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Instant Games Concept Test

March 2015

RESEARCH • STRATEGIC CONSULTING

Purpose

The results of this study will be used to assist in the selection and development of scratch-off games sold by the West Virginia Lottery.

The objectives of the study are to:

- Identify the scratch-off game tickets that are most appealing to lottery players in terms of game theme, overall appearance and play method.
- Identify the concept games that will add to the overall appeal of scratch-off game offerings.
- Determine initial as well as post-play purchase intent.
- Assess dollar allocation for each game concept.

Research Methodology

This quantitative research used a sequential monadic design to measure the purchase intent of 32 instant game concepts, with each respondent exposed to six game tickets selected at random. The sequence of tickets was randomized to reduce order bias.

This research was conducted using consumer online research panels. Respondents were recruited and qualified from households in West Virginia and border counties in Kentucky, Maryland, Ohio, Pennsylvania and Virginia. Respondents completed the survey via a secure website.

To qualify for participation in the study, respondents were required to be at least 18 years old and to have purchased \$1, \$2, \$3 or \$5 Instant Game tickets from the West Virginia Lottery within 60 days prior to the survey.

Research Methodology *Continued*

Potential respondents were disqualified from participation if they or an immediate family member worked for an advertising, PR or marketing research firm, the West Virginia Lottery or the media.

A total of 250 surveys were completed between January 28 and February 23, 2015.

The reader should note that the data in this report has been weighted to represent the state Census by gender of respondents (50% male, 50% female).

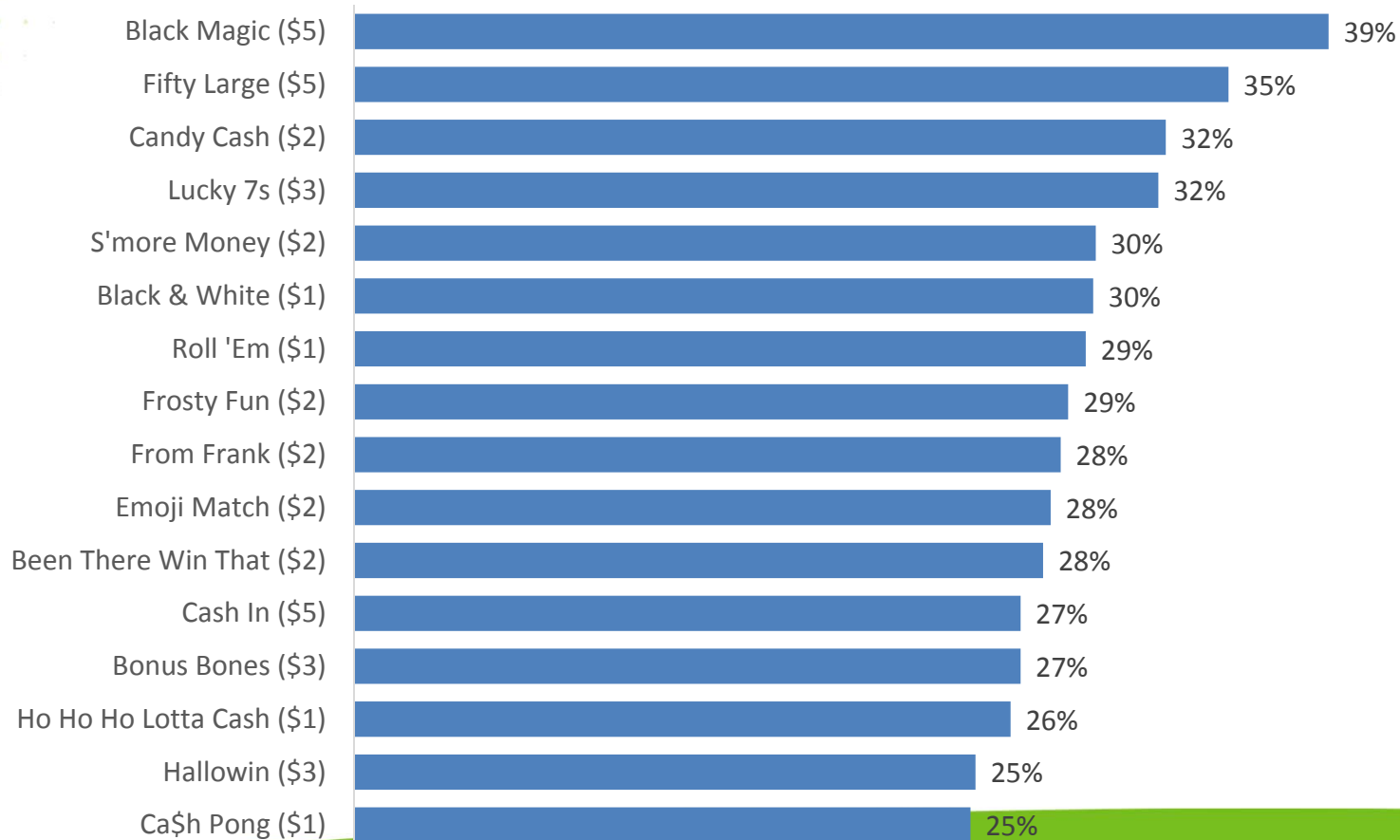


Detailed Findings

Incidence of Purchase Intent *Prior to Play*

Net: *Definitely Would Purchase*

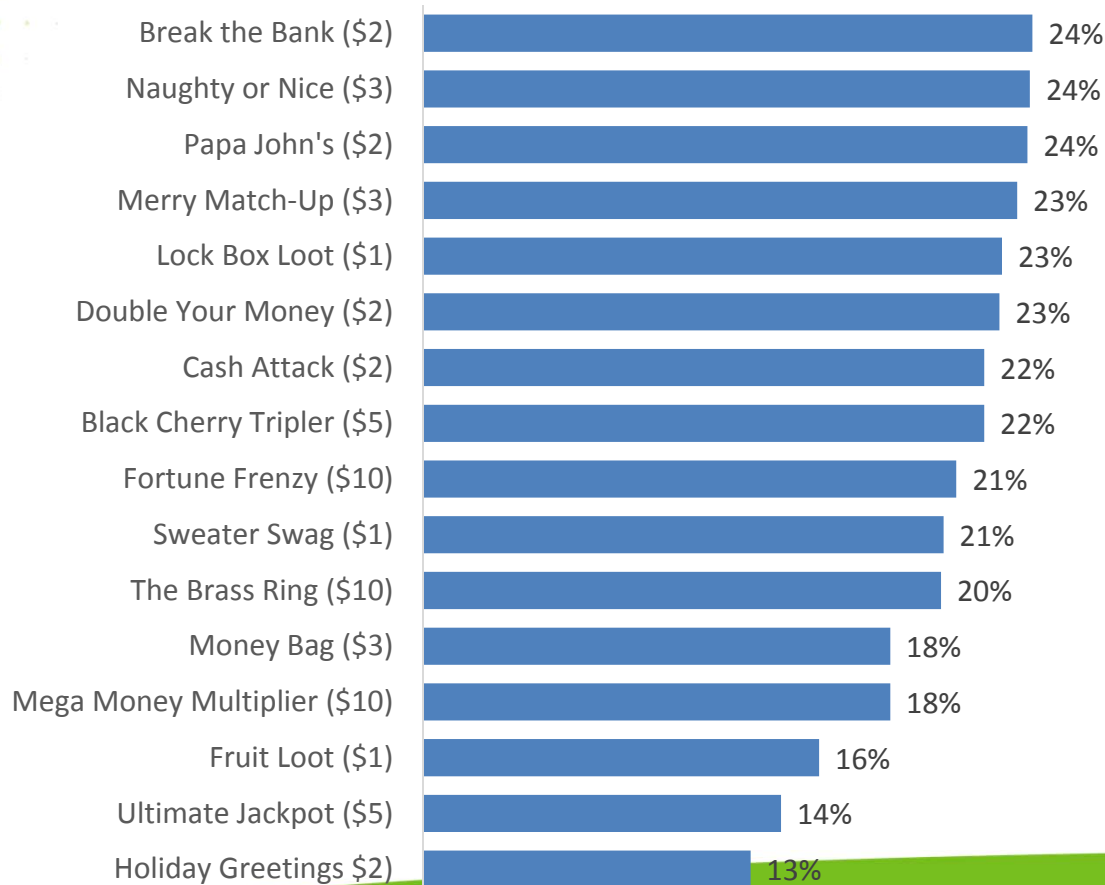
How likely would you be to purchase this scratch-off game?





Incidence of Purchase Intent *Prior to Play* Net: *Definitely Would Purchase*

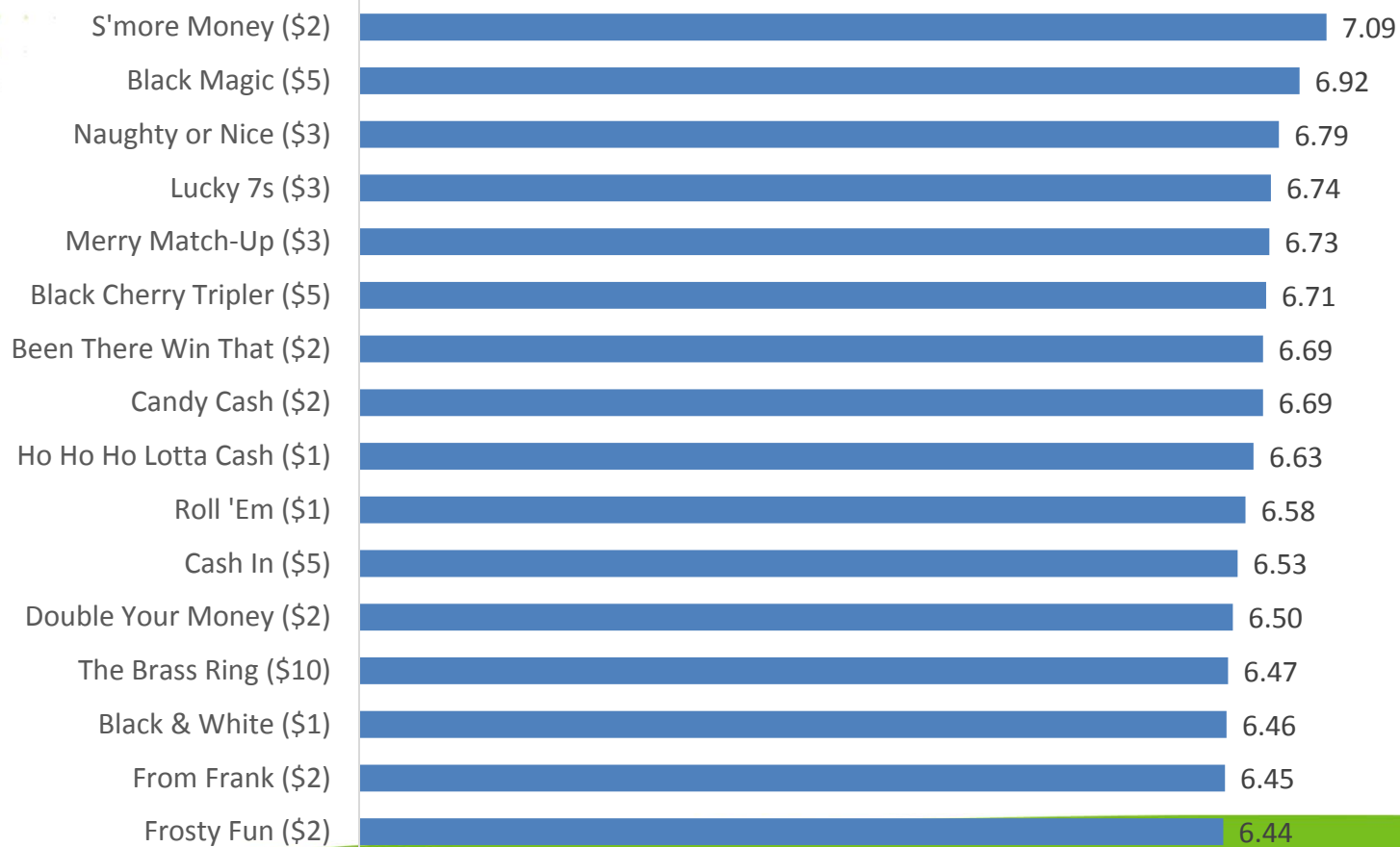
How likely would you be to purchase this scratch-off game?



Like / Dislike of Game *Prior to Play*

Mean Rating

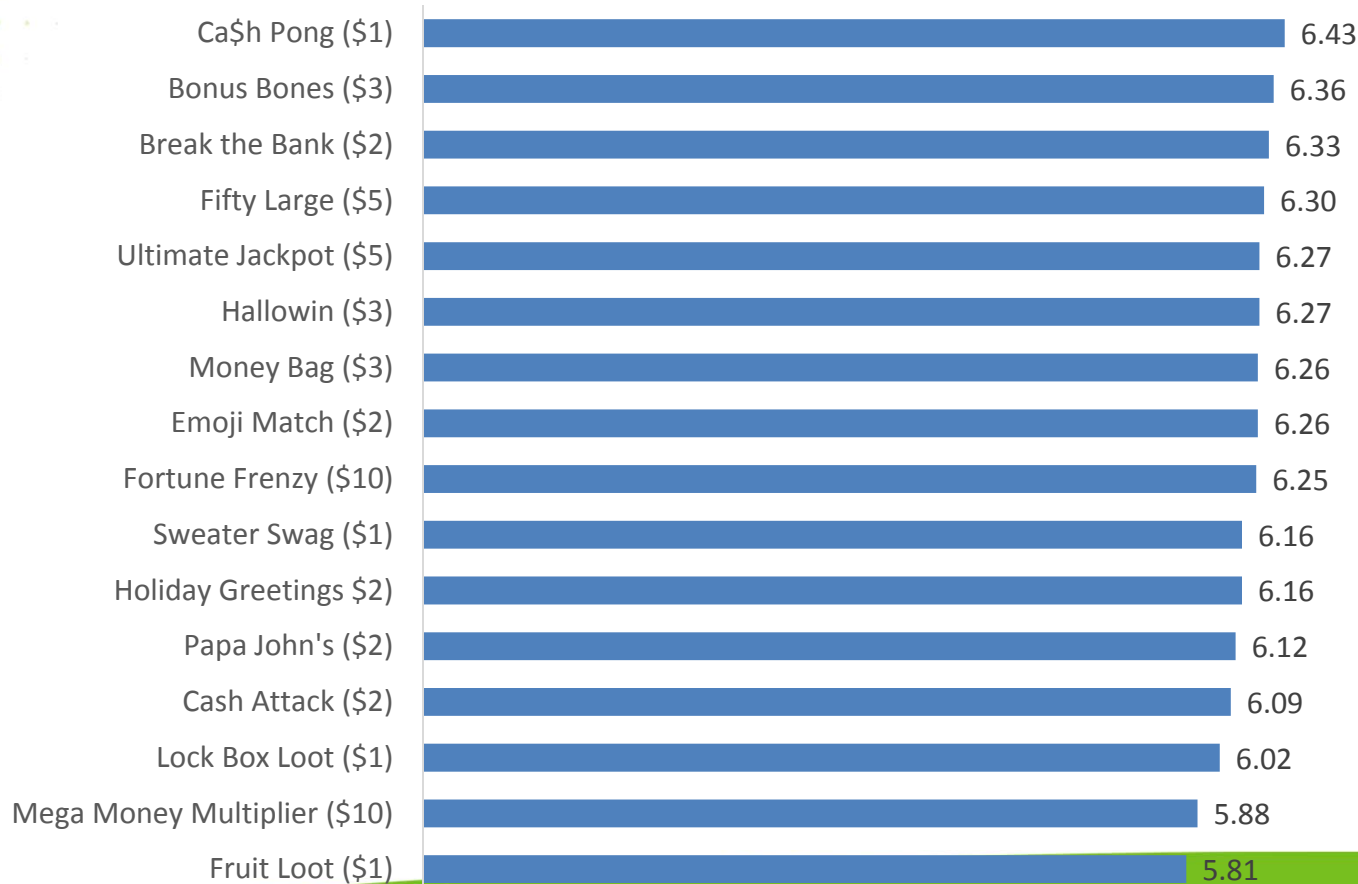
Using a scale from 1 to 9 where "1" means you do not like the game at all and "9" means you like the game very much, how much do you like or dislike this scratch-off game?



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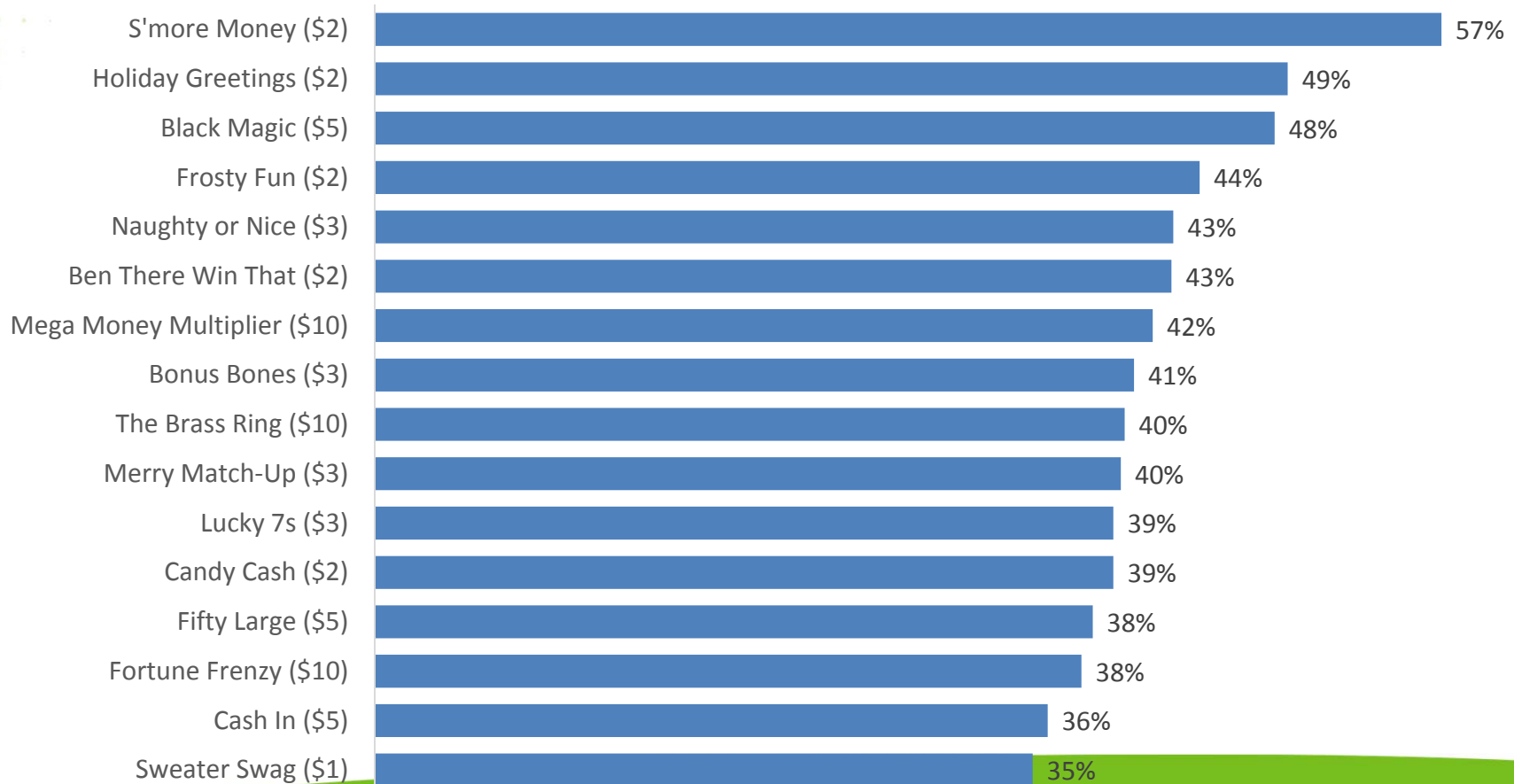


Overall Ticket Appearance

Net: *Excellent*



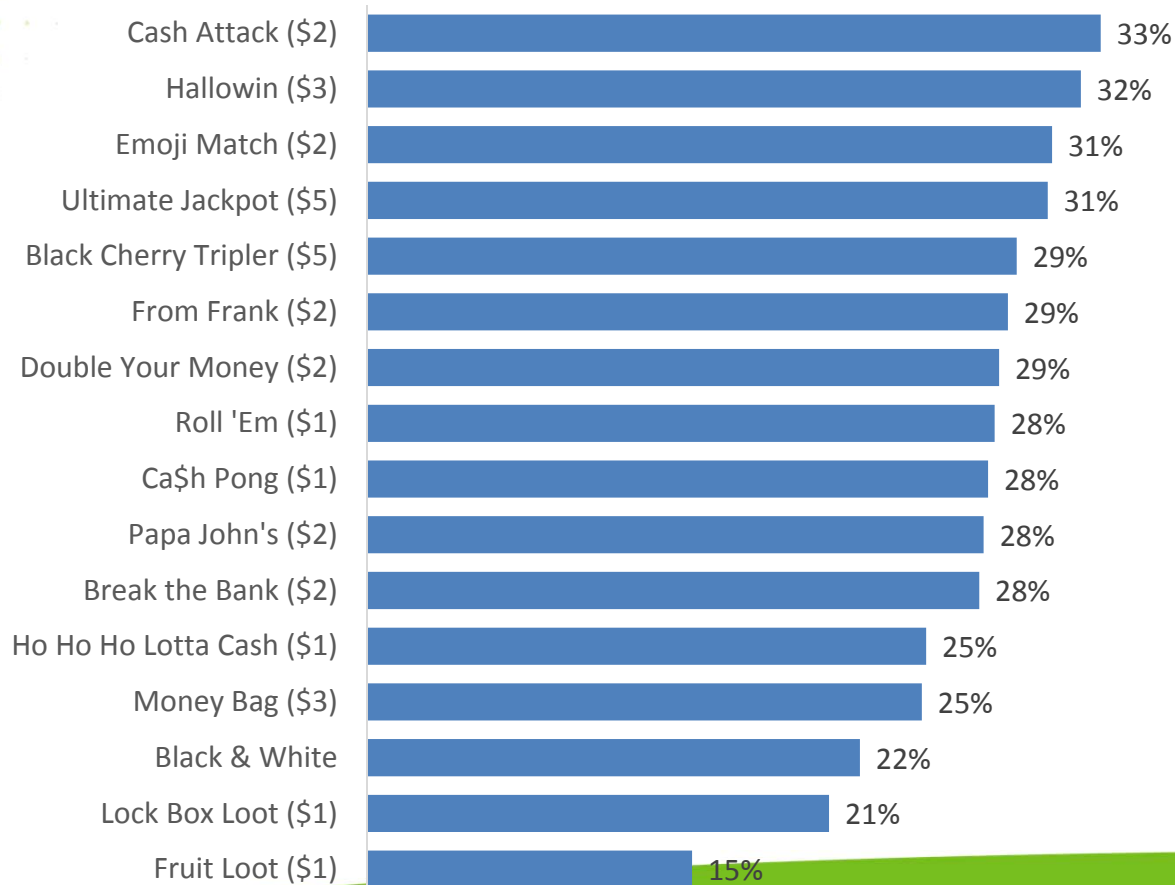
Please rate this ticket on the characteristics listed below. Overall appearance of the ticket. [Excellent, Very good, Good, Fair, Poor]



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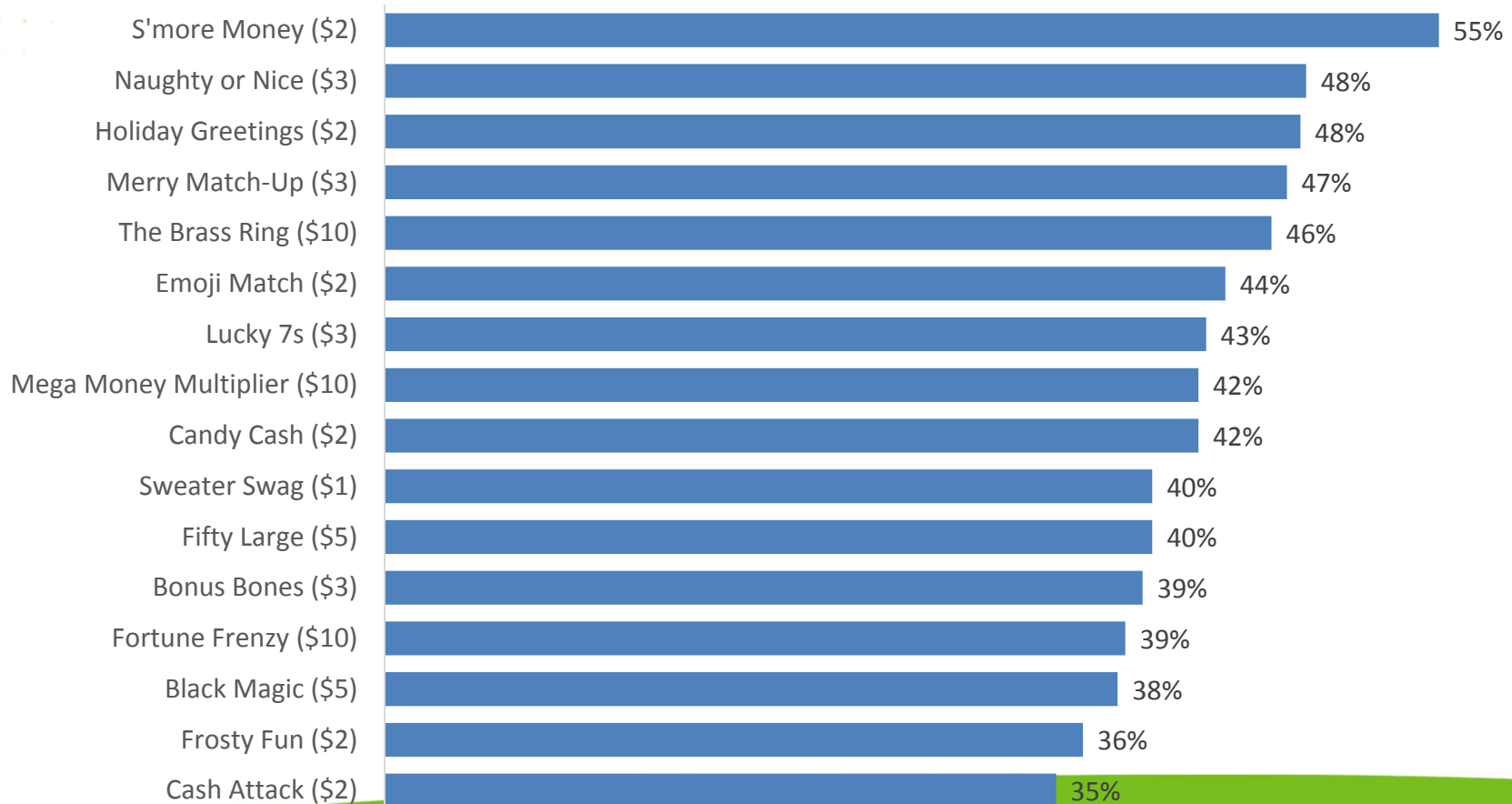


Colors Used in Ticket Design

Net: *Excellent*



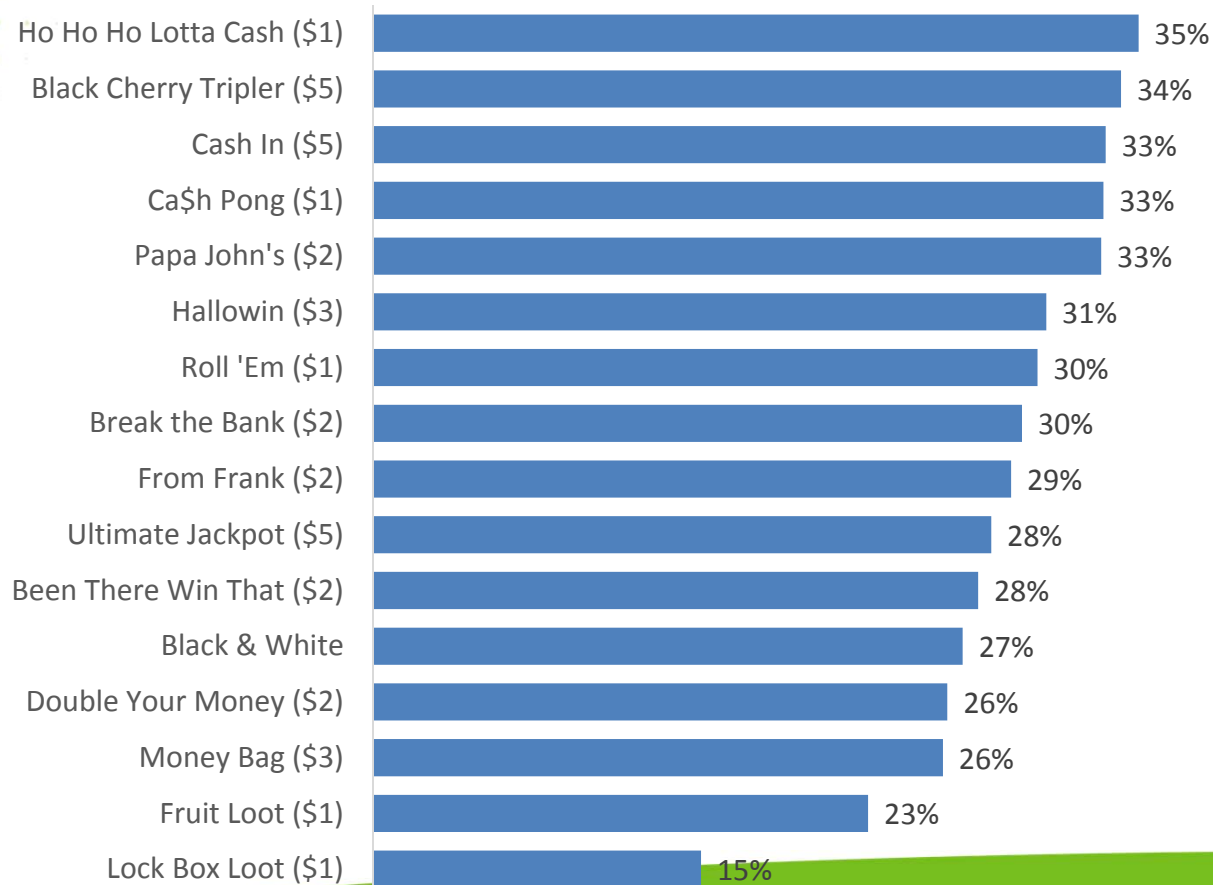
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Colors Used in Ticket Design

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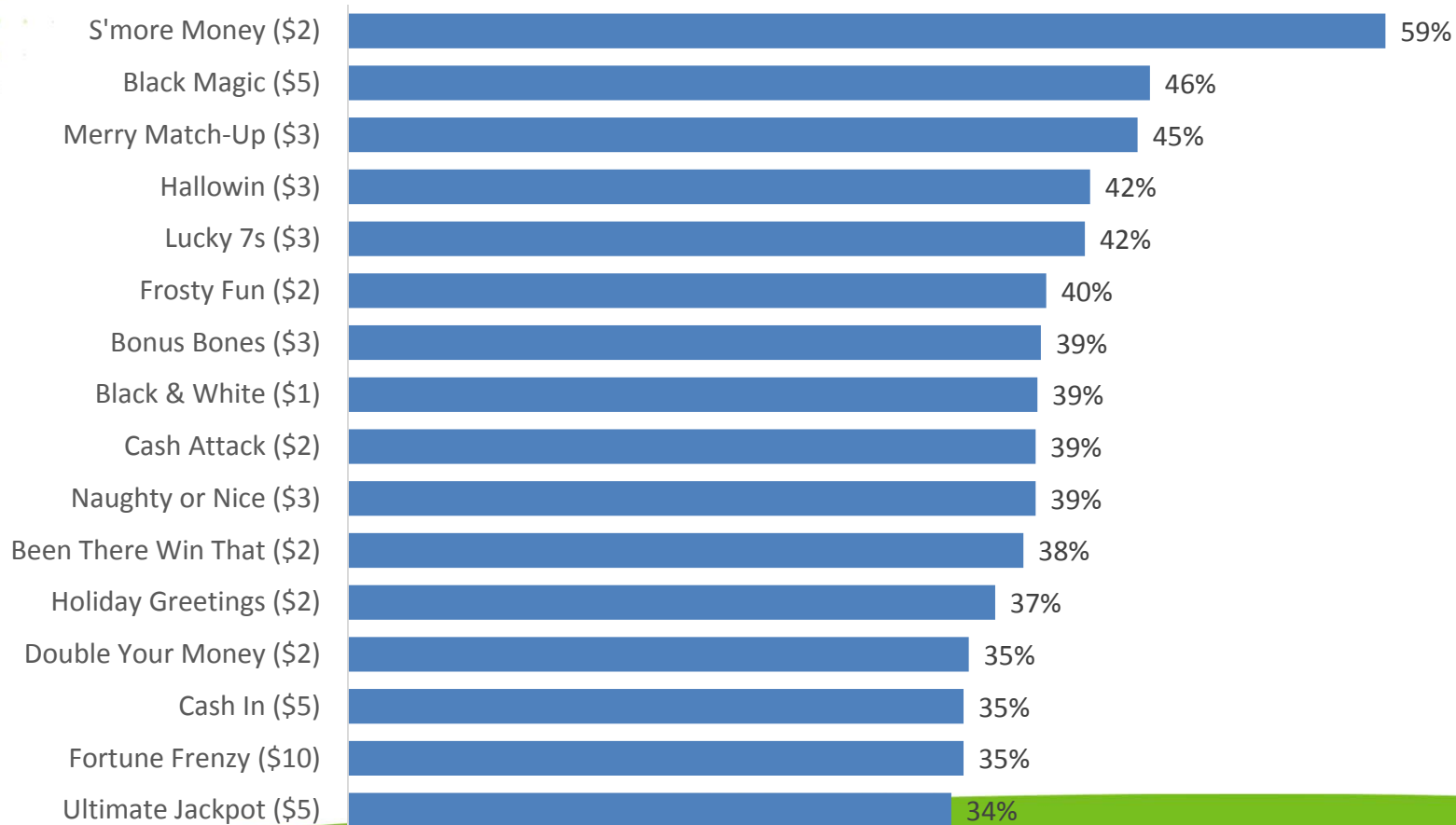
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Name of the Game

Net: *Excellent*

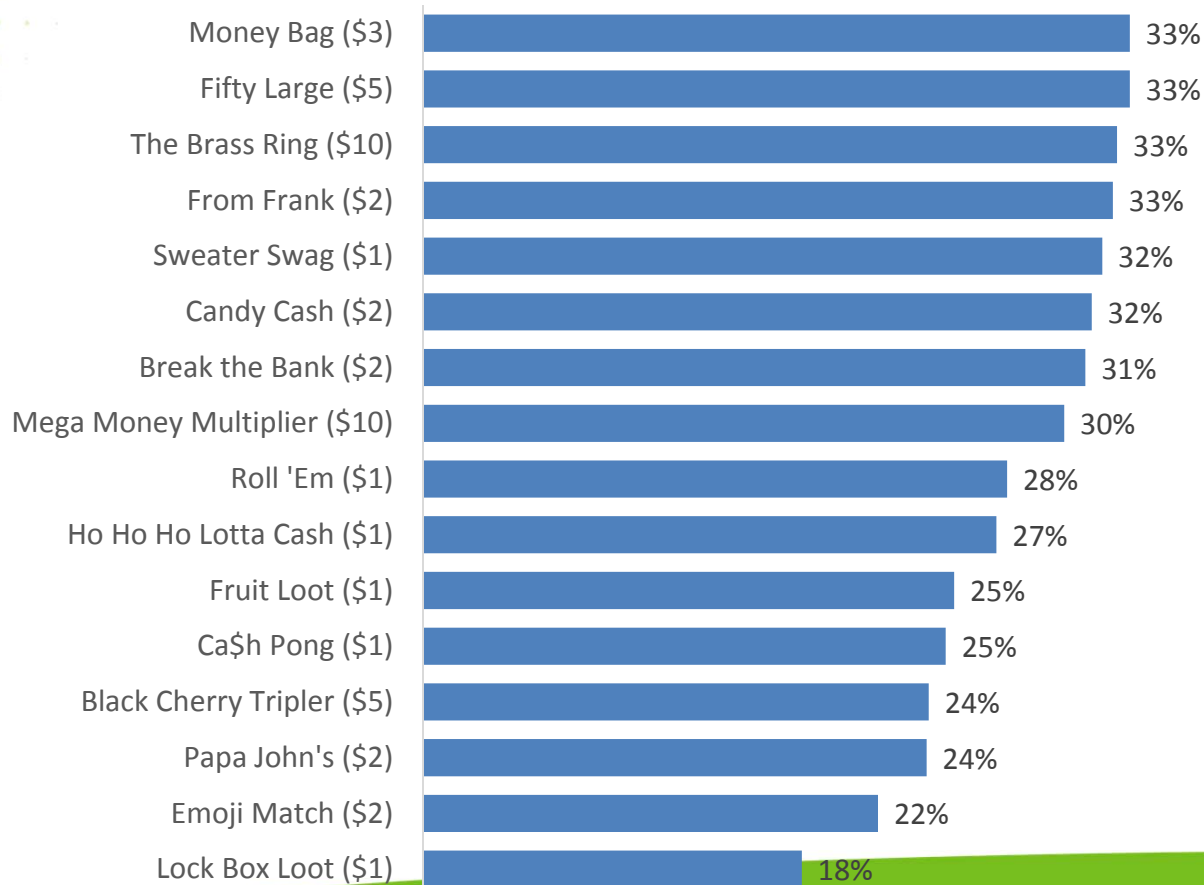
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Name of the Game

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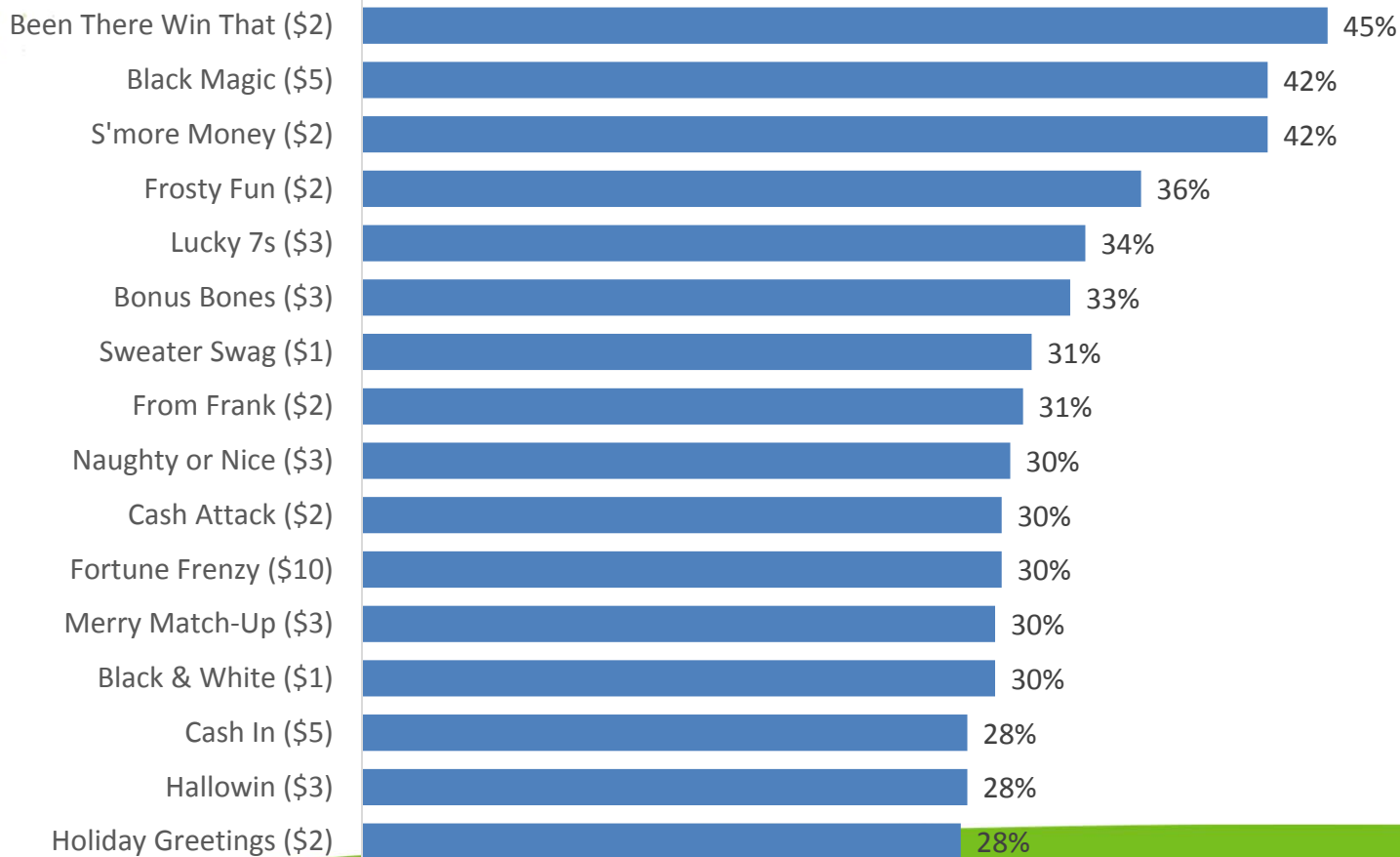
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Method of Game Play

Net: *Excellent*

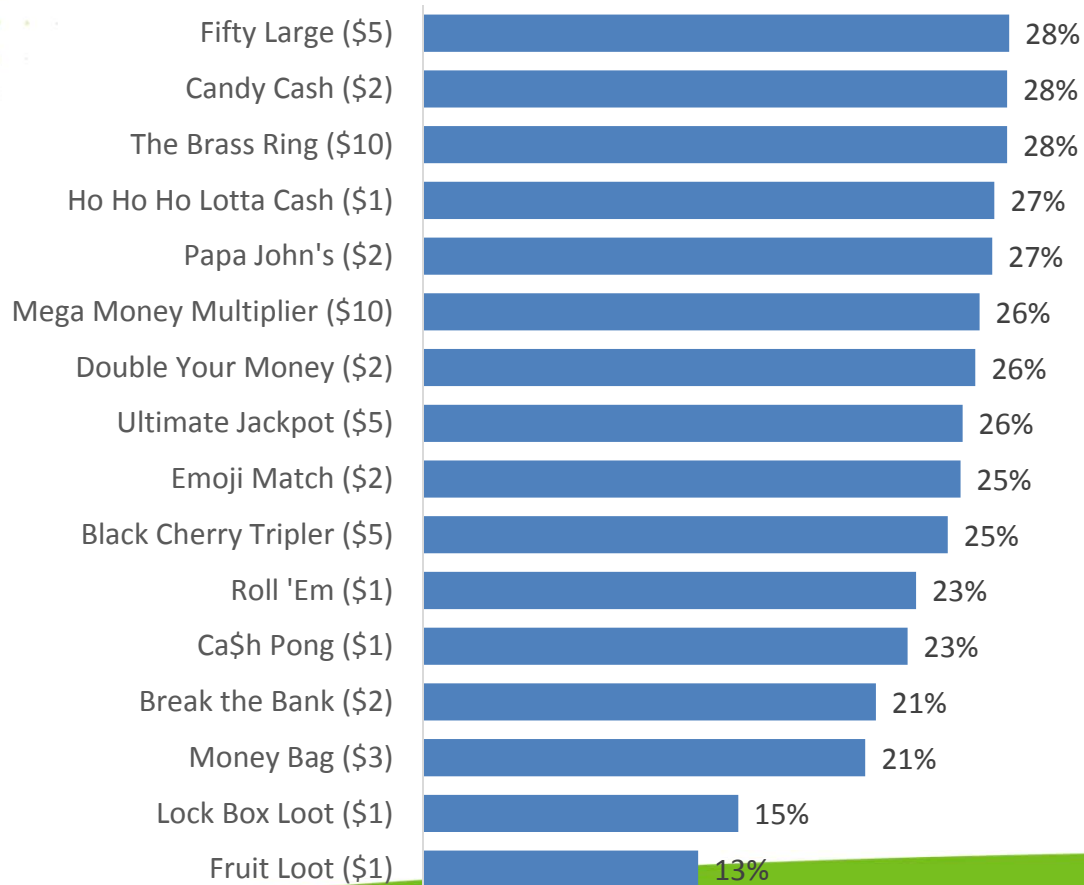
Please rate this ticket on the characteristics listed below. The way in which the game is played. [Excellent, Very good, Good, Fair, Poor]



Method of Game Play

Net: *Excellent*

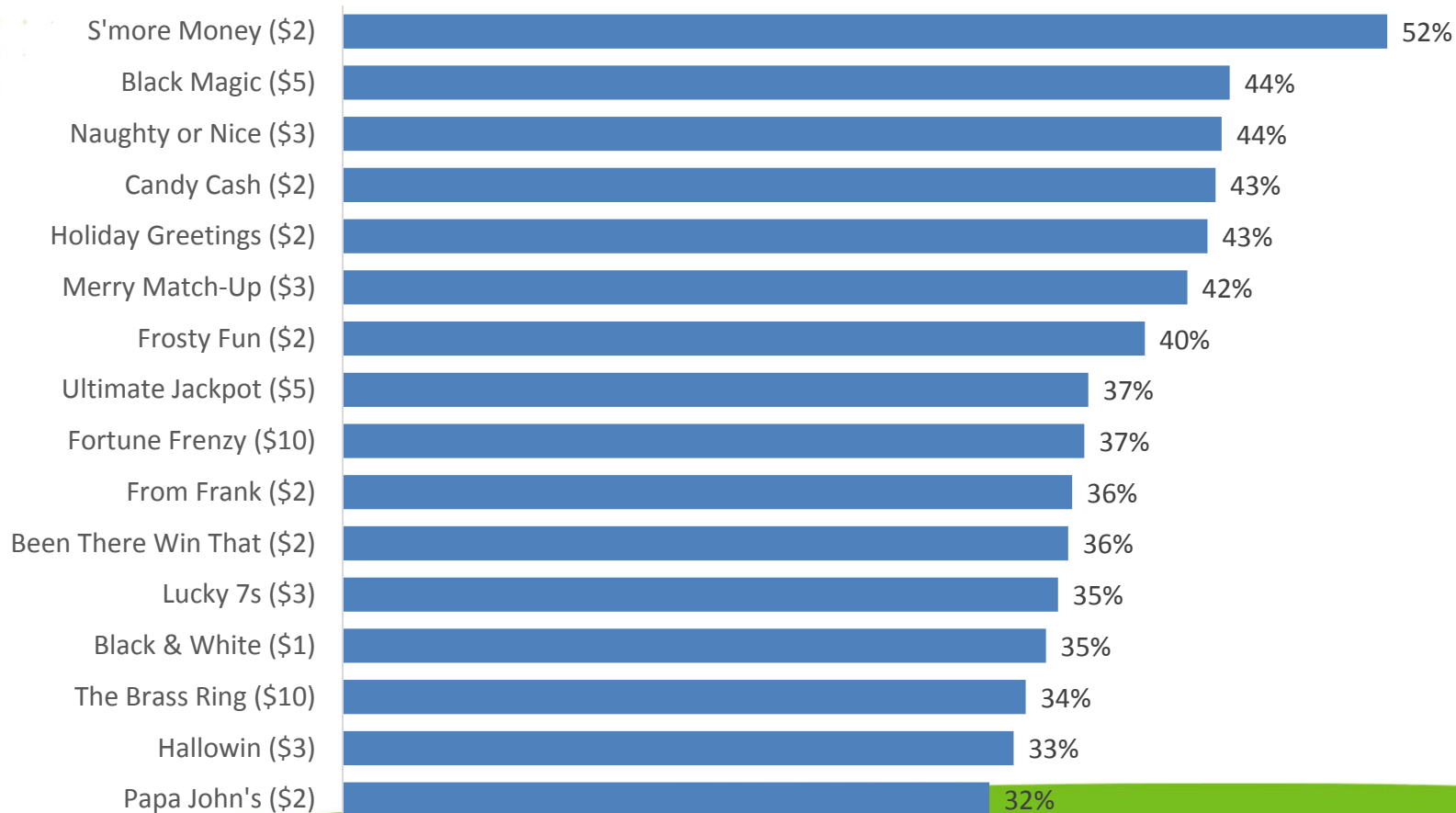
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Theme or Subject of the Ticket

Net: *Excellent*

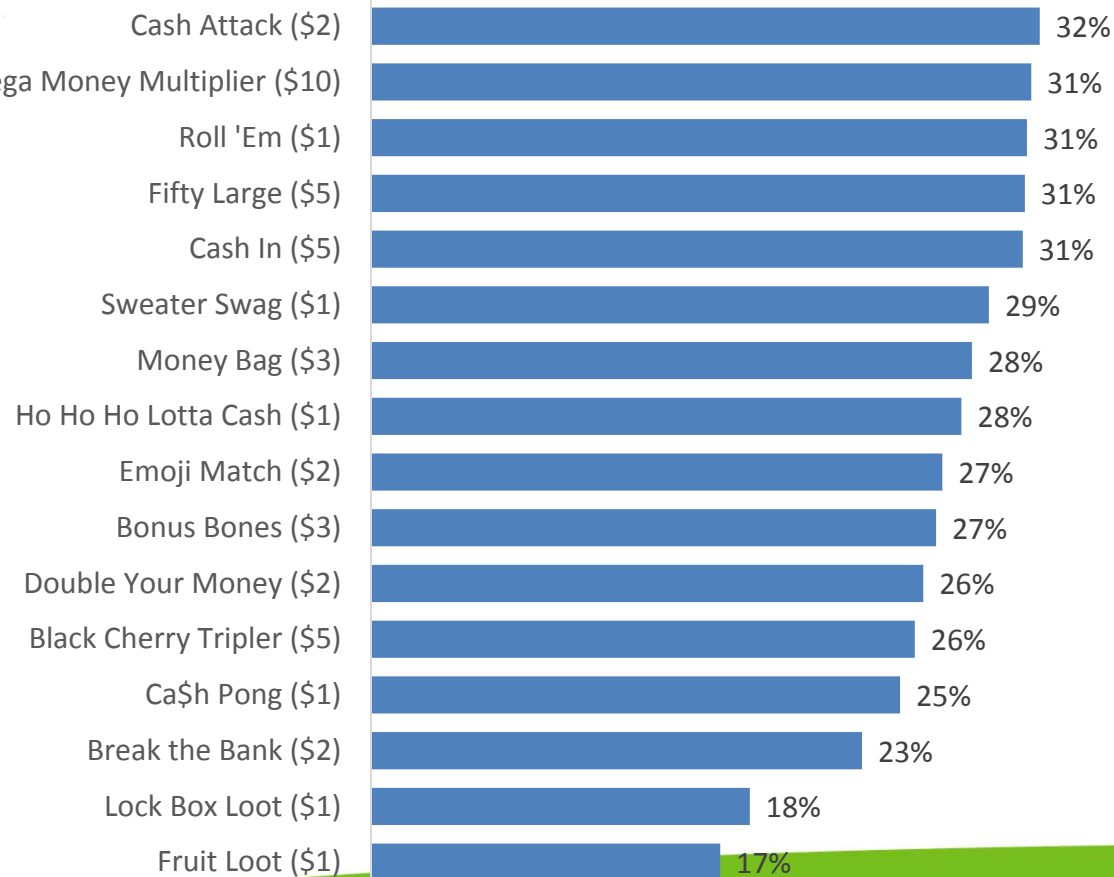
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Theme or Subject of the Ticket

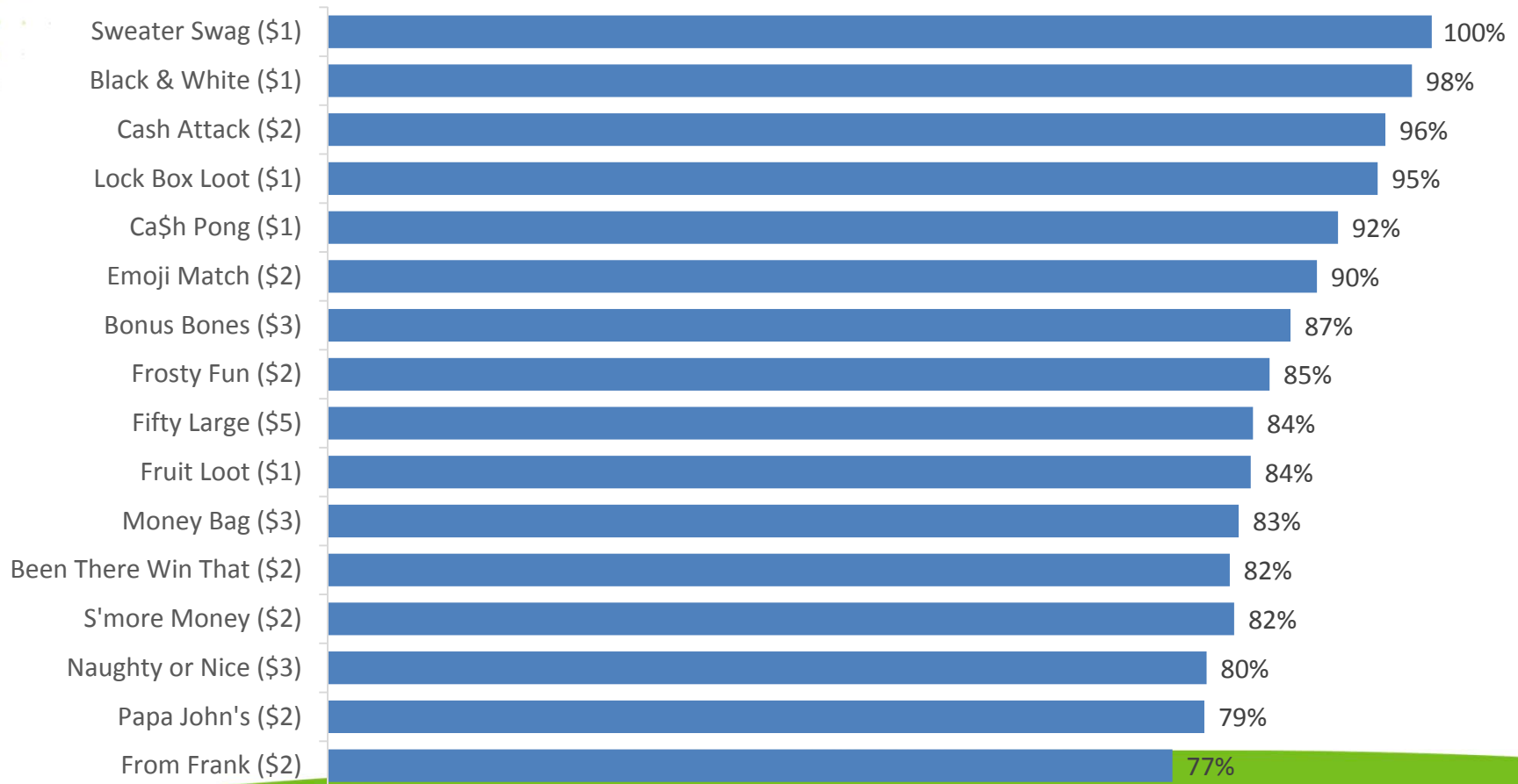
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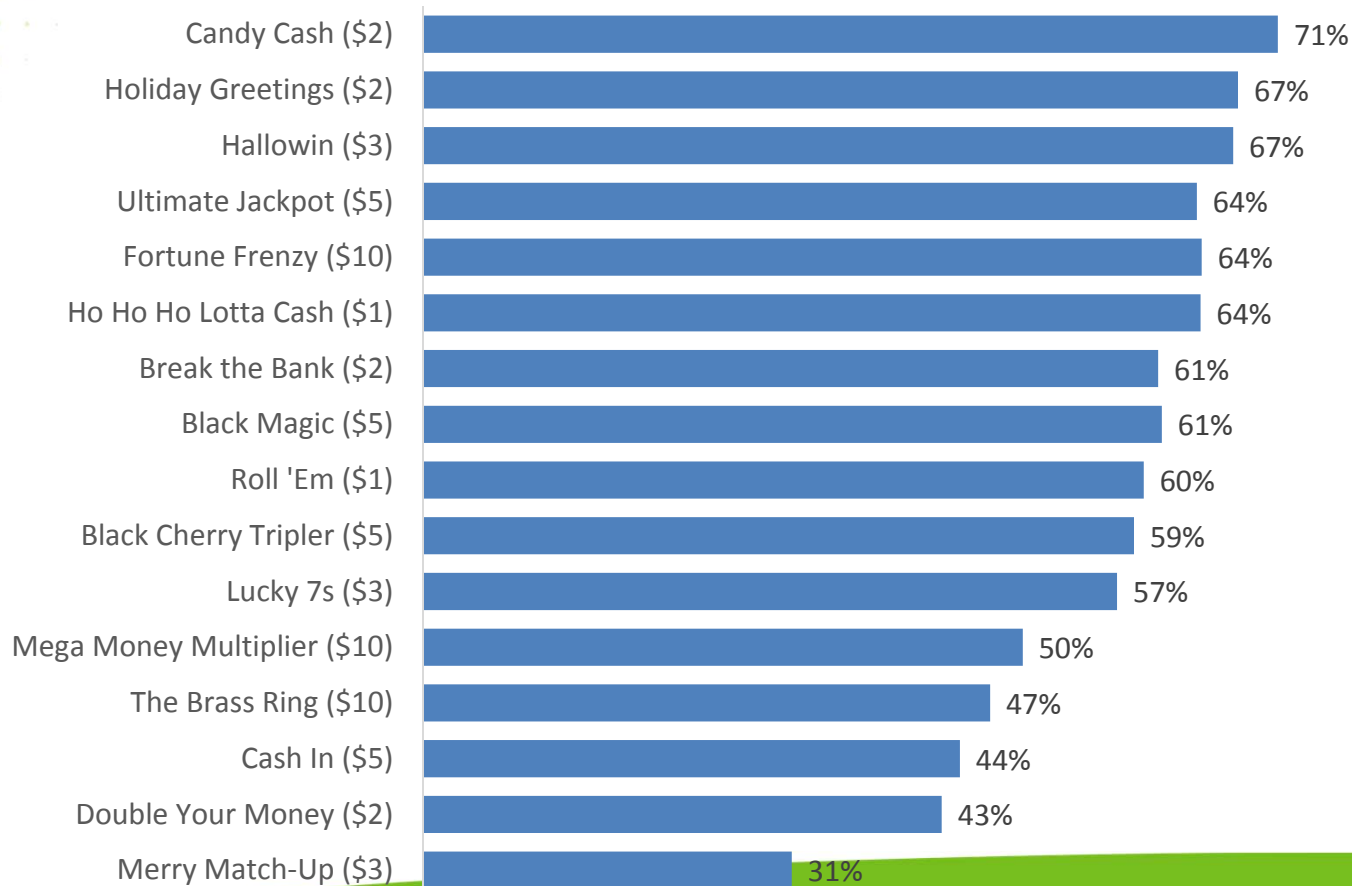
Accuracy of Winnings Calculation

If this had been an actual ticket, please enter the amount of money you would have won on this ticket.



Accuracy of Winnings Calculation

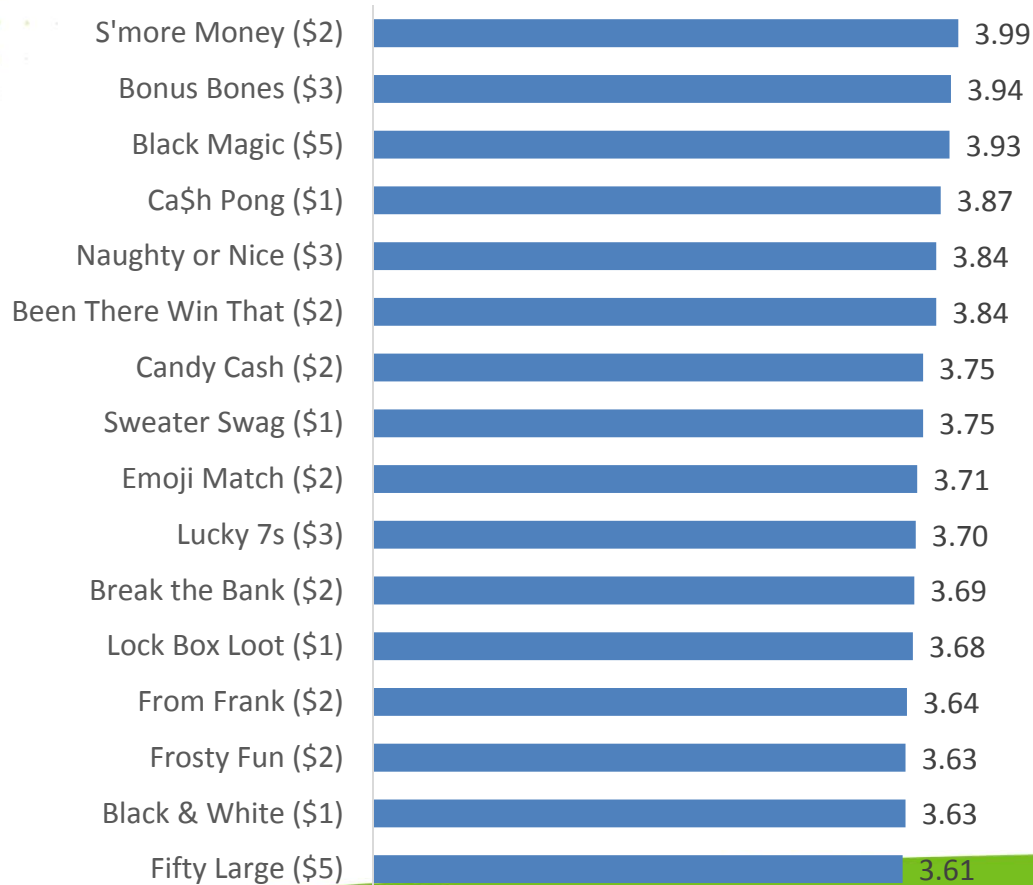
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Like / Dislike of Game *Following Game Play*

Mean Rating

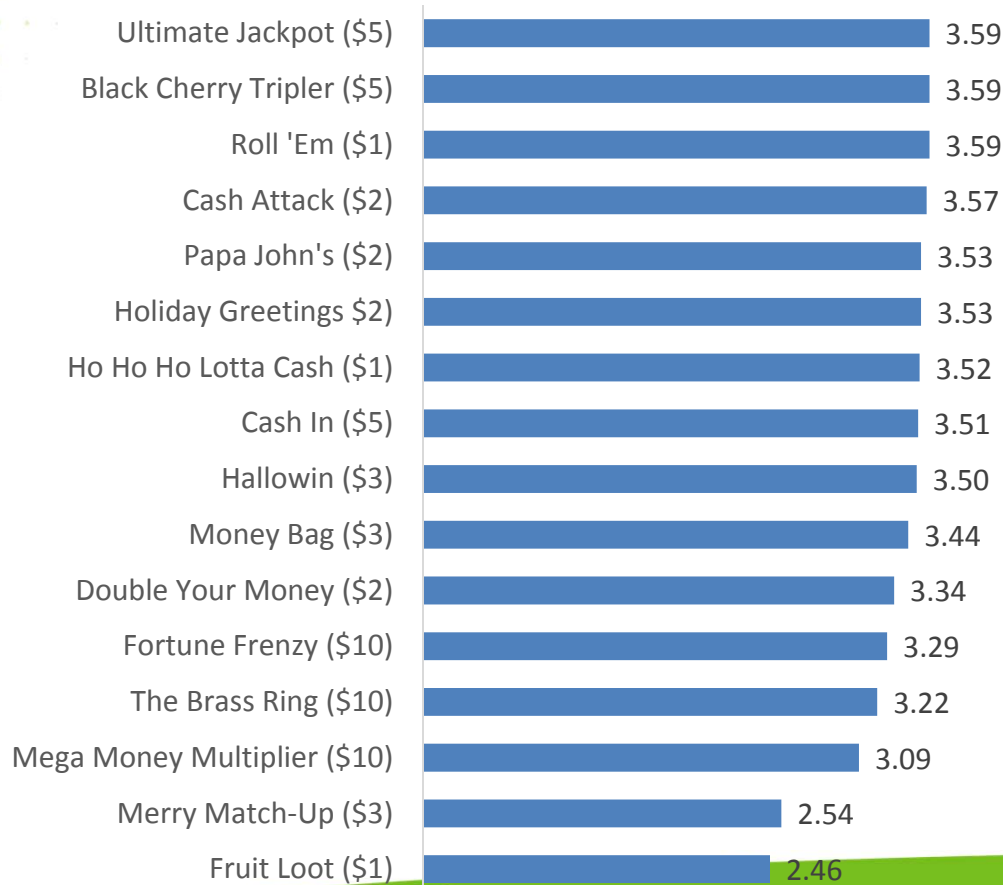
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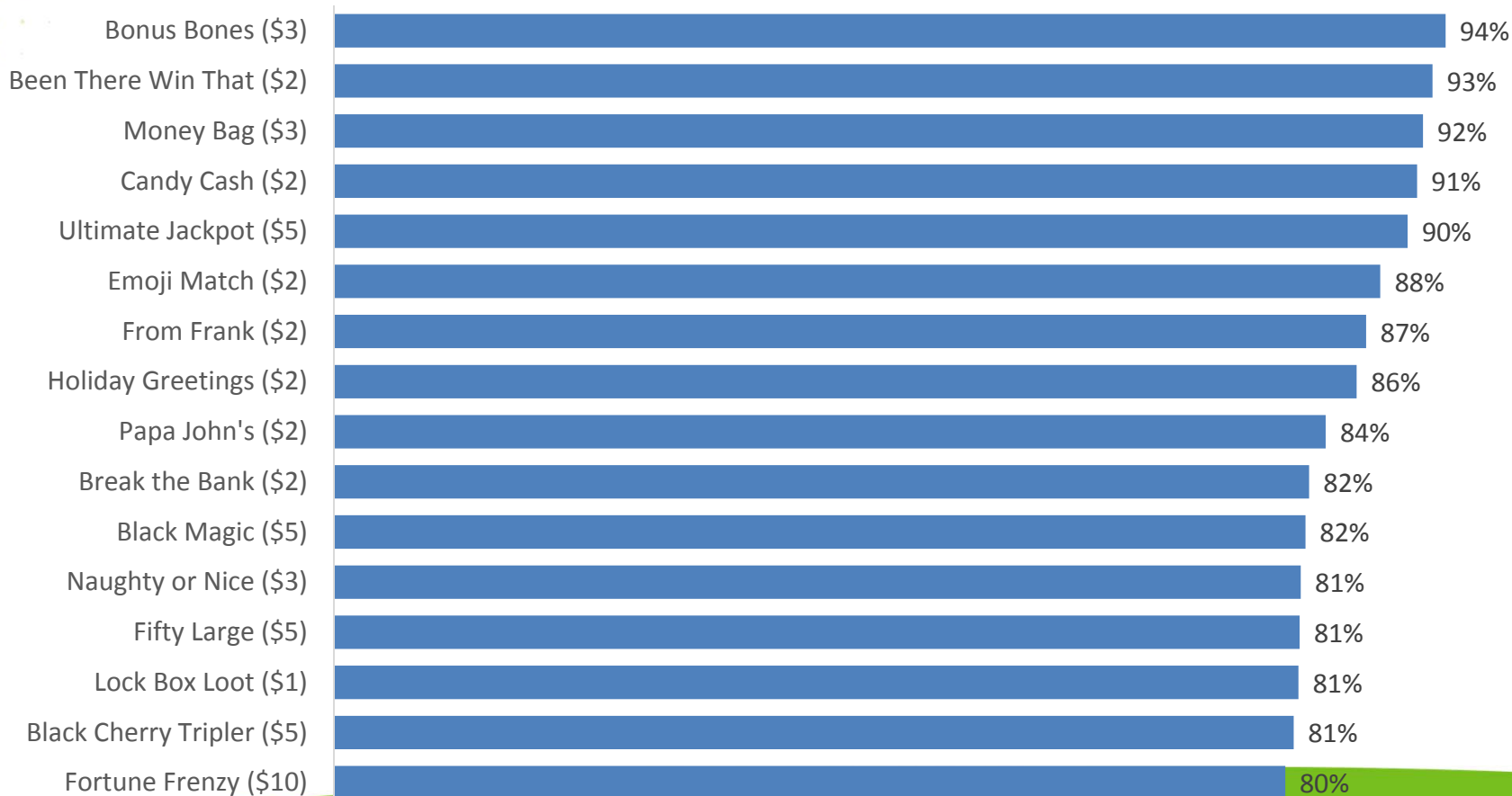
Using a scale from 1 to 9 where "1" means you do not like the game at all and "9" means you like the game very much, how much do you like or dislike this scratch-off game?



Involvement of Game Play

Net: *About Right*

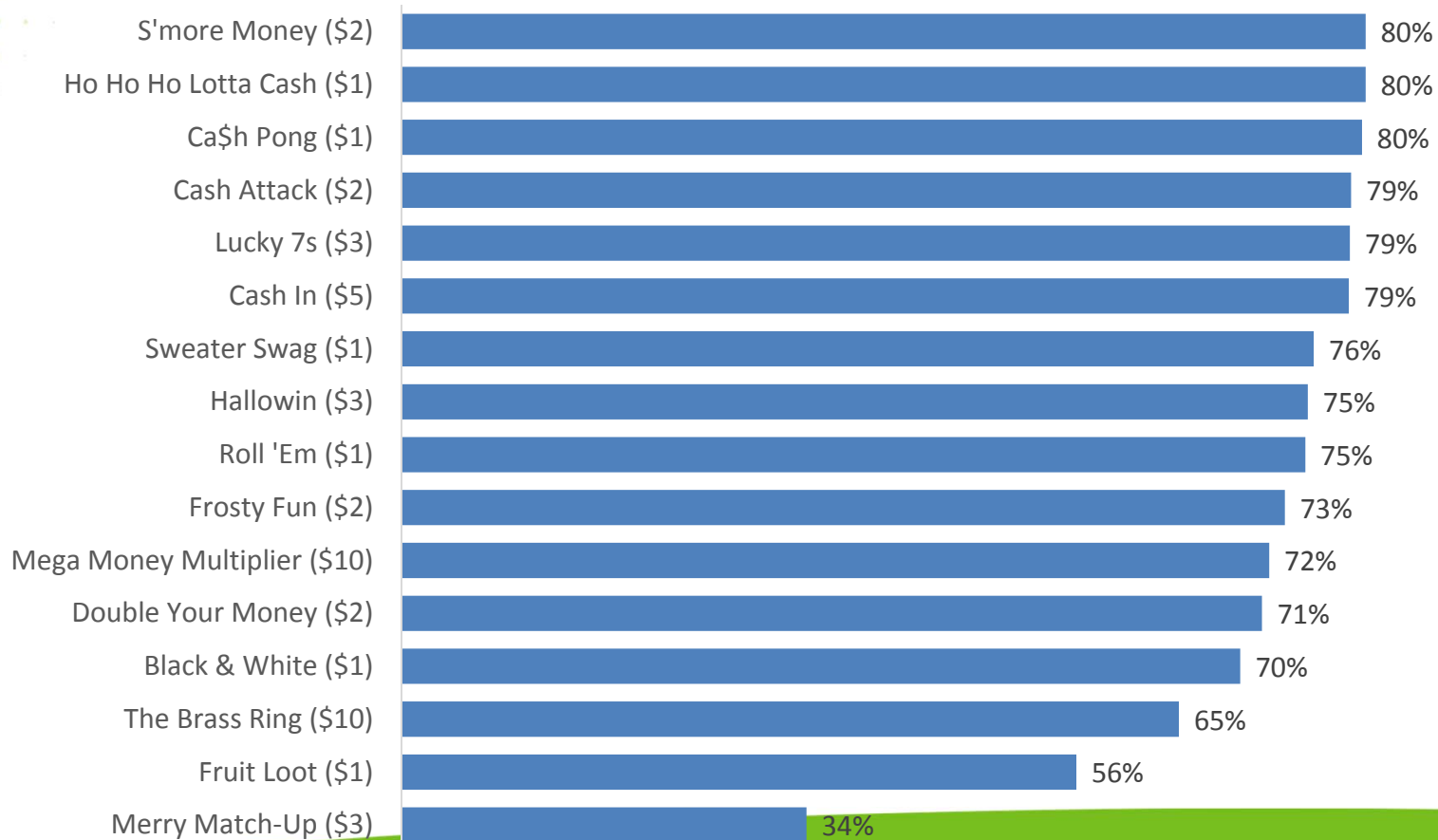
Compared to the type of scratch-off games you prefer to play, is this game too easy to play, about right, or too difficult to play?



Involvement of Game Play

Net: *About Right*

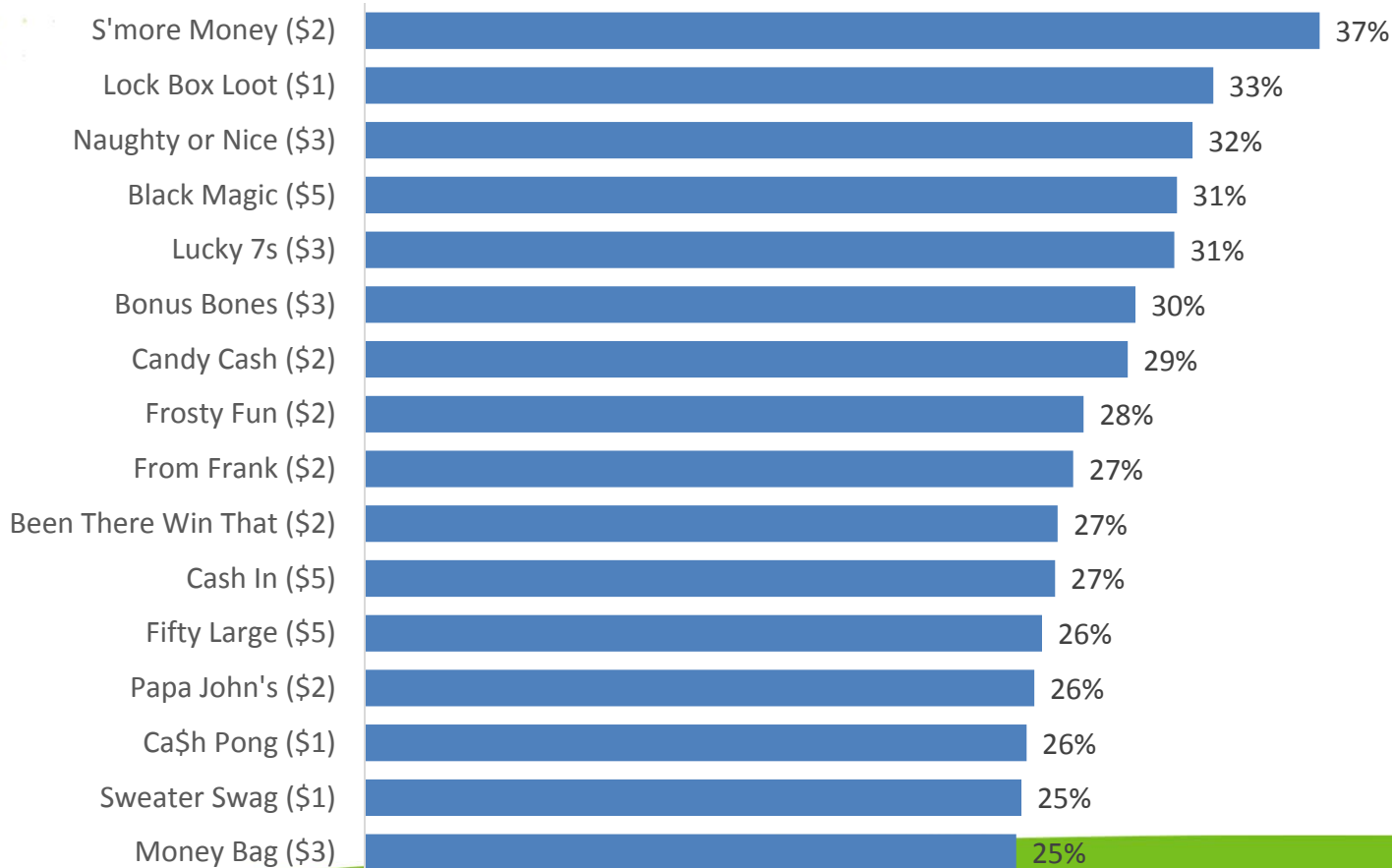
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Incidence of Purchase Intent *Following Play*

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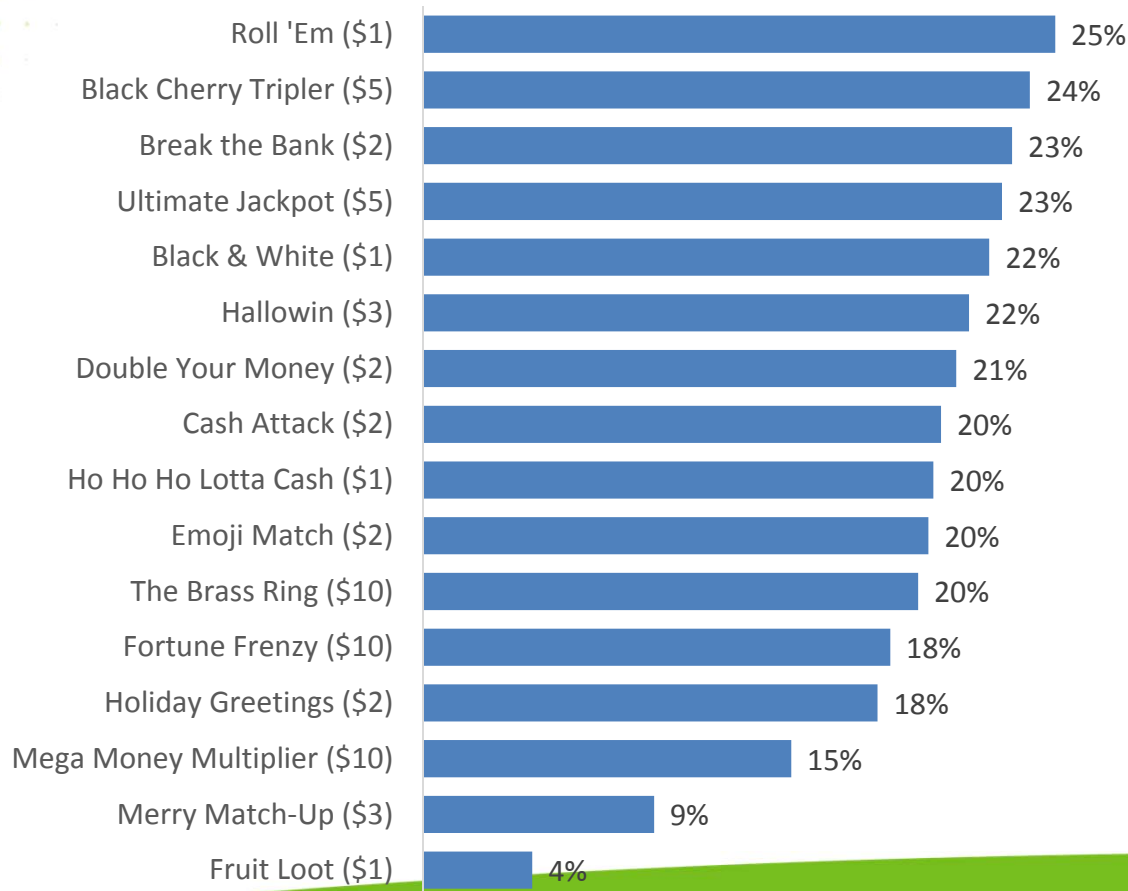
Now that you have seen how this game is played, how likely would you be to purchase this scratch-off game?



Incidence of Purchase Intent *Following Play*

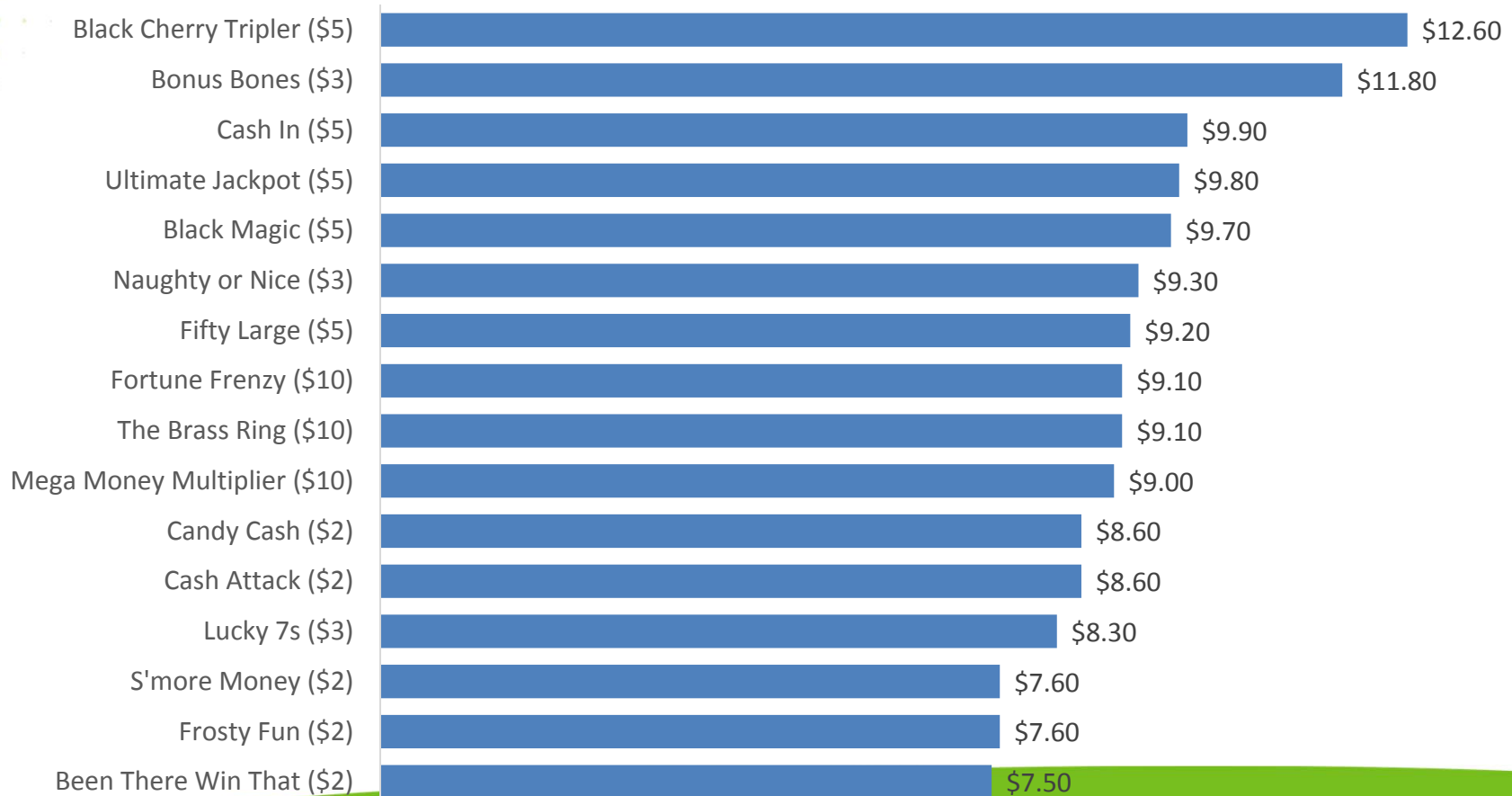
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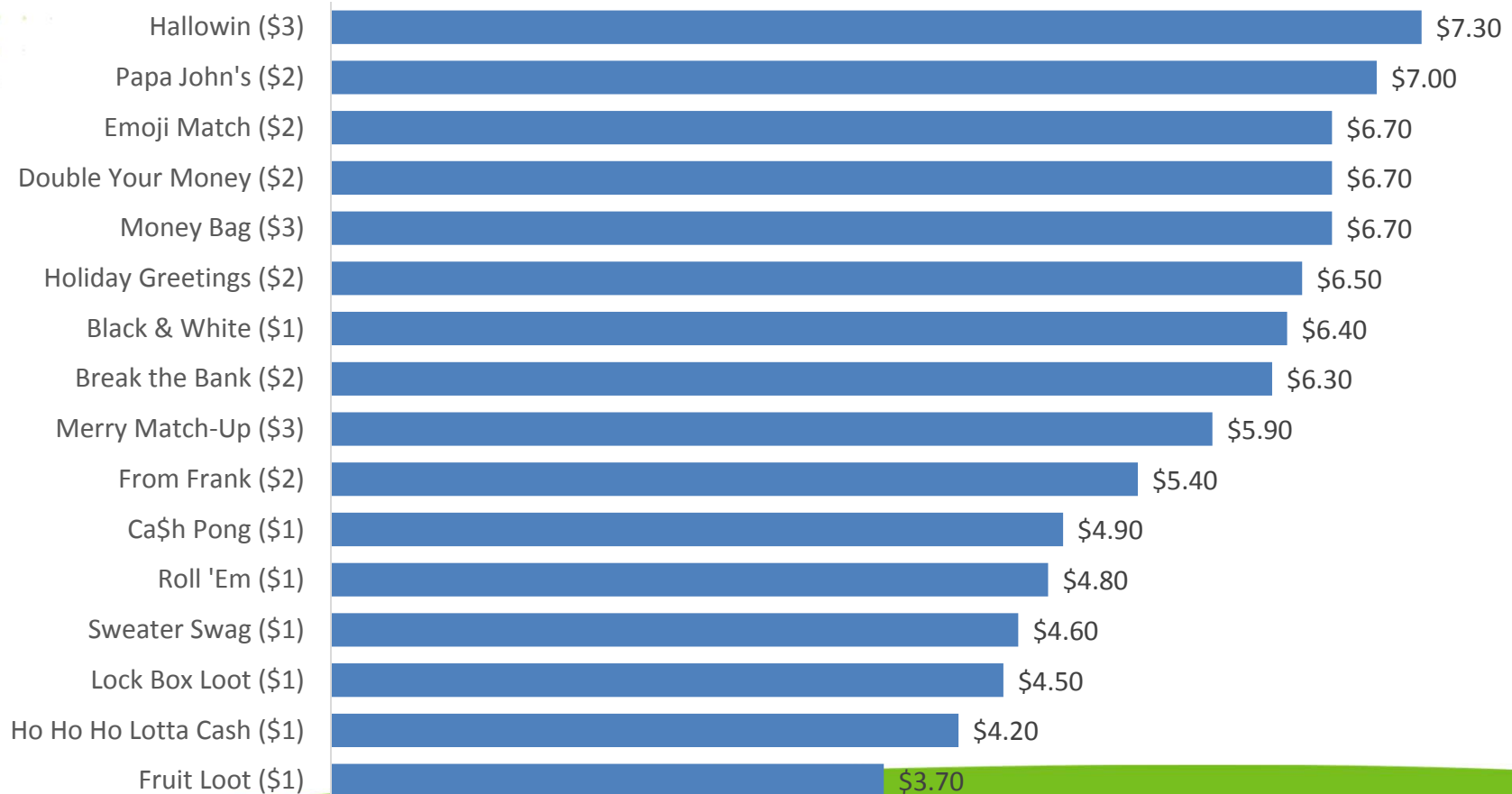
Average Amount Spent to Purchase Game Tickets

Shown below are all of the Scratch-Off tickets. Assume that you were going to spend \$48.00 on the purchase of scratch-off tickets. On the grid below, enter the amount you would spend on each ticket.



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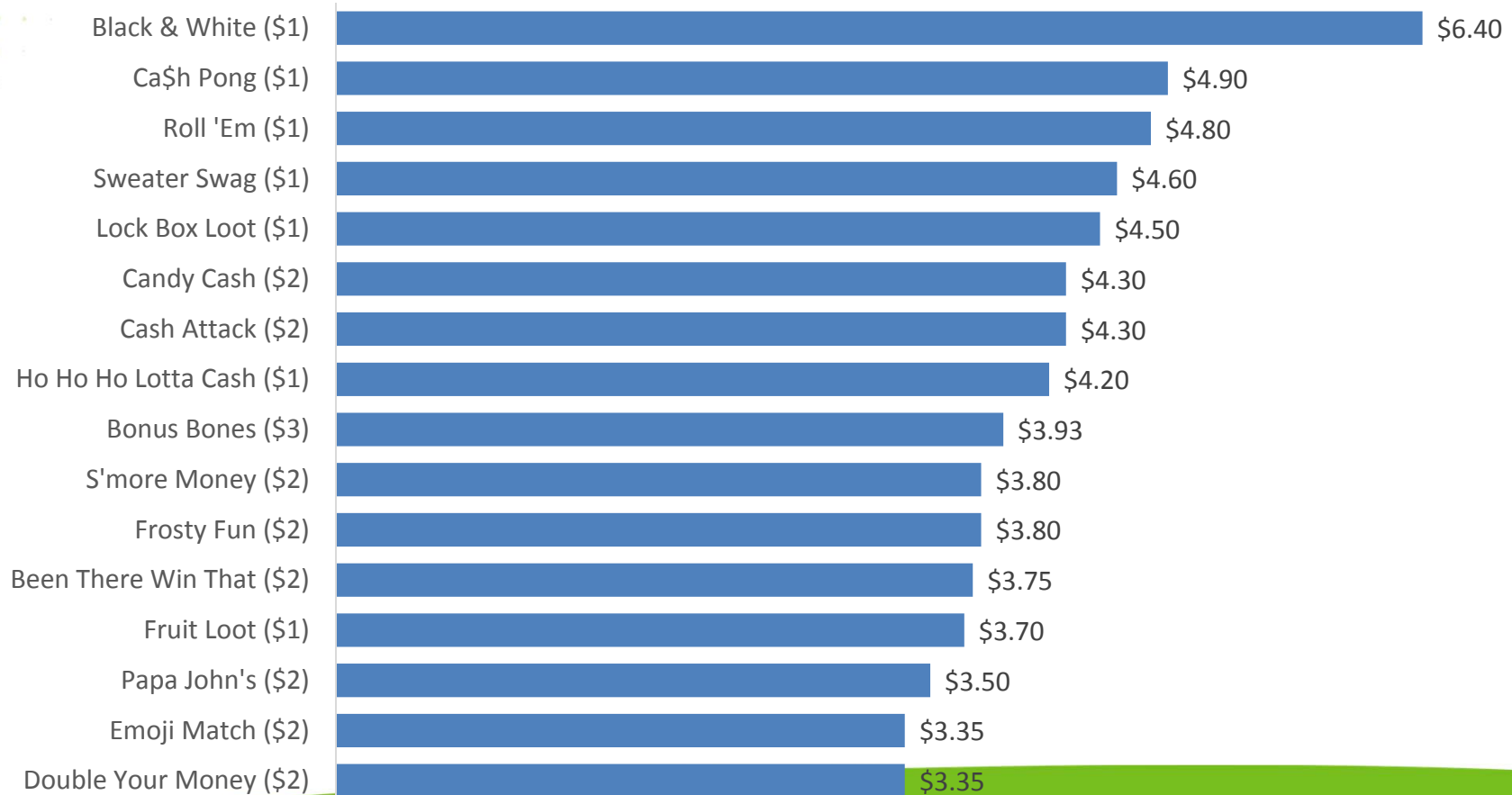




Indexed Amount of Game Ticket Purchase

Amount spent per dollar of game ticket value

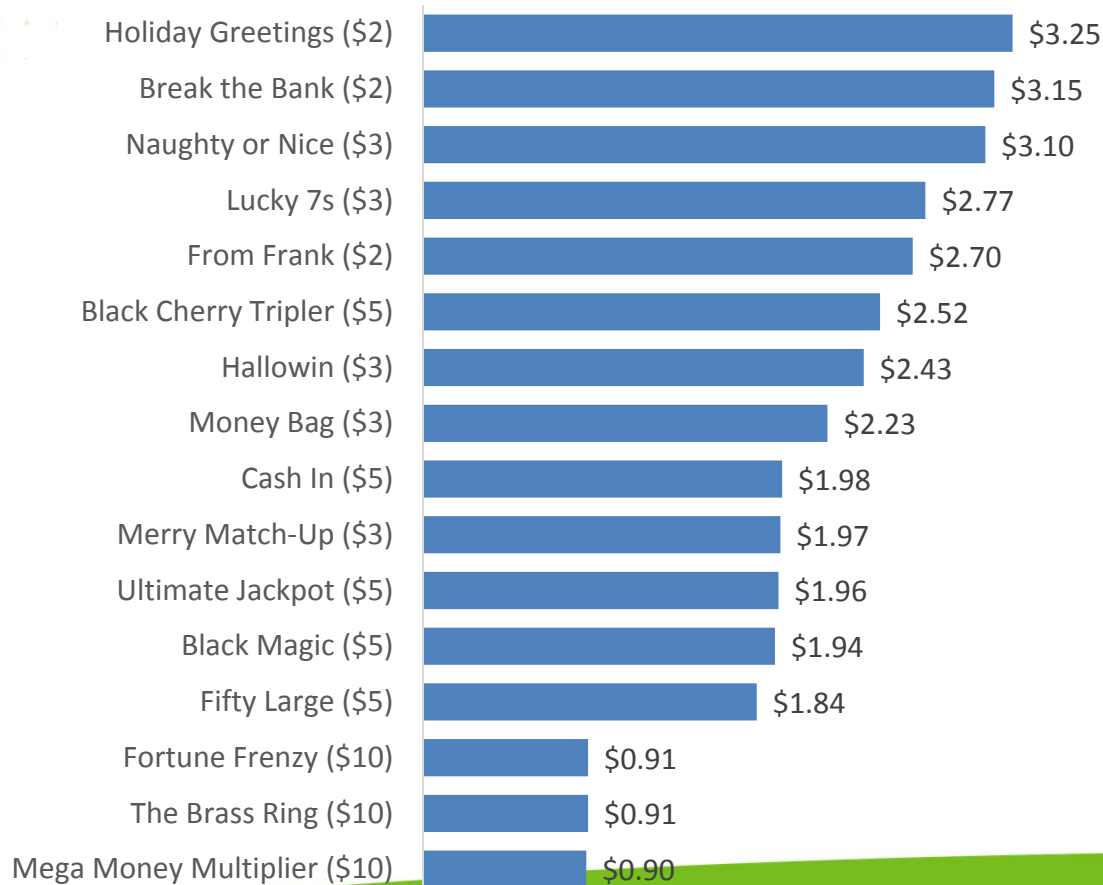
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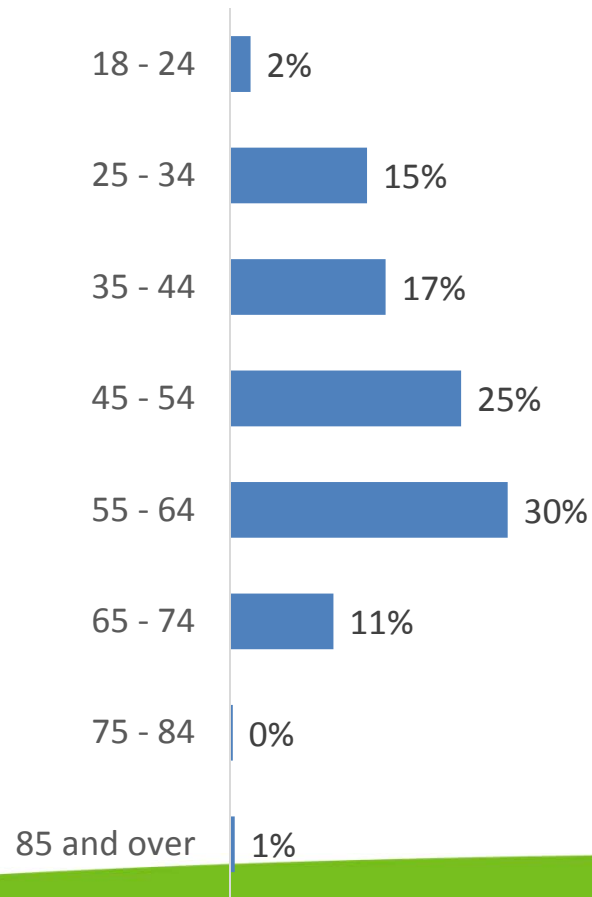
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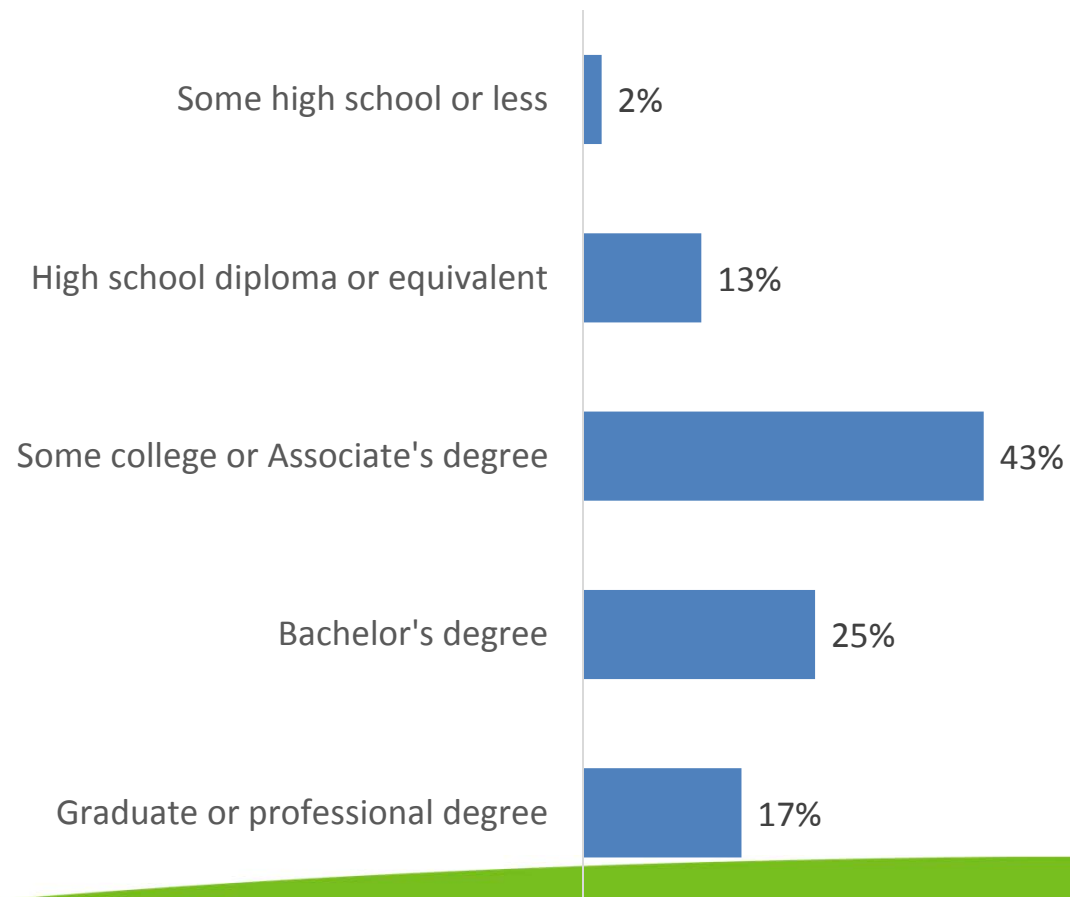


Respondent Profile

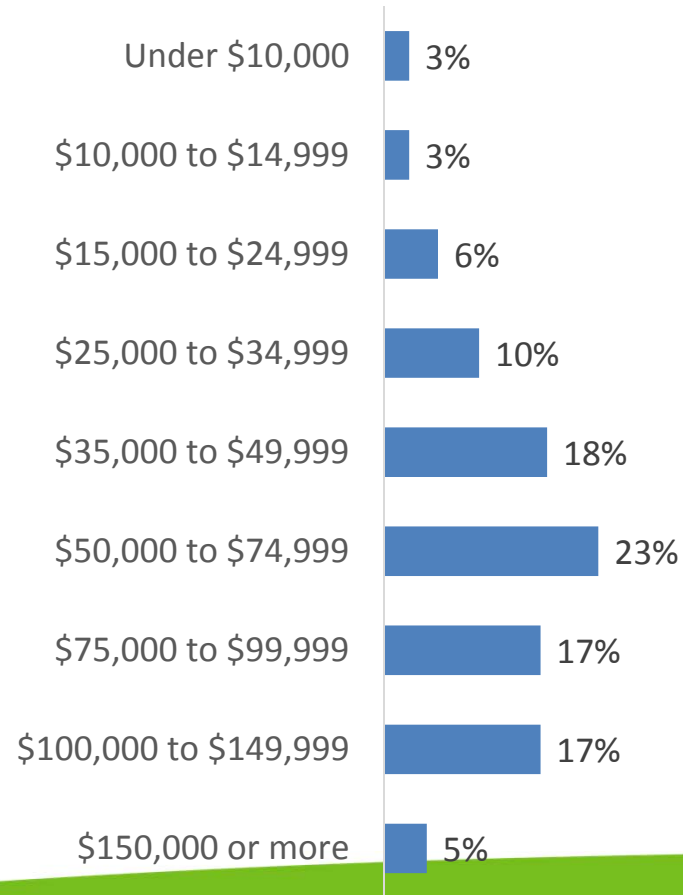
Age



Education

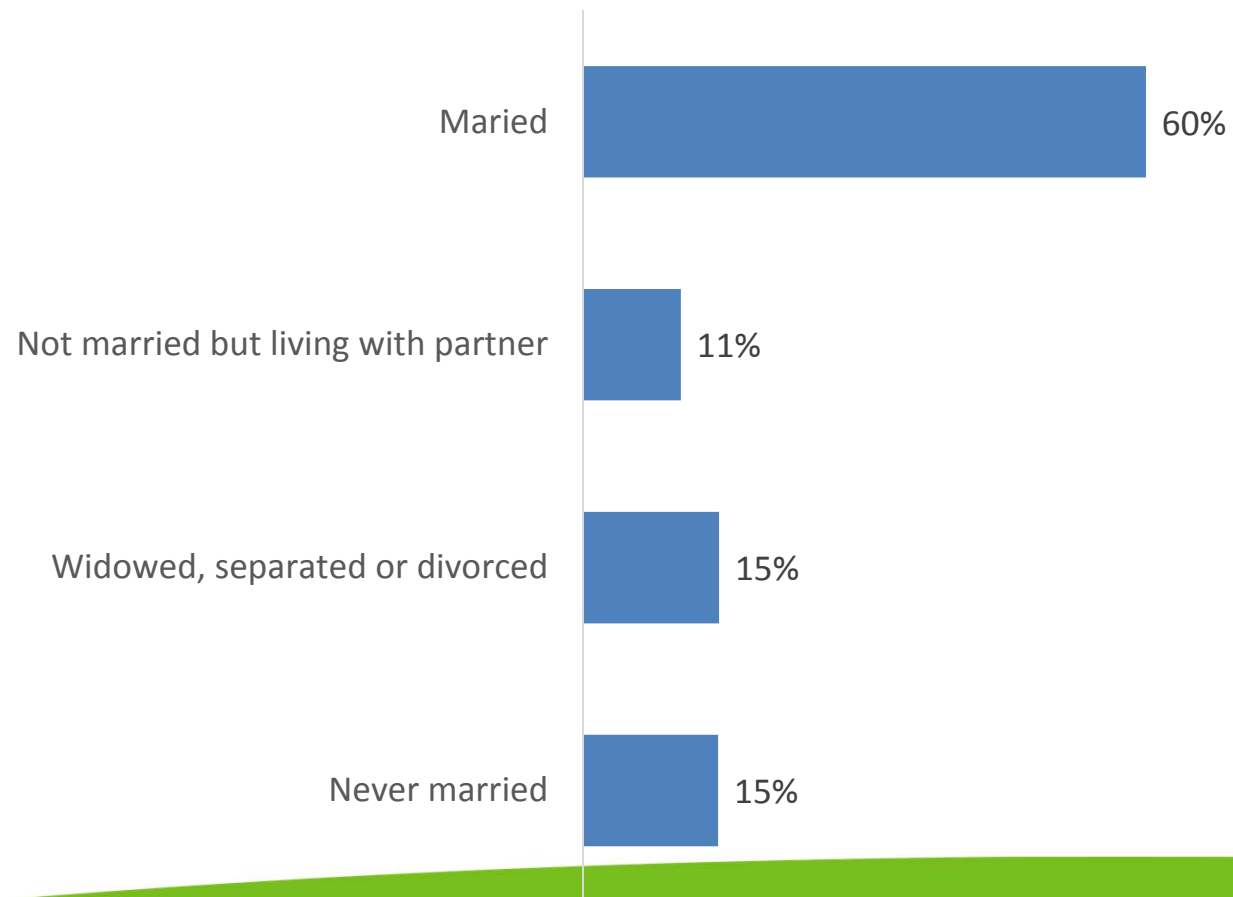


Income



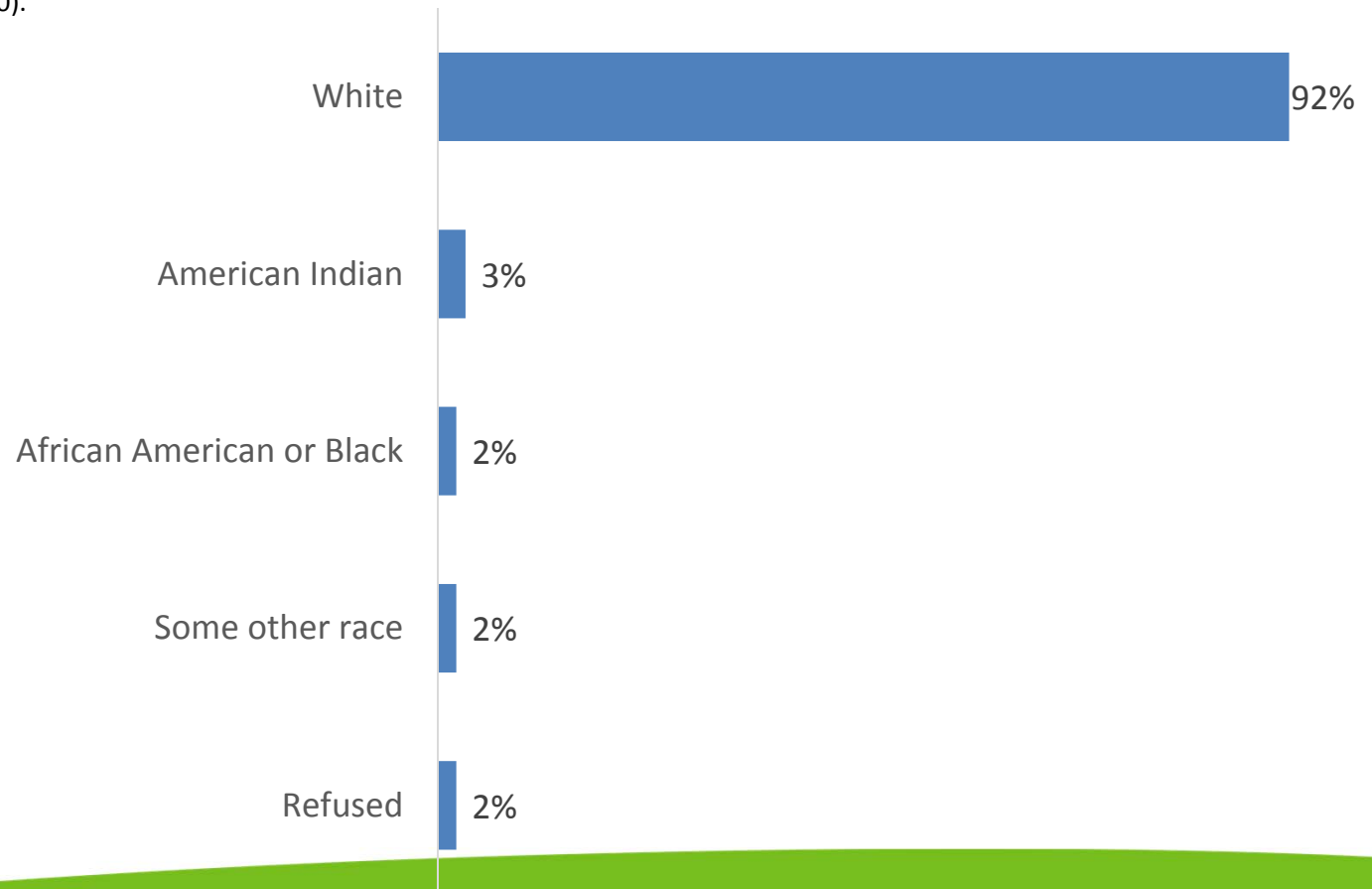
*Mean Household Income
\$68,900*

Marital Status

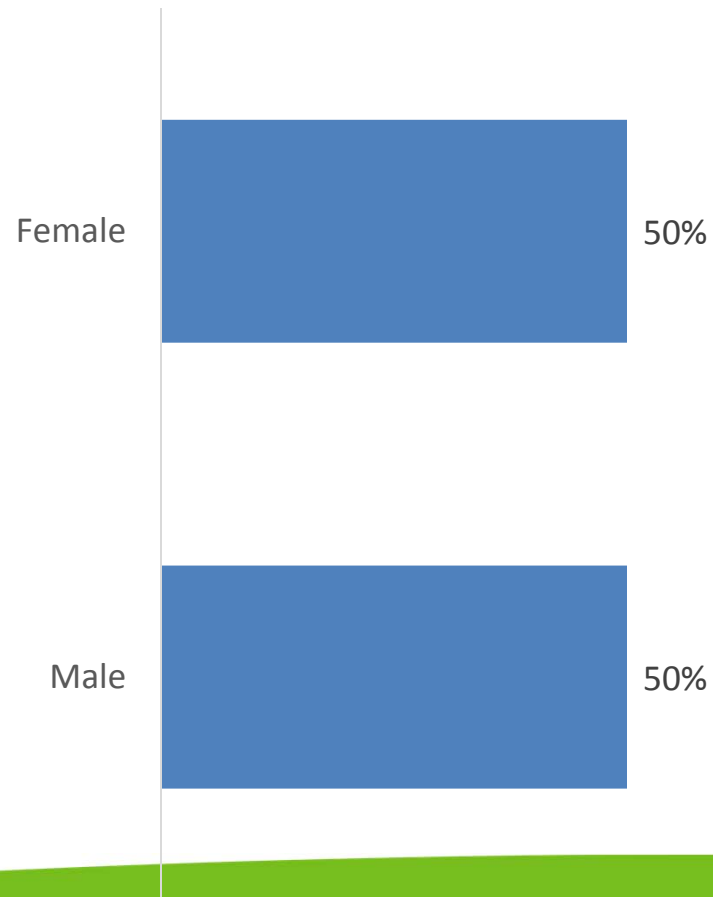


Race

Do you consider yourself...?
Base: All respondents (n=200).



Gender





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