

Maryland State Lottery

2004 Fall Scratch Groups

completed by:



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Objectives

A total of 31 scratch-off tickets were reviewed during the Fall, 2004 focus groups. The groups were designed:

- to help determine which scratch-off tickets could be ready to be printed “as is,” if they fit into the marketing plan (with no additional edits) and which could be ready to print, if they fit into the marketing plan, with edits
- to establish which tickets may be most appropriate for marketing support
- to gauge interest in Pouch Game promotion

The scratch-off tickets were evaluated on specific game attributes (i.e., ticket name, design, colors, play style and overall ticket impressions) and on likelihood of purchase. Consumers had the opportunity to evaluate each ticket individually and to provide suggestions for improvement.

Methodology

Focus groups were conducted at Columbia Focus in Ellicott City on October 26, 2004 and at The Media Network in Silver Fall on October 27, 2004. Columbia Focus managed the recruitment of all respondents.

Respondents were recruited for each of the three segments (Avid Scratch Traditionalists, Quick Action Gamers and Fair Weather Scratchers) based on their preferences and purchase behavior in scratch-off tickets. In order to determine the most appropriate player segment in which to place each respondent, respondents were asked to tell why they liked playing scratch-off's, what types of play styles they prefer, when and how they like to scratch their tickets, and their preferences on other scratch characteristics, such as: how long they take to play.

50% of all players recruited were classified as “core” players, 50% were classified as “occasional” players. There was a mix of core and occasional players in each group:

- Core players were defined as those who, in the past year, have purchased and played more than \$100 worth of scratch-off tickets and who play scratch-off tickets at least once every other week.
- Occasional players were defined as those who, in the past year, have purchased and played between \$5 and \$99 worth of scratch-off tickets and who play scratch-off tickets less than every other week.

The demographic breakdown of all groups combined as follows:

Overall Demographics

- Overall, respondents spend an average of \$8.71 per occasion, on scratch-off tickets. 57% of respondents were classified as “core” players, 43% were occasional.

* Gender

- o 65% Female respondents
- o 35% Male respondents

* Race

- o 57% Caucasian
- o 43% African American
- o 0% Other

* Age

- o 8% between 18-24
- o 14% between 25-34
- o 39% between 35-44
- o 31% between 45-54
- o 6% between 55-64
- o 2% 65+

* Annual Household Income

- o 0% under \$19,000
- o 10% between \$19,000 - \$30,999
- o 18% between \$31,000 - \$45,999
- o 24% between \$46,000 - \$60,999
- o 14% between \$61,000 - \$75,999
- o 34% \$76,000 or more

* Other Maryland Lottery Games Purchased in the Previous Month Include:

- o 67% also purchased Lotto
- o 57% also purchased Mega Millions
- o 18% also purchased Bonus Match 5
- o 41% also purchased Pick 3
- o 33% also purchased Pick 4
- o 22% also purchased Keno

Discussion Topics

All groups followed the same format:

Shopping Exercise*

- All 31 tickets were hung on the focus group room wall prior to the groups. Following a brief introduction, respondents were instructed to “purchase” \$34 worth of the displayed tickets.

Likelihood to Purchase

- Each participant then received a binder containing a smaller number of tickets. Respondents were asked to more closely examine the tickets in their binders and determine their likelihood to purchase each ticket on a scale of 1 to 4 (1=not at all likely, 4=very likely). Respondents recorded their ticket ratings on a worksheet provided by the moderator.

Ticket Review

- The moderator then proceeded to review each individual ticket in the respondents’ binders. For each ticket, respondents were asked to share with the group their likelihood to purchase and reasons why. Using this likelihood to purchase as the impetus for discussion, the moderator obtained specific input regarding game attributes and potential improvements.

Pouch Game Promotion Concept

- Respondents were given a description of a new Lottery Promotion which would be promoted as a game to play in a group. They were asked to provide feedback on the concept and state their likelihood to purchased the game if it were available in Maryland. Additionally, respondents were asked how likely they would be to play this game in a group versus by themselves.

Shopping Exercise

- Respondents were given a second opportunity to “purchase” \$34 worth of the displayed tickets. The reason for the re-shop was to determine if respondents would change their spending habits after they had a chance to more closely examine a number of tickets. The tickets that showed the largest jumps in popularity between the first and second shopping exercise AND had a strong likelihood to purchase will be strongly considered for marketing support.

Player Segment Overview

Avid Scratch Traditionalists (Segment 1)

- * Majority claim scratch as their favorite game
- * Accounted for nearly half of all scratch spending and highest per year spending on all lottery games, especially Pick 3 and Pick 4
- * Enjoy the act of scratching; fun and entertainment, and the thrill even if they do not win.
- * They like extended play games, like Bingo and crossword to let the anticipation build - they look for the mental challenge.
- * They are the most likely to cross-buy with other products.
- * They focus on themes that are more complicated and involved.

Quick Action Gamers (Segment 2)

- * 4 in 10 claim scratch as their favorite game, but 1 in 4 claims Keno as their favorite.
- * Accounted for 26% of per year scratch spending, but had highest spending on Keno.
- * Like quick action, find out immediately if they won, and also larger prizes and non-cash.
- * Want games that play like Keno, or Pick 3/Pick 4; symbol and number match.
- * Scratch tickets as quickly as possible to find out if they won; often start scratching before reading instructions.
- * Highest participation on slots, casinos and other forms of gaming.

Fair-weather Scratchers (Segment 3)

- * Highest participation on Mega Millions.
- * Accounted for 28% of per year scratch spending.
- * Tend to be a bit more superstitious - hence the higher participation on online games.
- * Lower appeal on most play style attributes.
- * Most likely to spend less on scratch if Lotto or Mega Millions jackpot is rolling.
- * Some policy concerns about lotteries and gaming compared to other segments, but not a critic.

Fall, 2004, Avid Scratch Traditionalist findings:

The top tickets among this segment were (includes pre shopping numbers only):

\$2

- * Wild Cash (11 tickets)
- * Weekly \$500 (10 tickets)

\$3

- * Red Cherries (12 tickets)
- * Dick Tracy (10 tickets)

\$5

- * Lucky 7 (15 tickets)
- * Supercash (7 tickets)

\$10

- * Super Size Cash (2 tickets)
- * Instant Fortune (2 tickets)

\$20

- * Cool Million (3 tickets)



Shopping Outcome: Segment 1

	Pre-Shopping Tickets Purchased	Post-Shopping Tickets Purchased	Total Tickets
\$2			
Wild Cash	11	17	28
Weekly \$500	10	7	17
Drive It	3	3	6
\$3			
Dick Tracy	10	12	22
Red Cherries	12	9	21
Looney Toons Loot	5	6	11
Road Runner Fast Cash	8	3	11
Couch Potato	5	1	6
Triple Tripler	4	1	5
Star Wars	3	0	3
\$5			
Lucky 7	15	8	23
Supercash	7	2	9
Texas Hold 'Em	3	6	9
Casino Action	1	7	8
World Poker	2	5	7
Red Hot & Blue 7's	5	1	6
High 5's Jackpot	1	5	6
5 Times the Fun	4	1	5
Orange County Choppers (P)	4	1	5
Casino Fortune	2	2	4
Fabulous Fortune	1	3	4
Big Bucks	4	0	4
Fabulous 5's	2	2	4
Orange County Choppers (B)	0	2	2
Power Card	1	0	1
\$10			
Super Size Cash	2	1	3
Instant Fortune	2	1	3
Club Casino	0	1	1
\$20			
Games Galore	0	4	4
Cool Million	3	1	4
Double Millions	0	2	2

Avid Scratch Traditionalist Demographics: Baltimore

* Respondents spent an average of \$8.40 per occasion on scratch-off tickets. 60% of respondents were classified as “core” players, 40% were occasional.

* Gender

- o 60% Female respondents
- o 40% Male respondents

* Race

- o 70% Caucasian
- o 30% African American
- o 0% Other

* Age

- o 20% between 18-24
- o 20% between 25-34
- o 20% between 35-44
- o 30% between 45-54
- o 10% between 55-64
- o 0% 65+

* Annual Household Income

- o 10% between \$19,000 - \$30,999
- o 20% between \$31,000 - \$45,999
- o 40% between \$46,000 - \$60,999
- o 10% between \$61,000 - \$75,999
- o 20% \$76,000 or more

* Other Maryland Lottery Games Purchased in the Previous Month Include:

- o 60% also purchased Lotto
- o 50% also purchased Mega Millions
- o 10% also purchased Bonus Match 5
- o 40% also purchased Pick 3
- o 40% also purchased Pick 4
- o 10% also purchased Keno

Avid Scratch Traditionalist Demographics: DC

* Respondents spent an average of \$8.25 per occasion on scratch-off tickets. 62.5% of respondents were classified as “core” players, 37.5% were occasional.

* Gender

- o 50% Female respondents
- o 50% Male respondents

* Race

- o 75% Caucasian
- o 25% African American
- o 0% Other

* Age

- o 0% between 18-24
- o 12.5% between 25-34
- o 62.5% between 35-44
- o 12.5% between 45-54
- o 12.5% between 55-64
- o 0% 65+

* Annual Household Income

- o 0% between \$19,000 - \$30,999
- o 0% between \$31,000 - \$45,999
- o 37.5% between \$46,000 - \$60,999
- o 12.5% between \$61,000 - \$75,999
- o 50% \$76,000 or more

* Other Maryland Lottery Games Purchased in the Previous Month Include:

- o 75% also purchased Lotto
- o 75% also purchased Mega Millions
- o 0% also purchased Bonus Match 5
- o 50% also purchased Pick 3
- o 25% also purchased Pick 4
- o 25% also purchased Keno

Fall 2004, Quick Action Gamer findings:

The top tickets among this segment were (includes pre shopping numbers only):

\$2

- * Drive It (15 tickets)
- * Wild Cash (12 tickets)

\$3

- * Road Runner Fast Cash (9 tickets)

\$5

- * Lucky 7's (10 tickets)
- * Supercash (6 tickets)
- * World Poker (6 tickets)

\$10

- * Club Casino (3 tickets)
- * Super Size Cash (2 tickets)

\$20

- * Games Galore (2 tickets)



Shopping Outcome: Quick Action Gamers

	Pre-Shopping Tickets Purchased	Post-Shopping Tickets Purchased	Total Tickets
\$2			
Weekly \$500	7	30	37
Wild Cash	12	13	25
Drive It	15	5	20
\$3			
Road Runner Fast Cash	9	8	17
Dick Tracy	5	8	13
Triple Tripler	4	8	12
Looney Toons Loot	2	10	12
Star Wars	3	3	6
Red Cherries	3	2	5
Couch Potato	3	1	4
\$5			
Lucky 7	10	11	21
Orange County Choppers (P)	1	7	8
Casino Fortune	5	2	7
Big Bucks	2	5	7
Power Card	2	5	7
Supercash	6	0	6
World Poker	6	0	6
Red Hot & Blue 7's	3	2	5
Texas Hold 'Em	4	1	5
5 Times the Fun	2	2	4
High 5's Jackpot	3	1	4
Fabulous 5's	1	2	3
Fabulous Fortune	3	0	3
Casino Action	1	1	2
Orange County Choppers (B)	1	0	1
\$10			
Super Size Cash	2	3	5
Club Casino	3	1	4
Instant Fortune	0	0	0
\$20			
Games Galore	2	1	3
Cool Million	0	2	2
Double Millions	1	0	1

Quick Action Gamer Demographics: Baltimore

* Respondents spent an average of \$9.40 per occasion on scratch-off tickets. 60% of respondents were classified as “core” players, 40% were occasional.

* Gender

- o 50% Female respondents
- o 50% Male respondents

* Race

- o 50% Caucasian
- o 50% African American
- o 0% Other

* Age

- o 10% between 18-24
- o 30% between 25-34
- o 20% between 35-44
- o 30% between 45-54
- o 10% between 55-64
- o 0% 65+

* Annual Household Income

- o 10% between \$19,000 - \$30,999
- o 20% between \$31,000 - \$45,999
- o 20% between \$46,000 - \$60,999
- o 10% between \$61,000 - \$75,999
- o 40% \$76,000 or more

* Other Maryland Lottery Games Purchased in the Previous Month Include:

- o 50% also purchased Lotto
- o 40% also purchased Mega Millions
- o 20% also purchased Bonus Match 5
- o 30% also purchased Pick 3
- o 30% also purchased Pick 4
- o 10% also purchased Keno

Quick Action Gamers Demographics: DC

* Respondents spent an average of \$11.67 per occasion on scratch-off tickets. 66.66% of respondents were classified as “core” players, 33.33% were occasional.

* Gender

- o 50% Female respondents
- o 50% Male respondents

* Race

- o 33.33% Caucasian
- o 66.66% African American
- o 0% Other

* Age

- o 16.66% between 18-24
- o 0% between 25-34
- o 83.33% between 35-44
- o 0% between 45-54
- o 0% between 55-64
- o 0% 65+

* Annual Household Income

- o 16.66% between \$19,000 - \$30,999
- o 33.33% between \$31,000 - \$45,999
- o 16.66% between \$46,000 - \$60,999
- o 16.66% between \$61,000 - \$75,999
- o 16.66% \$76,000 or more

* Other Maryland Lottery Games Purchased in the Previous Month Include:

- o 50% also purchased Lotto
- o 83.33% also purchased Mega Millions
- o 66.66% also purchased Bonus Match 5
- o 66.66% also purchased Pick 3
- o 50% also purchased Pick 4
- o 50% also purchased Keno

Fall, 2004, Fair Weather Scratcher findings:

The top tickets among this segment were (includes pre shopping numbers only):

\$2

* Wild Cash (10 tickets)

\$3

* Looney Toons Loot (7 tickets)

\$5

* Red Hot & Blue 7's (8 tickets)

* Texas Hold 'Em (8 tickets)

* Lucky 7's (7 tickets)

* Casino Action (7 tickets)

\$10

* Instant Fortune (4 tickets)

\$20

* Cool Million (3 tickets)

* Games Galore (2 tickets)



Shopping Outcome: Fair Weather Scratchers

	Pre-Shopping Tickets Purchased	Post-Shopping Tickets Purchased	Total Tickets
\$2			
Weekly \$500	9	9	18
Wild Cash	10	7	17
Drive It	8	5	13
\$3			
Red Cherries	7	7	14
Road Runner Fast Cash	4	3	7
Dick Tracy	4	3	7
Couch Potato	4	3	7
Triple Tripler	1	4	5
Star Wars	4	1	5
Looney Toons Loot	4	0	4
\$5			
Casino Fortune	4	10	14
Texas Hold 'Em	8	5	13
Lucky 7	7	4	11
Red Hot & Blue 7's	8	3	11
Big Bucks	3	7	10
Supercash	5	5	10
Fabulous Fortune	4	5	9
Casino Action	7	2	9
5 Times the Fun	4	3	7
Fabulous 5's	4	2	6
World Poker	3	3	6
Orange County Choppers (B)	3	1	4
Power Card	0	3	3
Orange County Choppers (P)	2	0	2
High 5's Jackpot	1	1	2
\$10			
Super Size Cash	2	3	5
Club Casino	1	4	5
Instant Fortune	4	0	4
\$20			
Cool Million	3	4	7
Games Galore	2	4	6
Double Millions	0	0	0

Quick Action Gamer Demographics: Baltimore

* Respondents spent an average of \$7.60 per occasion on scratch-off tickets. 60% of respondents were classified as “core” players, 40% were occasional.

* Gender

- o 70% Female respondents
- o 30% Male respondents

* Race

- o 70% Caucasian
- o 30% African American
- o 0% Other

* Age

- o 10% between 18-24
- o 20% between 25-34
- o 30% between 35-44
- o 30% between 45-54
- o 10% between 55-64
- o 0% 65+

* Annual Household Income

- o 20% between \$19,000 - \$30,999
- o 20% between \$31,000 - \$45,999
- o 10% between \$46,000 - \$60,999
- o 20% between \$61,000 - \$75,999
- o 30% \$76,000 or more

* Other Maryland Lottery Games Purchased in the Previous Month Include:

- o 100% also purchased Lotto
- o 60% also purchased Mega Millions
- o 10% also purchased Bonus Match 5
- o 40% also purchased Pick 3
- o 20% also purchased Pick 4
- o 30% also purchased Keno

Quick Action Gamer Demographics: DC

* Respondents spent an average of \$7.40 per occasion on scratch-off tickets. 60% of respondents were classified as “core” players, 40% were occasional.

* Gender

- o 60% Female respondents
- o 40% Male respondents

* Race

- o 20% Caucasian
- o 80% African American
- o 0% Other

* Age

- o 0% between 18-24
- o 0% between 25-34
- o 20% between 35-44
- o 80% between 45-54
- o 0% between 55-64
- o 0% 65+

* Annual Household Income

- o 0% between \$19,000 - \$30,999
- o 20% between \$31,000 - \$45,999
- o 20% between \$46,000 - \$60,999
- o 20% between \$61,000 - \$75,999
- o 40% \$76,000 or more

* Other Maryland Lottery Games Purchased in the Previous Month Include:

- o 60% also purchased Lotto
- o 40% also purchased Mega Millions
- o 0% also purchased Bonus Match 5
- o 20% also purchased Pick 3
- o 40% also purchased Pick 4
- o 20% also purchased Keno

Top Tickets Overall

The number of tickets purchased during the initial shopping exercise determined the top tickets. The best “selling” tickets were as follows:

\$2 Tickets

Wild Cash (33 tickets purchased)

Drive It (26 tickets purchased)

Weekly \$500 (26 tickets purchased)

\$3 Tickets

Red Cherries (21 tickets purchased)

Road Runner Fast Cash (21 tickets purchased)

\$5 Tickets

Lucky 7's (32 tickets purchased)

Supercash (18 tickets purchased)

Red Hot & Blue 7's (16 tickets purchased)

\$10 Tickets

Instant Fortune (6 tickets purchased)

Super Size Cash (6 tickets purchased)

\$20 Tickets

Cool Millions (6 tickets purchased)

Games Galore (4 tickets purchased)



Based on the initial shopping exercise, "Wild Cash" was the #1 ticket purchased in the \$2, Money category, with 33 tickets purchased and was the #1 ticket tested, overall. 79% of respondents who viewed this ticket were likely to purchase this ticket.

Positives

Respondents really liked the number of chances they had to win on this \$2 ticket. Additionally, the graphics and colors were eye-catching.

Negatives

One respondent didn't like the "wild" look of this ticket as it didn't "say money" to them. Two others didn't like the roaring tiger.

Shopping Exercise

Among all 49 respondents, 33 tickets were purchased during the first shopping exercise and 37 tickets were purchased during the second shopping exercise. Among those who reviewed this ticket, there were 13 tickets purchased in the first exercise and 19 purchased in the second.

Recommendation

"Wild Cash" is ready to be produced at any time, if it fits into the marketing plan.

"The yellow really catches your eye."

"The word 'wild' is GREAT!"

"The tiger doesn't do much for me."



"Weekly \$500" was the #2 ticket purchased in the \$2, Money category, with 26 tickets purchased. 65% of respondents who viewed this ticket were likely to purchase this ticket.

Positives

Being able to win X amount over a long period of time was the most appealing attribute of this ticket. Respondents were also attracted to the simplicity of this ticket.

Negatives

Several respondents thought that this ticket was dull in color and not very eye catching.

Shopping Exercise

Among all 49 respondents, 26 tickets were purchased during the first shopping exercise and 46 tickets were purchased during the second shopping exercise. Of the respondents who viewed this ticket, they purchased 19 tickets in the first exercise and 32 in the second.

Recommendation

Consider brightening the the colors on this ticket to create more contrast and Weekly \$500 will be ready to be produced, if it fits into the marketing plan.

We recommend considering this ticket for marketing support.

"I can win every week for only \$2?!?"

"\$500 a Week?!? Sounds GREAT!"

"It's so simple to play - it could be easy to win too!"

"Brighten up the colors - it looks so dull."



"It's a very unique ticket."

"I want to win a new car!"

"Could we make it a Mercedes instead?"

"We're so used to bright tickets that this one doesn't really stand out."

"Drive It" was the #1 ticket purchased in the \$2, Novelty category with 26 tickets purchased in the first exercise. 63% of respondents were likely to purchase this ticket.

Positives

Respondents were most attracted to the fact that they could win a car on this ticket. Many stated that this ticket looked "different" than other Lottery tickets which was appealing. Being able to win cash for gas was also a great draw.

Negatives

A few didn't like the idea of winning a car on a Lottery ticket. Others felt that the colors of this ticket were too soft for a Lottery ticket and suggested that they be brighter. A few would like to win a car other than a VW Beetle.

Shopping Outcome

Among all 49 respondents, 26 tickets were purchased during the initial shopping exercise and 13 tickets were purchased during the second shopping exercise. Of those respondents who viewed this ticket 13 tickets were purchased in the first exercise and 8 in the second.

Recommendation

While respondents pointed out that this ticket would get overlooked in the store due to the colors, it was one of the top tickets purchased during the first shopping exercise and seemed to stand out pretty well. We'd recommend moving forward with this ticket, but only if there is marketing support behind it, given the unique look of the ticket.



"Triple Tripler" was #1 in the \$3, Money ticket category with 9 tickets purchased in the first round of shopping (this was the only ticket tested in this category). 75% of respondents who viewed this ticket were likely to purchase it.

Positives

The simplicity and the colors were the most appealing attributes of this ticket. Additionally, the name made respondents feel that they could win more on this ticket.

Negatives

A few respondents associated this ticket with baseball, which wasn't appealing. Similarly, they didn't feel that this ticket screamed "money." One respondent felt the instructions were too long for such a simple game.

Shopping Exercise

Among all 49 respondents, 9 tickets were purchased during the first shopping exercise and 12 tickets were purchased during the second. Of those who viewed this ticket, there were 7 tickets purchased in the first exercise and 10 in the second.

Recommendation

Triple Tripler can be produced at any time, without changes, if it fits into the marketing plan.

"The name made me think I could win more!"

"This would be a great quickie to play at the office."

"It just makes you want to pick it up!"

"It doesn't scream money to me -- I don't like baseball."



"Road Runner Fast Cash" was the #1 ticket in the \$3, Novelty category in the first shopping exercise with 21 tickets purchased. 74% of respondents who viewed this ticket said they'd be likely to purchase it.

Positives

The cartoon characters featured on this ticket were most appealing to respondents. Many had fond memories of the Road Runner cartoon show. Additionally, the colors and graphics were appealing. Many respondents liked the idea of being able to win a Jet Ski.

Negatives

Some respondents don't like cartoon-themed tickets. A few felt that there weren't enough chances to win (play area too small). Many didn't notice the bonus area prize until it was pointed out to them.

Shopping Exercise

Among all 49 respondents, 21 tickets were purchased during the first shopping exercise and 14 tickets were purchased during the second shopping exercise. Among those who reviewed this ticket, 4 purchased it in the first shopping exercise and 7 purchased it in the second.

Recommendation

Consider enlarging the play area and making the bonus prize more prominent and Road Runner Fast Cash can be produced at any time, if it fits into the marketing plan.

Due to the novelty of this licensed product, we'd recommend considering it for marketing support and it may appeal to people who may not otherwise play the Lottery.

"The Road Runner! I used to watch him when I was a kid!"

"The poor coyote never catches him...I want to help him out!"

"Wow - great cartoons AND I can win a jet ski!"

"I don't like cartoon tickets."

"I didn't even see the jet ski! I'd want to know about that!"



"Dick Tracy" was the #2 ticket in the \$3, Novelty category, with 19 tickets purchased during the first shopping exercise. 76% of respondents who viewed this ticket were likely to purchase it.

Positives

Respondents described this ticket as "fun." They liked the simplicity and the unique graphics. Additionally, they liked the mystery associated with the game (fingerprints). Many had fond memories of the Dick Tracy cartoon character. The colors also attracted respondents.

Negatives

Some respondents don't like cartoon themed Lottery tickets.

Shopping Exercise

Among all 49 respondents, 19 tickets were purchased during the first exercise and 23 were purchased in the second. Among those respondents who viewed this ticket, 15 purchased it in the pre-shopping and they purchased all 22 in the post.

Recommendation

Dick Tracy can be produced at any time, if it fits into the marketing plan.

Due to the novelty of this licensed product, we'd recommend considering it for marketing support and it may appeal to people who may not otherwise play the Lottery.

"It looks like a lot of fun to scratch!"

"The fingerprints and other graphics really stand out."

"It's really catchy and novel - it's a face everyone knows!"

"Cartoons are too childish, Lottery should not be childish."



"I'm a sports fan so the balls really caught me eye!"

"Hey look - that's me on a Sunday, just sittin' back, watching the game. I'd like to watch it on that nice TV!"

"I want that TV!"

"When I see couch potato it just reminds me of my lazy brother."

"Couch Potato" was #3 out of 5, \$3, Novelty tickets tested. 10 tickets were purchased during the first shopping exercise and respondents who reviewed this ticket were 76% likely to purchase it.

Positives

Many respondents associated with the "couch potato" attitude which they found cute and funny. The sports balls on the ticket along with the plasma TV were very appealing, especially to sports fans.

Negatives

Some just didn't like the idea of a couch potato ticket - they associated it with laziness.

Shopping Exercise

Among all 49 respondents, 10 tickets were purchased during the first shopping exercise and 5 tickets were purchased during the second shopping exercise. Of the respondents who reviewed this ticket, there were 5 ticket purchased in the first exercise and 5 in the second.

Recommendation

Couch Potato can be produced at any time, if it fits into the marketing plan.



"It's fun and familiar - everyone knows these guys!"

"It's festive - I feel like they're celebrating a win!"

"It's just too cartoonish."

"I want to win cash and I don't see much of a game here."

"Looney Toons Loot" was #4 out of the 5, \$3, Novelty tickets tested. 11 tickets were purchased during the first shopping exercise and 60% of the respondents who reviewed this ticket were likely to purchase it.

80% of Avid Scratch Traditionalists were likely to purchase this ticket. However, only 50% of Quick Action Gamers and Fair Weather Scratchers were likely.

Positives

The familiar cartoon characters were the most appealing attribute of this ticket. Respondents liked that the characters were having fun, it made them "feel like a kid again." The pinball machine prize was also appealing to some.

Negatives

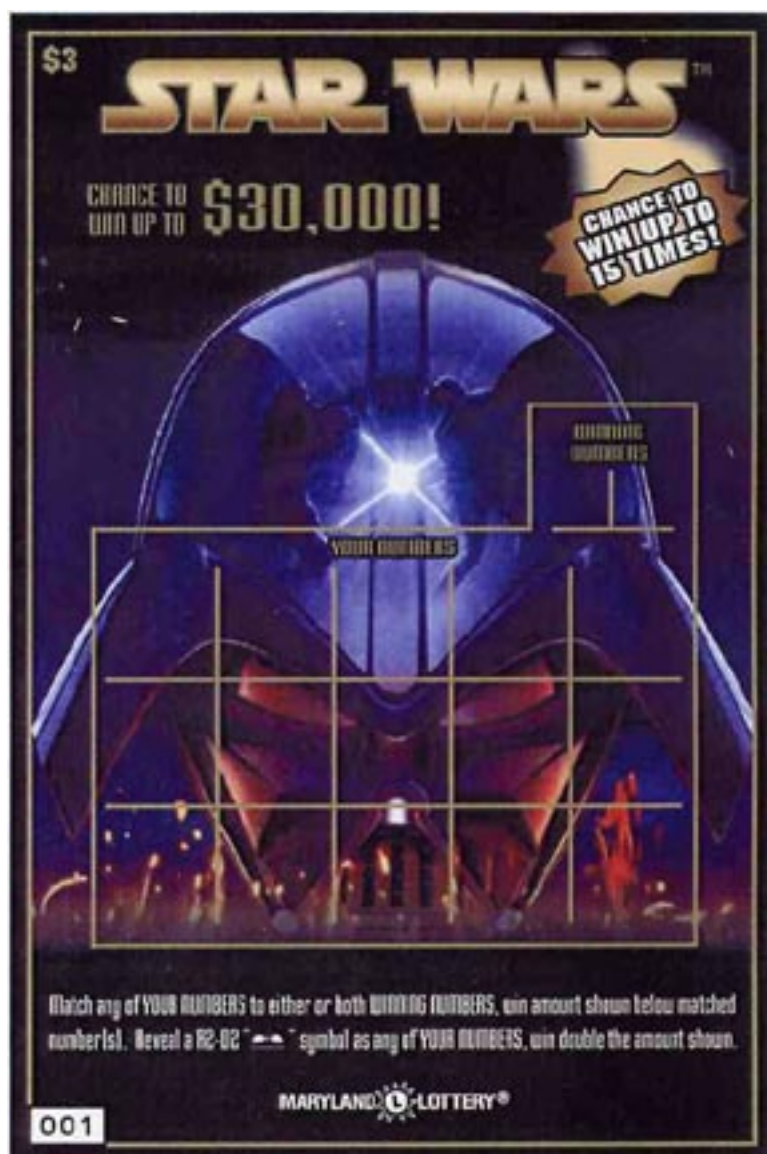
Several felt this ticket was too busy and found the play area lacking in terms of size and chances to win. Others didn't like the cartoon-theme ticket. Still others didn't like the pinball machine prize.

Shopping Exercise

Among all 49 respondents, 11 tickets were purchased during the first shopping exercise and 16 tickets were purchased during the second shopping exercise. Of the respondents who reviewed this ticket, they purchased 6 tickets in the first exercise and 10 tickets in the second.

Recommendation

Given the low purchase levels during the initial shopping exercise and the low likelihood to purchase, we don't recommend moving forward with this ticket at this time.



"Star Wars" was #5 out of 5, \$3, Novelty tickets tested. 7 tickets were purchased in the first shopping exercise and 23% of respondents who reviewed this ticket were likely to purchase it.

Positives

The idea of a Star Wars ticket was very appealing to respondents. The mysteriousness of this ticket was attractive to some. Others felt it would be a great gift for Star Wars fans.

Negatives

While there were many Star Wars fans in the groups, most respondents didn't like how dark and haunting this ticket looked. It didn't give them a winning feeling, nor was the play area entirely clear.

Shopping Exercise

Among all 49 respondents, 7 tickets were purchased during the first shopping exercise and 4 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, there were 3 tickets purchased during the first exercise and 2 in the second.

Recommendation

While this ticket wasn't attractive to most, there were many who were interested in a Star Wars themed ticket. Consider developing a Star Wars ticket that's brighter and features other characters and re-test in future groups.

"He looks like he's going to rob you, not give you money!"

"I like Star Wars, but this is just too dark. Why don't they use Luke Skywalker?"

"It would be a great gift for Star Wars fans."

"It's really difficult to see anything on this ticket."



"It reminds me of the casino."

"Great color combination!"

"It's a little seductive...!"

"What do cherries have to do with the Lottery?"

"Red Cherries" ranked #1 of the \$3, Gaming tickets tested with 21 tickets purchased in the first exercise (this was the only ticket tested in this category). 80% of respondents who reviewed this ticket were likely to purchase it.

Avid Scratch Traditionalists and Quick Action Gamers were both 90% likely to purchase this ticket. However, Fair Weather Scratchers were only 60% likely.

Positives

The simplicity and colors of this ticket were very attractive to respondents, especially gaming players who associated the name with slots at casinos. A few described this ticket as seductive.

Negatives

One respondent didn't understand what cherries had to do with winning money.

Shopping Exercise

Among all 49 respondents, 21 tickets were purchased during the first shopping exercise and 18 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 12 tickets in the first exercise and 16 in the second.

Recommendation

Red Cherries can be produced at any time, if it fits into the marketing plan.



"Supercash" was the #1, \$5, Money ticket out of 4 tickets tested. 18 tickets were purchased during the first shopping exercise and 83% of respondents were likely to purchase it.

Positives

The name of this ticket, along with the "Superman" theme were the most appealing attributes. Additionally, the simplicity of the play area and the fact that there are "no winning tickets under \$10" were very attractive features.

Negatives

Some felt that the color in the scratch area on this ticket was too dull.

Shopping Exercise

Among all 49 respondents, 18 tickets were purchased during the first shopping exercise and 7 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 14 tickets in the first exercise and 5 in the second.

Recommendation

Consider brightening the colors in the play area and Supercash can be produced at any time, if it fits into the marketing plan.

"It reminds me of Superman!"

"There are so many chances and great colors!"

"No winning tickets under \$10?!? That's GREAT!"

"The play area is really dull - it needs to be brighter."



"Red Hot & Blue 7's "was the #2, of the 4, \$3 Money tickets tested. 16 tickets were purchased during the first shopping exercise and 95% of respondents were likely to purchase it.

Positives

The red, white and blue color scheme, along with the metallic sparkle background was a very eye-catching attribute of this ticket. Respondents liked the sparkle and associated it with winning. The number of chances to win and the 7 theme were also attractive to respondents.

Negatives

Two respondents didn't like the colors and sparkle of the background.

Shopping Exercise

Among all 49 respondents, 16 tickets were purchased during the first shopping exercise and 6 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 8 tickets in the first exercise and 1 in the second.

Recommendation

Red Hot & Blue 7's can be produced at any time, if it fits into the marketing plan.

"The sparkle is great! It's calling me!"

"It represents the US with the patriotic colors."

"It really jumps out at you!"

"The sparkle just makes it tacky to me."



"Big Bucks" tied with "Fabulous Fortune" for #3 or the 4, \$5 Money tickets tested. 9 tickets were purchased during the first shopping exercise and 80% of respondents were likely to purchase it.

Avid Scratch Traditionalists were 90% likely to purchase this ticket. Quick Action Gamers were 100% likely. However, Fair Weather Scratchers were only 50% likely.

Positives

The number of chances to win, and the simplicity of the game, were this ticket's most appealing attributes. Additionally, the ticket is easy to read and the colors really grab attention.

Negatives

A few respondents didn't like the color or the fact that this ticket only offered one game - they felt that for such a large ticket and for \$5 that it should offer many different games.

Shopping Exercise

Among all 49 respondents, 9 tickets were purchased during the first shopping exercise and 12 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 6 tickets in the first exercise and 9 in the second.

Recommendation

Big Bucks is ready to be produced at any time, if it fits into the marketing plan.

"There are so many chances to win!"

"Four winning numbers?!? That's unheard of!"

"It just looks like a Lottery ticket!"

"It's just too big and everything is just too much the same."



"Fabulous Fortune" tied with "Big Bucks" for #3 of the 4, \$5 Money tickets tested. 8 tickets were purchased during the first shopping exercise and 84% of respondents were likely to purchase it.

Positives

The variety of games offered, and the Quick \$50 bonus area, were this tickets' most appealing features. The colors and graphics were also attractive to respondents.

Negatives

A few respondents felt that this ticket was too busy and had too many games.

Shopping Exercise

Among all 49 respondents, 8 tickets were purchased during the first shopping exercise and 8 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 5 tickets in the first exercise and 7 in the second.

Recommendation

Fabulous Fortune can be produced at any time, without changes, if it fits into the marketing plan.

"There are so many opportunities to win - there are so many games!"

"It's really colorful!"

"The graphics are great - they really get my attention."

"I'm a busy person, this is just too much to do!"



"Lucky 7's" was #1 of the 6, \$5 Novelty tickets tested. 32 tickets were purchased during the first shopping exercise and was the #2 ticket purchased overall for this round of Scratch Groups. 76% of respondents were likely to purchase it.

Avid Scratch Traditionalists were 90% likely to purchase, Quick Action Gamers were 80% likely. However, Fair Weather Scratchers were only 60% likely.

Positives

The variety of games offered on this ticket was a big draw for many respondents. Additionally, respondents were very attracted to the color and clean layout of the ticket. The fact that this was a 7's themed ticket was also appealing to most. It also reminded some of a slot machine and the casino.

Negatives

This ticket didn't appeal to players who prefer simple, single playstyle tickets. Some stated that this ticket was too busy and had too many games.

Shopping Exercise

Among all 49 respondents, 32 tickets were purchased during the first shopping exercise and 23 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 19 tickets in the first exercise and 22 in the second.

Recommendation

Lucky 7's can be produced at any time, without any changes, if it fits into the marketing plan.

"I'd really get my money's worth on this one!"

"GREAT colors! It makes me feel like I'm at the casino."

"There are so many chances to win."

"Great name!"

"It's just too complicated, there's way too much going on."



"5 Times the Fun" was #2 of the 6, \$5 Novelty tickets tested. 10 tickets were purchased during the first shopping exercise and 84% of respondents were likely to purchase it.

Positives

Respondents like the variety of games offered on this ticket as well as the cloud graphics in the background. Additionally, players liked that the play areas appeared to be larger than on other Lottery tickets. The bonus area was also appealing.

Many respondents weren't aware at first glance that this ticket offered a 5x prize option. Once this was discovered, respondents were even more excited about this ticket.

Negatives

A few respondents weren't attracted to the look of this ticket, they didn't feel it jumped out enough.

Shopping Exercise

Among all 49 respondents, 10 tickets were purchased during the first shopping exercise and 6 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 3 tickets in the first exercise and all 4 in the second.

Recommendation

Consider making the "win 5 times the prize" feature more prominent on this ticket and 5 Times the Fun can be produced at any time, if it fits into the marketing plan.

"I love how they use different images for each game."

"The cloud motif is really nice."

"OH! You can win 5 times the prize on some of these! That's great! I guess that's why they call it 5 Times the Fun!"

"It's just not appealing to me - it's not cute."



"That number 5 just really catches my eye!"

"Good layout!"

"There's just too much going on - it's overwhelming."

"Fabulous 5's" tied with "Orange County Choppers (people picture)" for #3 of the 6, \$5 Novelty tickets tested. 7 tickets were purchased during the first shopping exercise and 60% of respondents were likely to purchase it.

Avid Scratch Traditionalists were 80% likely to purchase this ticket and 70% of Quick Action Gamers. However, only 30% of Fair Weather Scratchers were likely to purchase Fabulous 5's.

Positives

The number 5 really jumped out at respondents and got their attention. In addition, the colors and number of options were very appealing to most.

Negatives

Some respondents didn't like the colors and described them as "girly." Others felt it was too busy and overwhelming. Negative responses tended to come from Fair Weather Scratchers.

Shopping Exercise

Among all 49 respondents, 7 tickets were purchased during the first shopping exercise and 6 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 2 tickets in the first exercise and 5 in the second.

Recommendation

While Fair Weather Scratchers didn't find much appeal in this ticket, the other two player segments gave it high ratings. Therefore, Fabulous 5's can be produced at any time, without changes, if it fits into the marketing plan.



"Orange County Choppers" tied with "Fabulous 5's" for #3 of the 6, \$5 Novelty tickets tested. 7 tickets were purchased during the first shopping exercise and 40% of respondents were likely to purchase it.

Positives

For those who enjoy the Orange County Choppers show and who enjoy choppers/motorcycles, this ticket was appealing. They liked the graphics used in the play area and the chance to win a chopper.

Negatives

This ticket held no appeal to non-watchers of the show or to those who aren't interested in motorcycles. Many respondents didn't make the association between this ticket and the show, still others never had heard of the show. Even for those who enjoyed this ticket, many found it to be too dark.

Shopping Exercise

Among all 49 respondents, 7 tickets were purchased during the first shopping exercise and 8 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased all 7 tickets in the first exercise and all 8 in the second.

Recommendation

Given the extremely small niche market for this type of ticket, we don't recommend moving forward with it at this time.

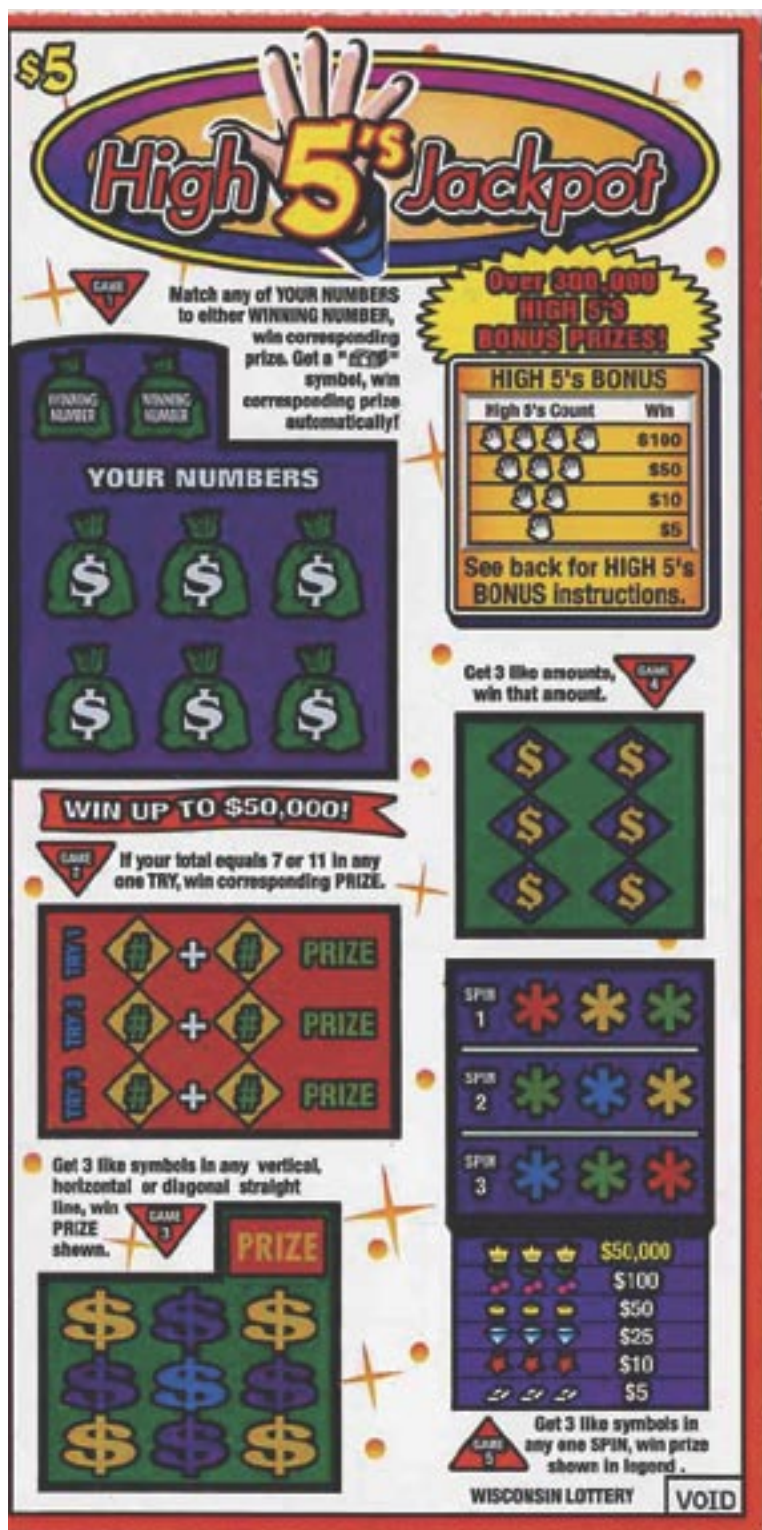
"YEAH! I want to win a chopper - these guys are AWESOME!"

"I felt obligated to like this - my husband has it on every night."

"It's a show? I've never heard of it."

"I thought these guys were inmates or something - they're scary."

"It's a really dark ticket."



"High 5's Jackpot" was #4 of the 6, \$5 Novelty tickets tested. 5 tickets were purchased during the first shopping exercise and 89% of respondents were likely to purchase it.

Positives

This game offered a lot of different types of game for players. They liked the simplistic layout and the simplistic games and instructions. Additionally, respondents found this ticket to be very easy to read.

Negatives

Some respondents felt this ticket was too boring, that it lacked "glitter" and "sparkle."

Shopping Exercise

Among all 49 respondents, 5 tickets were purchased during the first shopping exercise and 7 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 4 tickets in the first exercise and 5 in the second.

Recommendation

While this ticket received a very high likelihood to purchase score, it received very little interest from respondents during the shopping exercises and was among the least of the tickets purchased. Therefore, we don't recommend moving forward with this ticket at this time.

"The more scratch areas THE BETTER!"

"There are so many different colors - it's really layed out well."

"It's so simple and clean."

"It's just boring and drab - it needs more glitter."

"It reminds me of a boring board game."



"Orange County Choppers (bike picture)" was last of the 6, \$5 Novelty tickets tested. 4 tickets were purchased during the first shopping exercise and 31% of respondents were likely to purchase it.

Positives

Reactions to this ticket were similar to the other Orange County Chopper ticket tested: For those who enjoy the Orange County Choppers show and who enjoy choppers/motorcycles, this ticket was appealing. They liked the graphics used in the play area and the chance to win a chopper.

Interestingly, fewer people made the connection between this ticket and the show, Orange County Choppers, perhaps this is because it didn't have a picture of the show's main characters.

Negatives

Negative comments were similar to the other Orange County Choppers ticket tested: This ticket held no appeal to non-watchers of the show or to those who aren't interested in motorcycles. Many respondents didn't make the association between this ticket and the show, still others never had heard of the show. Even for those who enjoyed this ticket, many found it to be too dark.

Shopping Exercise

Among all 63 respondents, 4 tickets were purchased during the first shopping exercise and 3 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 4 tickets in the first exercise and 4 in the second.

Recommendation

Due to the low likelihood to purchase, we don't recommend moving forward with this ticket at this time. Consider re-testing in a future extended play group.

"It's a nice looking ticket! I'd love the chance to win that bike."

"Oh, I didn't make the connection to the show - I guess that is their logo, isn't it? And that's probably why the ticket is so dark, because these are the show's colors?"

"For \$5 it needs to be more entertaining."

"I'm just not interested in that kind of thing."



"Texas Hold 'Em" was #1 of the 5, \$5 Gaming tickets tested. 15 tickets were purchased during the first shopping exercise and 79% of respondents were likely to purchase it.

There were some segment differences pertaining to this ticket. Avid Scratch Traditionalists and Fair Weather Scratchers were most likely to purchase this ticket, they were 100% and 80% likely, respectively. However, only 50% of Quick Action Gamers were likely.

Positives

For those who enjoy poker and card games, this ticket was most appealing. They liked the number of chances to win and the general layout of the ticket.

Negatives

Non-poker players found this ticket confusing. Some weren't attracted to the graphics on this ticket.

Shopping Exercise

Among all 49 respondents, 15 tickets were purchased during the first shopping exercise and 12 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 6 tickets in the first exercise and all 12 in the second.

Recommendation

While this ticket held little appeal for the player segment who is most often drawn to casino-type tickets, it was one of the most-liked gaming ticket for the other two segments. Therefore, we recommend moving forward with this ticket, if it fits into the marketing plan.

"I'm a card player, so this just jumped right out at me!"

"I love poker!"

"I spend a lot of time in Atlantic City, so this ticket would be my practice table!"

"I'm not a poker player, I would have no idea what to do with those community cards."



"Casino Fortune" tied with "World Poker Showdown" for #2 of the 5, \$5 Gaming tickets tested. 11 tickets were purchased during the first shopping exercise and 67% of respondents were likely to purchase it.

Avid Scratch Traditionalists and Quick Action Gamers alike were 80% likely to purchase this ticket. However, only 40% of Fair Weather Scratchers were likely.

Positives

The number of games offered on this ticket was, by far, it's greatest attribute. Players loved the games offered, even some non-gaming players felt these games would be easy enough for them to play. The colors were also appealing to many.

Negatives

Some felt this ticket was too busy - they prefer simpler games with single playstyles.

Shopping Exercise

Among all 49 respondents, 11 tickets were purchased during the first shopping exercise and 14 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 3 ticket in the first exercise and 10 in the second.

Recommendation

Casino Fortune can be produced at any time, if it fits into the marketing plan.

"There are lots of games that I would play at the casino!"

"This ticket just makes me feel like I'm in the casino for a minute!"

"It doesn't seem as complicated as some of the other casino tickets."

"It's really busy - I don't have the time to play all these games."



"World Poker Showdown" tied with "Casino Fortune" for #2 of the 5, \$5 Gaming tickets tested. 11 tickets were purchased during the first shopping exercise and 30% of respondents were likely to purchase it.

Positives

For those who are avid poker players and those who enjoy watching the World Poker Showdown television show, this ticket was very appealing.

Negatives

Many felt that this ticket was too dull, others felt it was too complicated a game. Still others felt that this ticket was more like "gambling" than a Lottery ticket.

Shopping Exercise

Among all 49 respondents, 11 tickets were purchased during the first shopping exercise and 8 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 4 ticket in the first exercise and 5 in the second.

Recommendation

Due to the low likelihood to purchase, we do not recommend moving forward with this ticket at this time.

"It's like the show and that's the only REAL reality show there is!"

"I'm just not into cards."

"I like poker, but this is just a dull ticket. I don't watch the show."

"This feels more like gambling to me than having fun playing a Lottery ticket."



"Casino Action" was ranked #3 out of the 5, \$5 Gaming tickets tested. 9 tickets were purchased during the first shopping exercise and 95% of respondents were likely to purchase it.

Positives

The number of games and the variety of games were very appealing to players. This ticket "felt like the casino" for many players and they described the games as "exciting."

Negatives

Some felt the colors were a little dull.

Shopping Exercise

Among all 49 respondents, 9 tickets were purchased during the first shopping exercise and 10 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 3 tickets in the first shopping exercise and 4 tickets in the second.

Recommendation

Due to the extremely high likelihood to purchase score (the highest of all tickets tested this round), "Casino Action" can be produced at any time, if it fits into the marketing plan.

"I'm not that familiar with card games, but I love this!"

"There are so many different games - I really am AT the casino with this ticket!"

"The colors could use a little work."

"There are so many opportunities!"



"Power Card" was last of the 5, \$5 Gaming tickets tested. 3 tickets were purchased during the first shopping exercise and 68% of respondents were likely to purchase it.

Positives

This ticket really appealed to respondents who play cards. They liked the "power" theme and felt that the graphics on the top of the ticket looked 3-D, which caught their attention.

Negatives

Some felt that the play area design didn't match the graphic on the top of the ticket. Other felt intimidated by the cards. Some wanted this ticket to have more sparkle.

Shopping Exercise

Among all 49 respondents, 3 tickets were purchased during the first shopping exercise and 8 tickets were purchased during the second shopping exercise. For those who reviewed this ticket, they purchased all 3 tickets in the first shopping exercise and all 8 in the second.

Recommendation

Given the low rate of purchase, when compared to other tickets tested, we don't recommend moving forward with this ticket at this time.

"This is an obvious choice if you play cards."

"The concept is really good, but the play area doesn't seem to match the 'power' theme at the top."

"I like the idea of 'power' it makes me feel like I have a chance of winning this!"

"Cards intimidate me."

"It could use some more bling bling."



"Super Size Cash" tied with "Instant Fortune" for #1 of the 2, \$10 Money tickets tested. 6 tickets were purchased during the first shopping exercise and 70% of respondents were likely to purchase it.

Positives

The concept of the ticket and the name "Super Size Cash" were very appealing to respondents. Coupled with all the cash floating around, these attributes made respondents feel that they would "win big" on this ticket. Players were also very drawn to the number of chances to win that this ticket offered.

Negatives

Some respondents felt that this ticket was too simple for a \$10 ticket and believed that it should have more games. A few thought that the colors in the play area were dull. A few thought of a "super size" soda when they saw this ticket.

Shopping Exercise

Among all 49 respondents, 6 tickets were purchased during the first shopping exercise and 7 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 4 tickets in the first exercise and 6 in the second.

Recommendation

Super Size Cash can be produced at any time, if it fits into the marketing plan.

"You can win big - it's SUPER SIZE!"

"It's simple and looks like you can win a bundle!"

"There are so many chance and it's so easy to understand."

"When I think I of super size, I think of soda."

"The play area is pretty dull, it should stand out more."



"Instant Fortune" tied with "Super Size Cash" for #1 of the 2, \$10 tickets tested. 11 tickets were purchased during the first shopping exercise and 68% of respondents were likely to purchase it.

Positives

The word "instant" was a big draw for many respondents. They liked that a ticket appealed to their desire to win instantly. Additionally, the Fast \$25 and Quick \$50 bonus areas were very attractive.

Negatives

Some felt that this ticket was a little silly because it had to do with magic. Several described the colors in the play area as being too dull and not matching the sparkle of the rest of the ticket.

Shopping Exercise

Among all 49 respondents, 6 tickets were purchased during the first shopping exercise and 1 ticket was purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 3 tickets in the first exercise and 1 in the second.

Recommendation

Consider brightening the color in the play area and Instant Fortune can be produced at any time, if it fits into the marketing plan.

"The name just gets me - Instant Fortune - like INSTANT WIN!"

"That fast \$25 and Quick \$50 really grab me."

"The graphics are great."

"It just doesn't jump out at me - it's a little hoakie."

"The place where you scratch is pretty dull."



"Club Casino" was #1 of 1, \$10 Gaming ticket tested. 4 tickets were purchased during the first shopping exercise and 68% of respondents were likely to purchase it.

Avid Scratch Traditionalists were 100% likely to purchase this ticket. Quick Action Gamers were 67% likely. Fair Weather Scratchers were only 20% likely.

Positives

For those who enjoy casinos, this ticket was very appealing. Respondents liked that the layout of this ticket was just like a casino and almost 3-D. This game seemed to offer "a little bit of everything" to respondents.

Negatives

Non-casino goers were not attracted to this ticket. Some felt that this ticket lacked the sparkle that casinos always have, they felt that this ticket was entirely too dull for a casino.

Shopping Exercise

Among all 49 respondents, 4 tickets were purchased during the first shopping exercise and 6 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 2 tickets in the first exercise and 5 in the second.

Recommendation

Due to the drastic differences in the likelihood to purchase and the fairly low shopping numbers, as compared to other \$10 tickets tested, we don't recommend moving forward with this ticket at this time. Consider brightening the ticket so it has more "sparkle" like a casino, and re-test in future groups.

"It's another no-brainer - I love casinos and the graphics are good."

"It has a little bit of everything!"

"I don't go to casinos, but aren't they usually really bright and colorful?"

"It says Club Casino, but it looks more like a funeral home."



"Cool Millions" was #1 of the 2, \$20 Money tickets tested. 6 tickets were purchased during the first shopping exercise and 68% of respondents were likely to purchase it.

Positives

Respondents really liked the bright, clean layout of this ticket. The name was attractive, as players expected that they would be able to win a million dollars, and the unique horizontal design caught their attention. Some players stated, "I've never spent \$20 on a Lottery ticket, but I'd try this one!" Several said that they would consider giving this ticket as a Christmas gift.

Negatives

Many players liked this ticket but just weren't willing to spend the \$20 for it. Others felt that this ticket didn't offer enough games to justify the \$20 price tag.

Shopping Exercise

Among all 49 respondents, 6 tickets were purchased during the first shopping exercise and 7 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 1 ticket in the first exercise and 4 in the second.

Recommendation

Cool Millions can be produced at any time, if it fits into the marketing plan.

Since this would be the first \$20 Lottery ticket in Maryland, we'd recommend considering this ticket for marketing support.

"It's just so catchy - I'd see this as soon as I walked into the store!"

"I've never spent \$20 on a single Lottery ticket in my life, but I'd buy this one!"

"It's really different with the sideways layout and it has so many chance!"

"For \$20 they should really give me something more to do."



"Double Millions" was ranked 2nd of the 2, \$20 Money tickets tested. 1 ticket was purchased during the first shopping exercise and 33% of those who reviewed it were likely to purchase it.

Positives

The hologram background was very appealing to respondents. They also liked all the different games and chances to win that this ticket offered. The name made people feel like they had a really good chance of winning.

Negatives

The price of this ticket was the most negative attribute, few respondents were willing to pay \$20 for this ticket, they stated that it was just "too expensive." Some felt that the \$20 price tag was due to the high quality hologram in the background.

Shopping Exercise

Among all 49 respondents, 1 ticket was purchased during the first shopping exercise and 2 tickets were purchased during the second shopping exercise. Of those who reviewed this ticket, they purchased 1 ticket in the first exercise and 2 in the second.

Recommendation

We don't recommend moving forward with Double Millions at this time.

"It's really dynamic looking! Beautiful!"

"I love the ticket, but not the price."

"It's so bright and shiny and has so much variety!"

"That price hurts my eyes."



"It's \$20 but you can spend a lot of time on it so you feel you get a lot for your money."

"I've never played a Lottery ticket that had so many great games!"

"I don't like Bingo and Crossword, give me a slot machine!"

"It's just too much for a Lottery ticket - I want quick and easy."

"It's like buying a book of tickets!"

"I'd buy this instead of a bunch of \$1 tickets."

"Games Galore" was #1 of 1, \$20 Gaming tickets tested. 4 tickets were purchased during the first shopping exercise and 55% of respondents were likely to purchase it.

Avid Scratch Traditionalists were 89% likely to purchase this ticket. Quick Action Gamers were 63% likely. Fair Weather Scratchers were only 20% likely.

Positives

The unique format of this ticket along with the many varieties of games offered were very appealing to respondents. For those respondents that enjoy taking their time when playing Lottery tickets, this ticket was a huge hit. Many suggested that this would make a great gift for someone.

Negatives

For respondents that prefer "quick and easy" playstyles, this ticket was not quite as appealing. They stated that this ticket didn't offer the same "instant" gratification that other Lottery tickets do. Some said they would like the ticket better if it had more casino games in it and fewer "involved" games like bingo and crossword.

There were several players who liked the game but wouldn't spend \$20 on a scratch-off ticket.

Several respondents felt that the "cover" of this ticket wasn't nearly as appealing as the inside of the ticket. Some respondents didn't realize, when first seeing this ticket during the shopping exercise, that all the different games were inside, they thought the cover of the book was the game.

Shopping Exercise

Among all 49 respondents, 4 tickets were purchased during the first shopping exercise and 9 tickets were purchased during the second shopping exercise. All respondents reviewed this ticket.

Recommendation

While there was a lot of verbal interest in this game, Games Galore didn't get a lot of interest during the first shopping or in the likelihood to purchase for two segments. We recommend revising this ticket to: have a more visually interesting and eye-catching cover that explains what games are inside and replacing some of the current games with casino-style games. After revisions are made, consider re-testing this ticket in future focus groups.

The concept of this game has incredible equity. It's likely that after the above changes are made and Games Galore is re-tested, this ticket will be a prime candidate for being the first \$20 ticket offered in Maryland due to its unique attributes.

Summary of Recommendations

The following ticket recommendations are made with certain caveats in mind. While there were many tickets that could be edited slightly and printed in the upcoming 6-8 months, it is important to pay attention to the mix of segment specific tickets and price points in order to maximize sales. The Lottery should revisit and determine which segments purchase the greatest number of scratch-off tickets, and which segments are most likely to purchase tickets at higher price points. While the Lottery has considered this information in the past to establish the most effective scratch-off product line, it is important to revisit this information and reevaluate it on an on-going basis.

The following tickets are ready to be *considered* for production, if they fit into the marketing plan, and do not require any revisions:

\$2

Wild Cash
Drive It

\$3

Triple Tripler
Dick Tracy
Couch Potato
Red Cherries

\$5

Red Hot & Blue 7's
Big Bucks
Fabulous Fortune
Lucky 7's
Fabulous 5's
Texas Hold 'Em
Casino Fortune
Casino Action

\$10

Super Size Cash

\$20

Cool Millions

The following tickets fared well during the groups and should be considered for production, if they fit into the marketing plan. However, minor revisions are recommended prior to production:

\$2

Weekly \$500

\$3

Road Runner Fast Cash

\$5

Supercash
Five Times the Fun

\$10

Instant Fortune

There were mixed reactions in regards to the following tickets, thus we recommend re-testing them in future groups:

\$3

Star Wars

\$10

Club Casino

\$20

Games Galore

We don't recommend moving forward with the following tickets at this time:

\$3

Looney Toons Loot

\$5

Orange County Choppers
World Poker Showdown
Power Card

\$20

Double Millions

Recommendations for Marketing Support

If produced, the following tickets are recommended for marketing support based on their increase in popularity from the first shopping exercise to the second, (these tickets seemed to become more “attractive” to respondents after reviewing them more closely during the groups) as well as on their overall ticket popularity. Marketing support should accomplish three objectives:

- * Highlight potentially successful tickets that need an extra push to drive sales.
- * Highlight the most universally attractive tickets in order to interest those who do not play scratch to try the product category.
- * Remind and encourage those who do not play often to revisit their local retailer and purchase scratch-offs

We recommend the following tickets be supported by Lottery marketing communications:

\$2
Weekly \$500
Drive It

\$3
Road Runner Fast Cash
Dick Tracy

\$20
Cool Millions

Promotion: Mega Million Pouch Game

Group Play

Approximately half of the respondents in each group had, at some time, participated in a group Lottery ticket purchase. Most often they were contributing money towards Lotto or Mega Millions in the hope of winning the multi-million dollar jackpot. The majority of respondents have groups form most often at the workplace or with family members. Rarely are groups formed with non-work friends.

Reactions to Promotion

Upon first learning about the promotion, many respondents were slightly confused about how the game would work and had many questions pertaining to when the drawing would happen and how they would know if they had won. Some felt that the game was too complicated and involved. However, the majority of respondents found the concept interesting and determined, on their own, that their chances of winning on this game would be greater than with other Lottery games offered.

Additionally, players really liked the fact that this game was set up to be played in a group. The fact that it provided the group "sign-in form" and that the Lottery would automatically disperse winnings to group members was very appealing.

A few respondents had concerns about who was going to manage the group list and whether they would be trustworthy.

Some respondents found the prize structure confusing (i.e. that you win something different for each drawing). Others felt that the top prize of \$1 million was too low as compared to other Lottery games.

Intent to Purchase

75% of respondents stated that they would be likely to try this game in a group setting. Approximately 15% said they would be likely to try this game by themselves.

Most Appealing Attributes

There were many attributes that respondents found appealing about this game:

- 1) The odds of winning
- 2) The multiple ways to win
- 3) The opportunity to win multiple times
- 4) The fact that you're chances to win for each drawing are exactly the same
- 5) The packaging
- 6) The fact that you can easily play in a group and that the Lottery splits the winnings
- 7) It only costs \$10 when playing in a group

Least Appealing Attributes

- 1) That you have to wait for the numbers to be drawn (it's not immediate like Mega Millions or Lotto)
- 2) The cost
- 3) That you would have to wait through 55 drawings to find out if you were the million dollar winner
- 4) That even if you match all the numbers you might not win \$1 million

If the Lottery were to produce this ticket, what would be the most important message that they would have to communicate to you to get you interested in the game?

- 1) The great odds of winning
- 2) That there are 65 drawings and you have the same chances to win on each draw
- 3) That you can play in a group and the Lottery disperses the winnings