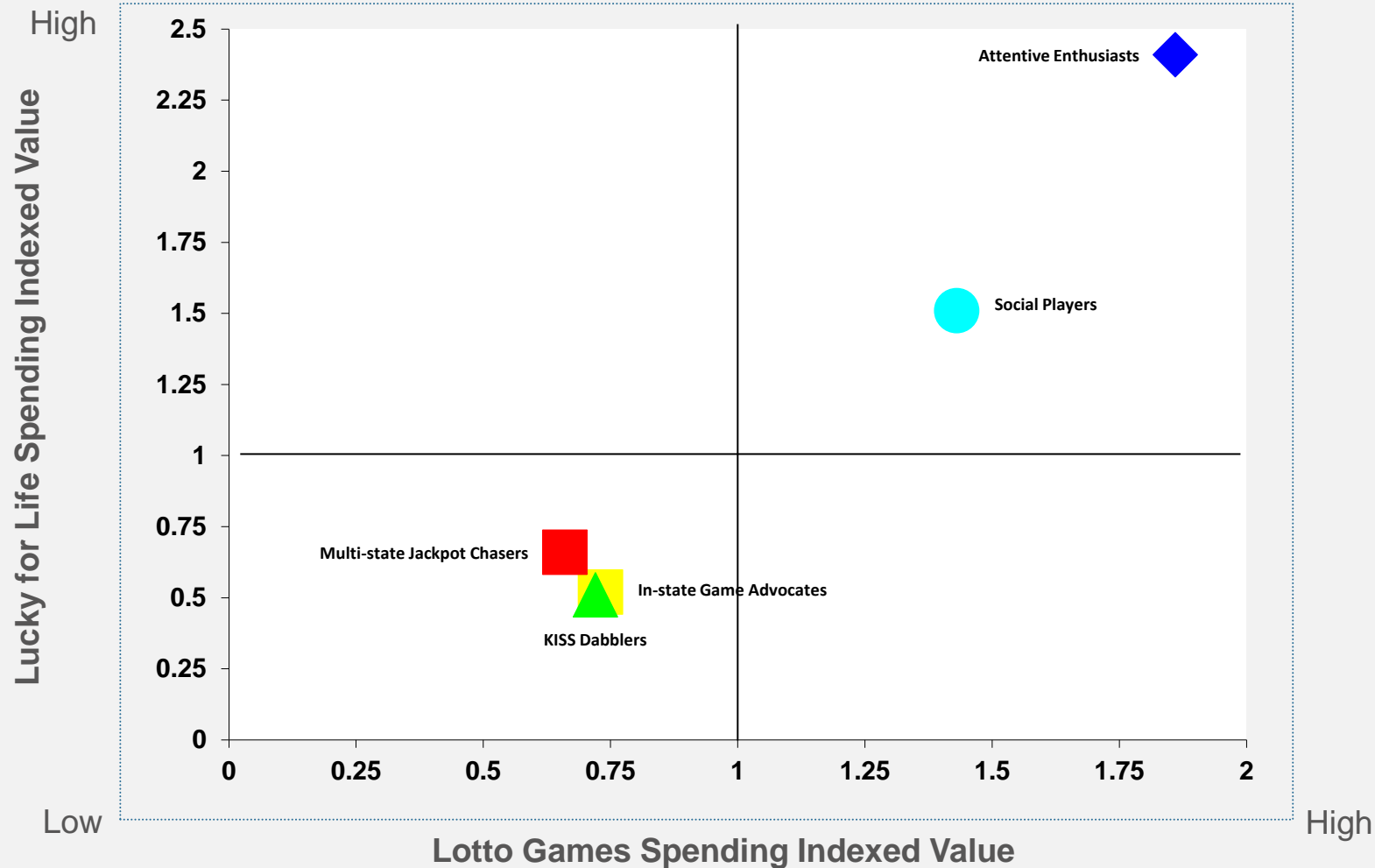
Indexed Value of Each Segment: Lotto Games vs NE Pick 5



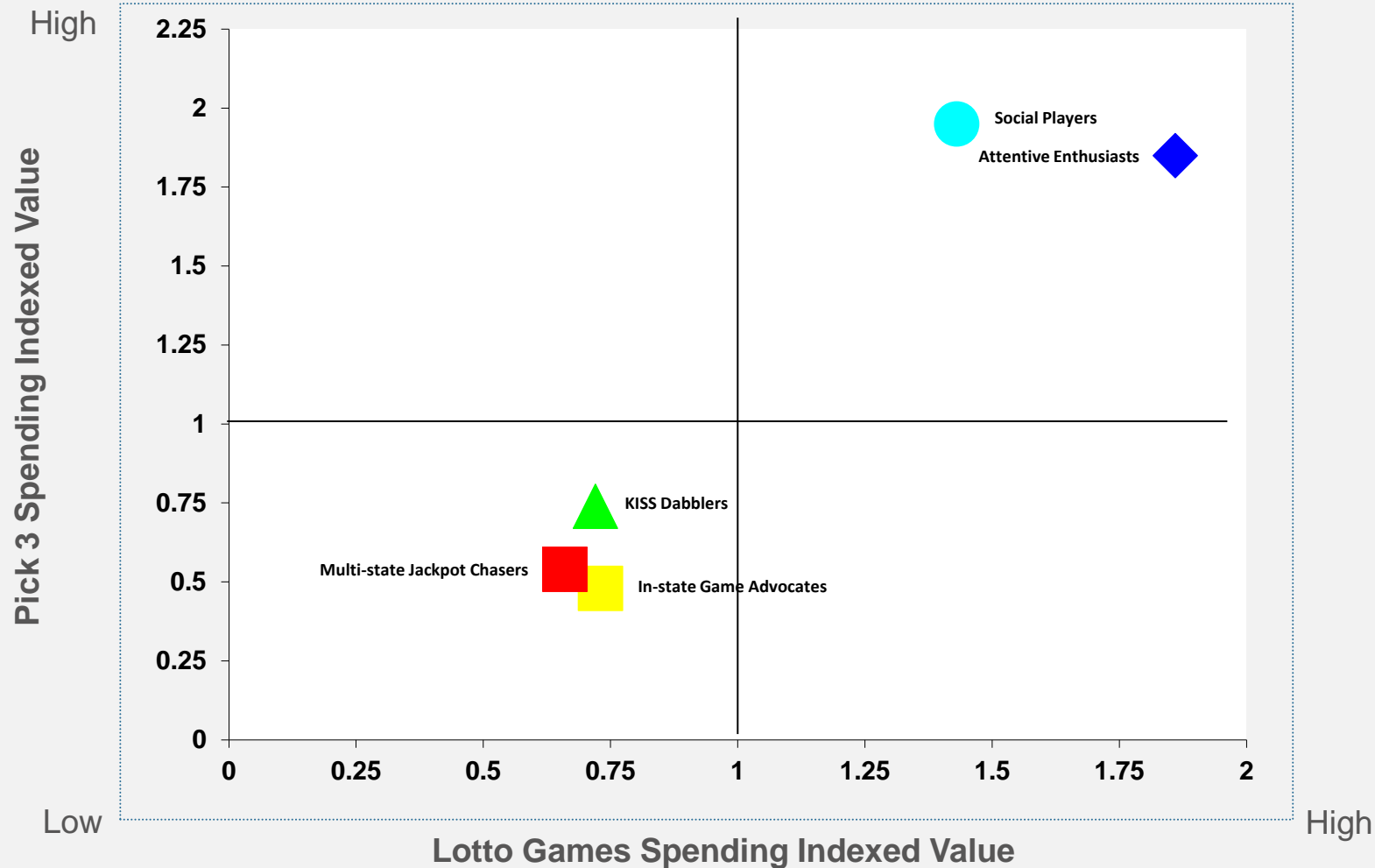
Indexed Value of Each Segment: Lotto Games vs MyDaY



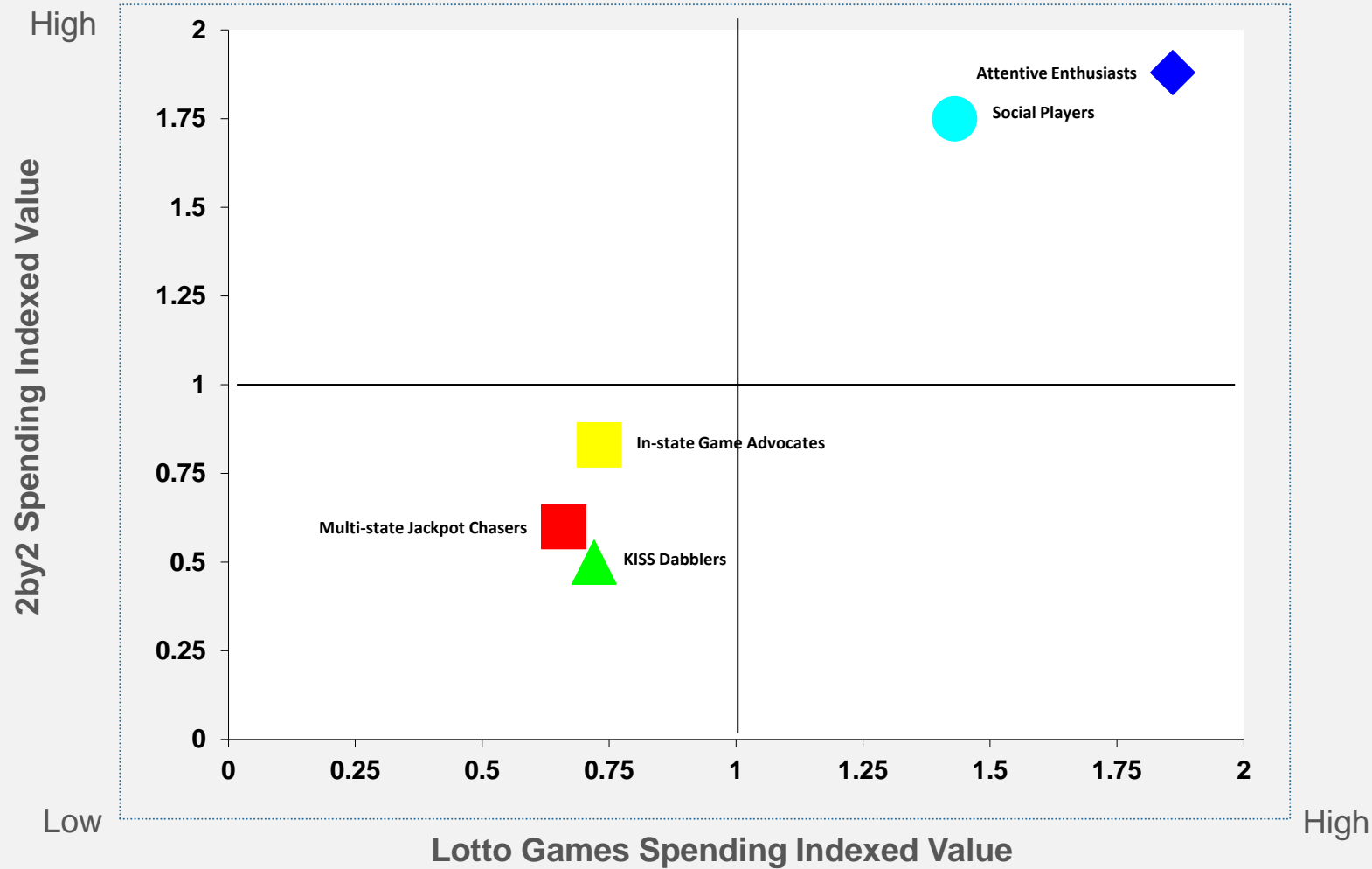
Indexed Value of Each Segment: Lotto Games vs Lucky for Life



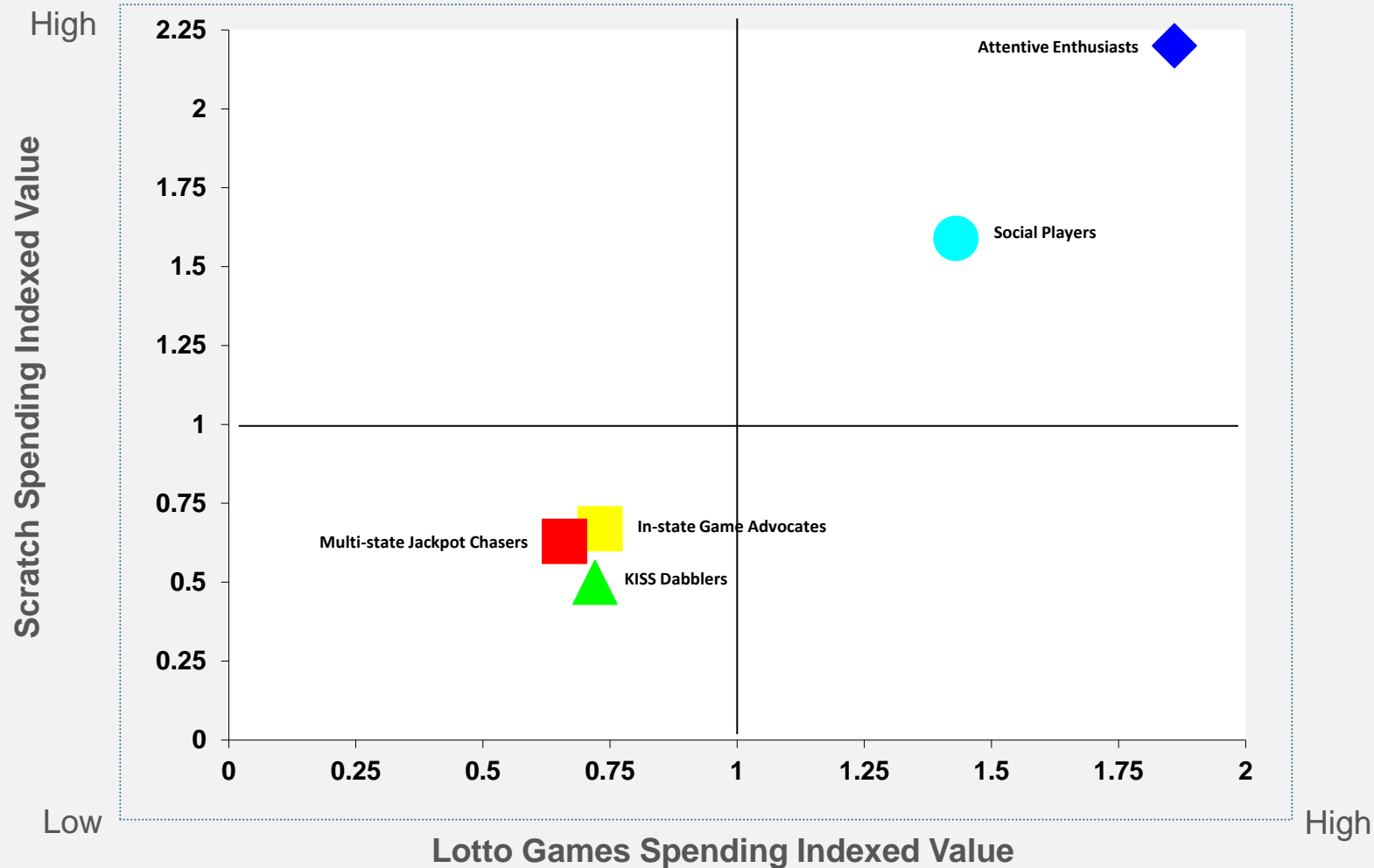
Indexed Value of Each Segment: Lotto Games vs NE Pick 3



Indexed Value of Each Segment: Lotto Games vs 2by2



Indexed Value of Each Segment: Lotto Games vs Scratch Games

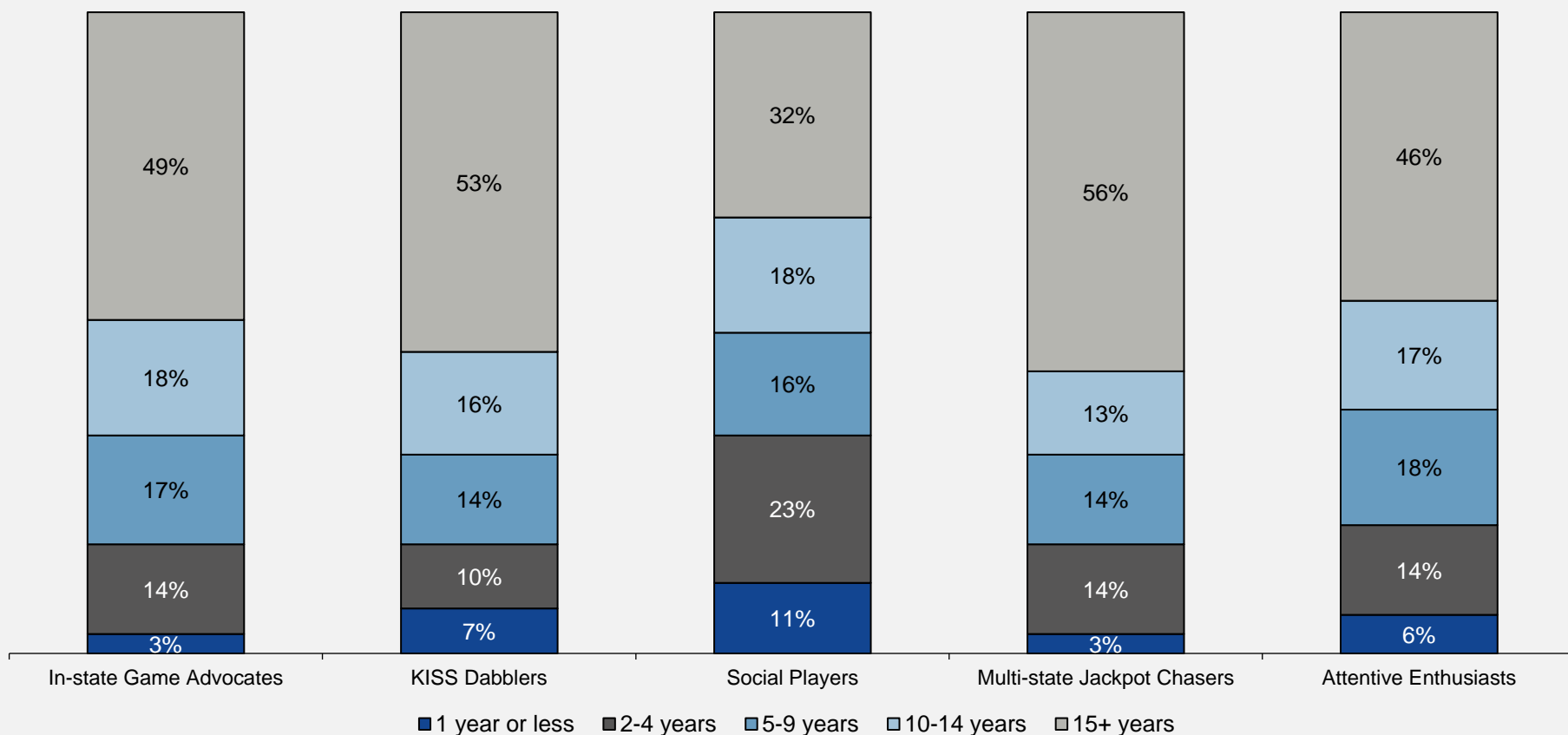


Segment Comparisons

Lotto Games:
Longevity, Familiarity, and Perceptions

Lotto Game Longevity

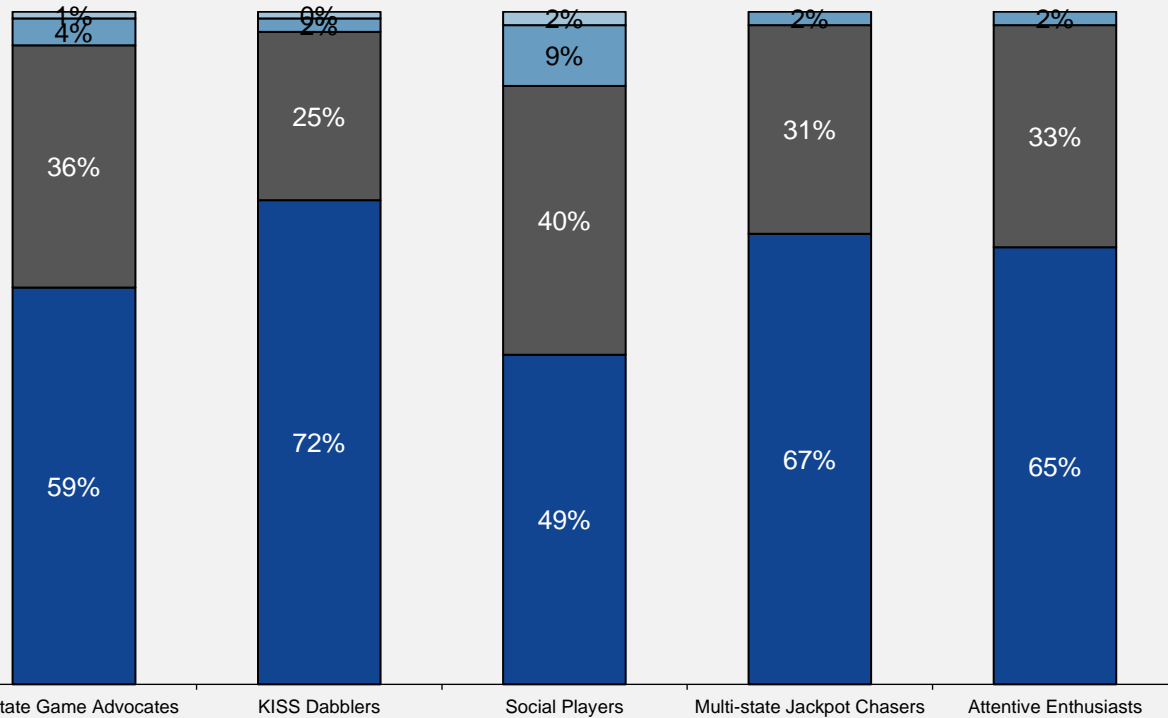
Approximately how long have you been playing Lotto games in Nebraska?



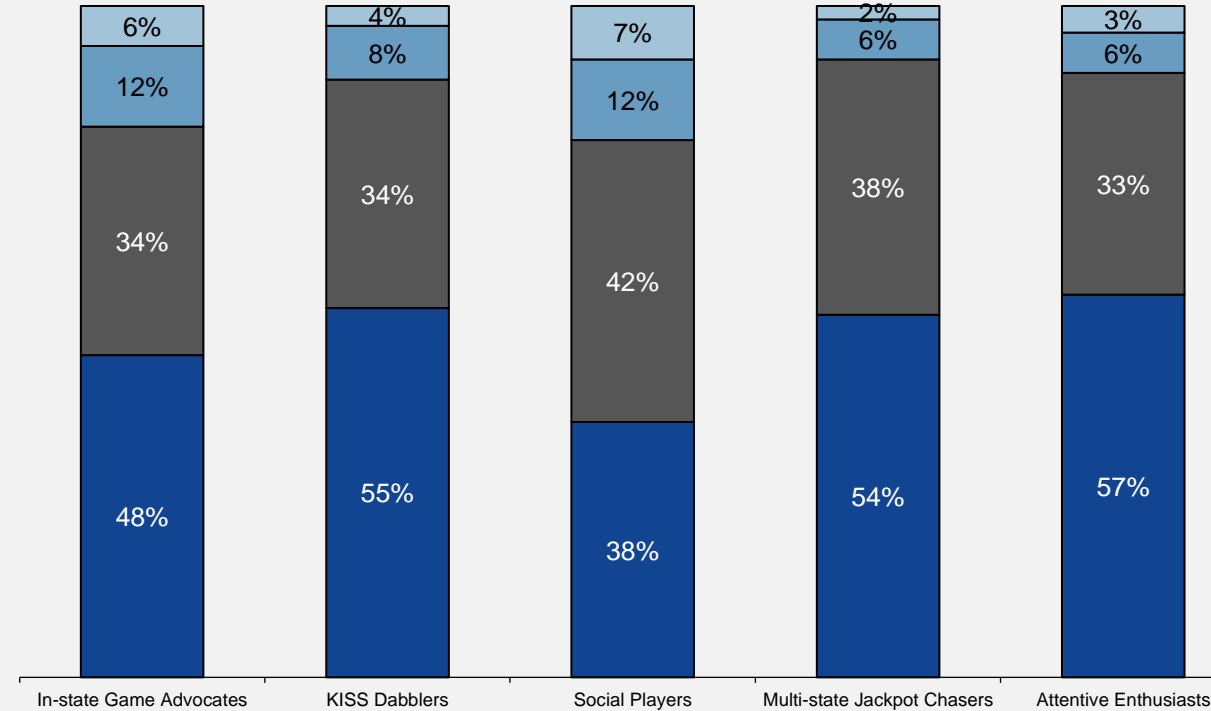
Lotto Game Familiarity

How familiar are you with how to play the following Lotto games in Nebraska?

POWERBALL



MEGA MILLIONS

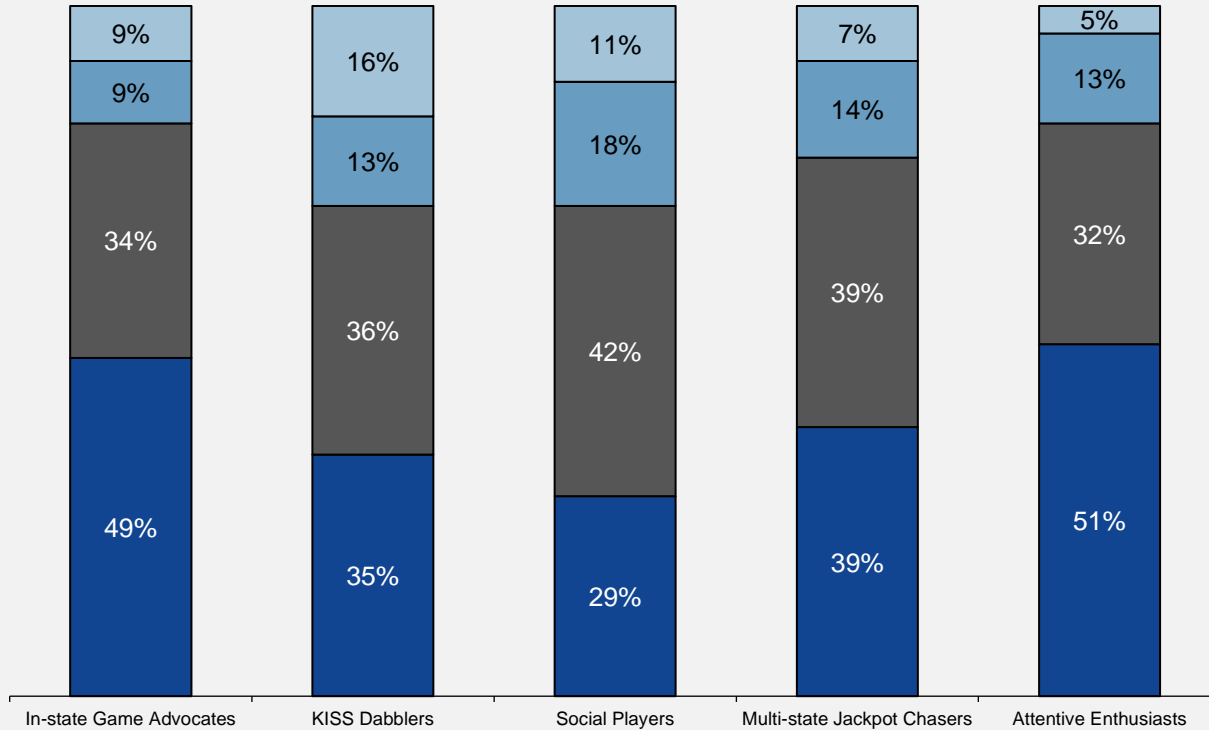


■ Extremely familiar ■ Somewhat familiar ■ Not very familiar ■ Not at all familiar

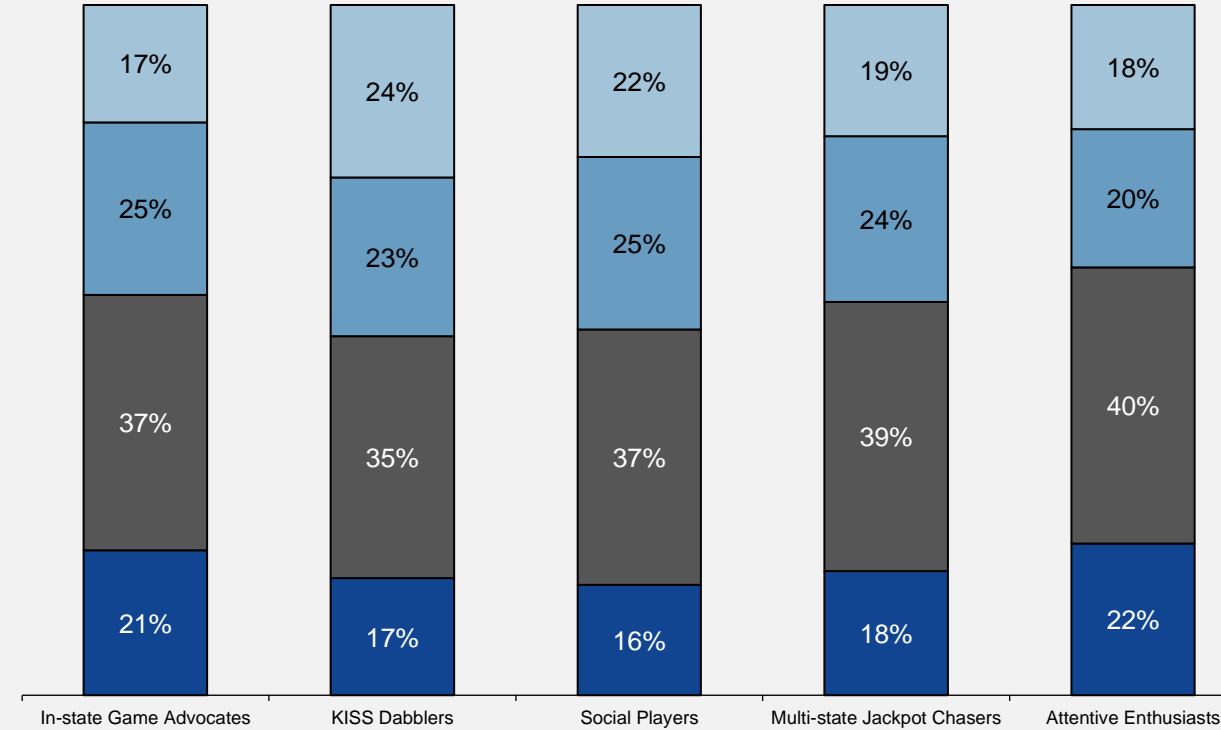
Lotto Game Familiarity

How familiar are you with how to play the following Lotto games in Nebraska?

NEBRASKA PICK 5



NEBRASKA PICK 3

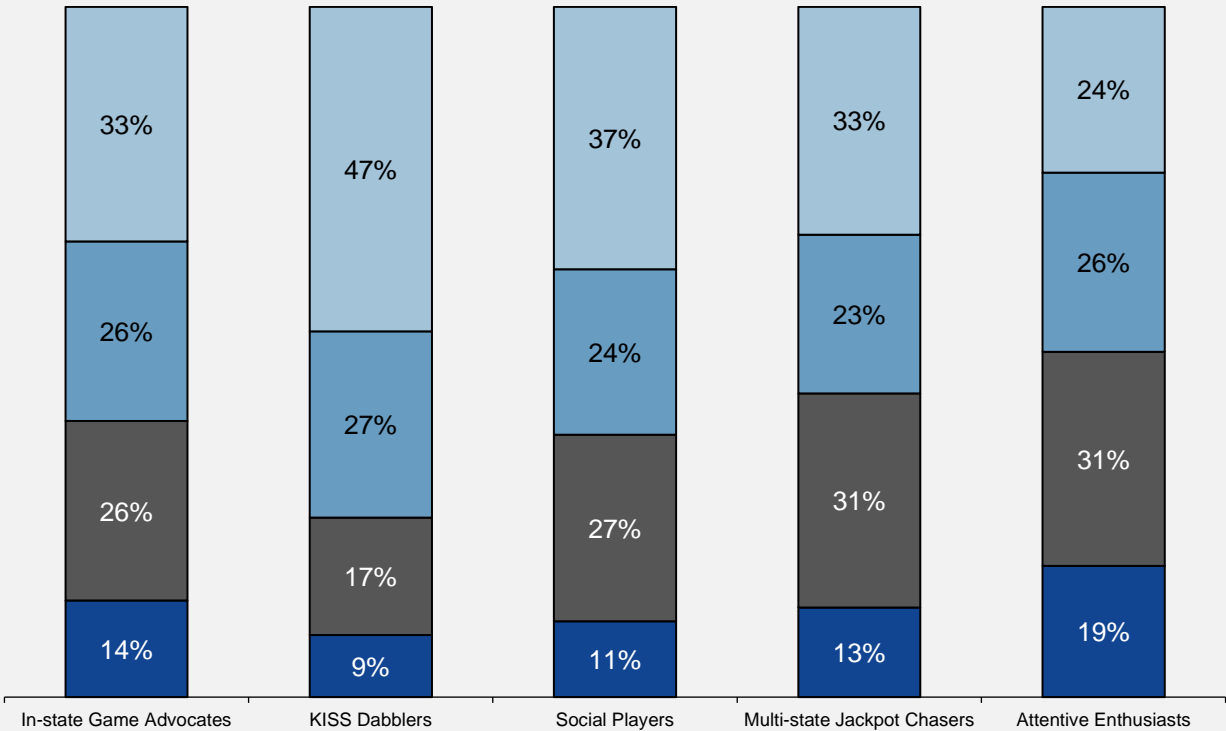


■ Extremely familiar ■ Somewhat familiar ■ Not very familiar ■ Not at all familiar

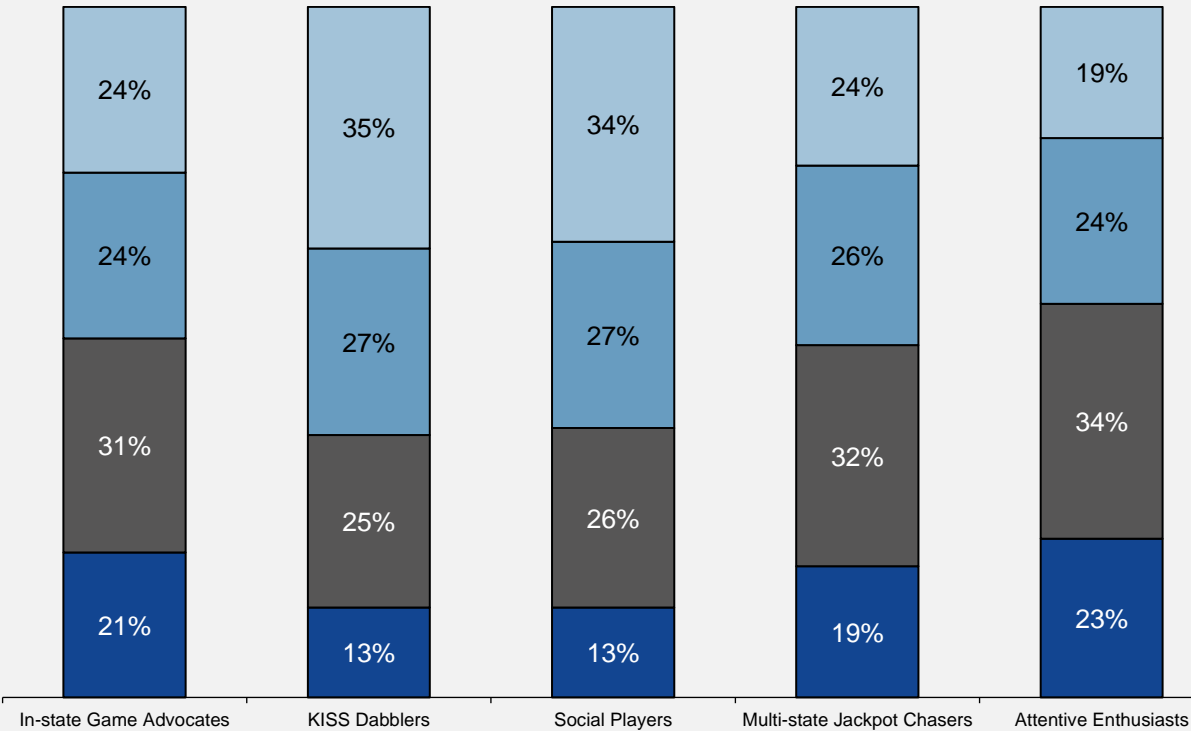
Lotto Game Familiarity

How familiar are you with how to play the following Lotto games in Nebraska?

MyDaY



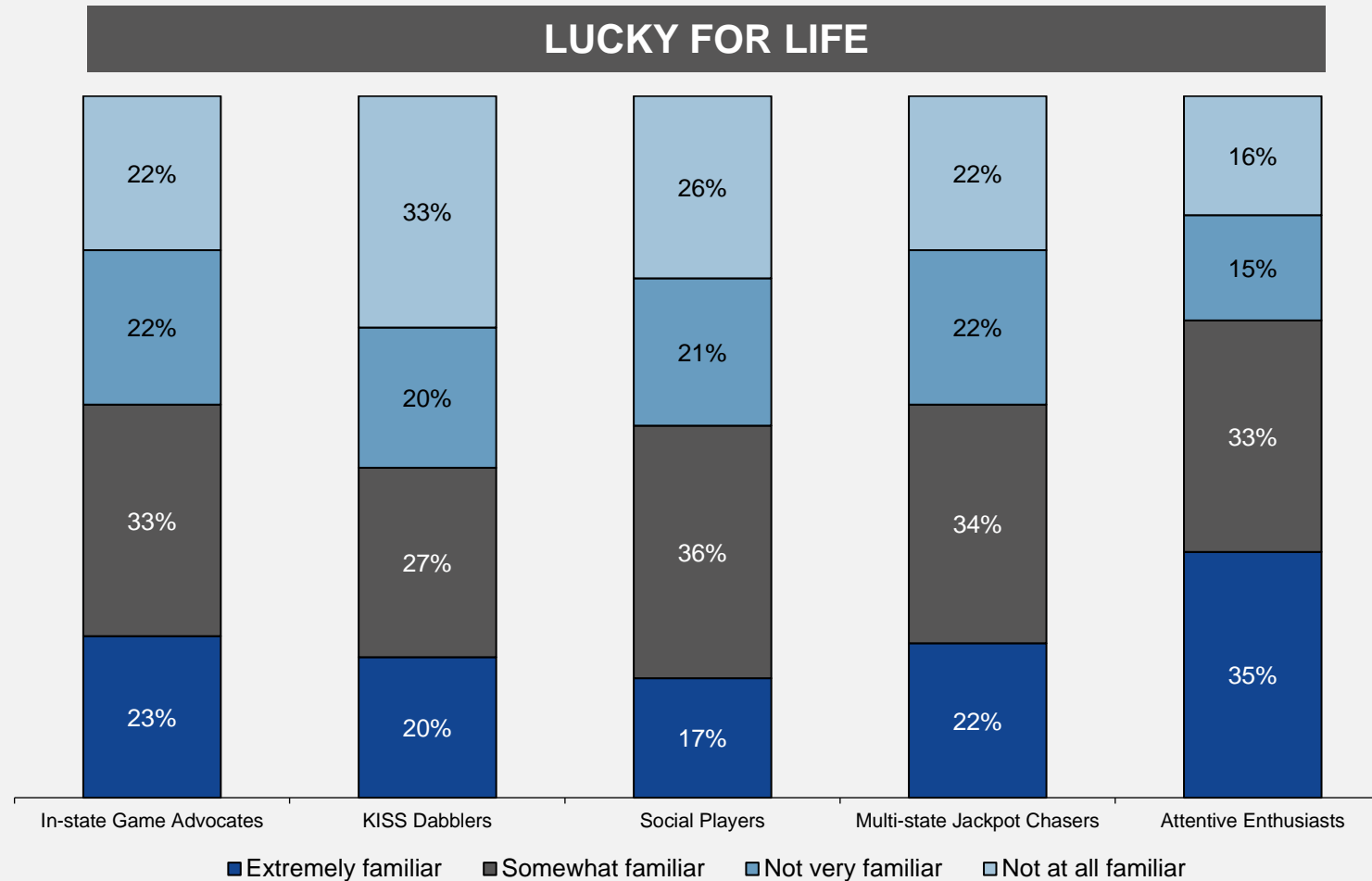
2by2



■ Extremely familiar ■ Somewhat familiar ■ Not very familiar ■ Not at all familiar

Lotto Game Familiarity

How familiar are you with how to play the following Lotto games in Nebraska?



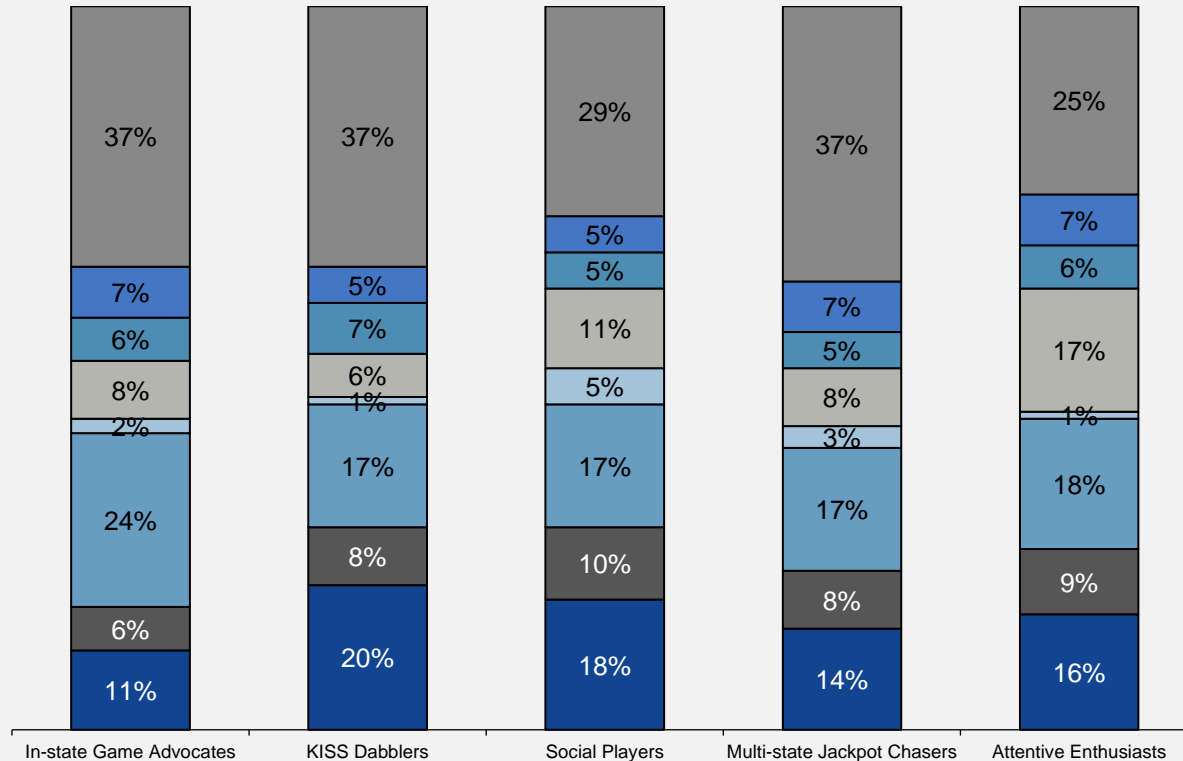
Confidential

Base: All Respondents (n=1778)

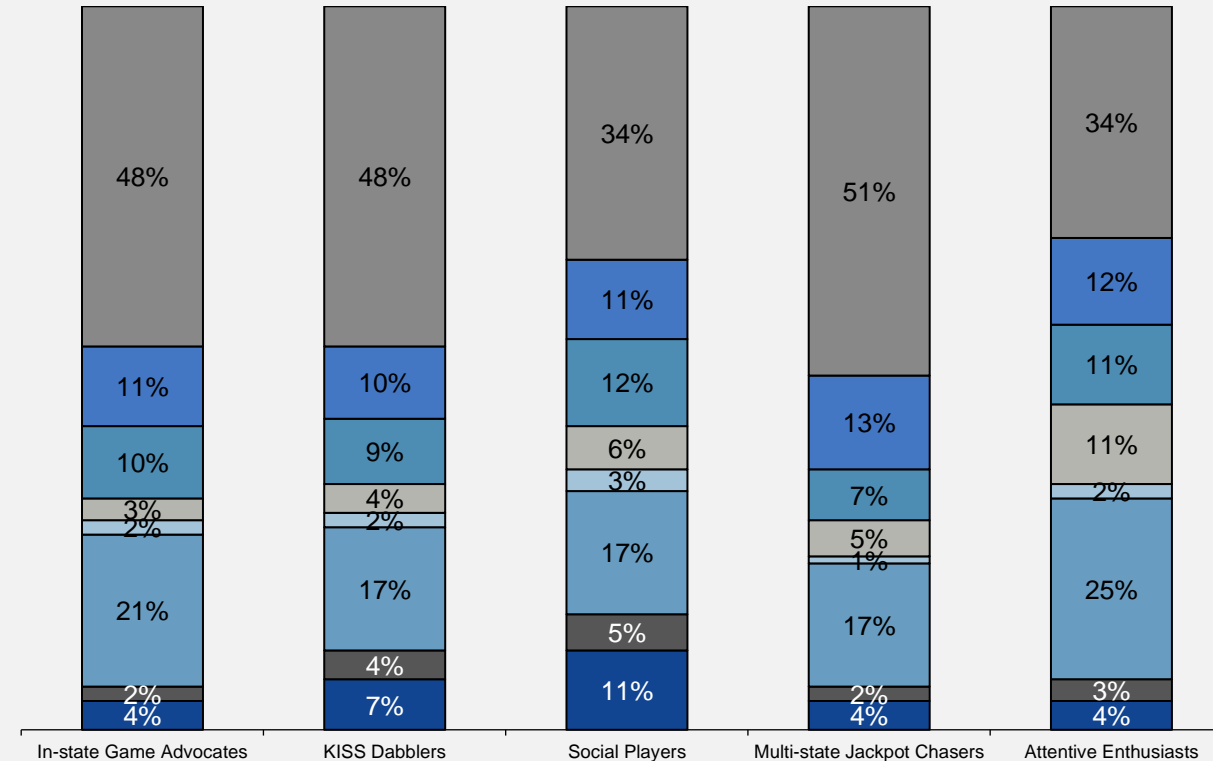
Lotto Game Perceptions

Please select which Lotto game currently offered by the Nebraska Lottery...

offers the best chance of winning a meaningful prize



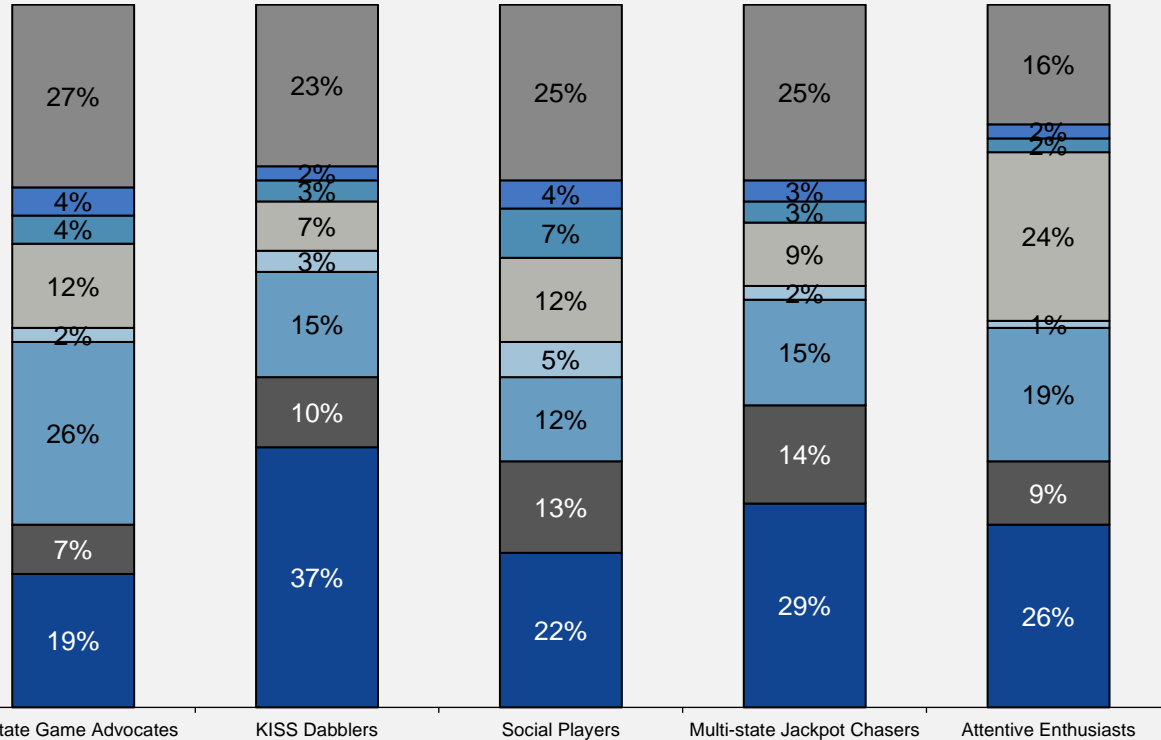
offers the best chance of winning a prize



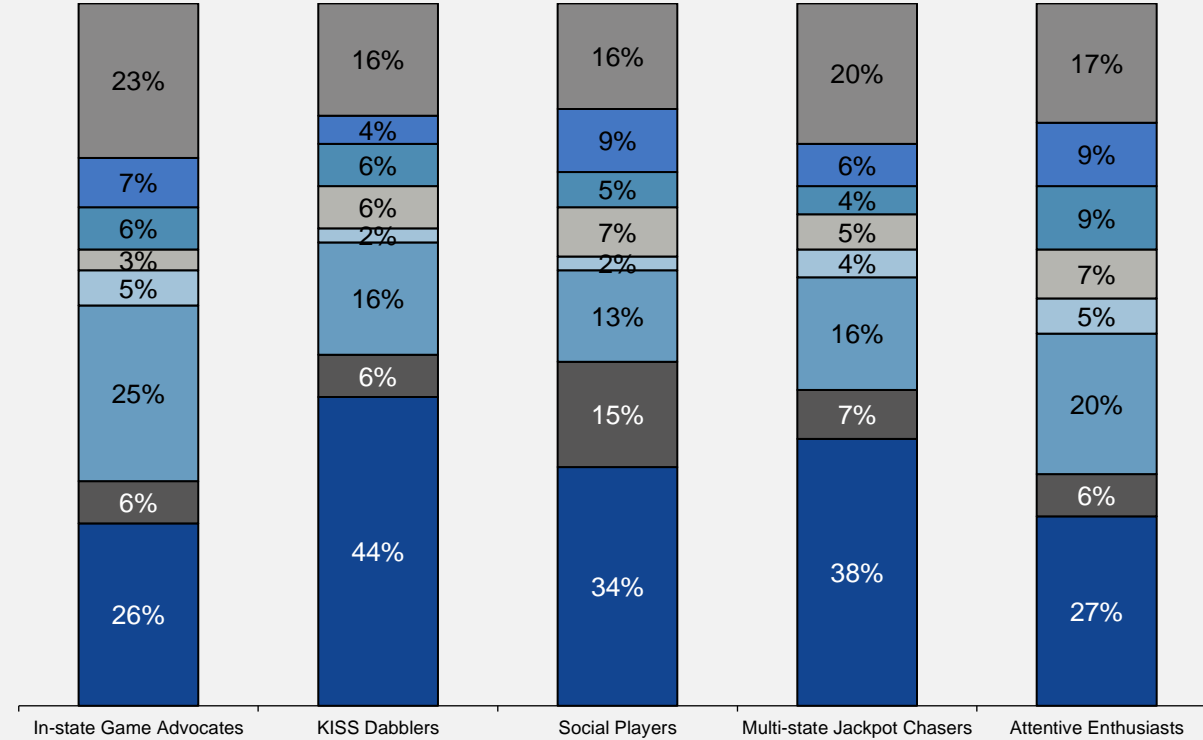
Lotto Game Perceptions

Please select which Lotto game currently offered by the Nebraska Lottery...

offers more of what I look for in a Lotto game



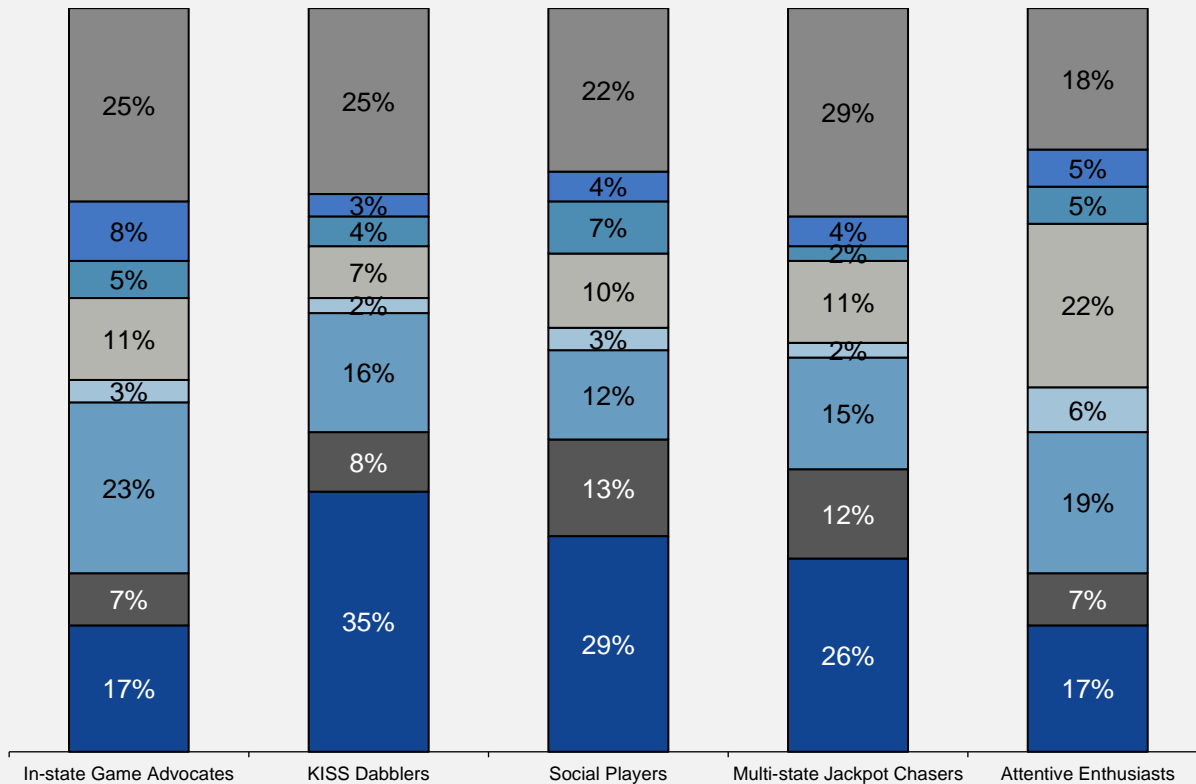
is the easiest to play



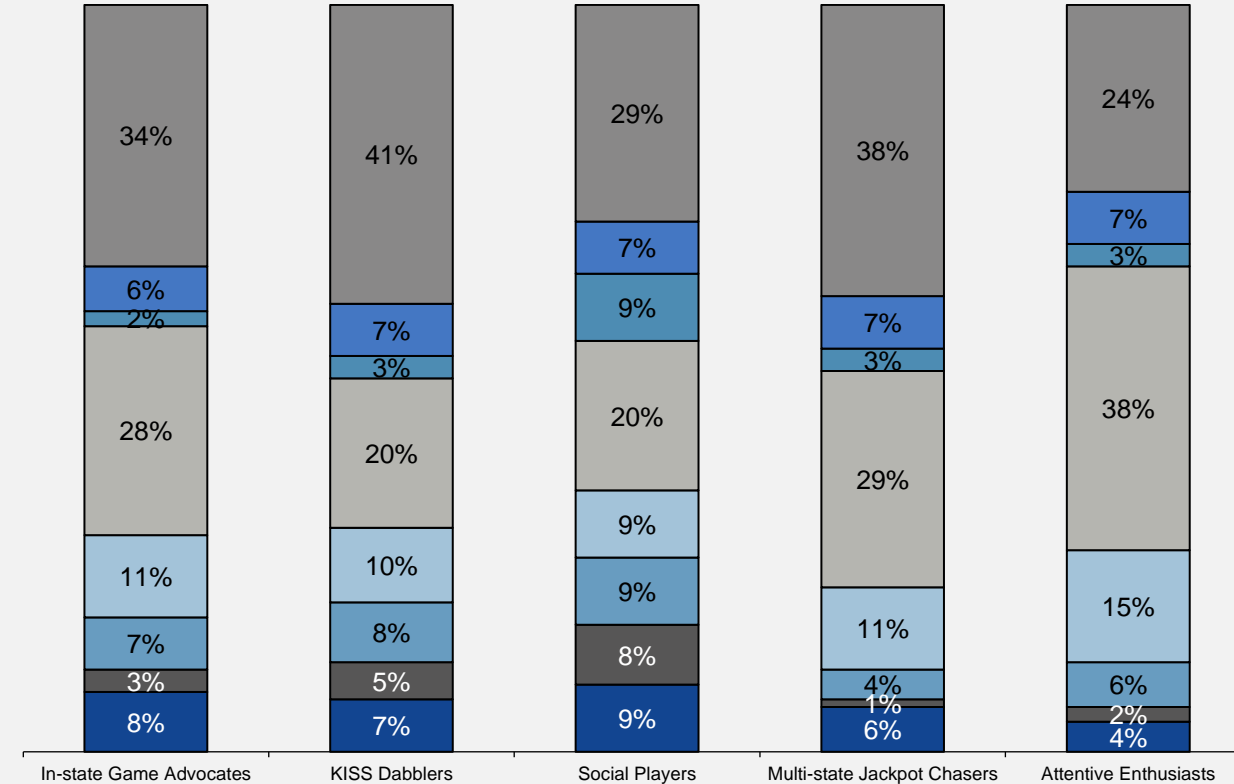
Lotto Game Perceptions

Please select which Lotto game currently offered by the Nebraska Lottery...

is the most fun to play





is the most unique



Segment Comparisons

Favorite Lottery Game

Favorite Lottery Game (Combined)

	IN-STATE GAME ADVOCATES (21%)	KISS DABBLERS (26%)	SOCIAL PLAYERS (15%)	MULTI-STATE JACKPOT CHASERS (22%)	ATTENTIVE ENTHUSIASTS (16%)
Scratch games	47%	36%	42%	42%	54%
Powerball	49%	76%	66%	65%	47%
Mega Millions	26%	41%	39%	42%	26%
Nebraska Pick 5	44% 	26%	23%	28%	31%
MyDaY	3%	1%	4%	1%	3%
Lucky for Life	15%	11%	11%	14%	25% 
Nebraska Pick 3	7%	6%	8%	2%	5%
2by2	10%	3%	7%	6%	7%

Favorite Lottery Game (1st Mention)

	IN-STATE GAME ADVOCATES (21%)	KISS DABBLERS (26%)	SOCIAL PLAYERS (15%)	MULTI-STATE JACKPOT CHASERS (22%)	ATTENTIVE ENTHUSIASTS (16%)
Scratch games	32%	20%	32%	28%	37%
Powerball	21%	43%	37%	37%	22%
Mega Millions	9%	12%	13%	9%	7%
Nebraska Pick 5	23%	14%	9%	16%	15%
MyDaY	1%	1%	1%		1%
Lucky for Life	8%	6%	4%	5%	14%
Nebraska Pick 3	3%	3%	3%	1%	2%
2by2	4%	1%	1%	4%	1%

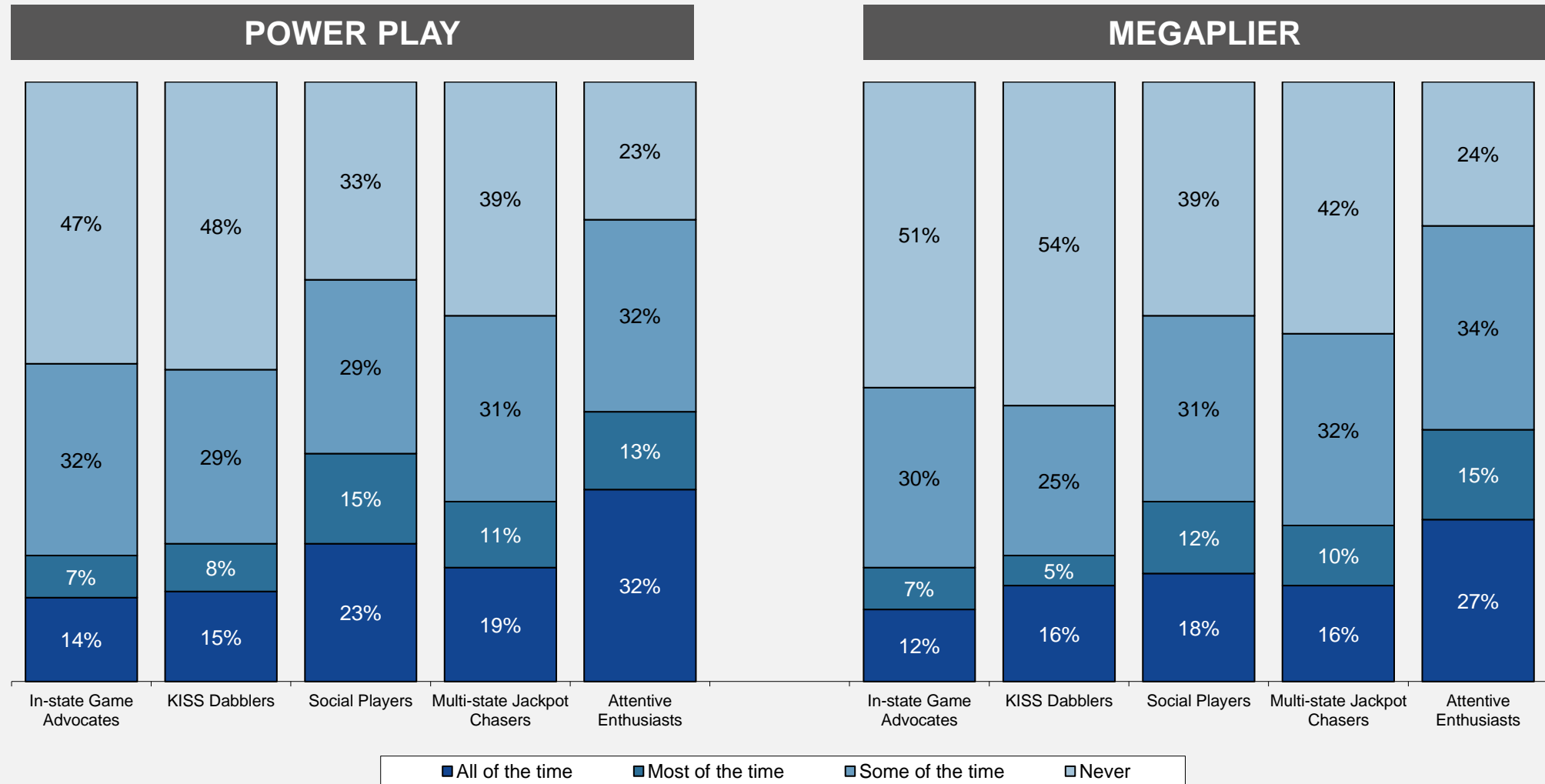
Favorite Lottery Game (2nd Mention)

	IN-STATE GAME ADVOCATES (21%)	KISS DABBLERS (26%)	SOCIAL PLAYERS (15%)	MULTI-STATE JACKPOT CHASERS (22%)	ATTENTIVE ENTHUSIASTS (16%)
Scratch games	16%	16%	10%	14%	18%
Powerball	28%	33%	29%	28%	25%
Mega Millions	17%	29%	26%	34%	20%
Nebraska Pick 5	21%	12%	13%	12%	15%
MyDaY	2%		3%	1%	2%
Lucky for Life	7%	5%	7%	9%	10%
Nebraska Pick 3	4%	2%	5%	1%	3%
2by2	6%	2%	5%	2%	6%

Segment Comparisons

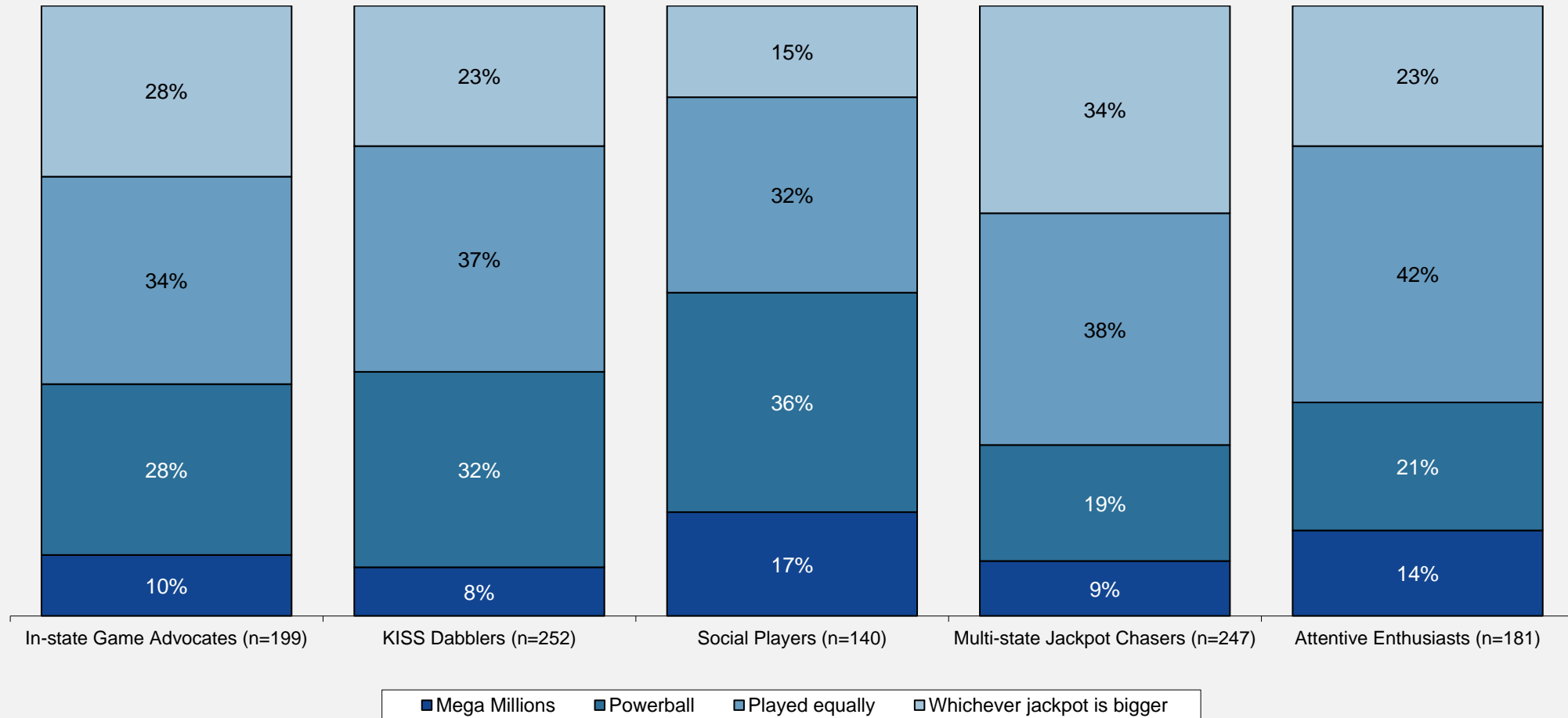
In-focus: Powerball vs Mega Millions

Power Play & Megaplier Frequency

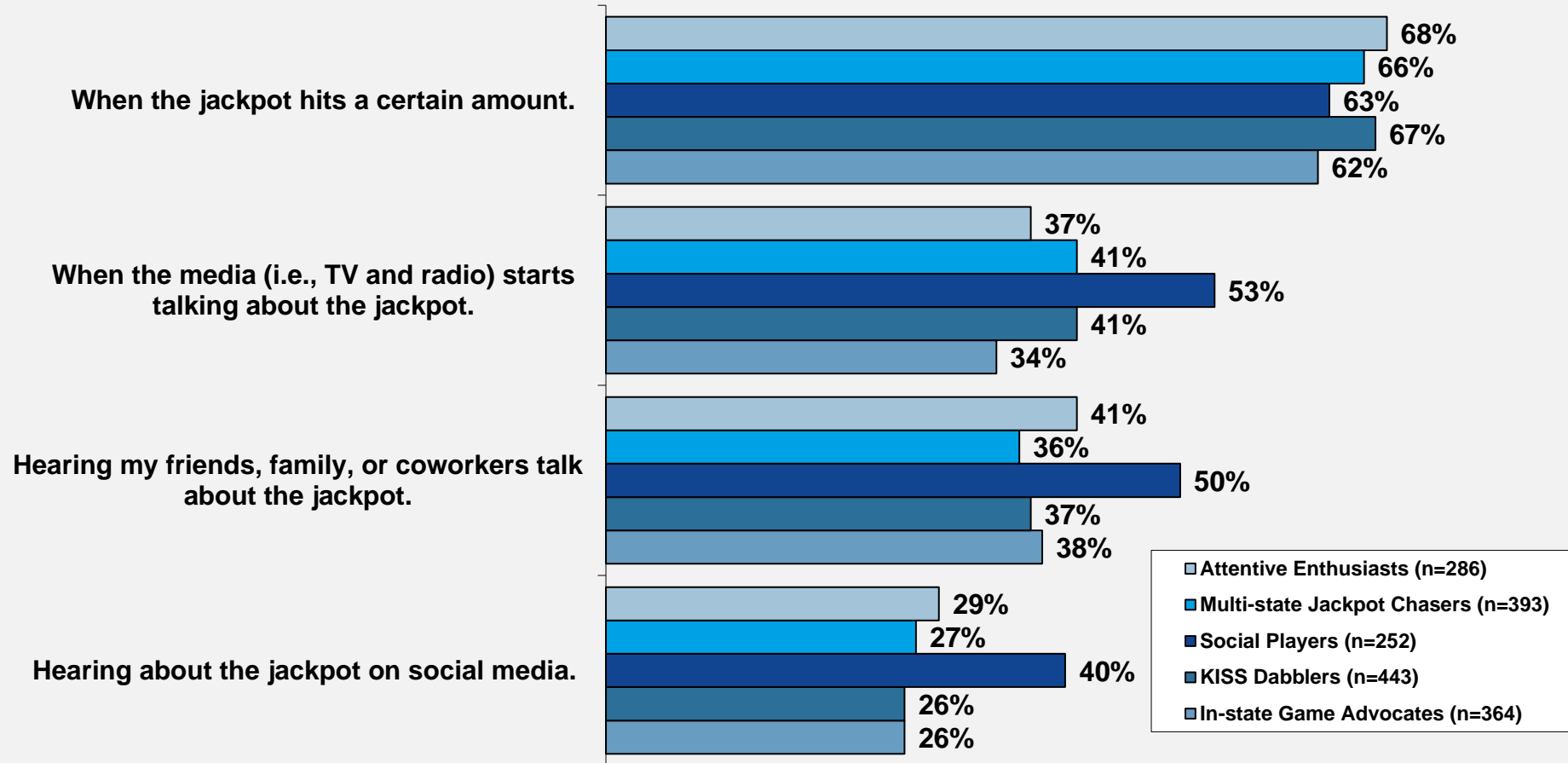


Game Played More Often: Powerball vs Mega Millions

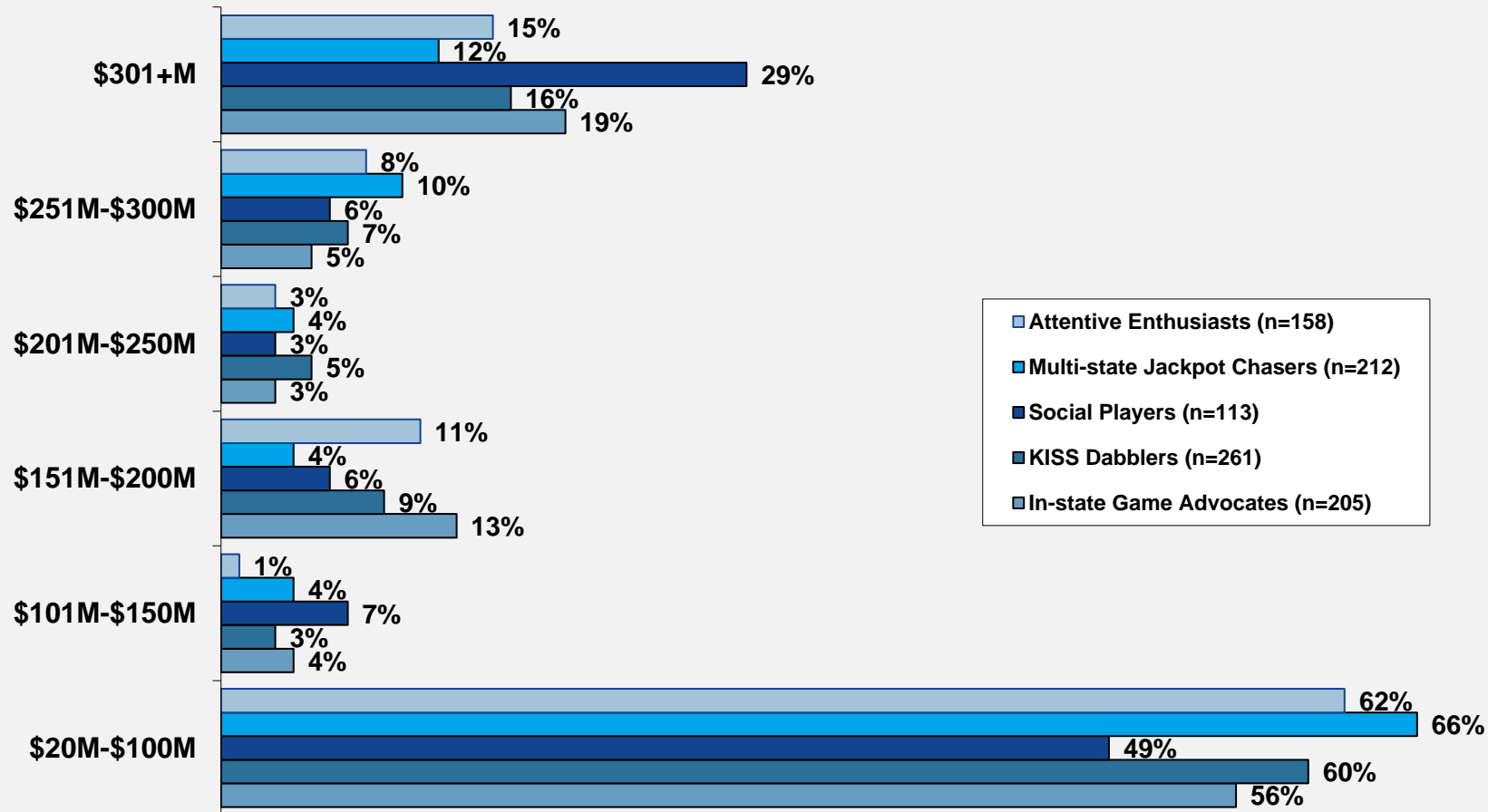
Since January 2021, which multi-state lottery game have you **played more often**?



Factors Influencing Purchasing a Multi-state Game

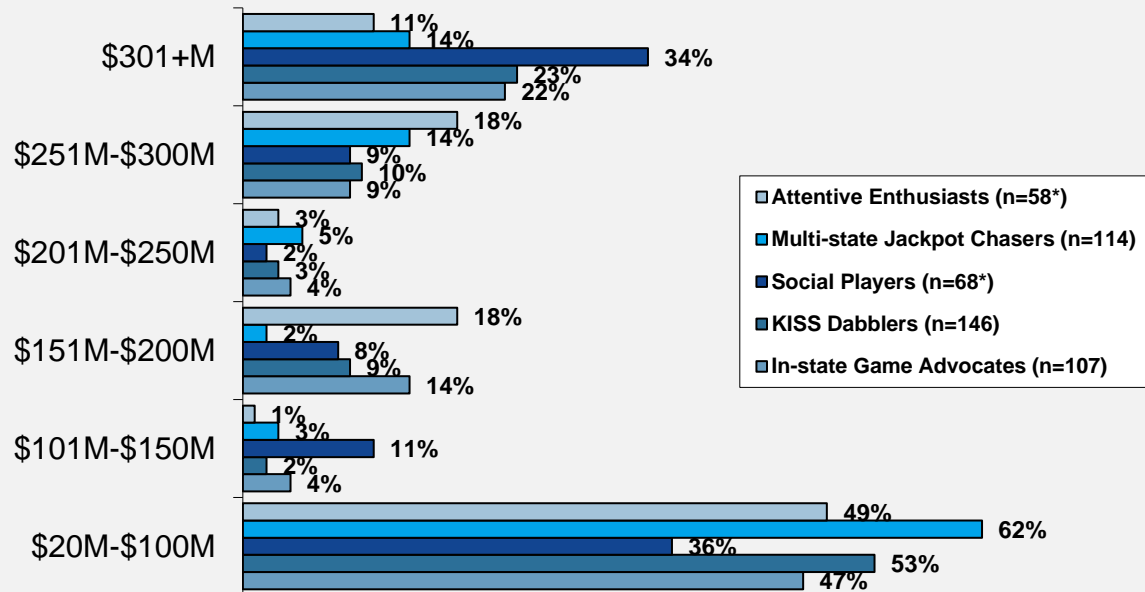


Jackpot Level That Peaks Interest of Powerball or Mega Millions Players

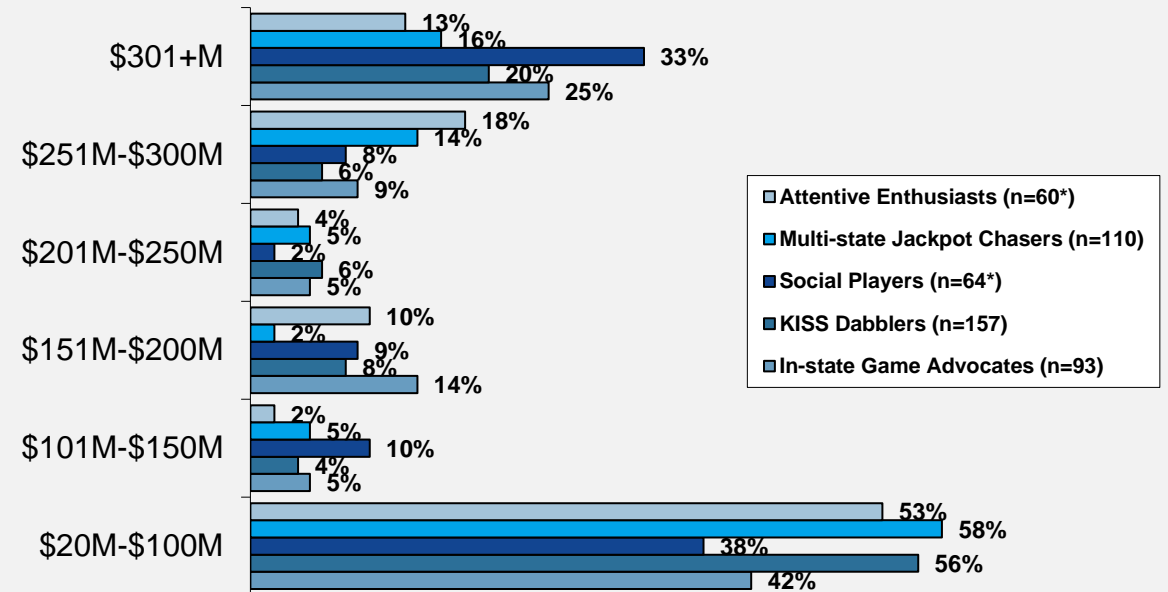


Jackpot Level That Peaks Interest of Infrequent Players

POWERBALL



MEGA MILLIONS

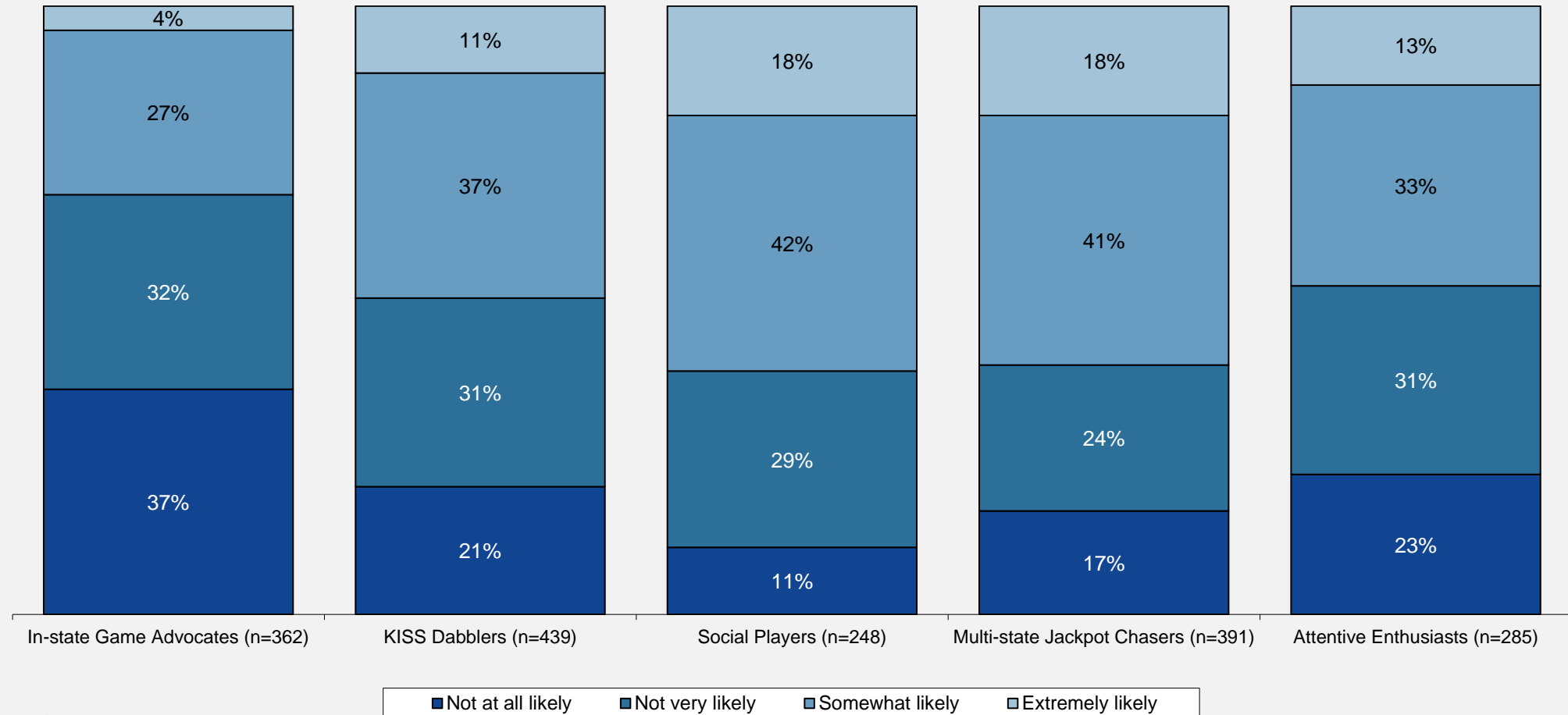


PLAY FREQUENCY DEFINITIONS

Regular - Every week
Occasional - Every couple of weeks or Every month
Infrequent - Every couple of months, Every 6 months, or Once a year
Non-Players - Less than once a year or Have never played

Likelihood to Continue Playing Powerball If Sold Internationally

How likely would you be to continue playing Powerball if it was sold to international players in some countries around the world to raise the jackpot faster?



Base: PY Powerball Players (n=1725)

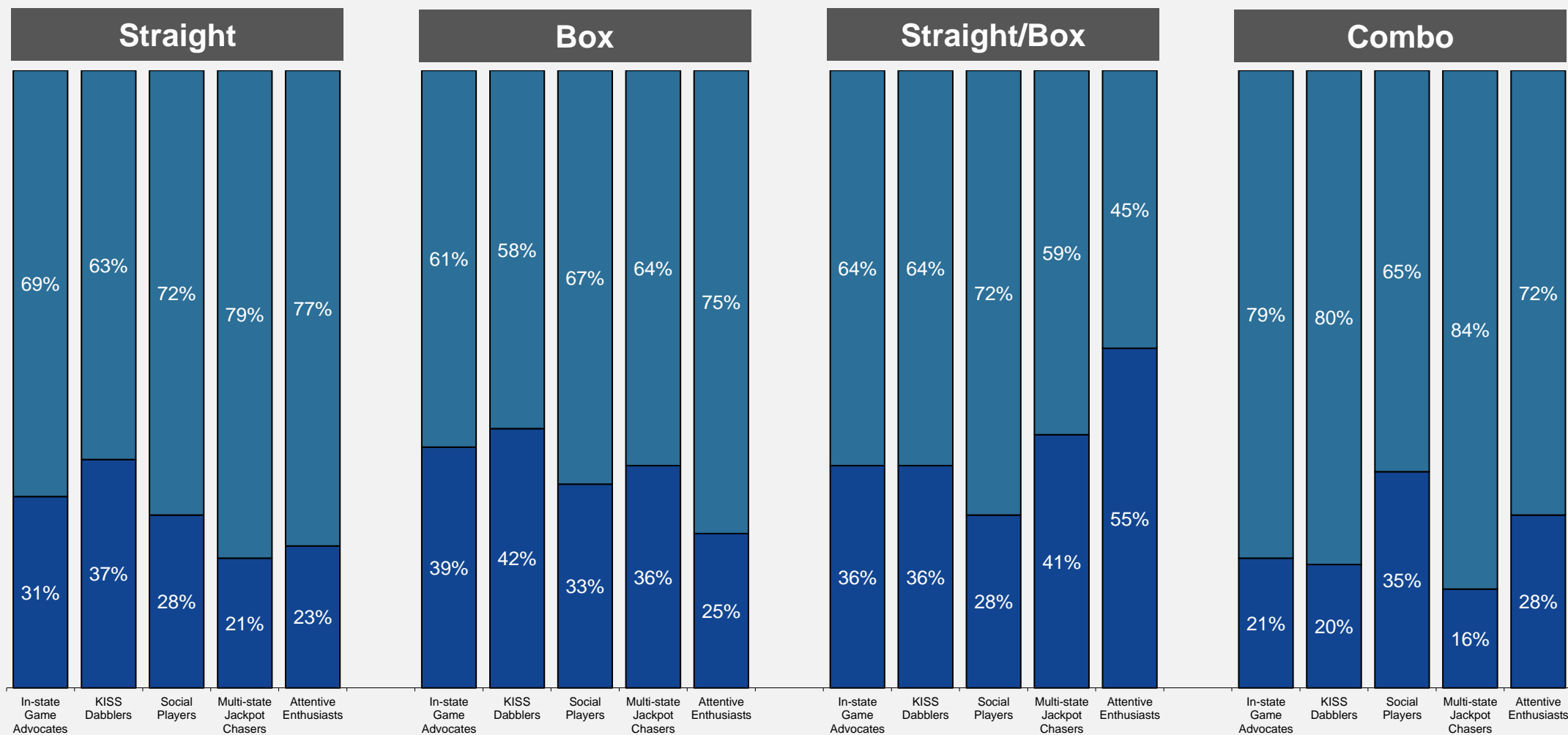
Confidential

Segment Comparisons

In-focus: Pick 3



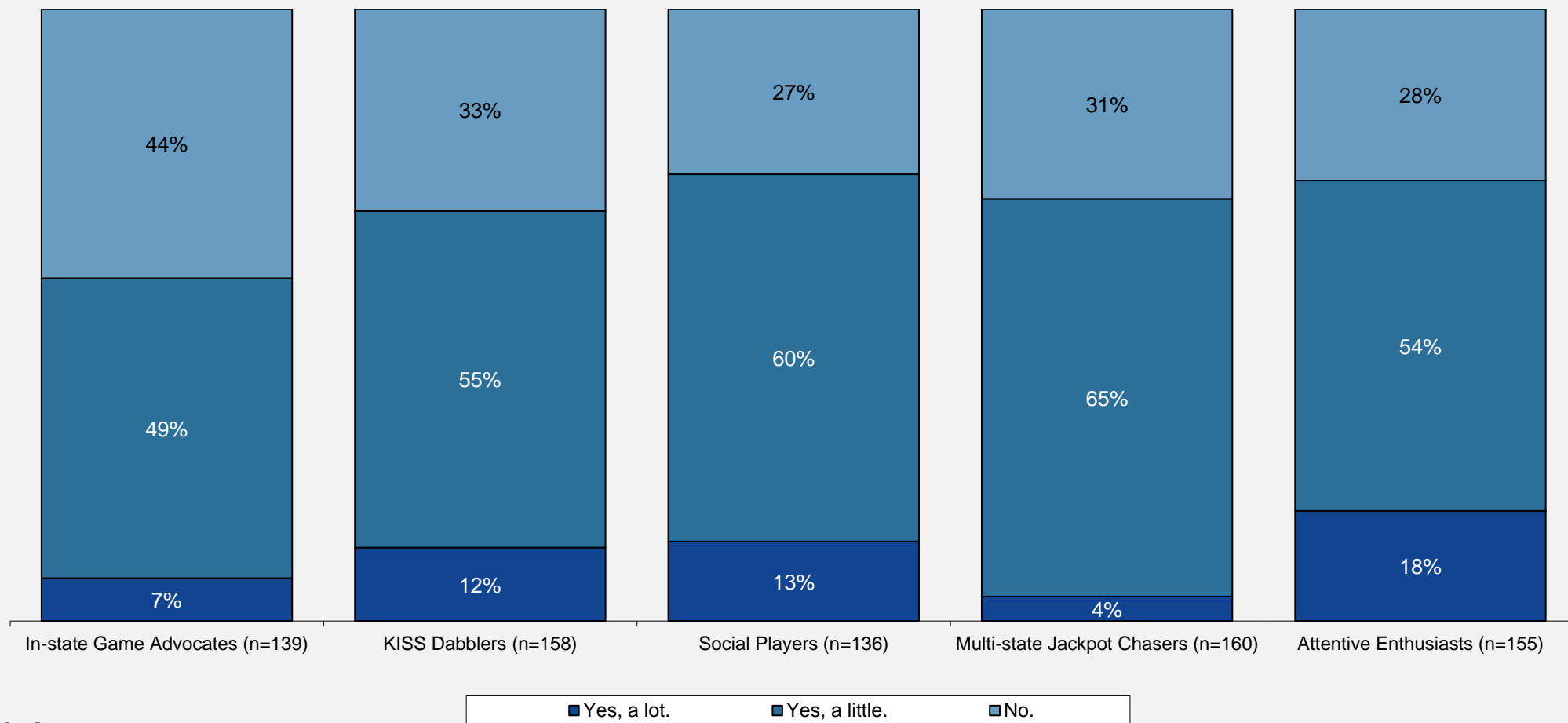
Bet Types Played in PY





Knowledge of Nebraska Pick 3 Over Time

Has your knowledge of Nebraska Pick 3, including your understanding of the different bet types you can play, improved over time?



Base: PY Pick 3 players (n=747)

Confidential

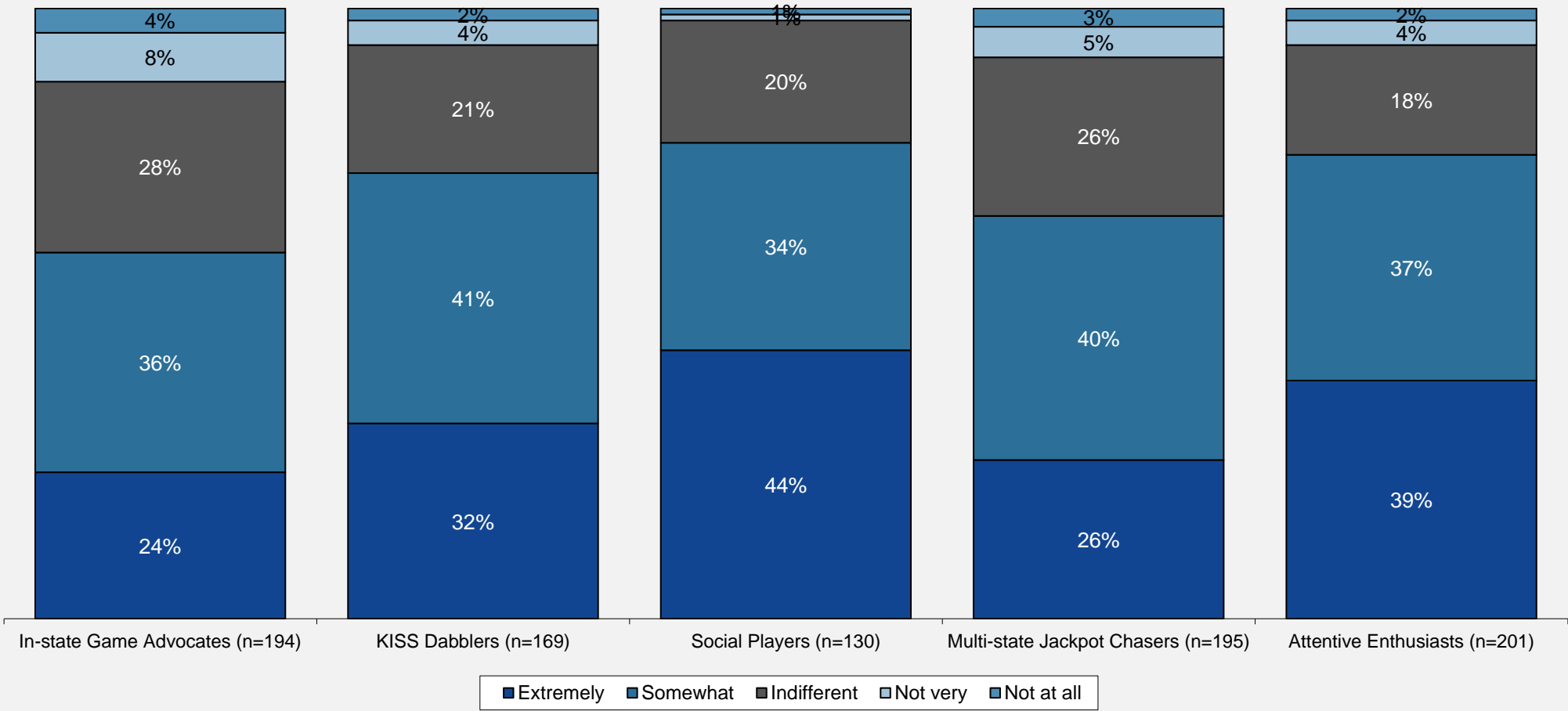
Segment Comparisons

In-focus: Lucky For Life



Satisfaction with Lucky For Life

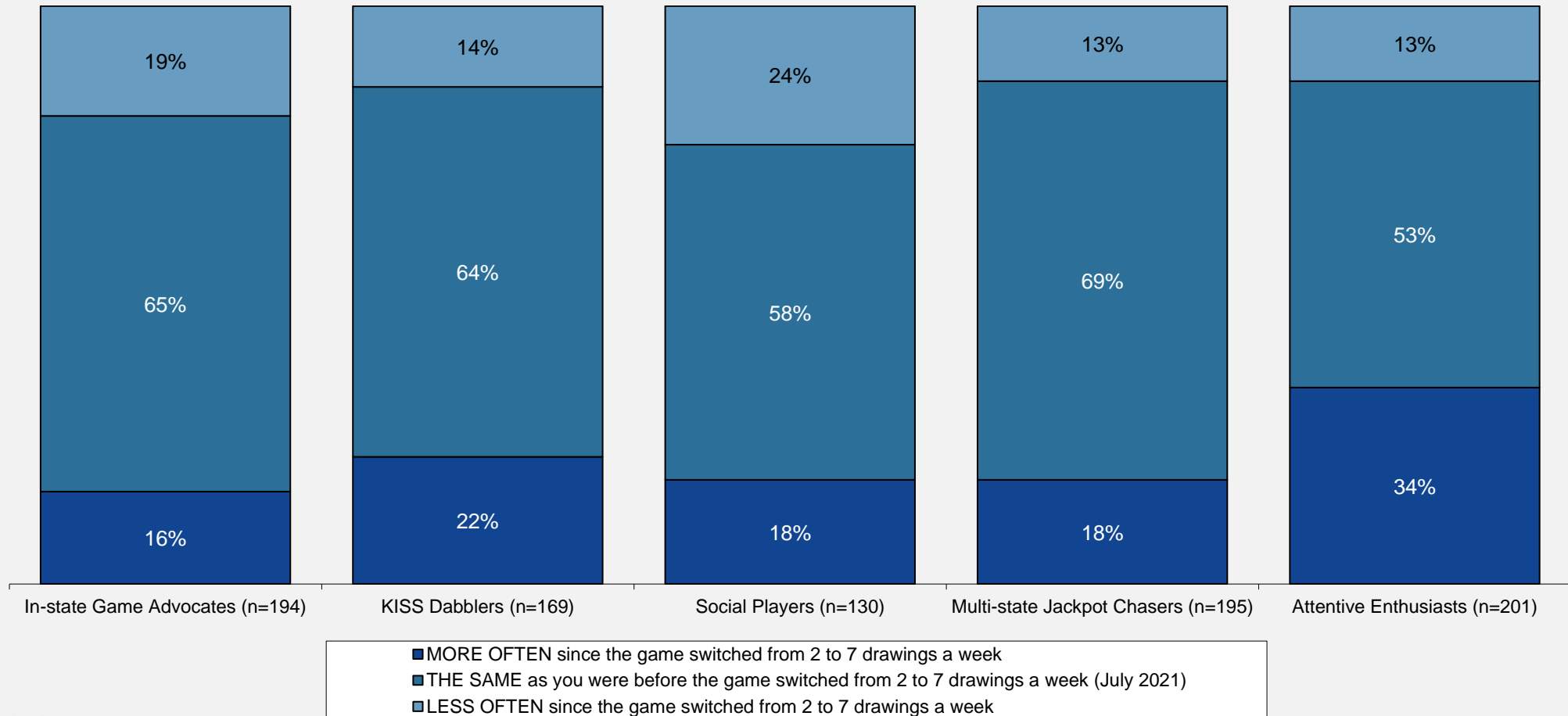
How satisfied are you with the Nebraska Lottery’s newest multi-state Lotto game, Lucky For Life?





Lucky For Life Frequency Since July 2021

When it comes to Lucky For Life, would you say you are playing...?



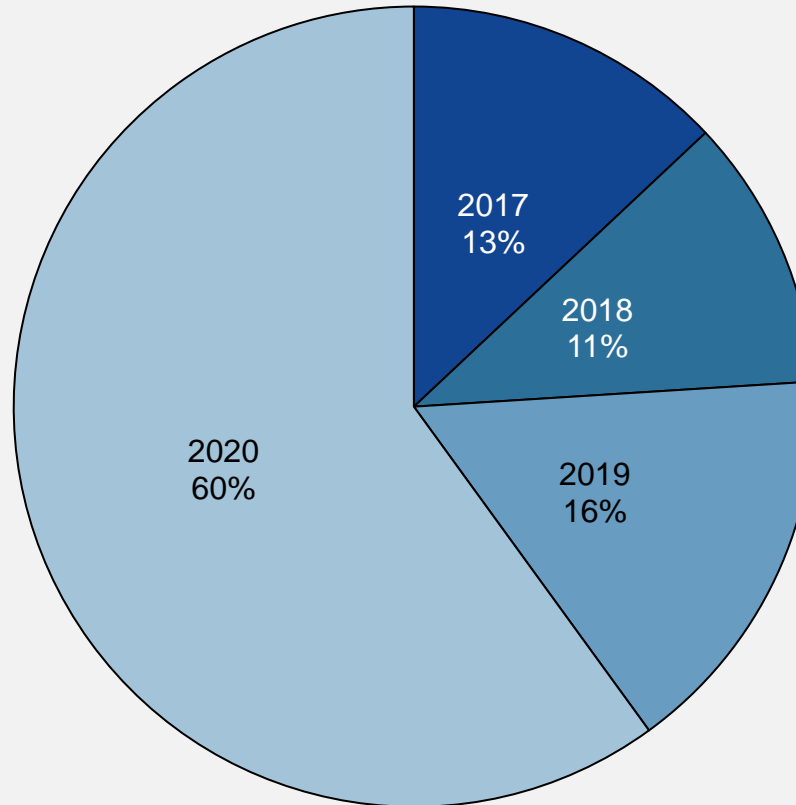
Base: PY Lucky For Life Players (n=888)

Confidential



Last Played Lucky For Life

In which year did you last play Lucky For Life?

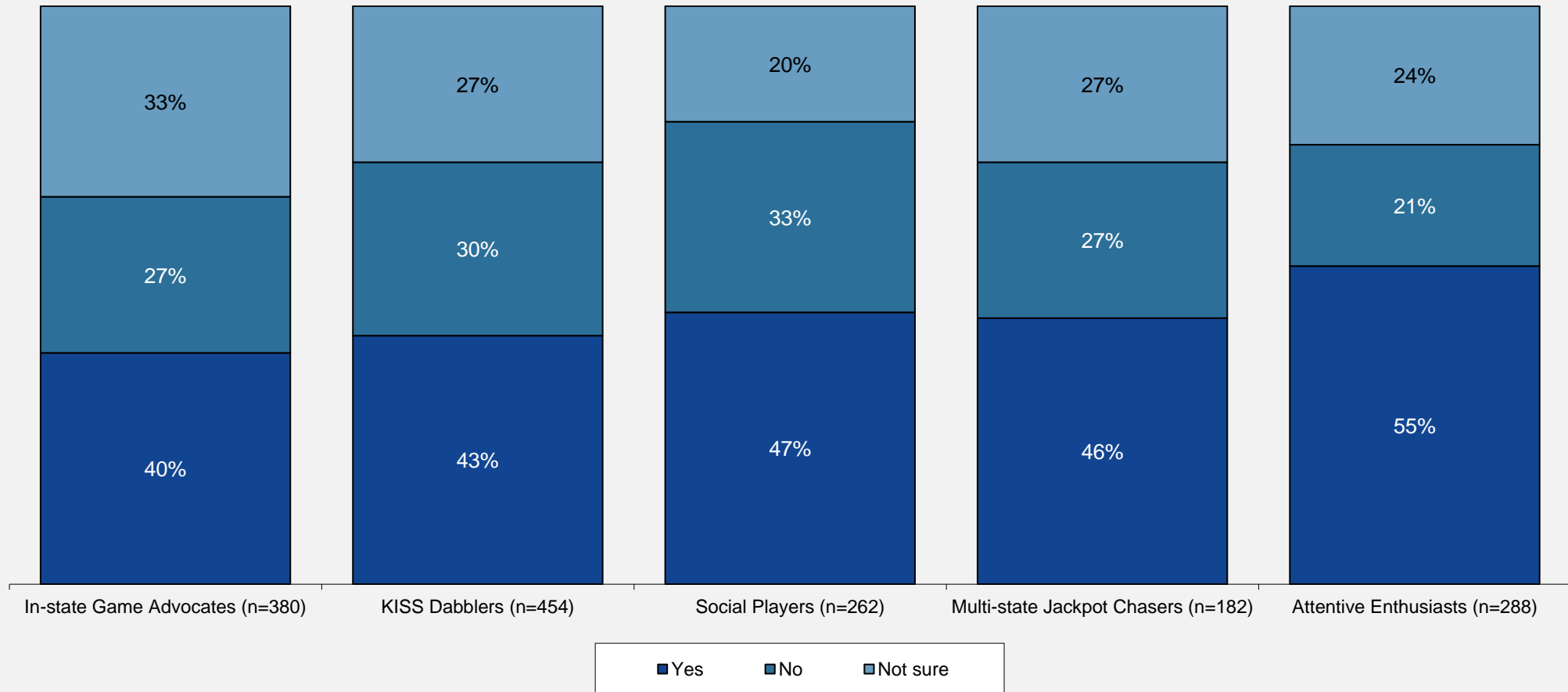


Segment Comparisons

In-focus: Casino Games in Nebraska

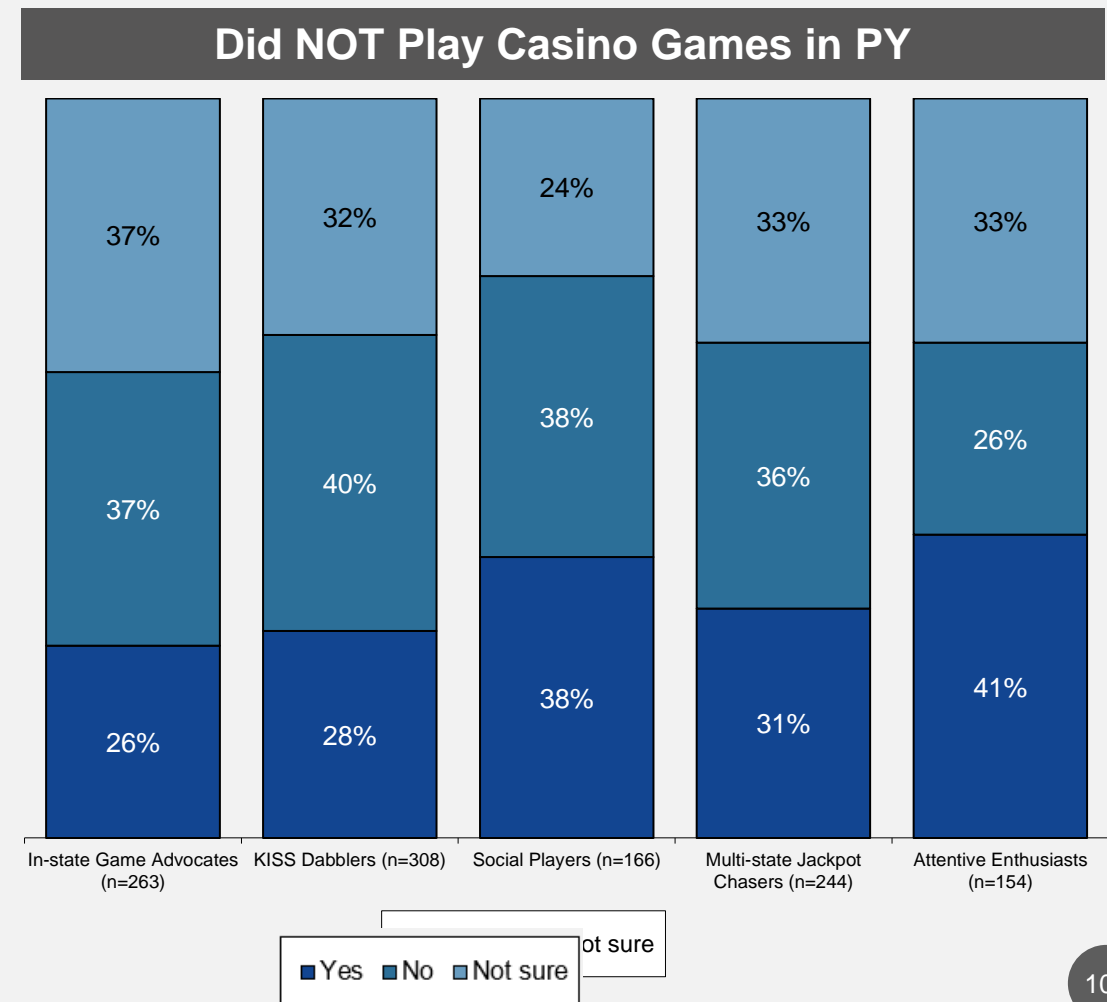
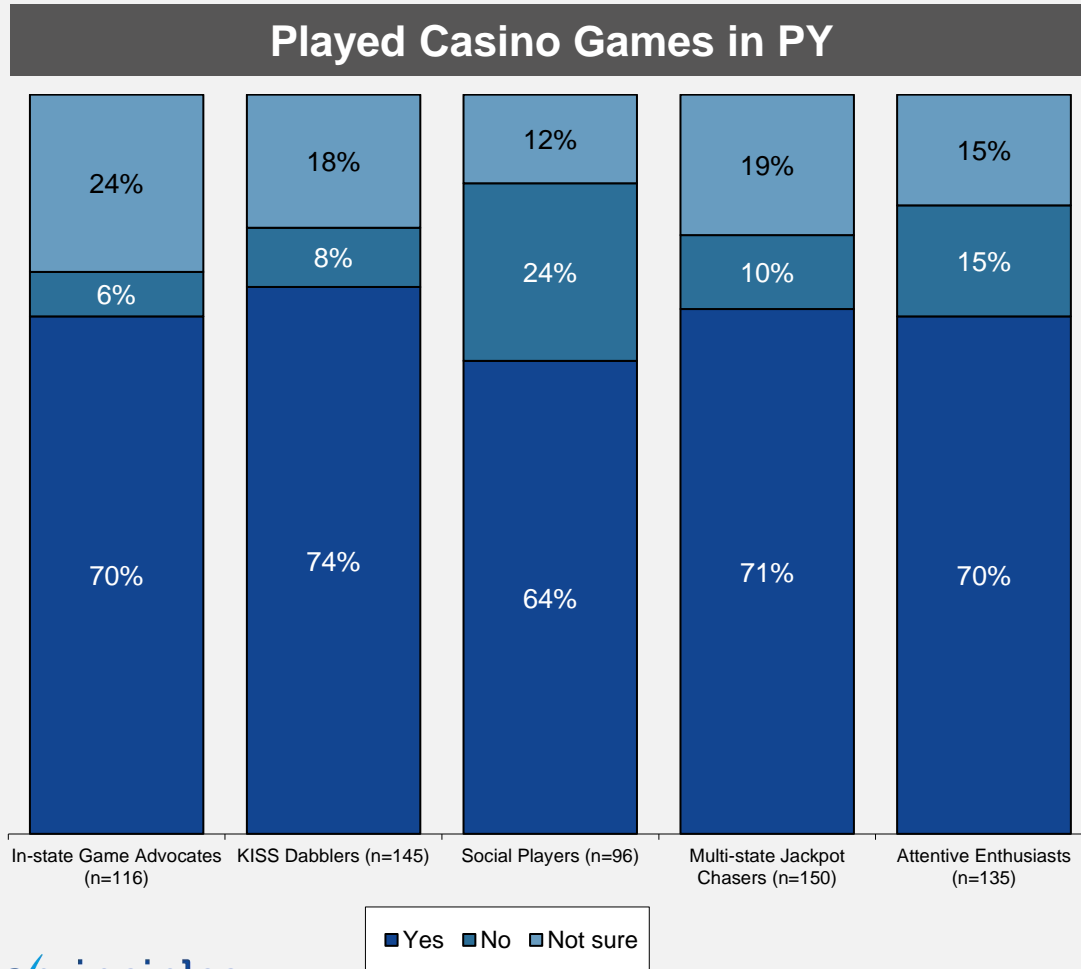
Likelihood to Visit a Racetrack in Nebraska Once Casino Games Are Available

Are you likely to go to a racetrack in Nebraska once casino games are available to play?



Intent to go to a Racetrack in Nebraska Once Casino Games Are Available

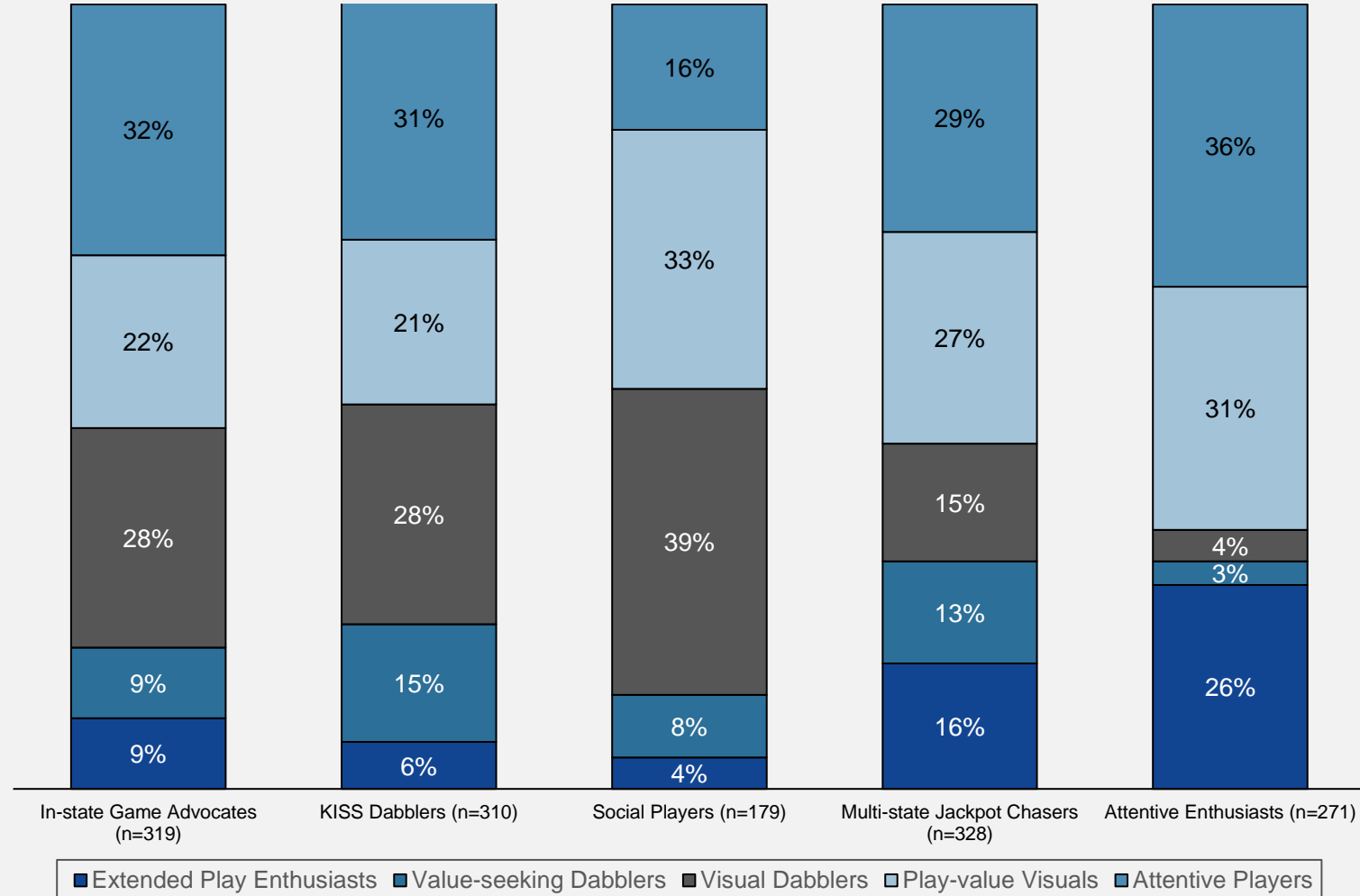
Are you likely to go to a racetrack in Nebraska once casino games are available to play?



Segment Comparisons

In-focus: Scratch Games

Scratch Segments by Lotto Segment

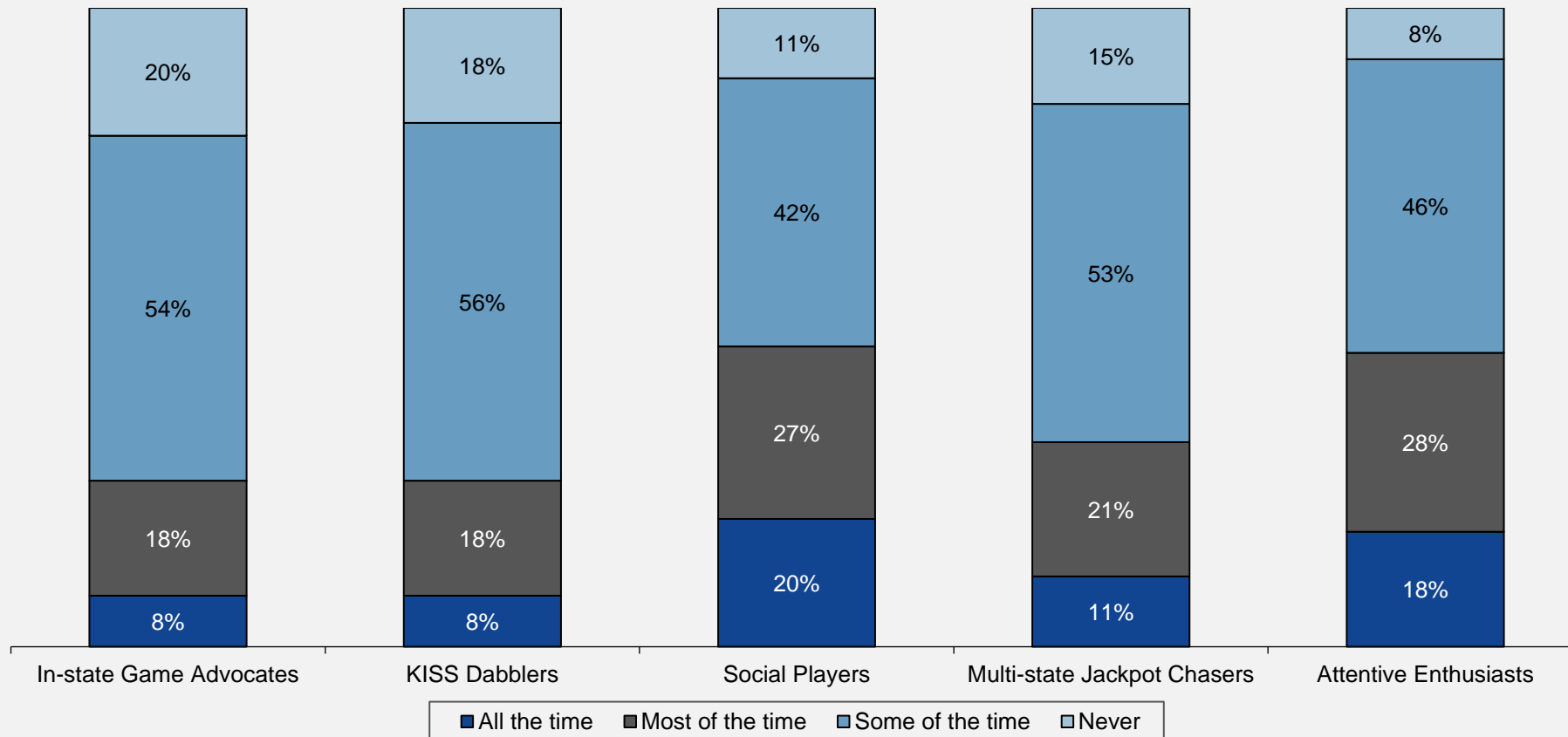


Base: PY Scratch Players (n=1406)

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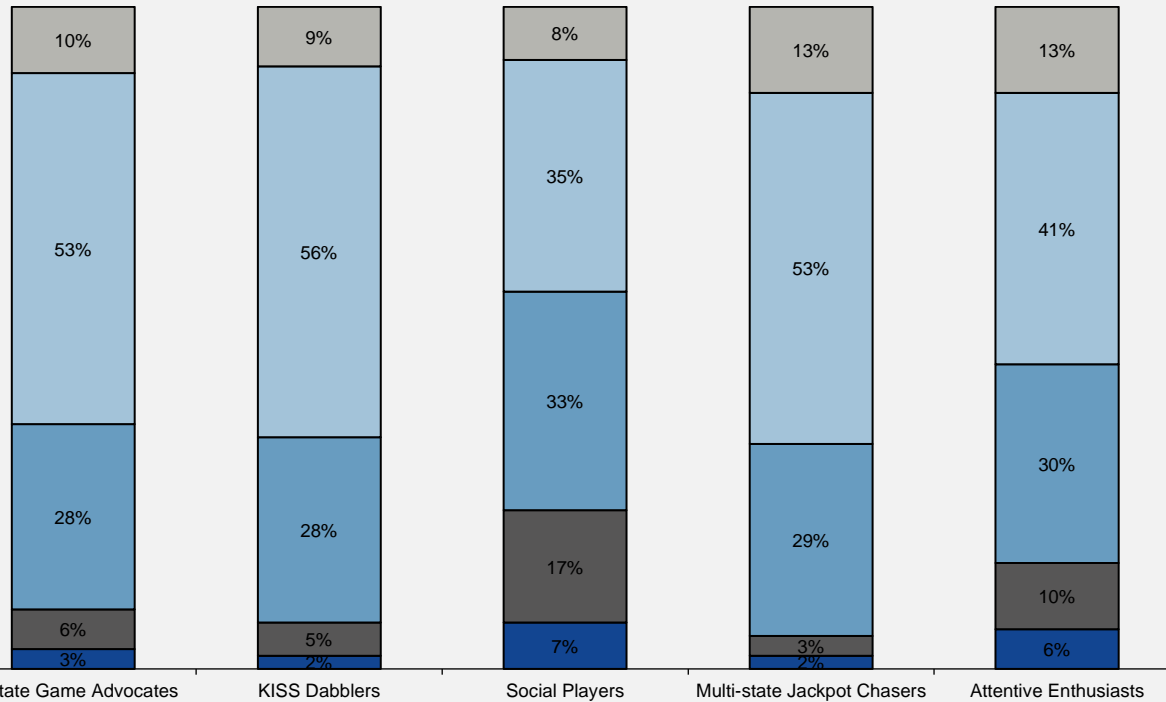
Scratch/Lotto Purchase Habits

How often do you purchase a Scratch game at the same time as a Nebraska Lotto game?

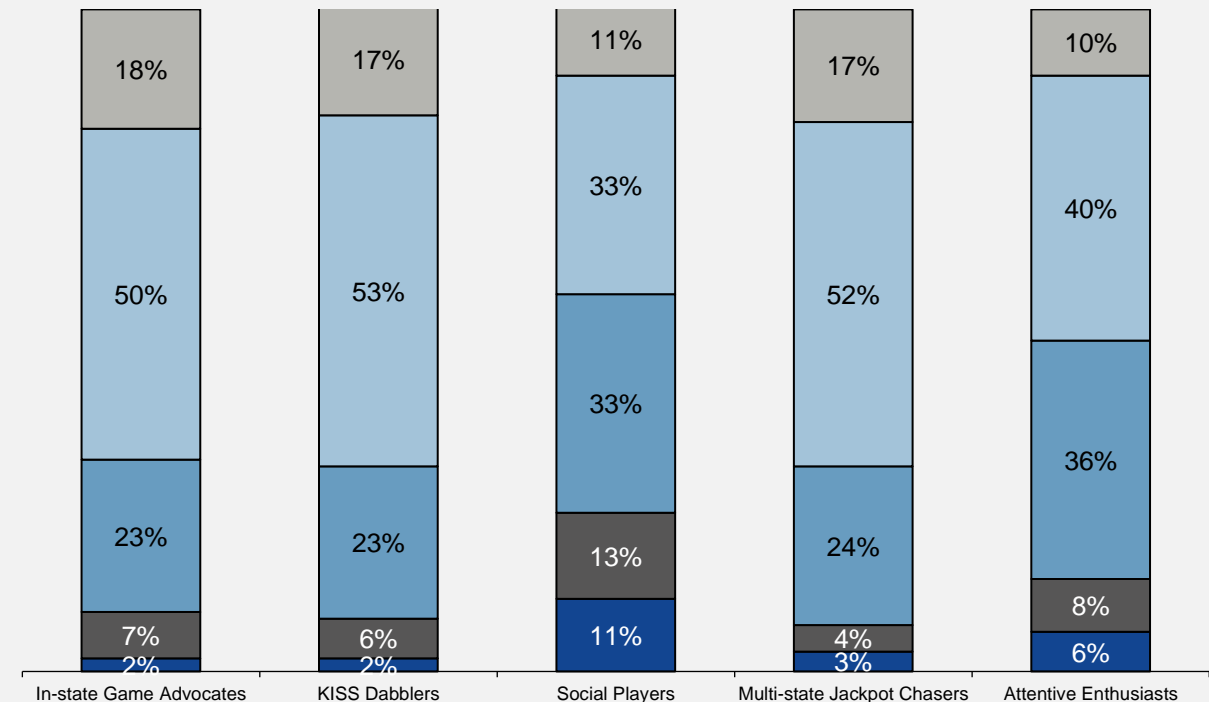


Scratch Game Spending

\$1 GAMES



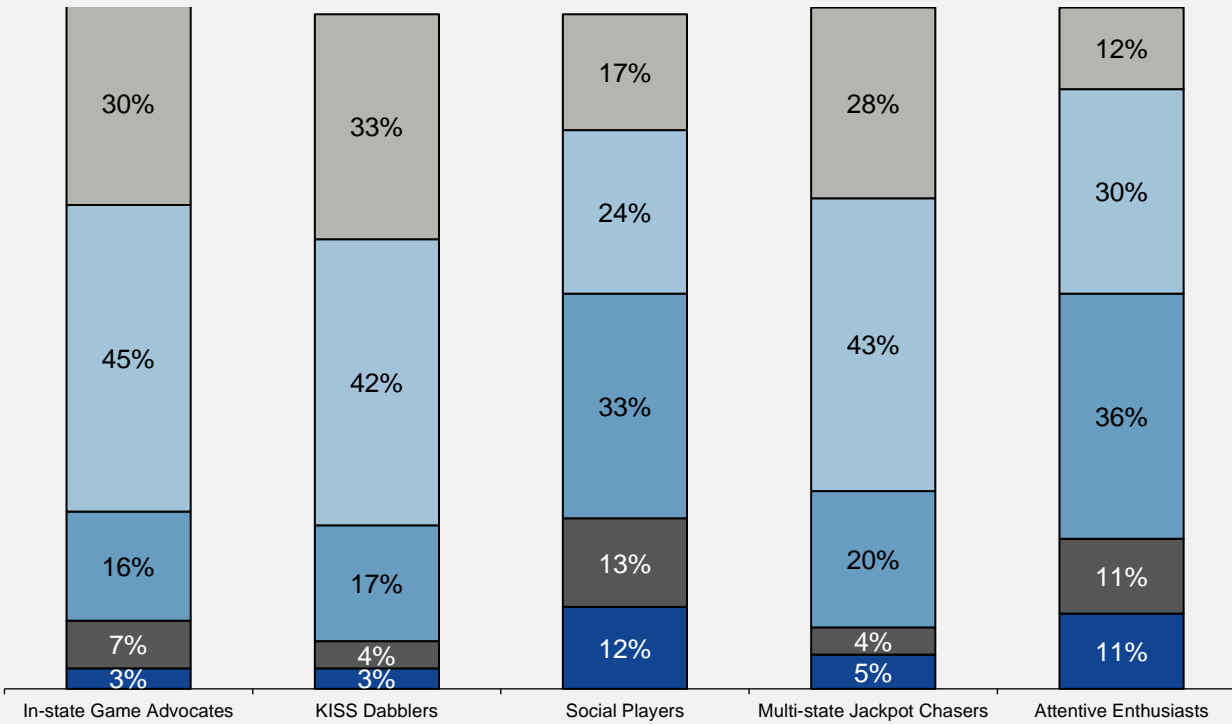
\$2 GAMES



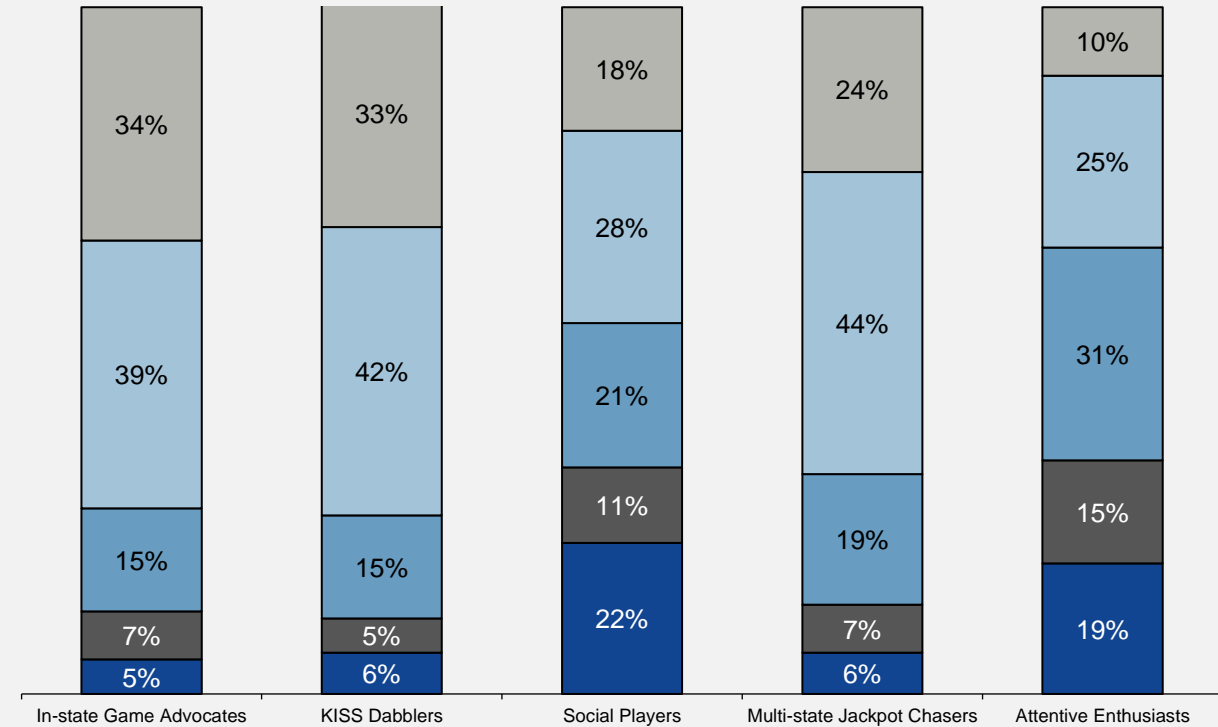
■ Heavy (\$1040+) ■ Moderate (\$520-\$1039) ■ Light (\$104-\$519) ■ Peripheral (\$1-\$103) ■ Non-spender

Scratch Game Spending

\$3 GAMES



\$5 GAMES

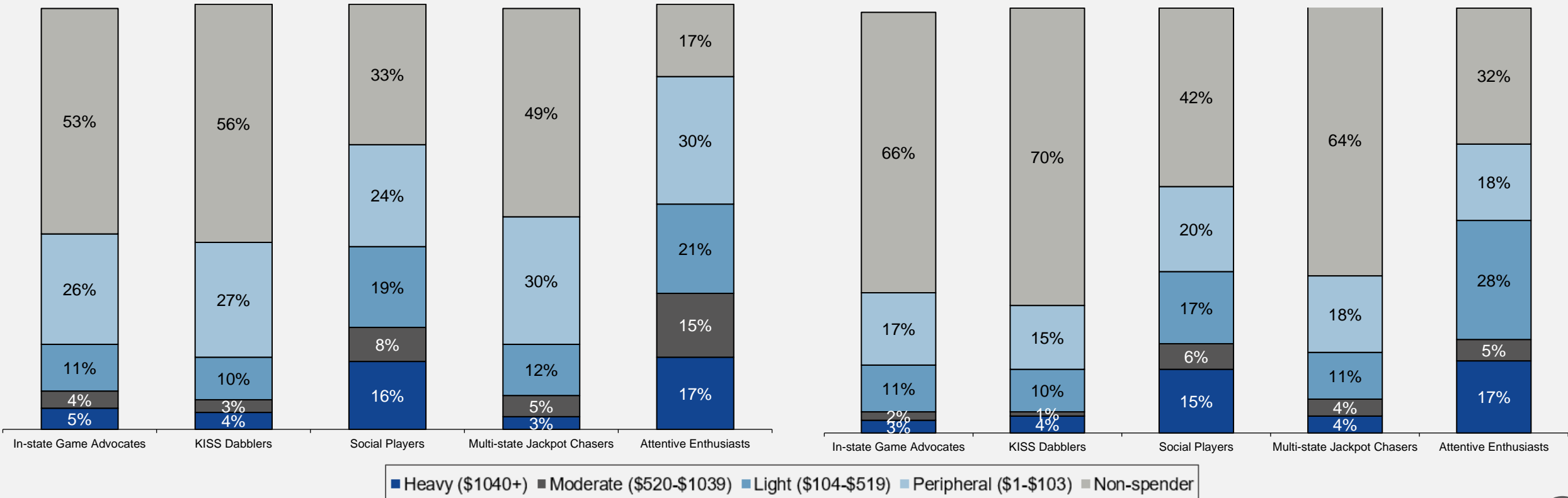


■ Heavy (\$1040+) ■ Moderate (\$520-\$1039) ■ Light (\$104-\$519) ■ Peripheral (\$1-\$103) ■ Non-spender

Scratch Game Spending

\$10 GAMES

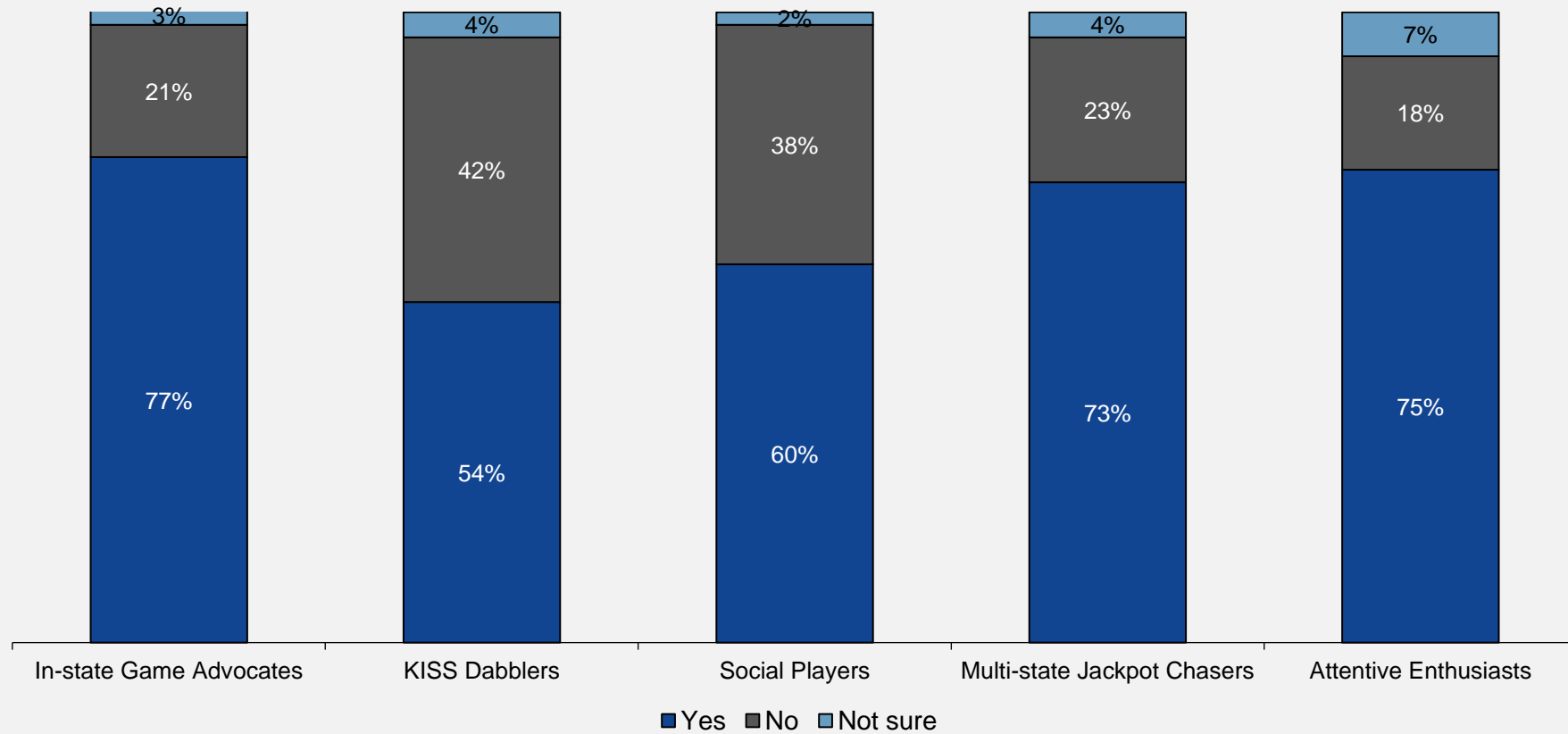
\$20 GAMES



Segment Comparisons

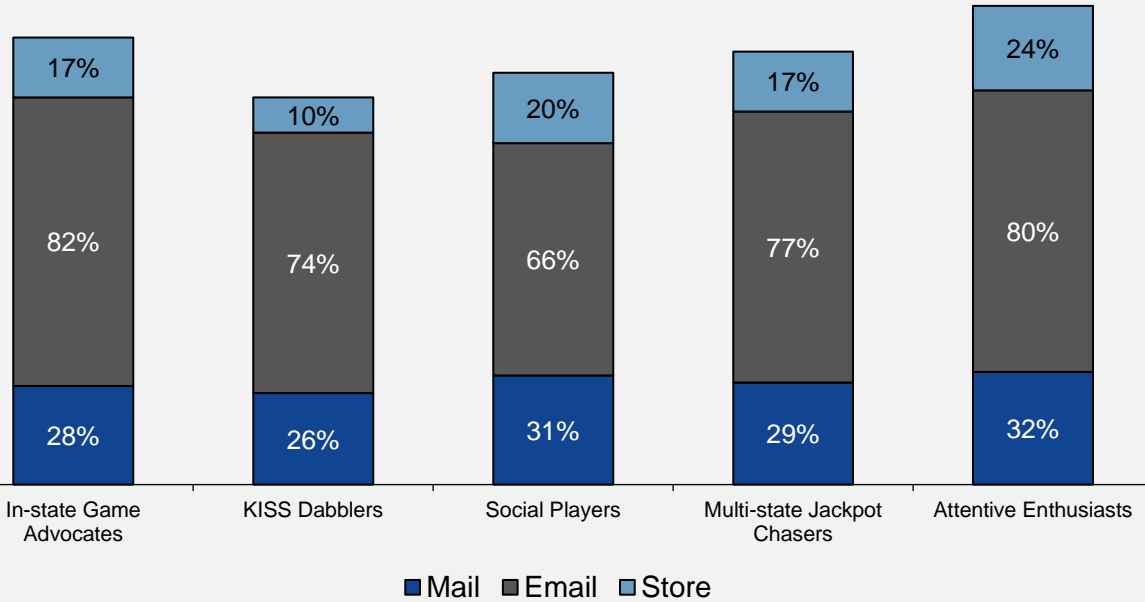
In-focus: Coupons

Past Year Coupon Use

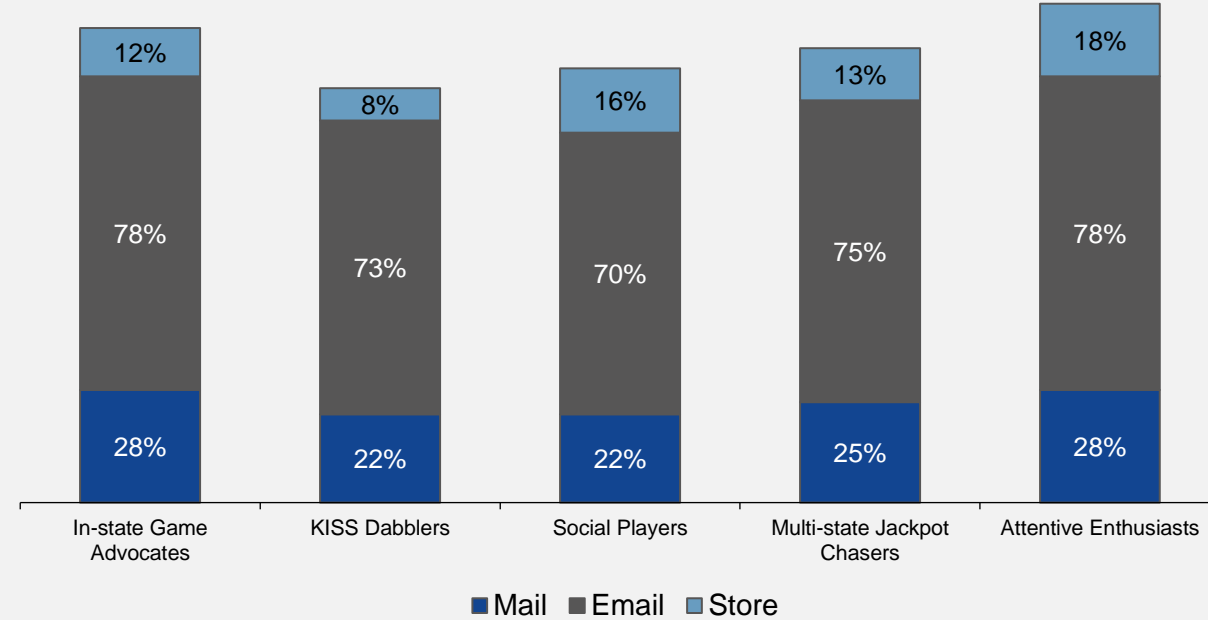


Past Year Coupon Use

LOTTO



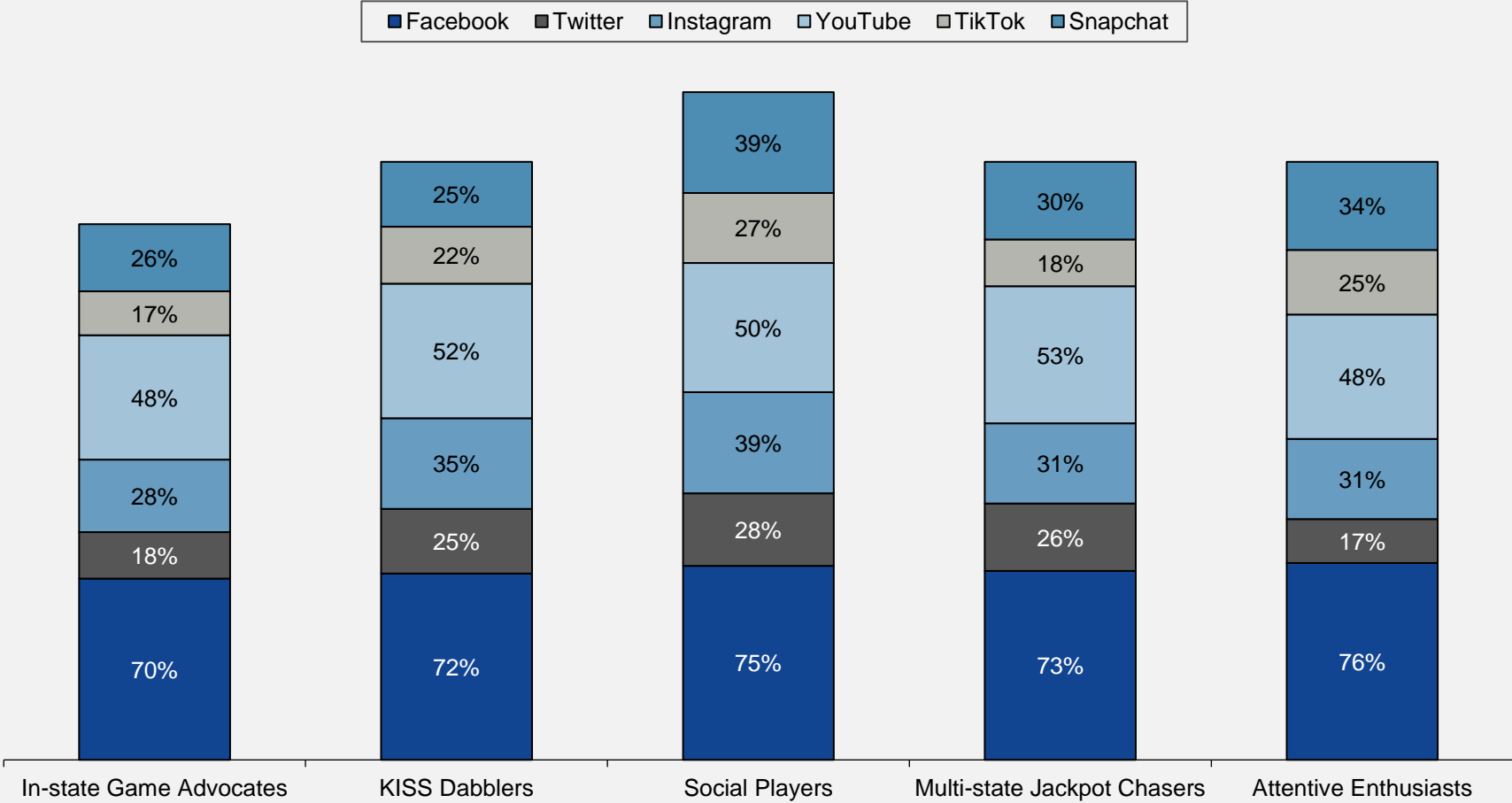
SCRATCH



Segment Comparisons

Social Media Usage

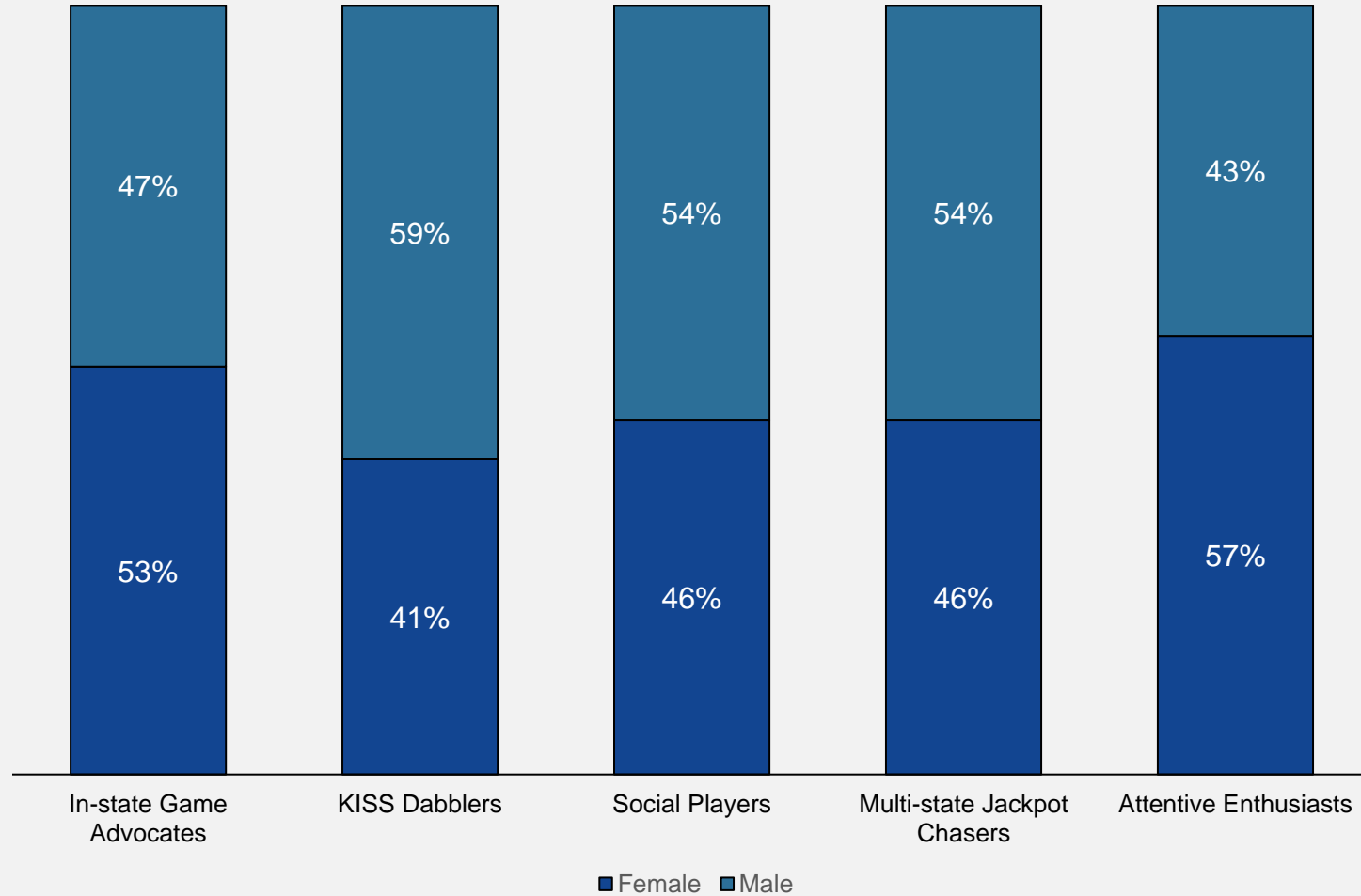
Actively Use Social Media



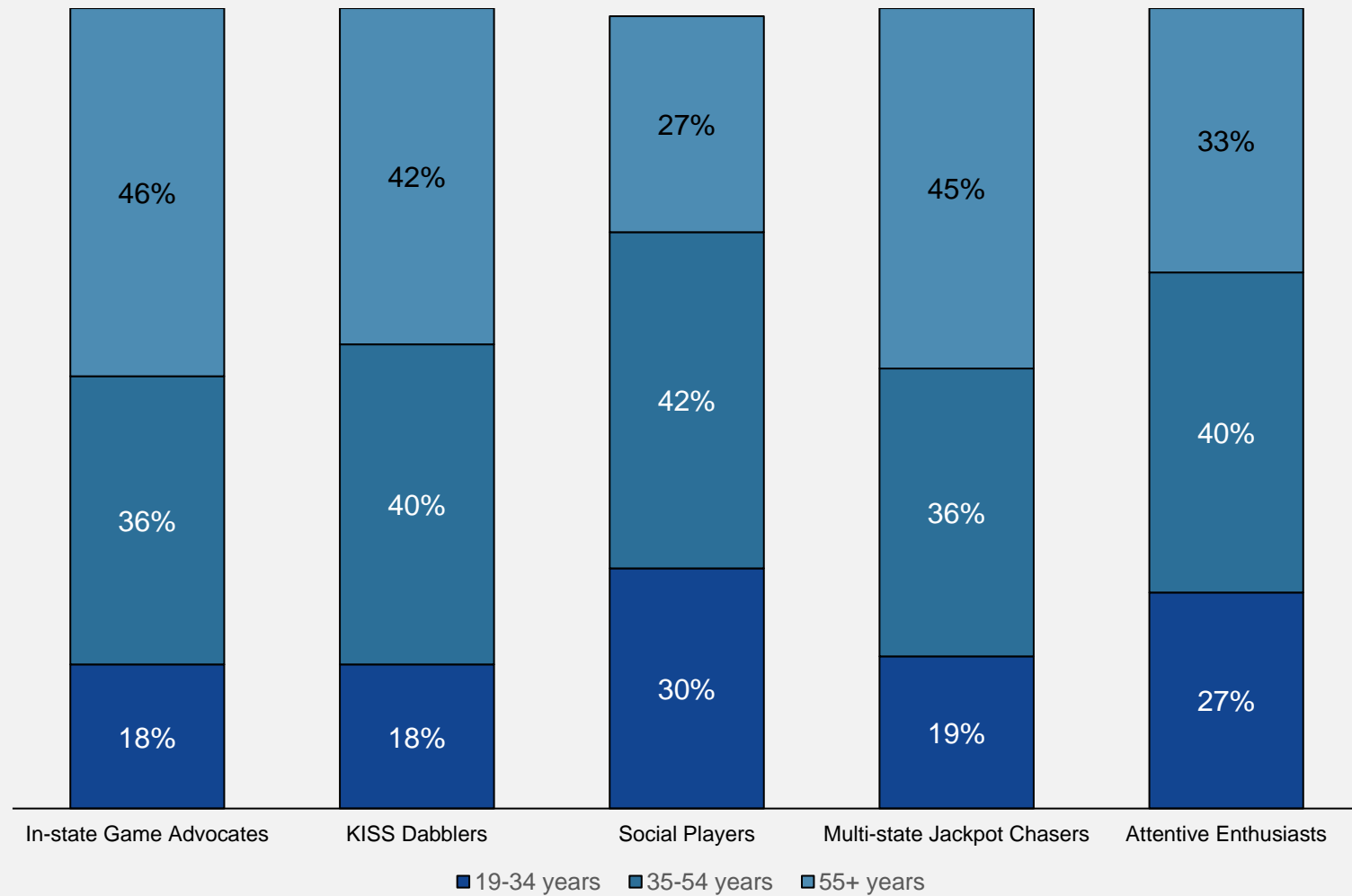
Segment Comparisons

Demographics

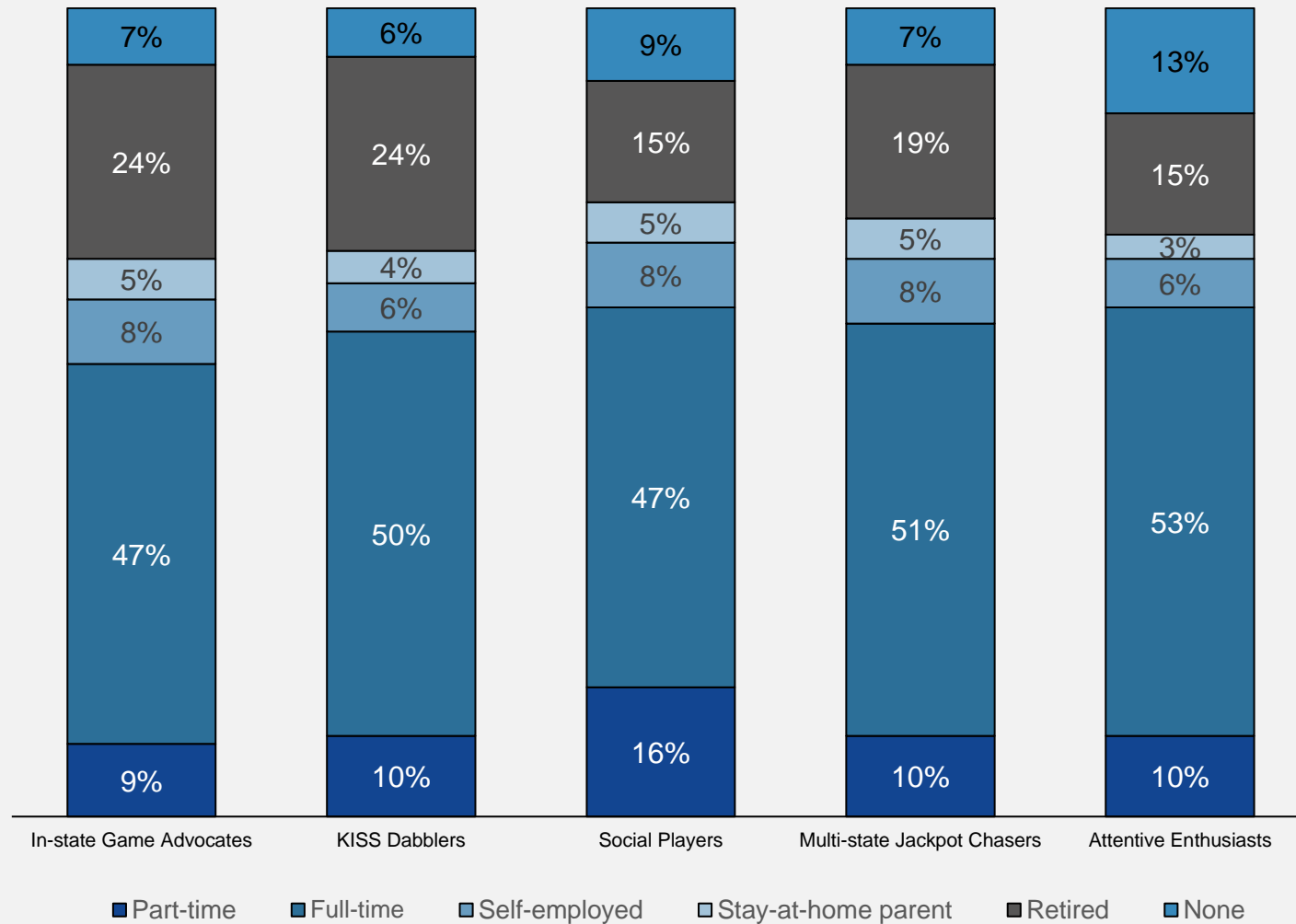
Gender



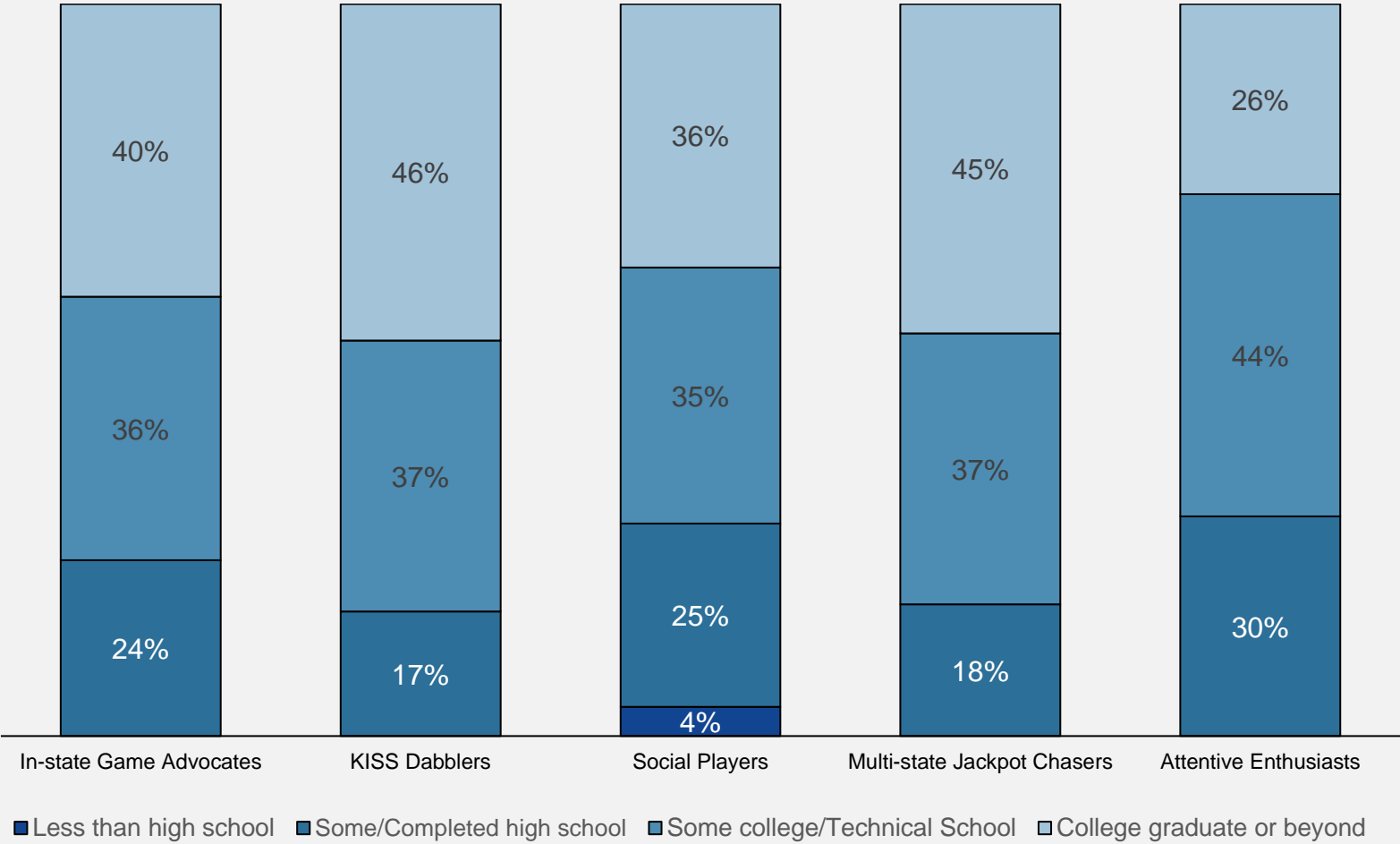
Age



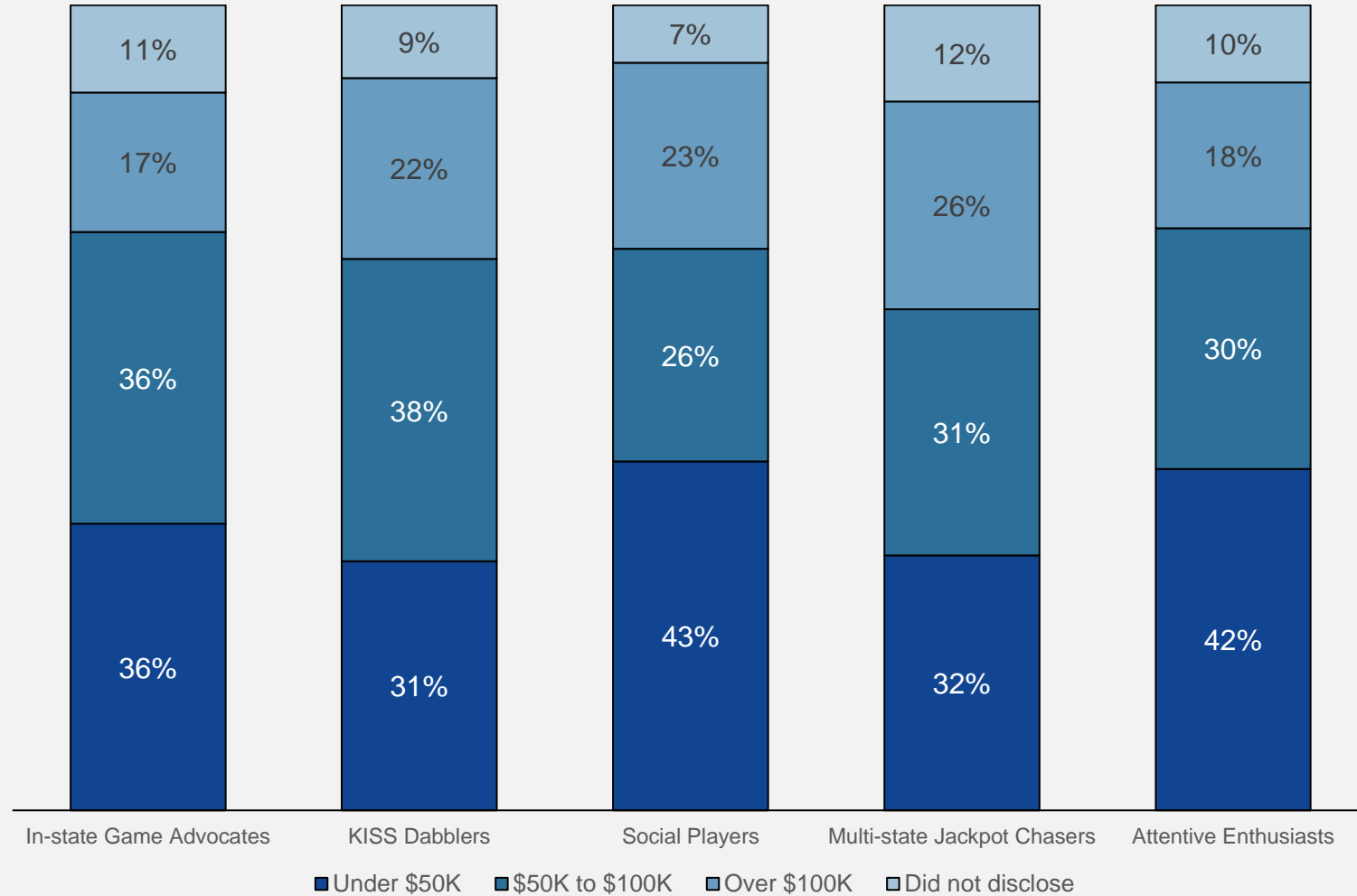
Employment Status



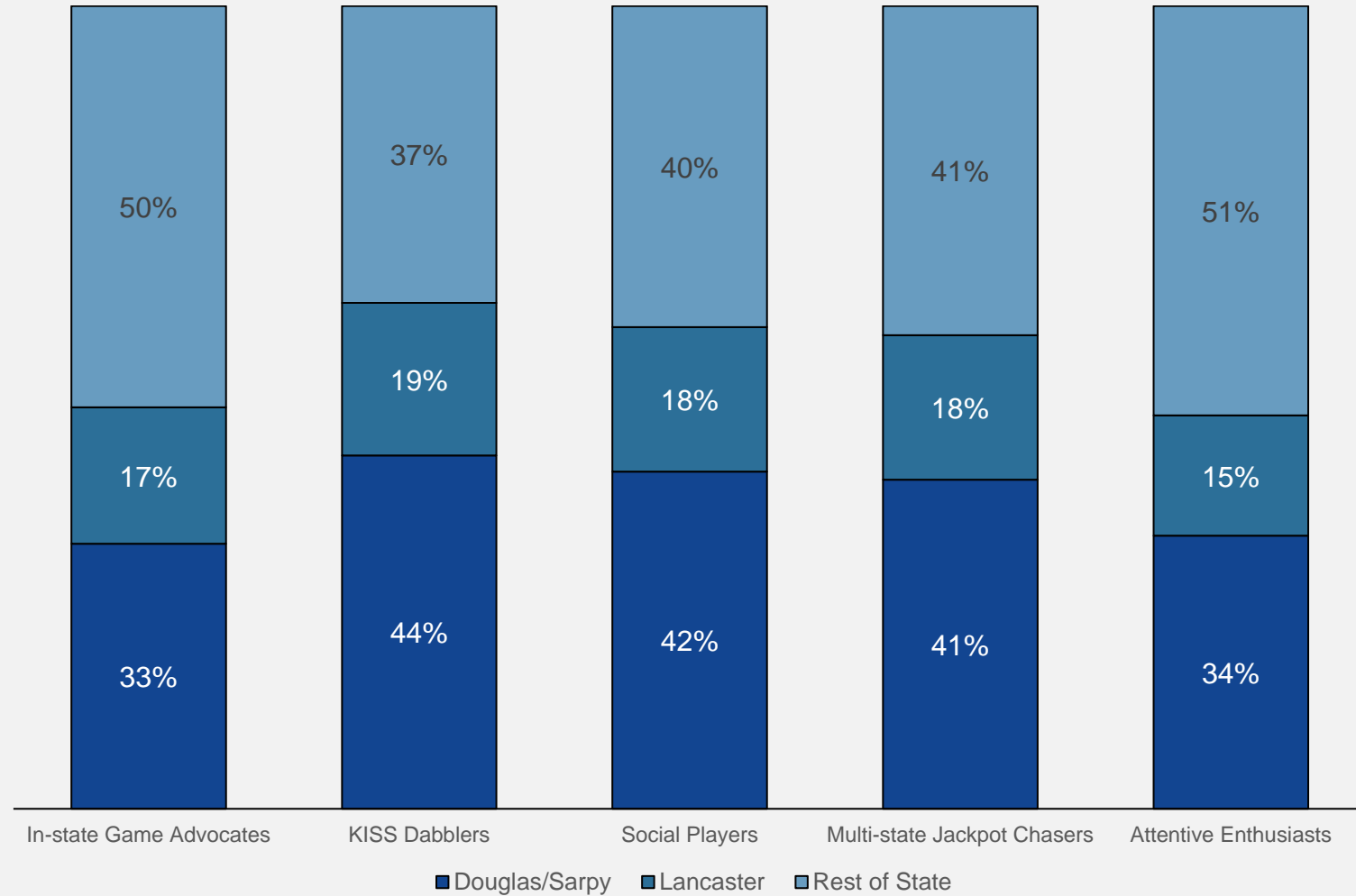
Education



Household Income



Regional Breakdown



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Recap of the Lotto Segments

8 Most Important (Overall) Purchase Decision Factors

PURCHASE DECISION FACTORS	IN-STATE GAME ADVOCATES	KISS DABBLERS	SOCIAL PLAYERS	MULTI-STATE JACKPOT CHASERS	ATTENTIVE ENTHUSIASTS
My chances of winning ANY prize amount (13.0%)	15.3%	13.2%	7.1%	14.1%	13.5%
The size of the jackpot for the next draw (12.4%)	9.5%	15.3%	11.7%	12.9%	11.8%
My chances of winning a prize amount that is meaningful to me (10.9%)	11.4%	11.1%	5.3%	11.6%	13.9%
My chances of winning the top prize / jackpot (9.7%)	9.0%	9.3%	5.7%	9.6%	14.9%
The cost to play that game (8.2%)	10.2%	11.8%	6.4%	7.3%	2.9%
The amount of cash I have on hand to spend on Lotto games (7.1%)	7.4%	8.5%	6.8%	6.9%	5.2%
A game that has served me well in the past (6.5%)	7.6%	6.6%	6.7%	4.9%	6.9%
The game is easy to play (5.8%)	4.7%	10.7%	7.4%	3.4%	1.1%
8 (out of 23) most important purchase decision factors account for 73.6% of choice share.	75.1%	86.7%	57.0%	70.7%	70.1%

LEGEND

■ = More important than Avg

■ = Less important than Avg

Other Noteworthy Purchase Decision Factors for Specific Segments

IN-STATE GAME ADVOCATES

- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (7.8%)

KISS DABBLERS

- There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: 'get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games') (0.4%)
- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (0.3%)

MULTI-STATE JACKPOT CHASERS

- There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: 'get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games') (9.1%)
- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (9.0%)

ATTENTIVE ENTHUSIASTS

- There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: 'get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games') (8.4%)
- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (8.4%)
- There is a limited statewide promotion of an entry into a drawing with a qualifying purchase (example: 'purchase a \$1 Nebraska Pick 5 ticket and receive an entry for a chance to win Huskers football season tickets') (6.0%)

LEGEND

X = Top 8 Item

X = Less important than Avg

Other Noteworthy Purchase Decision Factors for Specific Segments

SOCIAL PLAYERS

- A game I have played before (5.7%)
- There is a limited statewide promotion of an entry into a drawing with a qualifying purchase (example: 'purchase a \$1 Nebraska Pick 5 ticket and receive an entry for a chance to win Huskers football season tickets') (4.7%)
- There is a limited in-store discount offer for a specific game (example: 'purchase \$7 of 2by2 for \$4') (4.5%)
- There is a limited in-store offer of a free quick pick of a certain game with a qualifying purchase (example: 'get a free quick pick for Mega Millions if you purchase \$6 worth of Scratch games') (4.1%)
- Knowing other players have won money playing that game at that store (3.4%)
- A game that I play as part of a lottery pool with my friends, family or coworkers (3.1%)
- The game is being talked about in the news media (2.3%)
- A suggestion from the clerk (2.2%)
- The game is being talked about by friends, family, coworkers, or others I know (2.1%)

LEGEND

- ✕ = Top 8 Item
- ✕ = Add'l items to reach 73.6% share
- ✕ = Noteworthy

7 Most Important (Overall) Lotto Game Attributes

LOTTO GAME ATTRIBUTES	IN-STATE GAME ADVOCATES	KISS DABBLERS	SOCIAL PLAYERS	MULTI-STATE JACKPOT CHASERS	ATTENTIVE ENTHUSIASTS
The game offers the chance to win a jackpot that is at least \$20 million and can grow to over \$500 million (16.1%)	7.7%	19.1%	8.5%	24.4%	18.0%
The game is only played in Nebraska (12.1%)	32.6%	4.4%	8.4%	0.3%	16.8%
You can choose whether you would want your jackpot prize in annual payments or one lump sum payment (12.0%)	5.2%	14.8%	7.7%	16.5%	14.6%
A game that costs \$1 per play (11.2%)	16.4%	14.8%	10.1%	10.7%	0.5%
A game that promotes the chance to win a fixed prize amount 'For Life' (8.2%)	6.1%	7.1%	5.9%	9.2%	13.2%
The jackpot prize is paid all at once (7.0%)	4.7%	9.0%	5.6%	7.2%	8.0%
The game offers the chance to win a jackpot that starts at \$50 thousand and can grow to over \$150 thousand (5.2%)	4.0%	4.8%	4.0%	6.3%	6.8%
7 (out of 22) most important Lotto game attributes account for 71.8% of choice share.	76.6%	74.0%	50.1%	74.6%	77.9%

LEGEND

■ = More important than Avg

■ = Less important than Avg

Additional Important Lotto Game Attribute(s) for Specific Segments

SOCIAL PLAYERS

- You can win a FREE PLAY for that game by matching a specific number of balls (6.0%)
- The game gives you more flexibility regarding how to play (4.0%)
- A game that costs \$2 per play (4.0%)
- For \$1, you can purchase an add-on feature giving you the chance to multiply prize amounts other than the jackpot (3.8%)
- You select ALL your numbers from SINGLE set of balls (3.7%)
- The Top Prize amount is fixed regardless of the number of winners (3.5%)
- A game with an appealing name (3.4%)

LEGEND

☒ = Top 7 Item

☒ = Add'l item to reach 71.8% share

☒ = Noteworthy

Additional Important Lotto Game Attribute(s) for Specific Segments

MULTI-STATE JACKPOT CHASERS

- You can win a FREE PLAY for that game by matching a specific number of balls (5.5%)

ATTENTIVE ENTHUSIASTS

- For \$1, you can purchase an add-on feature giving you the chance to multiply prize amounts other than the jackpot (4.5%)

LEGEND

X = Top 7 Item

Recap: Annualized Spending

AVG ANNUALIZED SPEND

- All Lottery Games = \$4,727.44
- Lotto Games = \$2,003.15 (42%)
- Scratch Games = \$2,724.29 (58%)

SHARE OF LOTTO WALLET

- Powerball = 24%
- Mega Millions = 17%
- Nebraska Pick 5 = 19%
- Lucky for Life = 18%
- Nebraska Pick 3 = 7%
- MyDaY = 7%
- 2by2 = 7%

AVG ANNUALIZED SPEND

- All Lottery Games = \$1627.42
- Lotto Games = \$791.08 (49%)
- Scratch Games = \$836.34 (51%)

SHARE OF LOTTO WALLET

- Powerball = 26%
- Mega Millions = 17%
- Nebraska Pick 5 = 31%
- Lucky for Life = 10%
- Nebraska Pick 3 = 5%
- MyDaY = 4%
- 2by2 = 8%

AVG ANNUALIZED SPEND

- All Lottery Games = \$1,491.20
- Lotto Games = \$713.79 (48%)
- Scratch Games = \$777.41 (52%)

SHARE OF LOTTO WALLET

- Powerball = 31%
- Mega Millions = 20%
- Nebraska Pick 5 = 17%
- Lucky for Life = 14%
- Nebraska Pick 3 = 6%
- MyDaY = 5%
- 2by2 = 6%

AVG ANNUALIZED SPEND

- All Lottery Games = \$3,509.61
- Lotto Games = \$1,542.76 (44%)
- Scratch Games = \$1,966.85 (56%)

SHARE OF LOTTO WALLET

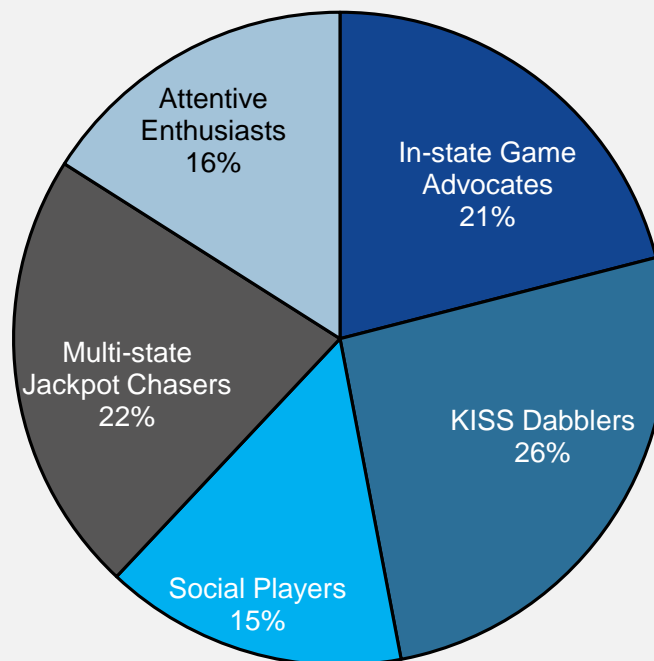
- Powerball = 21%
- Mega Millions = 17%
- Nebraska Pick 5 = 20%
- Lucky for Life = 15%
- Nebraska Pick 3 = 10%
- MyDaY = 9%
- 2by2 = 8%

AVG ANNUALIZED SPEND

- All Lottery Games = \$1,391.40
- Lotto Games = \$776.07 (56%)
- Scratch Games = \$615.33 (44%)

SHARE OF LOTTO WALLET

- Powerball = 33%
- Mega Millions = 21%
- Nebraska Pick 5 = 20%
- Lucky for Life = 10%
- Nebraska Pick 3 = 8%
- MyDaY = 3%
- 2by2 = 5%



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Recap: Relative Size & Importance

OVERALL

- SPEND DISPROPORTIONATELY LESS ON LOTTO GAMES
- Lottery games = 21% of spenders account for 14% of spending
- Lotto games = 22% of spenders account for 15% of spending
- Scratch games = 23% of spenders account for 14% of spending
- Powerball = 23% of spenders account for 17% of spending
- Mega Millions = 24% of spenders account for 16% of spending
- NE Pick 5 = 23% of spenders account for 12% of spending
- Lucky for Life = 22% of spenders account for 15% of spending
- NE Pick 3 = 21% of spenders account for 12% of spending
- MyDaY = 22% of spenders account for 12% of spending
- 2by2 = 22% of spenders account for 13% of spending

OVERALL

- SPEND DISPROPORTIONATELY MORE ON LOTTO GAMES
- Lottery games = 15% of spenders account for 22% of spending
- Lotto games = 15% of spenders account for 21% of spending
- Scratch games = 13% of spenders account for 23% of spending
- Powerball = 14% of spenders account for 17% of spending
- Mega Millions = 14% of spenders account for 19% of spending
- NE Pick 5 = 14% of spenders account for 20% of spending
- Lucky for Life = 15% of spenders account for 22% of spending
- NE Pick 3 = 18% of spenders account for 29% of spending
- MyDaY = 19% of spenders account for 32% of spending
- 2by2 = 16% of spenders account for 26% of spending

OVERALL

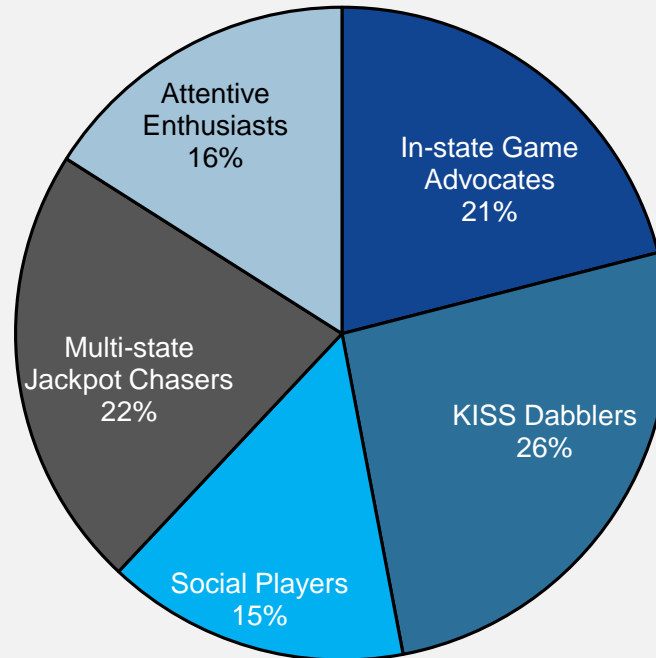
- SPEND DISPROPORTIONATELY MORE ON LOTTO GAMES
- Lottery games = 16% of spenders account for 33% of spending
- Lotto games = 16% of spenders account for 30% of spending
- Scratch games = 19% of spenders account for 36% of spending
- Powerball = 17% of spenders account for 27% of spending
- Mega Millions = 17% of spenders account for 29% of spending
- NE Pick 5 = 19% of spenders account for 27% of spending
- Lucky for Life = 23% of spenders account for 39% of spending
- NE Pick 3 = 21% of spenders account for 30% of spending
- MyDaY = 24% of spenders account for 37% of spending
- 2by2 = 20% of spenders account for 30% of spending

OVERALL

- Spend disproportionately LESS ON LOTTO GAMES
- Lottery games = 21% of spenders account for 15% of spending
- Lotto games = 21% of spenders account for 16% of spending
- Scratch games = 23% of spenders account for 14% of spending
- Powerball = 21% of spenders account for 15% of spending
- Mega Millions = 20% of spenders account for 15% of spending
- NE Pick 5 = 23% of spenders account for 23% of spending
- Lucky for Life = 22% of spenders account for 11% of spending
- NE Pick 3 = 19% of spenders account for 10% of spending
- MyDaY = 18% of spenders account for 11% of spending
- 2by2 = 24% of spenders account for 18% of spending

OVERALL

- SPEND DISPROPORTIONATELY LESS ON LOTTO GAMES
- Lottery games = 26% of spenders account for 15% of spending
- Lotto games = 26% of spenders account for 18% of spending
- Scratch games = 22% of spenders account for 13% of spending
- Powerball = 25% of spenders account for 23% of spending
- Mega Millions = 25% of spenders account for 21% of spending
- NE Pick 5 = 21% of spenders account for 18% of spending
- Lucky for Life = 19% of spenders account for 13% of spending
- NE Pick 3 = 21% of spenders account for 19% of spending
- MyDaY = 16% of spenders account for 8% of spending
- 2by2 = 17% of spenders account for 13% of spending



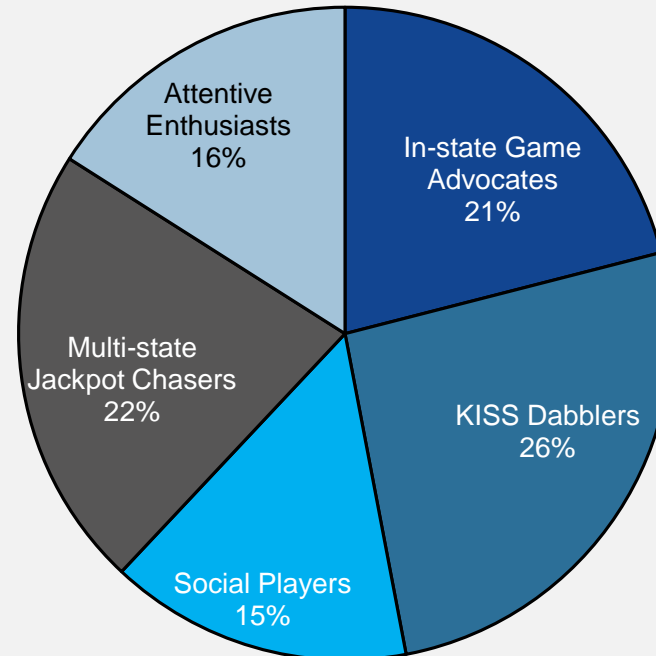
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Recap: Indexed Value of Each Segment Member

<u>LOTTO GAMES</u>	
•	Lotto Games = 0.66
•	Powerball = 0.79
•	Mega Millions = 0.72
•	Nebraska Pick 5 = 0.55
•	Lucky for Life = 0.66
•	Nebraska Pick 3 = 0.54
•	MyDaY = 0.55
•	2by2 = 0.60
<u>OVERALL</u>	
•	Lottery games = 0.64
•	Scratch games = 0.63

<u>LOTTO GAMES</u>	
•	Lotto Games = 1.86
•	Powerball = 1.67
•	Mega Millions = 1.76
•	Nebraska Pick 5 = 1.69
•	Lucky for Life = 2.41
•	Nebraska Pick 3 = 1.85
•	MyDaY = 2.29
•	2by2 = 1.88
<u>OVERALL</u>	
•	Lottery games = 2.04
•	Scratch games = 2.20

<u>LOTTO GAMES</u>	
•	Lotto Games = 0.73
•	Powerball = 0.72
•	Mega Millions = 0.69
•	Nebraska Pick 5 = 1.07
•	Lucky for Life = 0.52
•	Nebraska Pick 3 = 0.48
•	MyDaY = 0.49
•	2by2 = 0.83
<u>OVERALL</u>	
•	Lottery games = 0.70
•	Scratch games = 0.67



<u>LOTTO GAMES</u>	
•	Lotto Games = 1.43
•	Powerball = 1.16
•	Mega Millions = 1.32
•	Nebraska Pick 5 = 1.33
•	Lucky for Life = 1.51
•	Nebraska Pick 3 = 1.95
•	MyDaY = 2.14
•	2by2 = 1.75
<u>OVERALL</u>	
•	Lottery games = 1.51
•	Scratch games = 1.59

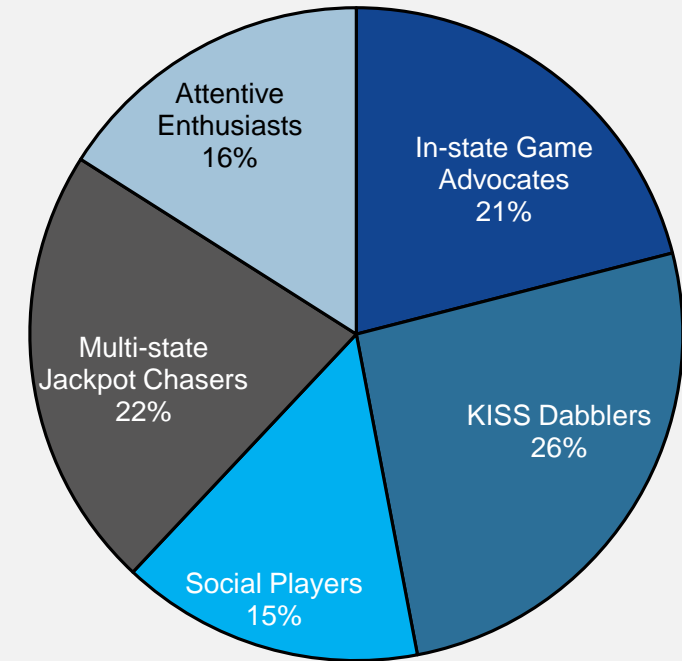
<u>LOTTO GAMES</u>	
•	Lotto Games = 0.72
•	Powerball = 0.90
•	Mega Millions = 0.84
•	Nebraska Pick 5 = 0.70
•	Lucky for Life = 0.51
•	Nebraska Pick 3 = 0.74
•	MyDaY = 0.33
•	2by2 = 0.50
<u>OVERALL</u>	
•	Lottery games = 0.60
•	Scratch games = 0.50

Preliminary Thoughts

- Characteristics of a Successful Segmentation

- Segments should be: (Frank, Massey and Wind 1972)

- **Identifiable** – distinctly different on easily measurable variables
- **Substantial** – large enough to matter
- **Accessible** – reachable through marketing, advertising, and distribution efforts
- **Stable** – persist over time
- **Responsive** – respond to efforts aimed at them
- **Actionable** – differences are able to guide marketing decisions



Next Steps

Next Steps

1. People Principles to provide PowerPoint-style report.
2. People Principles to provide Executive Summary of each segment.
3. Series of In-focus Research Webinars:
 - Topic: Familiarity and Perceptions of each Lotto game
 - Topic: Relative Size and Importance of each segment for each Lotto game
 - Topic: Crossplay of Lotto games
 - Topic: Powerball vs Mega Millions
 - Topic: Pick 3
 - Topic: Lucky for Life