

**COLORADO LOTTERY**  
**2014 IMAGE STUDY**

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## **SUMMARY**

A statewide image survey for the Colorado Lottery was conducted by The Howell Research Group in June-July 2014. This survey was a "tracking" survey to the 18 previous surveys conducted between 1991 and 2013. The 2014 survey employed a "blended" methodology of random telephone and online surveys to include persons who live in wireless phone only households as well as persons in households with landline phones. The total sample included 501 randomly selected adults (18 years or older). The primary objectives of the 2014 survey were to assess the awareness and image of the Colorado Lottery as an organization and its contributions to the State of Colorado, and to determine if any changes in awareness and image have occurred since the previous surveys. A secondary objective was to determine the impact of the Lottery's Proceeds Campaign launched in early 2014 to inform Colorado residents about what programs are supported by the Lottery's profits and the positive effects associated with those funds.

### **KEY FINDINGS**

The following are the key findings from the 2014 survey:

- Colorado residents have expressed strong support for the Colorado Lottery and the purposes for which it was established in every survey since 1991. In 2014, nearly three out of four Colorado residents (73%) were either **strongly** (37%) or **somewhat in favor** (36%) of the Colorado Lottery. More than one out of ten (14%) were **slightly in favor** of the Lottery. Thus, 87% were to some degree favorable toward the Lottery. A very small percentage (6%) were either **not in favor** (5%) or **very opposed** (1%) to the Lottery. Favorability towards the Lottery is high among all demographic segments and geographic locations.
- When asked (unaided) what they **liked** about the Colorado Lottery, the majority mentioned something related to *use of proceeds* (61%), while nearly one-half (46%) mentioned something regarding *game attributes*. The most frequently mentioned **dislikes** about the Lottery were related to *game attributes* (32%) and *moral issues* (21%). Dislikes related to *use of proceeds* (9%) and *administration* (3%) were mentioned infrequently. Four out of ten respondents (41%) said there was *nothing* they disliked about the Lottery.

- Support for the Colorado Lottery remains high with more than eight out of ten Colorado residents (83%) saying they *supported the operation of a state run lottery in Colorado*. A similar percentage (81%) also **agreed** that *it is appropriate for the Lottery to promote and advertise itself like any other business*. More than seven out of ten residents (73%) **agreed** that *the state does a good job of ensuring an honest Lottery*, and 70% **agreed** that *Colorado Lottery officials are doing a good job of running the Lottery*. Less than one out of ten residents **disagreed** with *doing a good job of ensuring an honest Lottery* and *doing a good job of running the Lottery*, but relatively large percentages had **no opinion**. Seven out of ten Colorado residents (71%) **agreed** that *it is appropriate for the Lottery to offer new and different games besides Scratch, Lotto, Cash 5, Powerball, Mega Millions or Pick 3 to generate more funds*.
- Although there is overall support for the Colorado Lottery, some Colorado residents express concerns about the societal impacts of the Lottery. Nearly one-half (49%) perceive that the Lottery is *primarily played by people in lower income groups*, and 45% perceive that it *encourages lower income people to waste their money instead of taking care of their basic needs*. In 2014, nearly four out of ten respondents (38%) held the perception that the Colorado Lottery *promotes addiction to gambling*, but only a small percentage (18%) held the perception that *addiction to gambling among Colorado residents is primarily due to the Colorado Lottery*.
- The majority of Colorado residents (58%) were aware (unaided) that the Lottery proceeds are used for “parks/ recreation” and/or “open space/wilderness areas”. Although residents often lump “parks/recreation” and “open space/wilderness areas” into the same category, 49% specifically mentioned “parks/recreation” and 17% specifically mentioned “open space/wilderness areas,” with a net of 58% mentioning one or both. Awareness of “education” (which became a purpose for the first time in 2001) was 23%, while awareness of “wildlife resources” was 5%. In total, 73% of all respondents were able to name (unaided) one or more of the current designated uses of Lottery proceeds.
- A correlation exists between awareness of Lottery purposes and overall impression of the Colorado Lottery. Persons who were strongly or somewhat favorable toward the Lottery were far more likely to be aware of at least one purpose than persons who were not in favor or opposed to the Lottery (76% vs. 56%).
- More than three out of four Colorado residents (77%) believe that the *Lottery is an appropriate method for the state to raise revenues*.



- About three out of four survey respondents (76%) **agreed** that the *Colorado Lottery has done a good job of funding parks and recreation projects in the state*. Smaller majorities **agreed** that the *Lottery has done a good job of funding open space and wilderness areas (74%)* and that the *Colorado Lottery has done a good job of funding parks/recreation projects in your community (64%)*. As in all previous surveys, only a small percentage of respondents (26%) supported the *Lottery diverting money from public purposes to increase the winners' prizes*.
- Nine out of ten residents continue to support the use of Lottery proceeds for of its two most recognized uses: state parks and recreation projects (91%) and local parks and recreation projects (91%). Nearly nine out ten residents support the use of Lottery proceeds for wildlife resources (87%), while 85% expressed support for open space/wilderness areas, and 79% expressed support for using Lottery proceeds to partially fund a program to address safety and health concerns in public schools.
- Colorado residents continue to have high levels of awareness and express support for the different Lottery games. In 2014, nearly all respondents (95%) were aware of at least one Colorado Lottery game. They were most aware of Instant/Scratch (87%), Powerball (84%), Lotto (81%) and Mega Millions (76%). They were less aware of Cash 5 (59%) and Pick 3 (62%).
- Colorado residents were very supportive of the Lottery offering each of its six current games. In 2014, more than eight out of ten respondents thought it was appropriate for the Colorado Lottery to offer Instant/Scratch (86%), Powerball (84%), Lotto (85%) and Mega Millions (81%). Slightly smaller percentages thought it was appropriate to offer Cash 5 (78%) and Pick 3 (77%). Opposition to any one game came from both respondents who supported and opposed the Lottery in general. While most opposition to these games is based on moral issues, some of the opposition for any one game is based on the attributes of the game itself such as odds, prizes and how the game is played.
- In 2014, 80% of the respondents recalled having seen or heard Lottery advertising within the past 12 months. Among those with recall of the Lottery's advertising, nearly nine out of ten (88%) **agreed** that *overall, Lottery's advertising is done in good taste*. The majority of residents **agreed** that the *Lottery's advertising is entertaining (59%)*. Residents have mixed perceptions about whether the *Lottery's advertising gives you information about how proceeds are used* – 56% **agreed** and 39% **disagreed**. The majority of the respondents (53%) agreed that the *Lottery's advertising makes you feel good*.

*about playing the Lottery*, while large percentages **disagreed** (31%) or had **no opinion** (16%). Comparable to previous years, in 2014 the majority of respondents **disagreed** that the *Lottery's advertising encourages people to waste their money* (63%) and that the *Lottery's advertising creates unrealistic expectations* (55%).

- Three out of four residents (74%) thought that the amount of advertising by the Colorado Lottery was about right, while 14% thought it was too much.
- In 1998, the Colorado Lottery initiated a “Play Responsibly” campaign to convey the message that Lottery players should “play responsibly,” and if they felt their playing had become a problem, they could call a 1-800 number for help. Awareness of this messaging reached an all-time high in 2014 with 59% recall. Awareness was highest (66%) among recent players, those who had played a Lottery game within the past 30 days.
- In 2011, the Colorado Lottery initiated a campaign directed at alerting players to potential scams and criminal activities directed toward winners. One-fourth of all respondents (24%) recalled having heard or seen such messages in 2014, and awareness was highest among recent players (30%).

### **IMPACT OF PROCEEDS CAMPAIGN**

There were several changes in survey responses between 2013 and 2014 that indicate the Lottery's Proceeds Campaign launched in early 2014 had a positive impact on informing Colorado residents about what programs are supported by the Lottery's profits and the beneficial effects associated with those funds:

- Awareness (unaided) increased between 2013 and 2014 for two Lottery purposes: open space/wilderness areas (13% to 17%) and education/schools (20% to 23%).
- Awareness (unaided) of at least one correct purpose of Lottery proceeds increased from 69% to 73%.

- The 2014 Colorado Image Survey has shown substantial increases since 2013 in those who **agreed** that the *Colorado Lottery has done a good job of funding parks and recreation in the state* (68% to 74%), *funding open space and wilderness areas* (64% to 74%), and *funding parks and recreation projects in your community* (57% to 64%).
- Those who **agreed** that the *Lottery's advertising gives you information about how proceeds are used* increased from 51% to 56% between 2013 and 2014.

## **MAJOR CHANGES/TRENDS**

Results from the Colorado Lottery Image Surveys have been generally consistent over the years with very positive perceptions about the Lottery and high awareness of the various Lottery games and the public purposes of the Lottery.

The only dramatic shifts in Lottery perceptions were measured in 2004 due to 2003 administrative controversies and the attended media coverage. The impacts of those controversies have subsided since 2004.

In addition to the changes described above (Impact of Proceeds Campaign) there were some other changes observed between 2013 and 2014:

- When asked (unaided) to indicate what was liked about the Colorado Lottery, residents were more likely to mention something related to *game attributes* in both 2013 (47%) and 2014 (46%) than any other survey.
- Between 2013 and 2014, agreement increased regarding *the state does a good job of ensuring an honest Lottery* (66% to 73%) and *Colorado Lottery officials are doing a good job of running the Lottery* (66% to 70%). The increases in agreement were due to declines in those with **no opinion**.
- Colorado residents were more likely in 2014 compared to 2013 to perceive negative societal impacts related to the Lottery. They were more likely to **agree** that *Lottery is primarily played by people in lower income groups* (49% vs. 44%) and *Colorado Lottery promotes addiction to gambling* (38% vs. 32%).

- Awareness of Mega Millions (69% to 76%) increased between 2013 and 2014.
- Recall of Lottery advertising within past 12 months declined from 85% to 80% between 2013 and 2014.
- Awareness of the Colorado Lottery's "Play Responsibly" message has increased significantly from 25% in 1998 (when campaign was first initiated) to an all time high of 59% in 2014.
- Play of any Lottery game in past 30 days increased from 43% to 49% between 2013 and 2014. The largest increases in recent play were Mega Millions (16% to 26%), Instant/Scratch (26% to 34%) and Lotto (22% to 28%).

## ***I. INTRODUCTION***

Since 1991, the Colorado Lottery has regularly conducted a statewide image survey. The 2014 Colorado Lottery Image Survey is the 19<sup>th</sup> such survey. Previous surveys were conducted annually between 1991 and 2004, annually between 2008 and 2010 and in 2013. All of the image surveys have been conducted by The Howell Research Group. This year's survey was conducted under the direction of the Communications and Marketing Department of the Colorado Lottery and Cactus Marketing Communications, the Lottery's advertising agency.

### **RESEARCH OBJECTIVES**

The primary purpose of the 2014 Colorado Image Survey was to assess the awareness and image of the Colorado Lottery as an organization and its contributions to the State of Colorado and to measure any changes in awareness and image over time. These studies serve as a basis for measuring the effectiveness of the Lottery's communications program and provide input for enhancing its program. Due in part to the results of the 2013 survey, the Lottery launched a statewide Proceeds Campaign in May of 2014 to inform Colorado residents about what programs are supported by the Lottery's profits and the positive effects associated with those funds. Thus, a secondary objective of the 2014 survey is to determine any impacts from the campaign. The primary research issues included in the 2014 survey were:

1. Do Colorado residents support the operation of a state run lottery?
2. What is the image of the Colorado Lottery regarding how well or efficiently it is run?
3. Do residents trust the Lottery? Do they think it is run in an honest, above-board manner?
4. Are residents aware of the specific uses of the Lottery proceeds?
5. Do Colorado residents support the public purposes for which the Lottery has been established?
6. Is the Colorado Lottery considered an appropriate way for the State to raise revenue?
7. Do Colorado residents think that the Lottery promotes addiction to gambling or other inappropriate behavior?

8. Do residents think that the Lottery exploits lower income persons?
9. What is the awareness and perceived appropriateness of the different games offered by the Lottery?
10. What are the awareness of and perceptions about the Lottery's advertising?
11. What is the awareness of the Lottery's "Play Responsibly" message?
12. What is the awareness of the Lottery's messages about avoiding Lottery scams or criminal activities directed toward Lottery winners?
13. What are the differences in opinions about the Lottery among different demographic segments, player segments and geographic areas?
14. What changes in the awareness and image of the Colorado Lottery have taken place since the 1991 "benchmark" survey?

## **METHODOLOGY**

Prior to 2013, all previous Colorado Lottery Image Surveys were conducted with a statewide telephone survey of randomly selected adults. The 2013 survey employed a new approach to include the increasing number of households which use only cellular phones and have no landlines. Previous surveys had not included such households. The U.S. Center for Disease Control and Prevention (CDC) conducts an ongoing (monthly) National Health Interview Survey (NHIS) that includes landline and cellular phone usage. In 2012, the CDC estimated that 42% of all Colorado adults lived in wireless-only households. The 42% estimate is an increase over CDC's previous estimate of 36% which was used for the 2013 Colorado Image Survey. While no age specific estimates are available for Colorado, national data by age and Colorado's total percentage indicates that the percentage of young adults (18-34) living in wireless only households is in excess of 60%.

In order to include wireless only households in the survey sample, a "blended" methodology was employed for the 2013 and 2014 Colorado Lottery Image Surveys. Households with landlines were surveyed using the traditional random telephone

interviews, while wireless only households were surveyed online. The online survey was conducted by randomly selecting Colorado residents from an opt-in panel provided by E-Rewards, the largest online panel of Colorado residents.

The telephone and online surveys used the same questionnaire. Each interview lasted approximately 15 minutes. The survey interviews were conducted between June 27 and July 17, 2014. The questionnaire used for the Colorado Lottery 2014 Image Survey is presented in Appendix A.

A total of 501 survey interviews were conducted among Colorado adults (18 years or older). The sampling was divided proportionately to account for the percentages of wireless only and landline households.

Telephone Sample	291	58%
Online Sample	<u>210</u>	<u>42%</u>
Total	501	100%

Quota samples were used to ensure proportionate representation of respondents by gender, age and ethnicity. The sample quotas were based on the 2010 U.S. Census. For example, 26% of all Colorado adults are ethnic minorities, thus, 26% of the sample (131) was conducted with minority residents.

The sample was also stratified geographically to reflect the statewide distribution of population based on the most recent county population estimates (2010) from the U.S. Census. The Denver Metropolitan Area accounted for 56% of Colorado's adult population in 2010. Thus, it represented the same proportion of the survey sample (56% or 281 interviews).

<u>Geographic Area</u>	<u>Percent of Colorado Population</u>	<u>Survey Sample</u>	<u>Statistical Reliability</u>
Denver Metro	56%	281	± 6.1%
Front Range (Non-Denver)	25	125	± 8.8%
Remainder of State	<u>19</u>	<u>95</u>	± 10.1%
	100%	501	± 4.5%

The statewide sample (501) is statistically reliable within  $\pm 4.5\%$  at the 95 percent confidence level. The Denver Metropolitan Area subsample (278) is statistically reliable within  $\pm 6.1\%$ . Reliability is  $\pm 8.8\%$  for the Non-Denver Front Range subsample (128) and  $\pm 10.1\%$  for the remainder of state subsample (95). The sample sizes for other counties and metropolitan areas in the State are too small to provide subarea information with an acceptable level of statistical reliability.

This report typically presents results for three survey years – the “baseline” (1991 in most cases), the previous survey (2013) and the current survey (2014). The “baseline” for questions incorporated into the survey after 1991 corresponds to the year in which the question was first introduced. Survey responses for some questions have fluctuated over the 18 survey years. In these instances, results for all of the surveys are presented to display important trends.



## II. DETAILED FINDINGS

### OVERALL IMPRESSION OF THE LOTTERY

#### ■ Impressions

As in all previous surveys, Colorado residents continue to express strong support for the Colorado Lottery. In 2014, nearly three out of four survey respondents (73%) were either **strongly** (37%) or **somewhat in favor** (36%) of the Lottery. More than one out of ten (14%) were **slightly in favor** of the Lottery. Thus, 87% of all respondents expressed favorability about the Colorado Lottery. Only a small percentage (6%) were either **not in favor** (5%) or **very opposed** (1%) to the Lottery, while 6% had **no opinion**. Those **strongly** or **somewhat favorable** declined between 2013 and 2014 (78% to 73%). (Refer to Table 1 and Figure 1.)

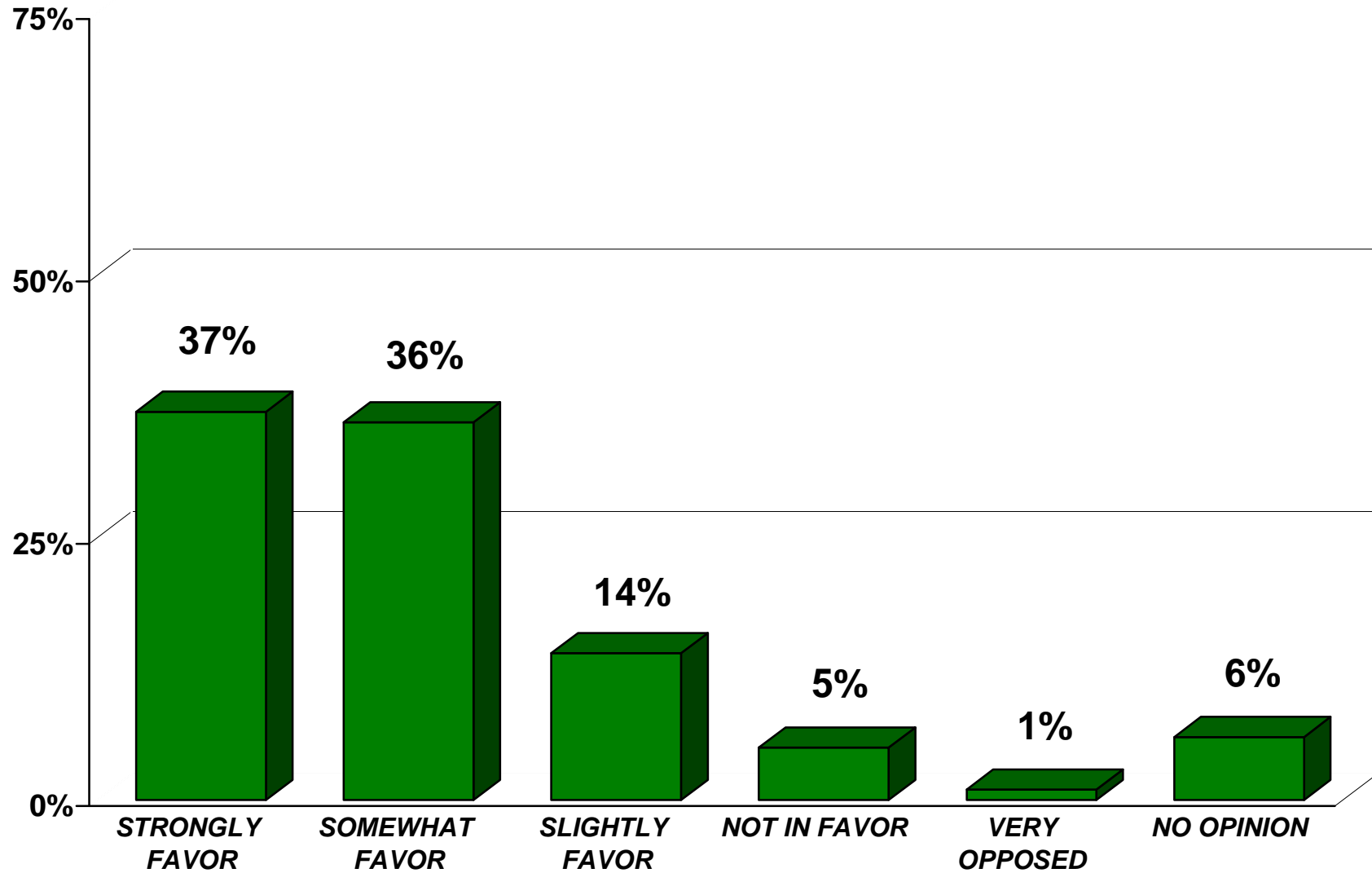
**Table 1 Overall Impression of Colorado Lottery: 1991, 2013 & 2014**

<u>Impression</u>	<u>1991</u>	<u>2013</u>	<u>2014</u>
Strongly Favor	38%	43%	37%
Somewhat Favor	40	35	36
Slightly Favor	11	12	14
Not in Favor	6	4	5
Very Opposed	2	3	1
No Opinion	<u>3</u>	<u>3</u>	<u>6</u>
Total*	100%	100%	99%
Mean Score**	4.1	4.2	4.1
Base	(501)	(501)	(501)

\* May add to less than 100% due to rounding.  
 \*\* Mean score is calculated by assigning integer values of "5" to **strongly favor**, "4" to **somewhat favor**, "3" to **slightly favor**, "2" to **not in favor**, "1" to **very opposed** and disregarding the **no opinions**.

Source: The Howell Research Group

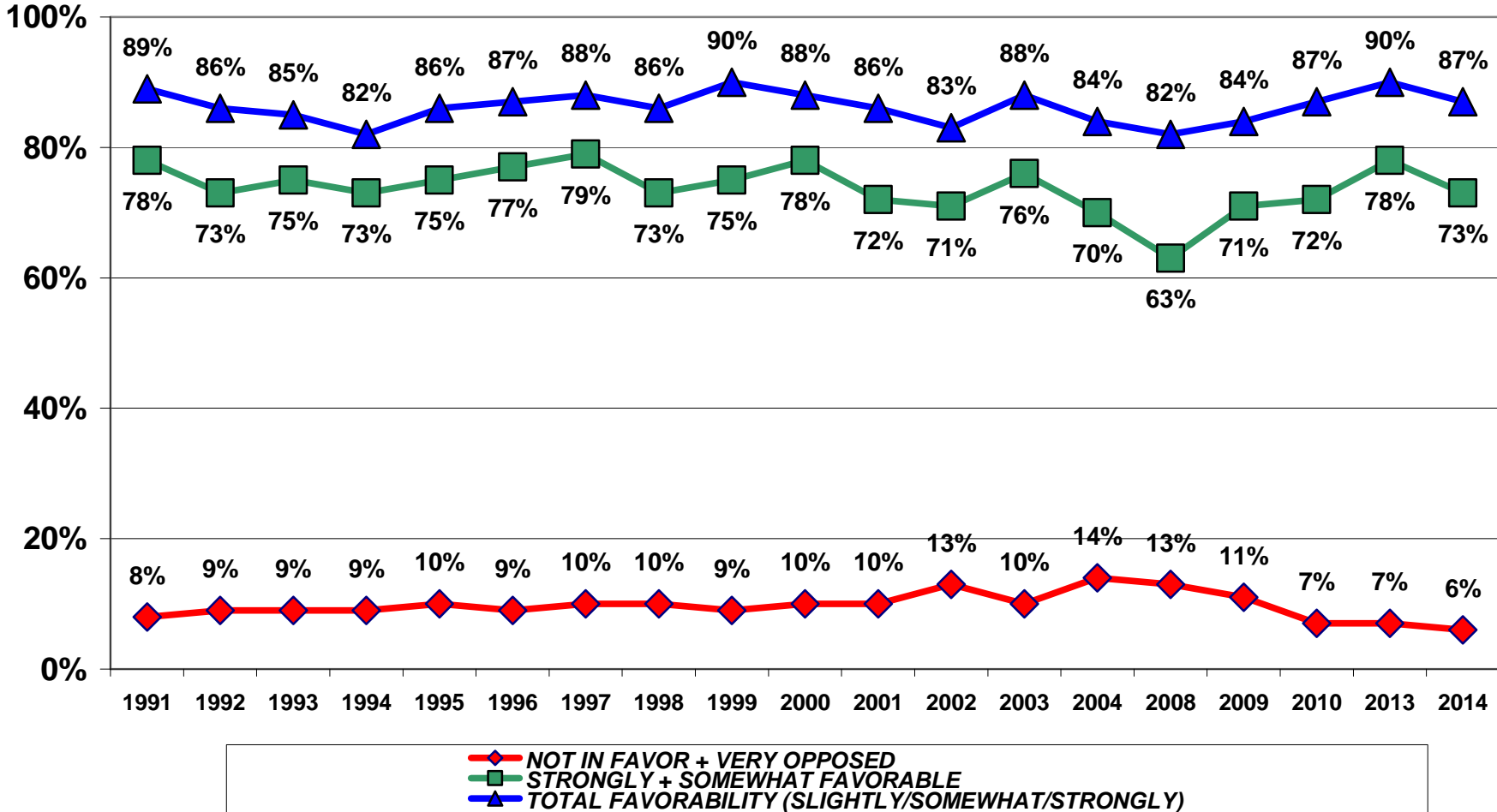
Figure 1  
OVERALL IMPRESSION OF COLORADO LOTTERY: 2014



Overall impressions of the Colorado Lottery did not vary significantly by the demographic and geographic characteristics of the respondents. As expected, Lottery players were far more favorable toward the Lottery than non-players. The vast majority of recent players (87%) were **strongly** or **somewhat in favor** compared to 75% of those who had played more than 30 days ago and only 41% of those who had never played.

In assessing favorability toward the Lottery, emphasis has traditionally been placed on the **strongly** and **somewhat favorable** ratings versus the **not in favor** and **very opposed** ratings. Another approach to view favorability is to look at total favorability which includes **slightly favorable** along with **strongly** and **somewhat**. While the **strongly** and **somewhat** ratings have shown some variation over the years, total favorability has remained exceptionally high between 82% and 90%. The **not in favor/very opposed** ratings have remained fairly consistent – typically a few percentage points above or below 10%. The 6% **not in favor/very opposed** ratings in 2014 was the lowest among all surveys. (Refer to Figure 2.)

**Figure 2**  
**OVERALL IMPRESSION OF COLORADO LOTTERY: 1991 - 2014**



### ■ ***What is Liked About the Colorado Lottery***

Beginning in 1997, all survey respondents were asked (unaided/multiple responses allowed) what they **liked** and **disliked** about the Colorado Lottery regardless of their overall impression. What is liked about the Lottery can be classified into two major categories: *use of proceeds* and *game attributes*. Six out of ten of the 2014 survey respondents (61%) mentioned something related to *use of proceeds*, while nearly one-half (46%) mentioned something related to *game attributes*. Only 15% said there was *nothing* they particularly liked about the Lottery. (Refer to Table 2 and Figure 3.)

The most frequently mentioned specific likes were “funds parks/recreation” (28%), a *use of proceeds* issue, and “provides an opportunity to win money” (28%), a *game attribute* issue. A general response, “provides state/community funds” (20%), was the second most frequently mentioned *use of proceeds* issue. Although respondents often lump “parks/recreation” and “open space/wilderness areas” together, 8% of the respondents specifically mentioned “open space/wilderness areas.” Mention of other proceeds use such as “funds education/schools” (6%), “funds wildlife” (2%) and “alternative to taxes” (3%) were each mentioned by smaller percentages of respondents.

The second most frequently mentioned *game attribute* was “it is fun/like to play” (16%). Other *game attribute* likes mentioned less frequently were “easy to play/tickets available everywhere” (3%), “variety of games” (3%) and “inexpensive to play” (2%).

Mention of likes related to *use of proceeds* was slightly higher in 2014 (61%) compared to the 1997 baseline (55%) and 2013 (59%). Unaided mention of *use of proceeds* as likes has varied from 55% (1991 and 2010) to 65% (2004). Mention of likes related to *game attributes* was higher in 2014 (46%) compared to 1997 (39%) but similar to 2013 (47%). Unaided mention of likes related to *game attributes* has varied from a low of 27% in 2009 to 47% in 2013.

Mention of **nothing** liked about the Colorado Lottery in 2014 (15%) did not vary significantly from 1997 (12%) or 2013 (17%).

What is **liked** about the Colorado Lottery in 2014 varied somewhat among different demographic segments:

- ▶ Men were slightly more likely than women to mention likes related to *game attributes* (48% vs. 43%) and less likely to say *nothing* (13% vs. 18%).
- ▶ *Use of proceeds* was mentioned by a larger percentage of Denver Metro (62%) and Non-Denver Front Range residents (65%) than Non-Front Range residents (54%). Denver Metro residents mentioned likes related to *game attributes* with higher frequency (48%) than either Non-Denver Front Range (45%) or Non-Front Range residents (40%).
- ▶ Persons under 35 (61%) were far more likely than persons 35 and older (38%) to mention items related to *game attributes* as likes.
- ▶ Ethnic minorities were more likely than non-minorities to mention *game attributes* (52% vs. 44%), and less likely to mention *use of proceeds* (50% vs. 65%).
- ▶ The mention of *game attributes* as likes was more frequent among persons with household incomes under \$35,000 (54%) than persons with higher household incomes (42%).
- ▶ Mention of *use of proceeds* as likes increases with education level. Persons with a college degree or higher (67%) were more likely than those with some college or less (54%) to mention *use of proceeds*.

The above variances observed in the 2014 survey were very similar to the variances observed in the 2013 survey.

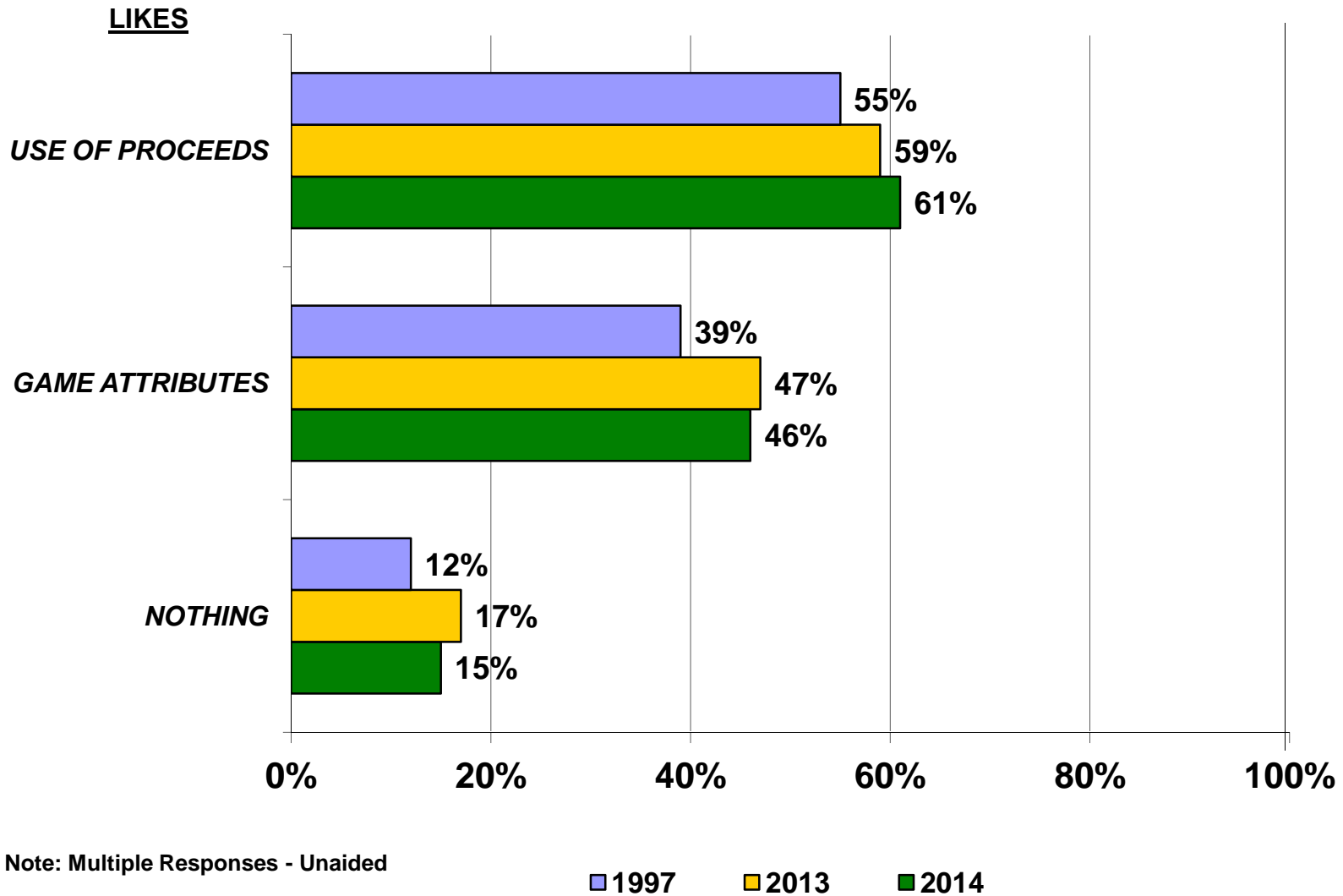
**Table 2 What Is Liked about the Colorado Lottery (Unaided): 1997, 2013 & 2014**

<u>Likes**</u>	<u>1997</u>	<u>2013</u>	<u>2014</u>
<b>Use of Proceeds (Net)</b>	<b>55%</b>	<b>59%</b>	<b>61%</b>
Funds parks/recreation***	47	28	28
Provides state/community funds	5	20	20
Funds open space/wilderness areas***	-	7	8
Funds education/schools	3	6	6
Funds wildlife	4	2	2
Alternative to taxes/voluntary	3	2	3
Funds highways/roads	2	1	1
Other – Use of Proceeds	1	1	2
<b>Game Attributes (Net)</b>	<b>39%</b>	<b>47%</b>	<b>46%</b>
Provides opportunity to win money	31	31	28
It is fun/like to play	10	15	16
Easy to play/tickets available everywhere	<1	4	3
Variety/choice of games	2	3	3
Inexpensive to play	<1	2	2
Other - Game Attributes	<1	1	1
<b>Other Positive</b>	<b>5%</b>	<b>0%</b>	<b>2%</b>
<b>Nothing</b>	<b>12%</b>	<b>17%</b>	<b>15%</b>
Base	(501)	(501)	(501)

\*\* Reflects multiple responses.  
 \*\*\* In 1997, “funds parks/recreation” included “funds open space/wilderness areas.” In 2010 and 2013, these two responses were tracked separately.  
 Note: This question was first asked in 1997.

Source: The Howell Research Group

**Figure 3**  
**LIKES ABOUT COLORADO LOTTERY BY MAJOR CATEGORY:**  
**BASELINE (1997), 2013 & 2014**





■ **What is Disliked About the Colorado Lottery**

Dislikes about the Lottery can be classified into four major categories in 2014: *game attributes* (32%), *moral issues* (21%), *use of proceeds* (9%) and *administration* (3%). In 2014, the most frequently mentioned specific dislike was “poor odds/difficult to win” (25%), a *game attribute* issue. Other *game attributes* mentioned as dislikes by small percentages of respondents were: “cost” (3%) and “prizes/jackpots too small” (2%). (Refer to Table 3 and Figure 4.)

The unaided mention of dislikes related to *game attributes* in 2014 (30%) was similar to the 1997 baseline (31%) and 2013 (30%). The mention of *game attributes* dislikes was the lowest in 2010 (26%) and highest in 2008 (37%).

The second and third most frequently mentioned specific dislikes were *moral issues*: “hurts the poor/wastes their money” (15%) and “promotes gambling” (9%). Mention of *moral issues* in 2014 (21%) was slightly higher than to 1997 (17%) and similar to 2013 (22%). Consistent with previous surveys, mention of *moral issues* increases significantly as favorability towards the Lottery declines. It is apparent that *moral issues* do have an impact on overall impression.

<u>Overall Impression</u>	<u>Moral Issues Mentioned as Dislike</u>
Strongly Favor	8%
Somewhat Favor	23%
Slightly Favor	33%
Not in Favor	60%
Very Opposed	71%

It should be noted, that while very large percentages of those **not in favor/very opposed** mentioned *moral issues* as dislikes, a large majority of all persons mentioning *moral issues* as dislikes (74%) were persons who expressed favorability toward the Lottery.

There were no specific dislikes related to *use of proceeds* mentioned frequently; however, “should fund education” (3%), “don’t inform me where money goes” (3%) and “not enough goes to parks” (1%) were mentioned most frequently. Mention of dislikes

related to the *use of proceeds* was lower in 2014 (9%) compared to the 1997 baseline (13%) but higher than in 2013 (5%). The unaided mention of dislikes related to *use of proceeds* reached an all time low in 2013 (5%) compared to the highest level in 2004 (15%).

The only specific *administration* dislikes mentioned with any frequency was “misuse of proceeds” (1%) and “not run honestly” (1%) – very low percentages. Dislikes related to *administration* were mentioned by only 2% in 2013 and 3% in 2014 – a significant decline from 15% in 2004. The spike in 2004 was due to a series of controversies and media coverage that occurred in 2003. The negative public perceptions related to these controversies have significantly subsided since 2004.

In 2014, four out of ten respondents (41%) could not name something they disliked about the Colorado Lottery. The mention of *nothing* in 2014 was comparable to the 1997 baseline (38%) and 2013 (45%).

In 2014, there were some variances in **dislikes** among different demographic segments:

- ▶ Persons 45 years or age or older were more likely than those under 45 to mention *moral issues* (27% vs. 15%) and less likely to mention *nothing* (34% vs. 47%).
- ▶ Mention of *moral issues* increases as educational attainment increases. Only 15% of those with some college education or less mentioned *moral issues* compared to 26% of those with a college degree or higher.
- ▶ Non-minorities were more likely than minorities to mention *moral* dislikes (25% vs. 9%), and less likely to mention *game attribute* dislikes (29% vs. 41%).
- ▶ Recent Lottery players (within past 30 days) were more likely (42%) to mention *game attribute* dislikes than past Lottery players (25%) and non-players (19%).
- ▶ Non-players (46%) were far more likely than recent (9%) and past players (23%) to mention *moral issues* as dislikes about the Colorado lottery.

The above variances observed in the 2014 survey were very similar to the variances observed in the 2013 survey.

**Table 3 What Is Disliked about the Colorado Lottery (Unaided): 1997, 2013 & 2014**

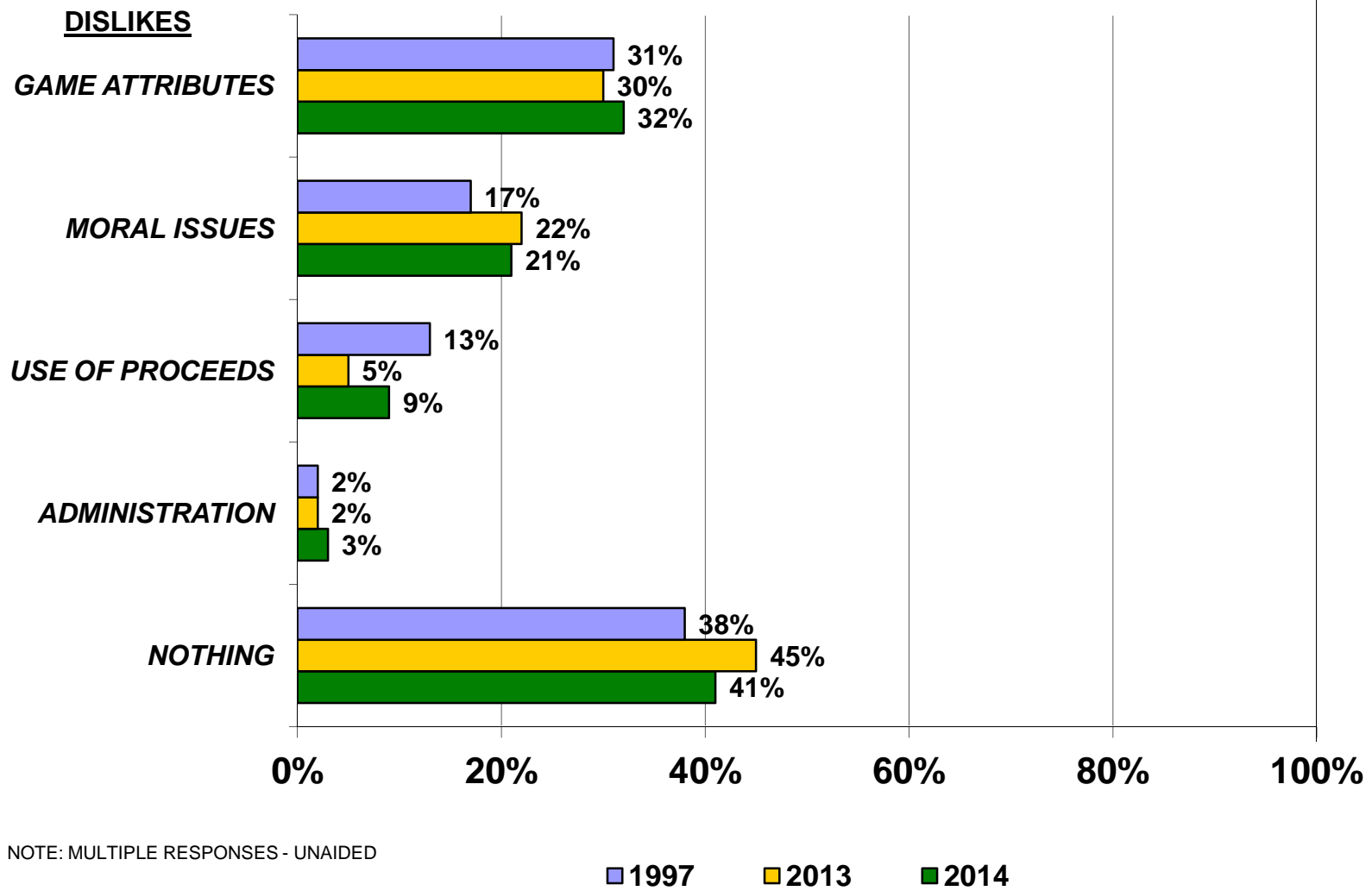
<u>Dislikes**</u>	<u>1997</u>	<u>2013</u>	<u>2014</u>
<b>Game Attributes (Net)</b>	<b>31%</b>	<b>30%</b>	<b>32%</b>
Poor odds/difficult to win	21	23	25
Cost	0	<1	3
Prizes/jackpots too small	7	2	2
Should divide jackpots	3	1	<1
Other – Game Attributes	<1	6	5
<b>Moral Issues (Net)</b>	<b>17%</b>	<b>22%</b>	<b>21%</b>
Hurts the poor/waste their money	12	13	15
Promotes gambling	6	9	9
Other – Moral Issues	<1	2	1
<b>Use of Proceeds (Net)</b>	<b>13%</b>	<b>5%</b>	<b>9%</b>
Don't inform me of where money goes	3	2	3
Should fund education	4	2	3
Not enough goes to parks	4	1	1
Other – Use of Proceeds	2	1	3
<b>Administration (Net)</b>	<b>2%</b>	<b>2%</b>	<b>3%</b>
Misuse of proceeds	0	1	1
Not run honestly/fairly	<1	<1	1
Other – Administration	0	1	2
<b>Other Negative</b>	<b>7%</b>	<b>&lt;1%</b>	<b>1%</b>
<b>Nothing</b>	<b>38%</b>	<b>45%</b>	<b>41%</b>
Base	(501)	(501)	(501)

\*\* Reflects multiple responses.

Note: This question was first asked in 1997.

Source: The Howell Research Group

**Figure 4**  
**DISLIKES ABOUT COLORADO LOTTERY BY MAJOR CATEGORY:**  
**BASELINE (1997), 2013 & 2014**



## **ATTITUDES ABOUT THE OPERATION OF THE LOTTERY**

Support for the operation of the Colorado Lottery remains very high. In 2014, more than eight out of ten respondents (83%) said they *supported the operation of a state-run lottery in Colorado*. More than four out of ten (44%) **strongly agreed**, while 39% **somewhat agreed** with the statement. Only 12% **disagreed** with this statement. Support for the operation of a state-run lottery was strong across various demographic and geographic segments. (Refer to Table 4 and Figure 5.)

Total agreement (**strongly** and **somewhat**) with *support operation of a state-run lottery in Colorado* was highest in the 1991 baseline year (87%) and had never dropped below 80% until 2004. It remained slightly below 80% until 2010 when agreement increased to 86%. Agreement was similar in 2013 (82%) and 2014 (83%). (Refer to Figure 6.)

In 2014, about eight out of ten respondents (81%) either **strongly** (44%) or **somewhat agreed** (37%) *it is appropriate for the Lottery to promote and advertise itself like any other business*, while only 14% **disagreed**. Agreement with this statement was similar to the 1991 baseline (84%) and 2013 (83%).

Agreement that the *state does a good job of ensuring an honest Lottery* was 73% (36% **strongly** and 37% **somewhat**) in 2014, while only 8% **disagreed** and a large percentage (18%) had **no opinion**. Agreement in 2014 was lower than the 1991 baseline (82%) but significantly higher than in 2013 (66%). Starting in the late 1990s, there was a downward trend in the percentages of survey respondents who **agreed** with this statement with a significant decline in 2004 due to the administrative controversies that occurred in 2003. Those who **disagreed** that *state does a good job of ensuring an honest Lottery* has only increased from 5% to 8% between 1991 and 2013. However, the percentage of persons with **no opinion** has increased (14% to 18%). Those with **no opinion** significantly declined between 2013 to 2014 (27% to 18%) which coincides with the increase in agreement (66% to 73%). (Refer to Figure 7.)

Since 1991, agreement has generally declined regarding *Colorado Lottery officials are doing a good job of running the Lottery*. Agreement was high in 1991 (80%), then dramatically declined to 53% in 2004. Agreement had increased to 71% in 2010 then declined to 66% in 2013. Agreement increased slightly to 70% in 2014. The downward trend in agreement has been

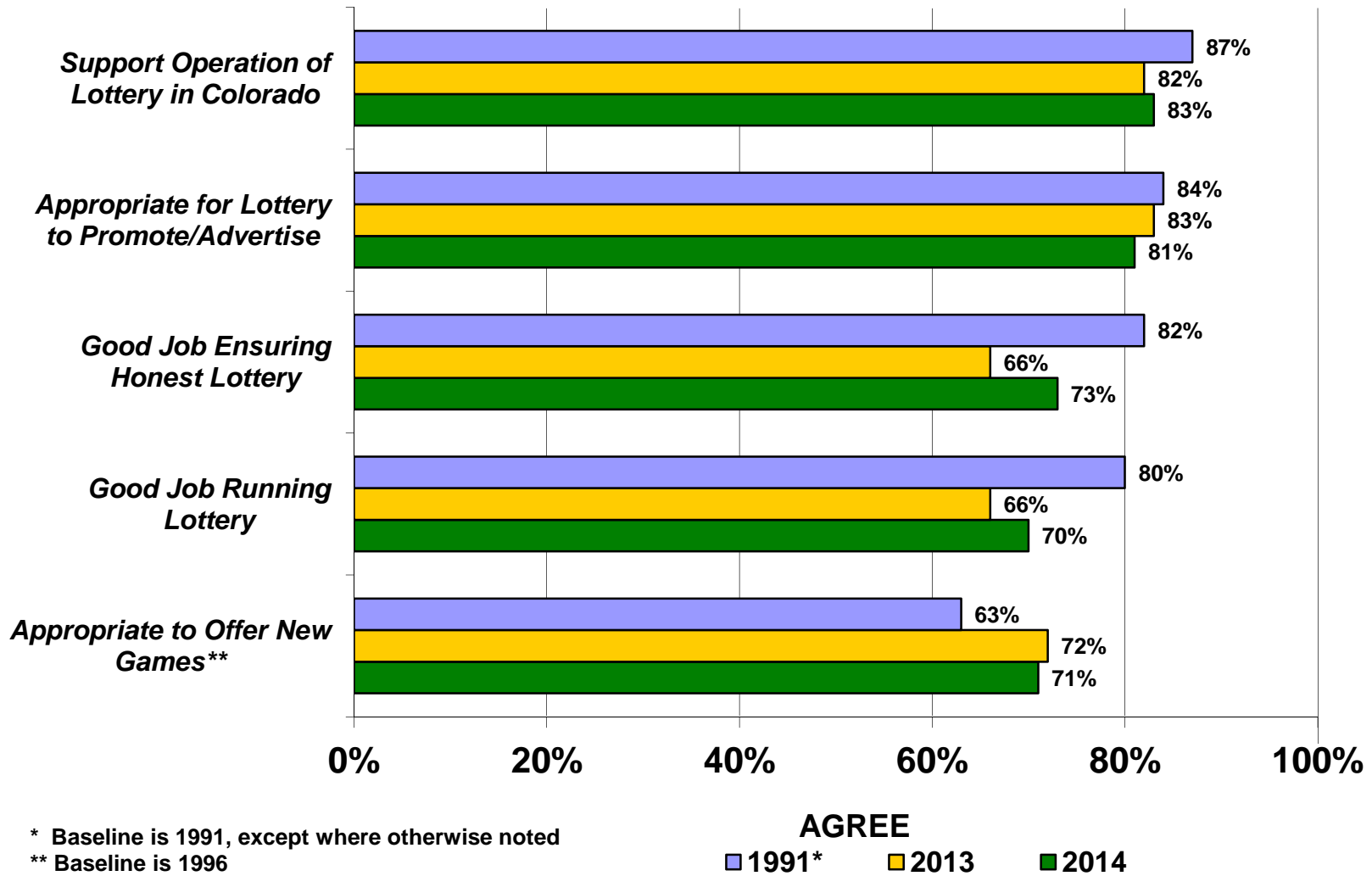
accompanied by significant increase in the **no opinions** (13% to 21%) with essentially no change in those who **disagreed** (8% to 9%). The low agreement and higher than normal disagreement measured in 2004 can also be attributed to the administrative controversies in 2003. (Refer to Figure 8.)

Since 1996, the majority of respondents have agreed that *it is appropriate for the Lottery to offer new and different games besides (which specific games are currently offered) to generate more funds*. Agreement has improved over time. The wording of this question has been revised to include all Lottery games offered at that time. The wording for 2014 was *it is appropriate for the Lottery to offer new and different games besides Scratch, Lotto, Cash 5, Powerball, Mega Millions or Pick 3 to generate more funds*. Agreement reached an all time high at 74% in 2010 and was similar in 2013 (72%) and 2014 (71%). Persons under 45 years of age were far more likely than those 45 and older (81% vs. 62%) to agree with this statement.

**Table 4 Attitudes Regarding Operation of Colorado Lottery: 1991, 2013 & 2014**

	<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Agreement Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>No Opinion</u>	<u>Mean Score*</u>
<b><i>Support the operation of a state run Lottery in Colorado</i></b>						
1991	49%	38%	5%	6%	2%	3.3
2013	51	31	6	7	6	3.3
2014	44	39	6	6	6	3.3
<b><i>It is appropriate for Lottery to promote/advertise itself like any other business</i></b>						
1991	46	38	7	6	3	3.3
2013	43	40	7	5	5	3.3
2014	44	37	9	5	5	3.3
<b><i>State is doing good job of ensuring an honest lottery</i></b>						
1991	40	42	3	2	14	3.4
2013	34	32	4	3	27	3.3
2014	36	37	6	2	18	3.3
<b><i>Colorado Lottery officials are doing a good job of running the Lottery</i></b>						
1991	35	45	5	3	13	3.3
2013	27	39	4	3	28	3.3
2014	27	43	5	4	21	3.2
<b><i>It is appropriate for the Lottery to offer new/different games besides Scratch, Lotto, Cash 5, Powerball, Mega Millions or Pick 3 to generate more funds**</i></b>						
1996	31	32	13	21	5	2.8
2013	37	35	11	11	6	3.0
2014	33	38	10	11	8	3.0
Base - - - - - (501) - - - - -						
* Mean score is calculated by assigning integer values of "4" to <b>strongly agree</b> , "3" to <b>somewhat agree</b> , "2" to <b>somewhat disagree</b> , "1" to <b>strongly disagree</b> and disregarding the <b>no opinions</b> .						
** Question was first asked in 1996. The wording has been changed over time to reflect the specific games offered by the Lottery.						
Source: The Howell Research Group						

**Figure 5**  
**ATTITUDES ABOUT OPERATION OF THE LOTTERY:**  
**BASELINE (1991/1996), 2013 & 2014**





**Figure 6**  
**"SUPPORT OPERATION OF STATE RUN LOTTERY IN COLORADO"**  
**1991 - 2014**

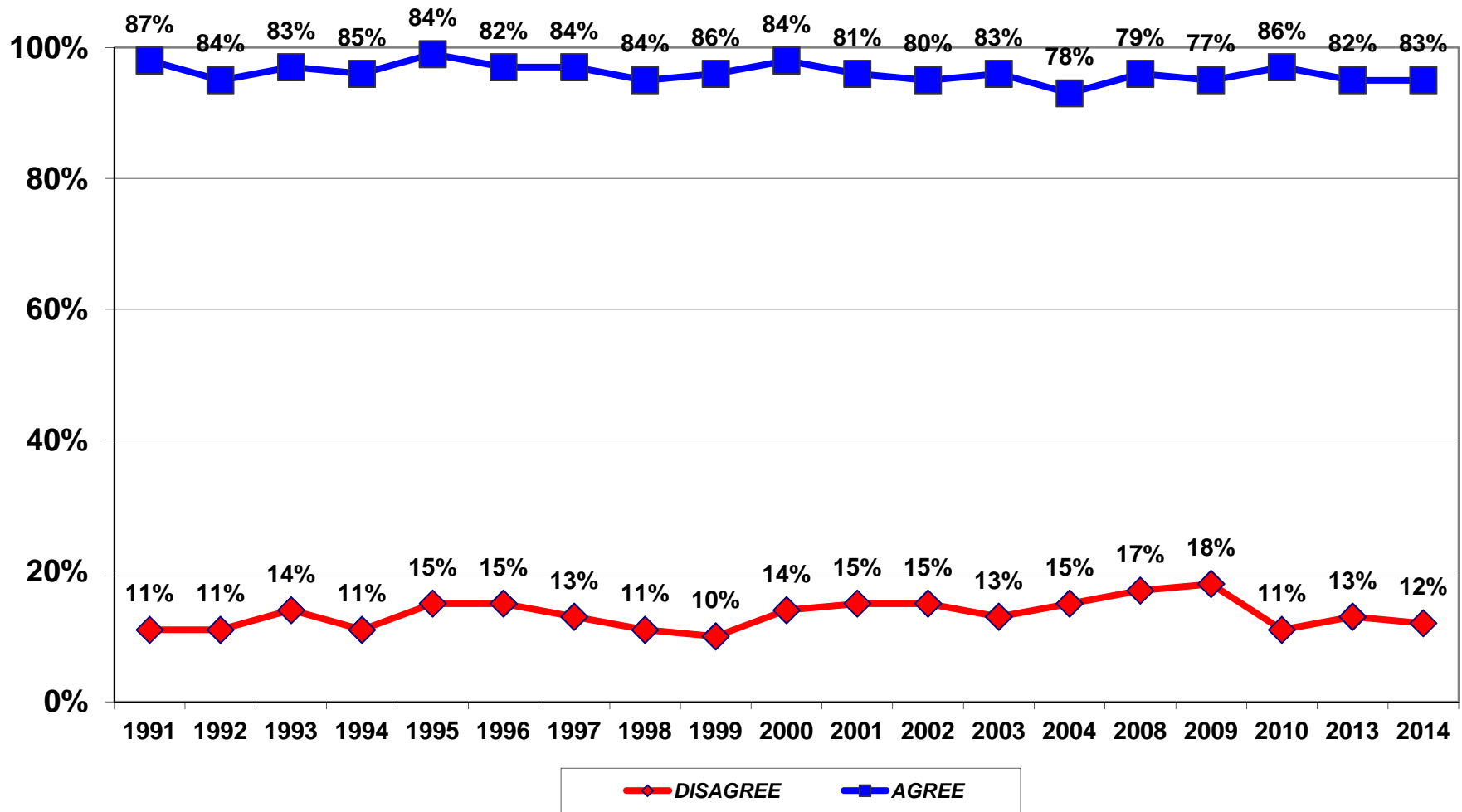


Figure 7  
 "STATE DOING GOOD JOB ENSURING AN HONEST LOTTERY"  
 1991 - 2014

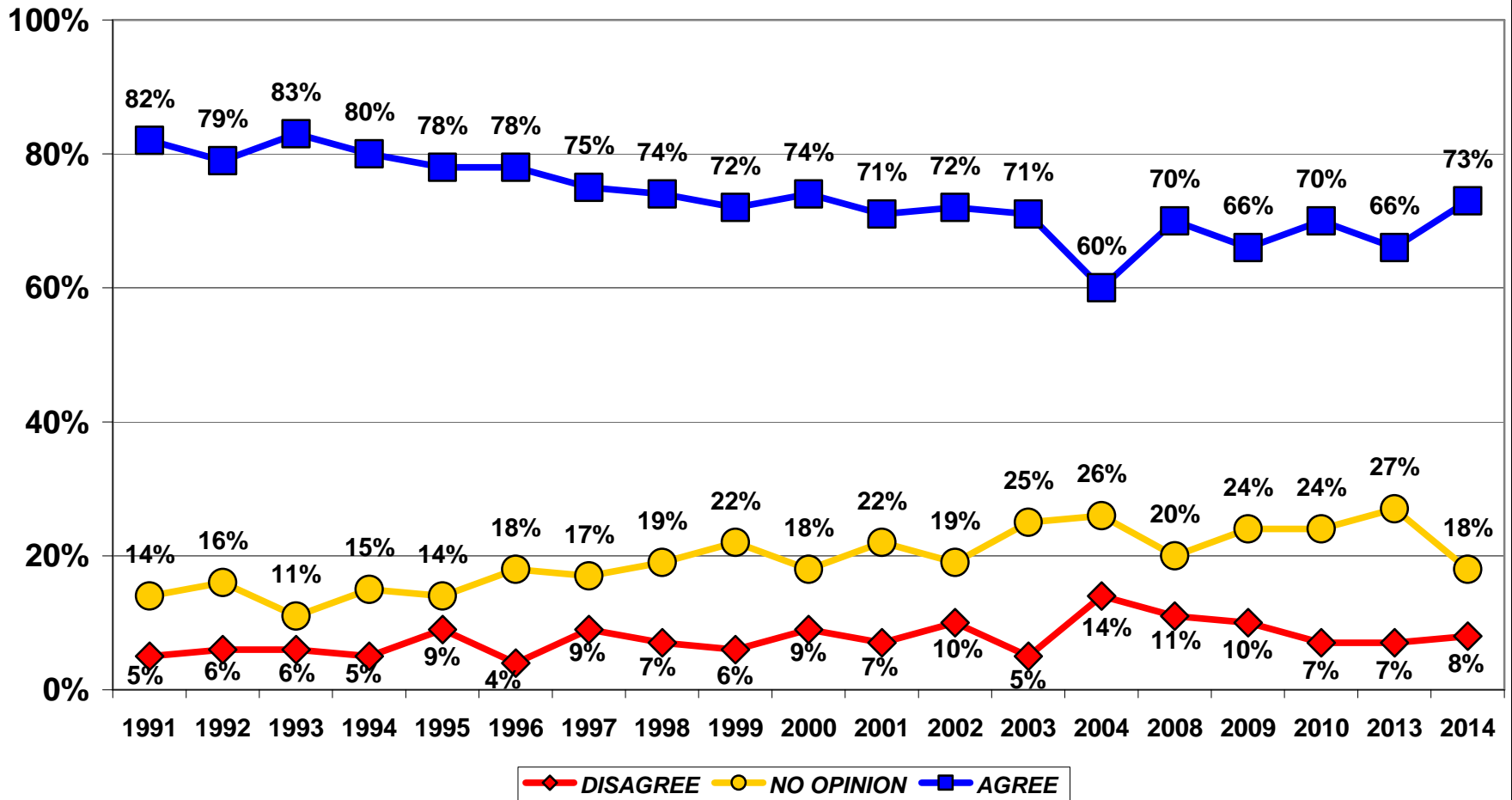
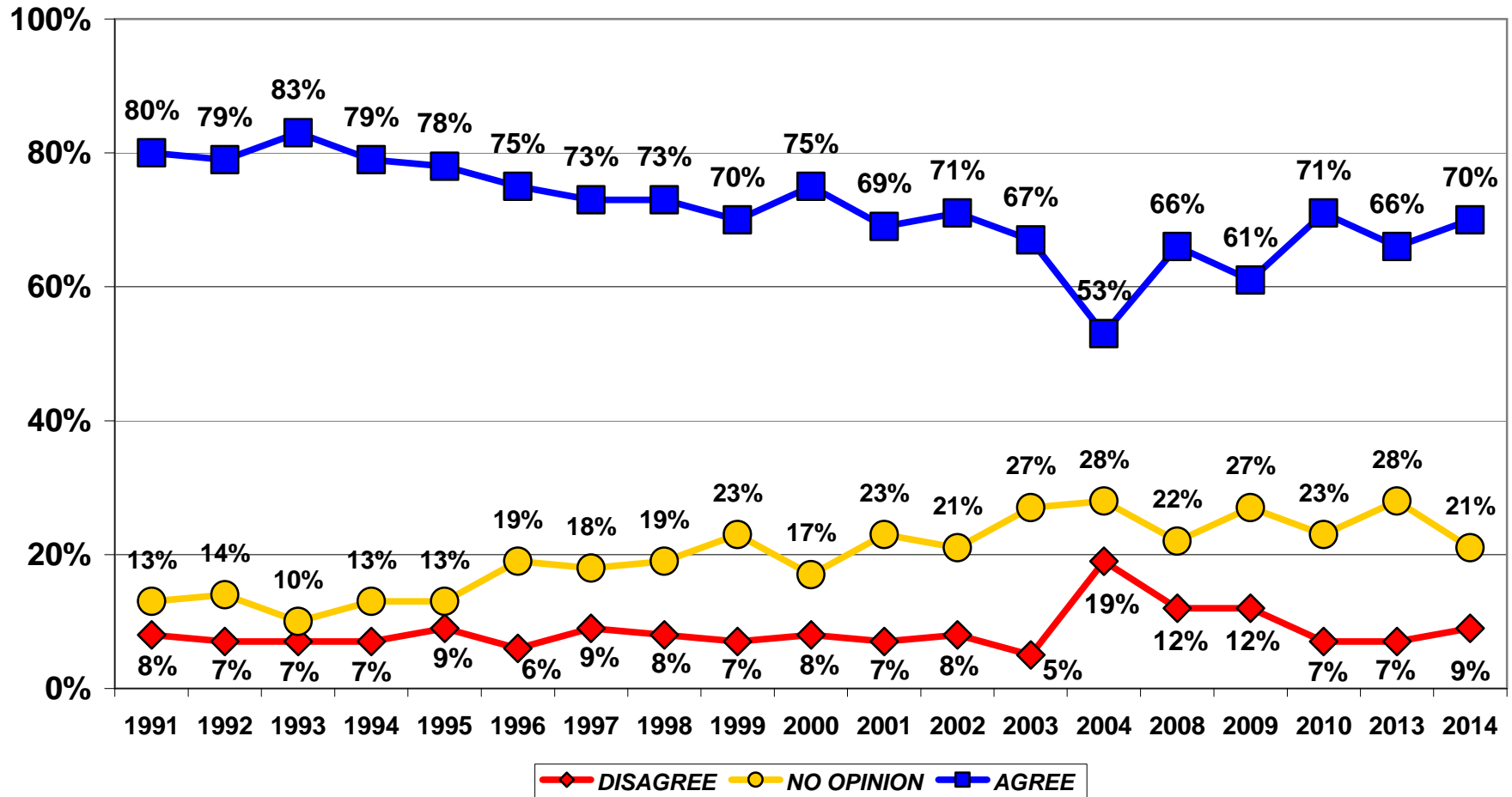


Figure 8  
 "LOTTERY OFFICIALS DOING GOOD JOB OF RUNNING COLORADO LOTTERY"  
 1991 - 2014



## **ATTITUDES REGARDING SOCIETAL IMPACTS OF COLORADO LOTTERY**

Colorado residents continue to be divided regarding the Lottery being *primarily played by people in lower income groups*. In 2014, nearly one-half of the respondents (49%) **agreed** that the Lottery is *primarily played by people in lower income groups*, while nearly four out of ten (39%) **disagreed** and 13% had **no opinion**. Agreement in 2014 (49%) was higher than the 1991 baseline (40%) and 2013 (44%). Agreement with this statement did not vary significantly by the demographic characteristics of the respondents. The term “low income groups” is subjective and its definition may vary widely among survey respondents. (Refer to Table 5 and Figure 9.)

In 2014, Colorado residents were about equally divided regarding whether the Lottery *encourages lower income people to waste money instead of taking care of their basic needs* - 45% **agreed** with this statement, while 46% **disagreed** and 9% had **no opinion**. Agreement in 2014 (45%) was higher than the 1991 baseline (39%) and similar to 2013 (46%). Persons with lower annual household incomes (under \$35,000) were slightly less likely than higher income persons (43% vs. 47%) to agree that the Lottery *encourages lower income people to waste money instead of taking care of their basic needs*.

Nearly four out of ten respondents (38%) **agreed** that the Lottery *promotes addiction to gambling*, while nearly six out of ten (57%) **disagreed** and 5% had **no opinion**. Agreement that the Lottery *promotes addiction to gambling* was higher than the 1991 baseline (31%) and 2013 (33%). The largest variance in agreement is by age. Respondents 55 and older were more likely than those under 55 (45% vs. 34%) to agree that the Lottery *promotes addiction to gambling*. Agreement with this statement has ranged from a low of 31% (1991) to a high of 42% (2000), thus, agreement in 2013 (38%) was at the high end.

Agreement that *addiction to gambling among Colorado residents is primarily due to the Colorado Lottery* has been minimal since 1996 when the question was asked for the first time. In 2014, a small percentage (18%) **agreed**, while the vast majority (73%) **disagreed** and 9% had **no opinion**. The largest segment of all respondents (46%) **strongly disagreed**. Agreement in 2014 (18%) was higher than the 1996 baseline (12%) and 2013 (14%). Agreement that *addiction to gambling among Colorado residents is primarily due to the Colorado Lottery* has never exceeded 19% (2009).

**Table 5 Attitudes Regarding Societal Impacts of Colorado Lottery: 1991, 2013 & 2014**

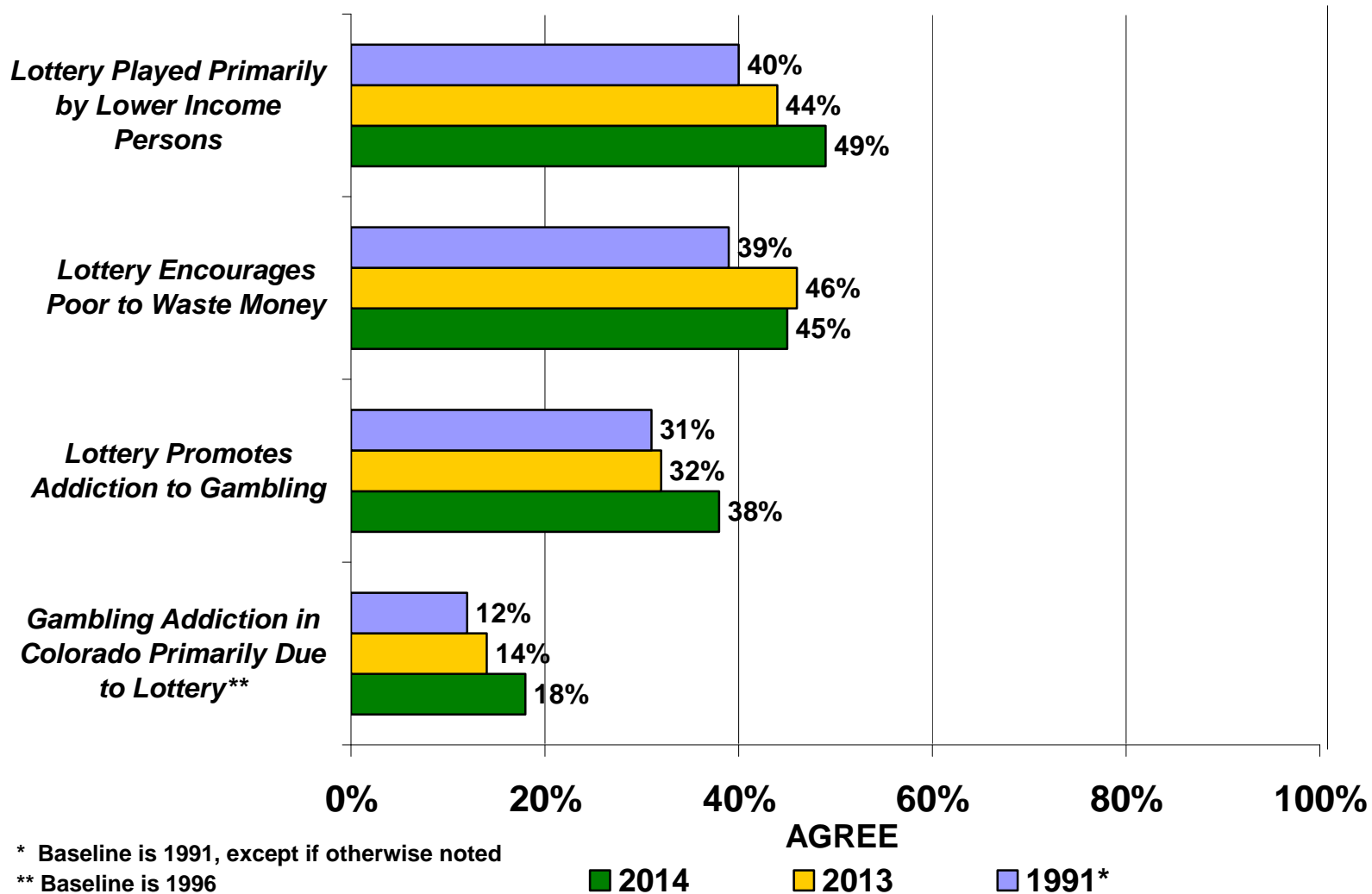
	<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Agreement Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>No Opinion</u>	<u>Mean Score*</u>
<b><i>The Lottery is primarily played by people in lower income groups</i></b>						
1991	15%	25%	24%	30%	7%	2.3
2013	20	24	19	19	19	2.6
2014	17	32	21	18	13	2.6
<b><i>The Lottery encourages lower income people to waste money instead of taking care of their basic needs</i></b>						
1991	15	24	26	31	5	2.2
2013	20	26	22	24	8	2.5
2014	19	26	20	26	9	2.4
<b><i>The Colorado Lottery promotes addiction to gambling</i></b>						
1991	10	21	29	36	4	2.0
2013	11	21	31	30	7	2.1
2014	13	25	26	31	5	2.2
<b><i>Addiction to gambling among Colorado residents is primarily due to the Colorado Lottery**</i></b>						
1996	4	8	18	68	3	1.5
2013	4	10	25	49	12	1.7
2014	5	13	27	46	9	1.8
Base	- - - - - (501) - - - - -					

\* Mean score is calculated by assigning integer values of “4” to **strongly agree**, “3” to **somewhat agree**, “2” to **somewhat disagree**, “1” to **strongly disagree** and disregarding the **no opinions**.

\*\* Question was first asked in 1996.

Source: The Howell Research Group

**Figure 9**  
**ATTITUDES ABOUT SOCIETAL IMPACTS OF LOTTERY:**  
**BASELINE (1991/1996), 2013 & 2014**



## **AWARENESS OF CURRENT PUBLIC PURPOSES FOR LOTTERY**

Prior to 1993, Lottery proceeds were used for parks/recreation projects, prisons and public buildings. In November 1992, Colorado residents passed an amendment to the Colorado Constitution, which designated 100% of Lottery profits for parks/recreation, wildlife and open space/wilderness areas, and established the Great Outdoors Colorado Trust Fund. In November 2000, Colorado residents voted to allow the state to offer multi-state lottery games such as Powerball. A portion of the net revenues in excess of what was being generated by the Lottery's other games can be used for emergency maintenance for public school districts in Colorado. These revenues partially fund the Colorado Department of Education's Public School Capital Construction Fund that addresses health and safety issues in public schools.

When asked (unaided) how the Lottery proceeds are currently used, other than for prizes and administration, the majority of respondents in 2014 (58%) named "parks/recreation" or "open space/wilderness areas." This was significantly lower than in the 1991 baseline (77%) but slightly higher than 2013 (56%). Although respondents often lump "parks/recreation" and "open space/wilderness areas" into the same category, these responses have been tracked separately starting in 1999. In 2014, 49% mentioned "parks/recreation" and 17% specifically mentioned "open space/wilderness areas" with a net of 58% mentioning one or both. Specific mention of "open space/wilderness areas" increased between 2013 and 2014 (13% to 17%). (Refer to Table 6 and Figure 10.)

"Wildlife" has always been tracked as a separate purpose. Specific awareness of "wildlife" continues to be very low. Unaided awareness of "wildlife" was 5% in 2014 which is higher than 1991 (2%) and the same as 2013 (5%). While many residents are now making a distinction between "wildlife," "parks/recreation" and "open space/wilderness areas," many still lump these three purposes into one category.

Awareness of "education/schools," which became a purpose for the first time in 2001, has significantly increased from 9% in 2001 to 23% in 2014. Awareness of "education/schools" was the highest ever measured. Prior to 2001 when "education/schools" became an actual use of some Lottery proceeds, there was always a small percentage of residents who believed that it was a purpose.

There continues to be very small percentages of respondents who think Lottery proceeds are still used for prisons and public buildings. Proceeds are no longer used for these purposes. Incorrect awareness of "highways/roads" was lower in 2013 (7%) than the 1991 baseline (12%) but higher than in 2013 (4%).

In total, 73% of all respondents in 2013 were able to name (unaided) one or more of the current designated uses of Lottery proceeds: "parks/recreation," "open space/wilderness areas," "wildlife" or "education". 2014 awareness of at least one current purpose was an improvement over 2013 (69%) which had been the lowest ever measured. The increased awareness between 2013 and 2014 (69% to 73%) indicates that the Proceeds Campaign was able to educate some Colorado citizens regarding the Lottery's use of proceeds. Awareness of at least one correct purpose has fluctuated with a low of 69% in 2013 and a high of 86% in 2002. (Refer to Figure 11.)

In 2014, there were variances in awareness of current Lottery purposes among different demographic segments:

- ▶ Persons 35 years and older had a higher awareness of at least one current purpose than persons under 35 (79% vs. 59%).
- ▶ Denver Metro (74%) and Non-Denver Front Range residents (72%) had higher awareness than Non-Front Range residents (67%).
- ▶ Non-minority persons had higher awareness than ethnic minority persons (75% vs. 64%). However, there was a substantial increase in correct awareness among minority residents from 57% in 2013 to 64% in 2014.
- ▶ Correct awareness of Lottery purposes was higher among recent players (74%) and past players (78%) than non-players (63%). However, correct awareness among non-players increased from 46% in 2013 to 63% in 2014.
- ▶ A correlation exists between awareness of Lottery purposes and overall impression of the Colorado Lottery. Persons who were strongly or somewhat favorable toward the Lottery were far more likely to be aware of at least one purpose than persons who were not in favor or opposed to the Lottery (76% vs. 56%).



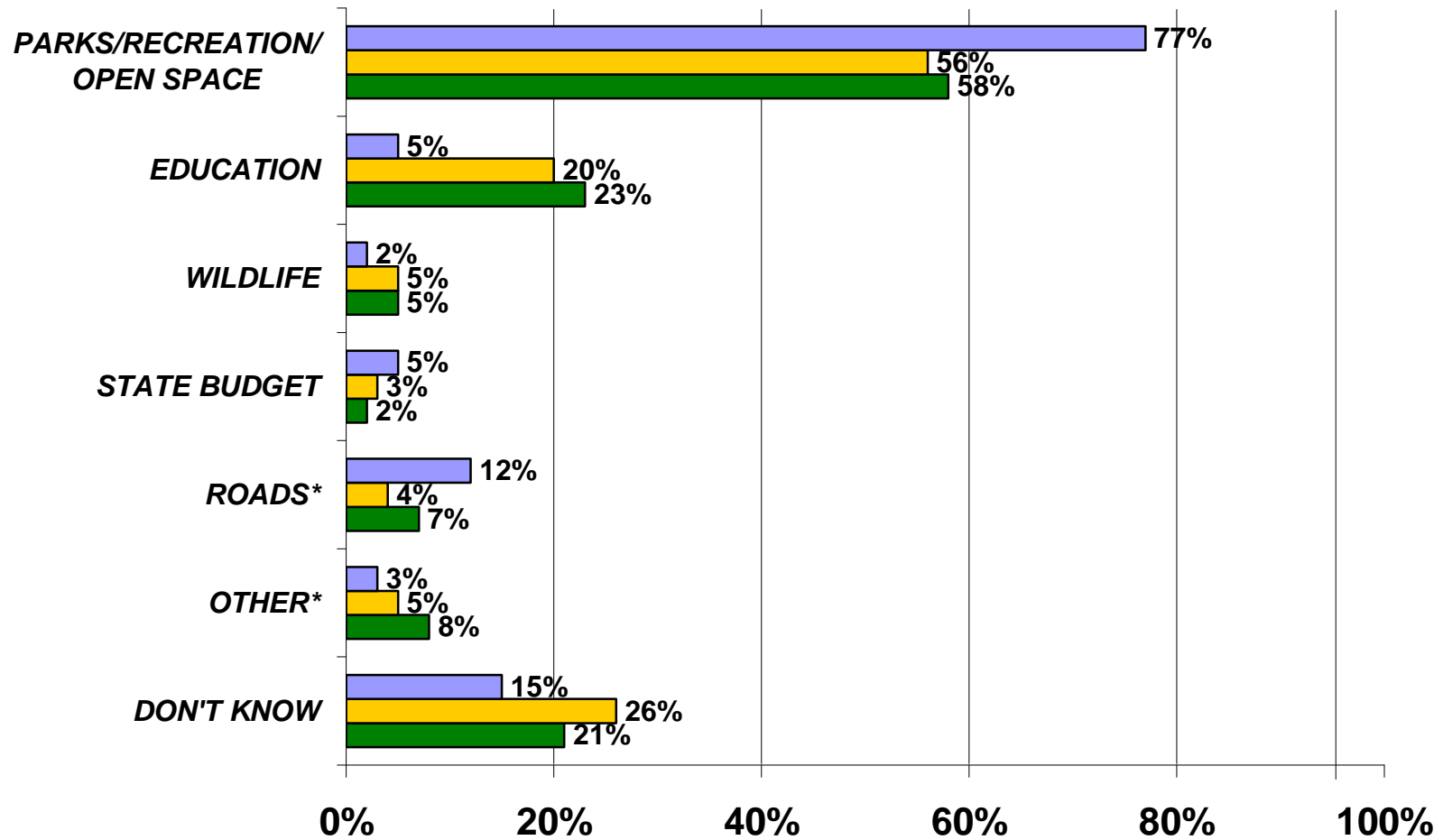
**Table 6 Awareness of How Lottery Proceeds Are Currently Used Other than for Prizes and Administration (Unaided): 1991, 2013 & 2014**

<u>How Proceeds Are Used*</u>	<u>1991</u>	<u>2013</u>	<u>2014</u>
Parks/Recreation and/or Open Space (Net)	77%	56%	58%
Parks/Recreation**	-	49	49
Open Space/Wilderness Areas**	-	13	17
Education/Schools***	5	20	23
Wildlife	2	5	5
State Budget (general)	5	3	2
Prisons	11	<1	1
Public Buildings	3	1	<1
Highways/Roads****	12	4	7
Historic Preservation****	0	<1	1
Other****	3	5	7
Don't Know	15	26	21
Base	(501)	(501)	(501)

\* Reflects multiple responses.  
\*\* Not tabulated as separate responses in 1991.  
\*\*\* Became a purpose in 2001  
\*\*\*\* Never a public purpose.

Source: The Howell Research Group

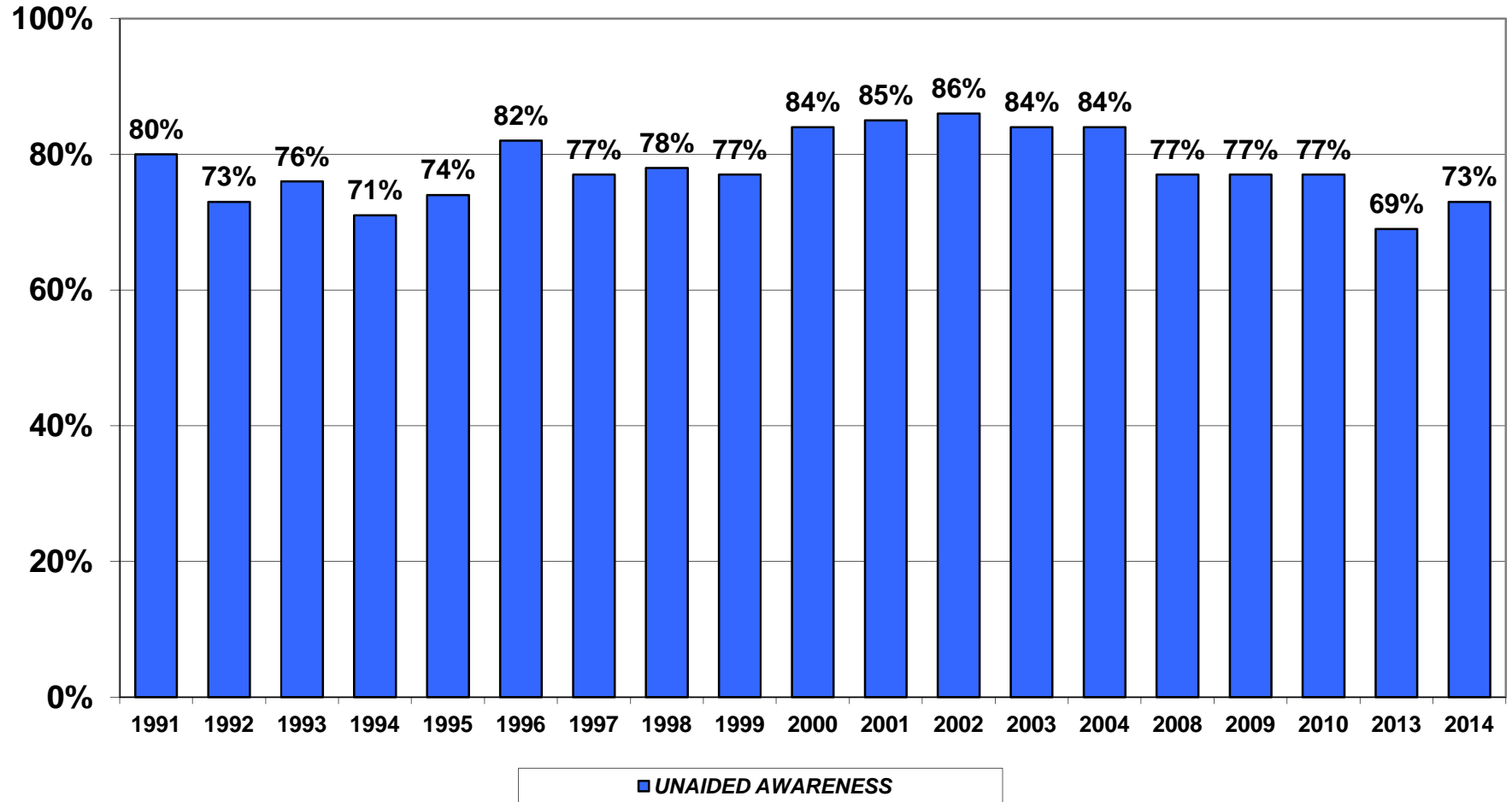
**Figure 10**  
**AWARENESS - CURRENT PUBLIC PURPOSES**  
**FOR LOTTERY (UNAIDED): BASELINE (1991), 2013 & 2014**



\* NEVER A PUBLIC PURPOSE

■ 2014    ■ 2013    ■ 1991

Figure 11  
**AWARENESS OF ONE OR MORE CORRECT PURPOSES  
OF LOTTERY PROCEEDS (UNAIDED): 1991 - 2014**



## **PERCEPTIONS ABOUT THE USE OF LOTTERY PROCEEDS**

### ■ **Specific Attitudes About Use of Proceeds**

In 2014, more than three out of four respondents (77%) **strongly** (39%) or **somewhat agreed** (38%) that the *Lottery is an appropriate method for the State to raise revenues*. Disagreement was only 18%, while 6% had **no opinion**. Agreement in 2014 (77%) was slightly higher than the 1991 baseline (73%) and 2013 (76%). Agreement with this statement was higher among persons under 45 compared to persons 45 and older (82% vs. 71%). (Refer to Table 7 and Figure 12.)

About three out of four respondents (76%) either **strongly** (37%) or **somewhat agreed** (39%) that the *Colorado Lottery has done a good job of funding parks and recreation projects in the state*, while 9% **disagreed** and a 15% had **no opinion**. Agreement in 2014 (76%) was the same as in 1991 (76%), but a significant improvement over 2013 (68%). The lower agreement in 2013 was due to a near doubling of **no opinions** between 1991 and 2013 (12% to 23%), but the percentage of **no opinions** declined to 15% in 2014. Those disagreeing that the *Colorado Lottery has done a good job of funding parks and recreation projects in the state* has always been low ranging between 6% (2001) and 13% (2008). Agreement with this statement did not vary significantly by the demographic or geographic characteristics of residents. (Refer to Figure 13.)

In 2002, respondents were asked for the first time if they agreed or disagreed with the statement *Colorado Lottery has done a good job of funding open space and wilderness areas*. In 2014, 74% **agreed** (34% **strongly** and 40% **somewhat**), while only 9% **disagreed** and 18% had **no opinion**. Agreement with this statement in 2014 (74%) was significantly higher than the 2002 baseline (66%) and 2013 (64%). Agreement with this statement did not vary significantly by the demographic or geographic characteristics of residents.

Starting in 1995, respondents were asked if they agreed or disagreed with the statement *Colorado Lottery has done a good job of funding parks/recreation projects in your community*. Respondents continue to have less positive perceptions about the impact of the Lottery on their community than the state as a whole. Agreement with this statement had increased from 56% in 1995 to an all-time high of 65% in 2000. Agreement significantly declined to 52% in 2004. Agreement was 64% in 2014 (30% **strongly** and 34% **somewhat**) which was significantly higher than the 1995 baseline (56%) and 2013 (57%). In 2014, 16% of the respondents **disagreed**, while a large percentage (20%) had **no opinion**. Over the years, agreement has fluctuated

between 52% (2002) and 65% (2000), while disagreement has fluctuated between 13% (2010) and 24% (2004). While agreement did not vary significantly by location in 2014, Non-Denver Range (28%) and Non-Front Range residents (24%) were more likely to **disagree** compared to Denver Metro residents (12%). Denver Metro residents were more likely to have **no opinion**. (Refer to Figure 14.)

There continues to be a lack of support for *spending more money on winners' prizes and less for public purposes*. In all of the surveys, the majority of respondents **disagreed** with this statement, while one-third or less have **agreed**. In 2014, 26% of the respondents **agreed**, while 62% **disagreed** and 11% had **no opinion**. Agreement in 2014 (26%) was lower than the 1991 baseline (31%) and similar to 2013 (24%). As expected, recent Lottery players were more likely to **agree** (34%) that *Lottery should spend more money on winners' prizes and less for public purposes* than past players (23%) or non-players (12%). However, the majority of recent players (62%) **disagreed** with this statement.

The 2014 Colorado Image Survey has shown substantial increases since 2013 in those who **agreed** that the *Colorado Lottery has done a good job of funding parks and recreation in the state* (68% to 74%), *funding open space and wilderness areas* (64% to 74%), and *funding parks and recreation projects in your community* (57% to 64%). These results indicate that the Proceeds Campaign has had a positive impact on increasing the knowledge and improving the attitudes of Colorado residents regarding the use of proceeds.

**Table 7 Attitudes Regarding the Use of Lottery Proceeds: 1991, 2013 & 2014**

	<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Agreement Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>No Opinion</u>	<u>Mean Score*</u>
<b><i>Lottery is an appropriate method for the state to raise revenues</i></b>						
1991	35%	38%	8%	10%	9%	3.1
2013	37	39	8	9	7	3.1
2014	39	38	10	7	6	3.2
<b><i>Lottery has done a good job of funding parks/recreation projects in the state</i></b>						
1991	39	37	7	5	12	3.2
2013	31	37	5	4	23	3.2
2014	37	39	6	3	15	3.3
<b><i>Lottery has done good job of funding open space and wilderness areas**</i></b>						
2002	35	31	3	5	26	3.3
2013	27	37	5	4	27	3.2
2014	34	40	6	3	18	3.3
<b><i>Lottery has done a good job of funding parks/recreation projects in your community***</i></b>						
1995	28	28	10	11	23	3.0
2013	26	31	9	6	27	3.1
2014	30	34	9	7	20	3.1
<b><i>Lottery should spend more money on winners' prizes and less for public purposes</i></b>						
1991	14	17	31	31	6	2.2
2013	11	13	31	34	11	2.0
2014	9	17	28	34	11	2.0
Base - - - - - (501) - - - - -						
* Mean score is calculated by assigning integer values of "4" to <b>strongly agree</b> , "3" to <b>somewhat agree</b> , "2" to <b>somewhat disagree</b> , "1" to <b>strongly disagree</b> and disregarding the <b>no opinions</b> .						
** Question was first asked in 2002.						
*** Question was first asked in 1995.						
Source: The Howell Research Group						

**Figure 12**  
**ATTITUDES ABOUT LOTTERY PROCEEDS:**  
**BASELINE (1991/1995/2002), 2013 & 2014**

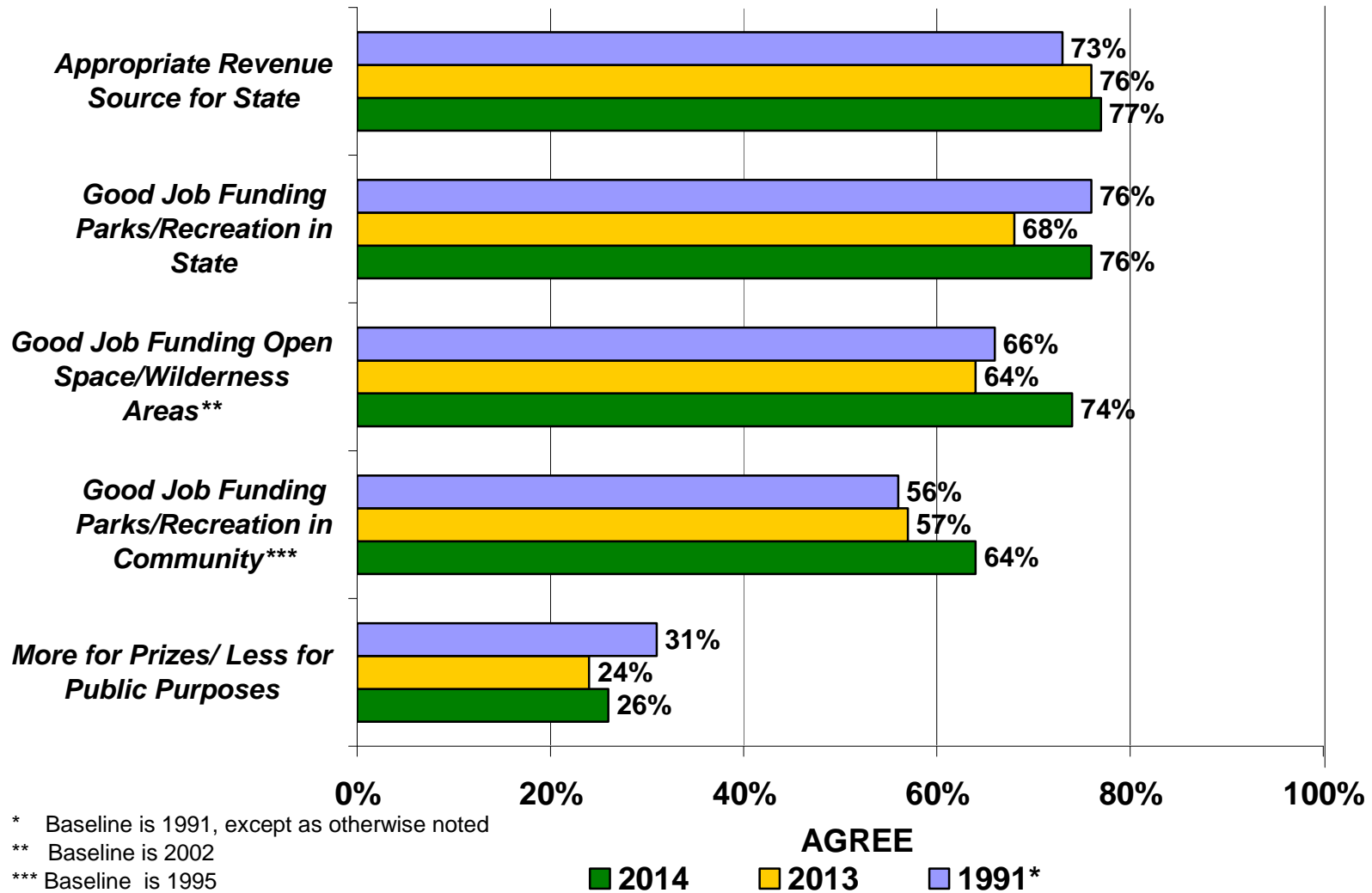
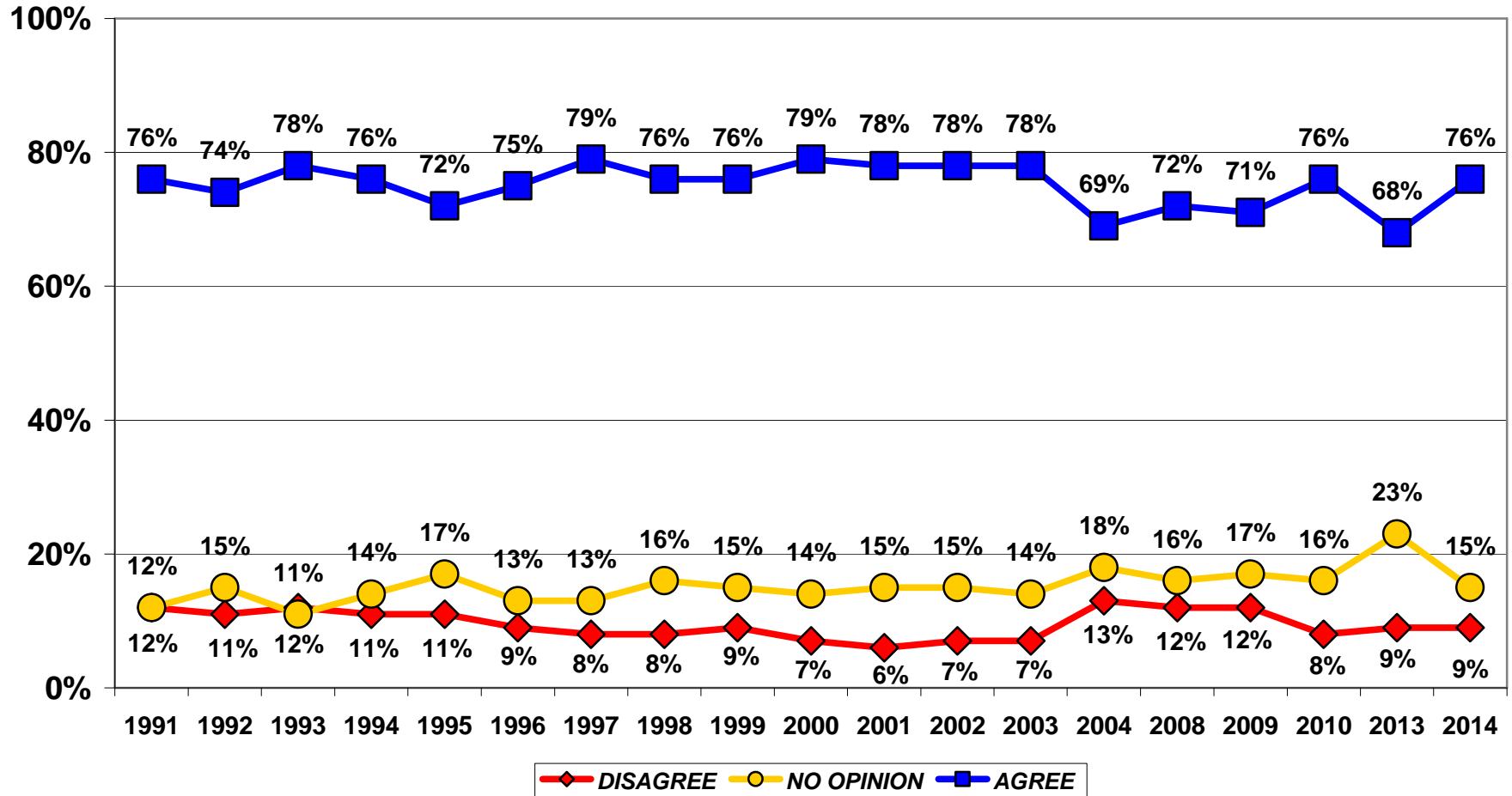
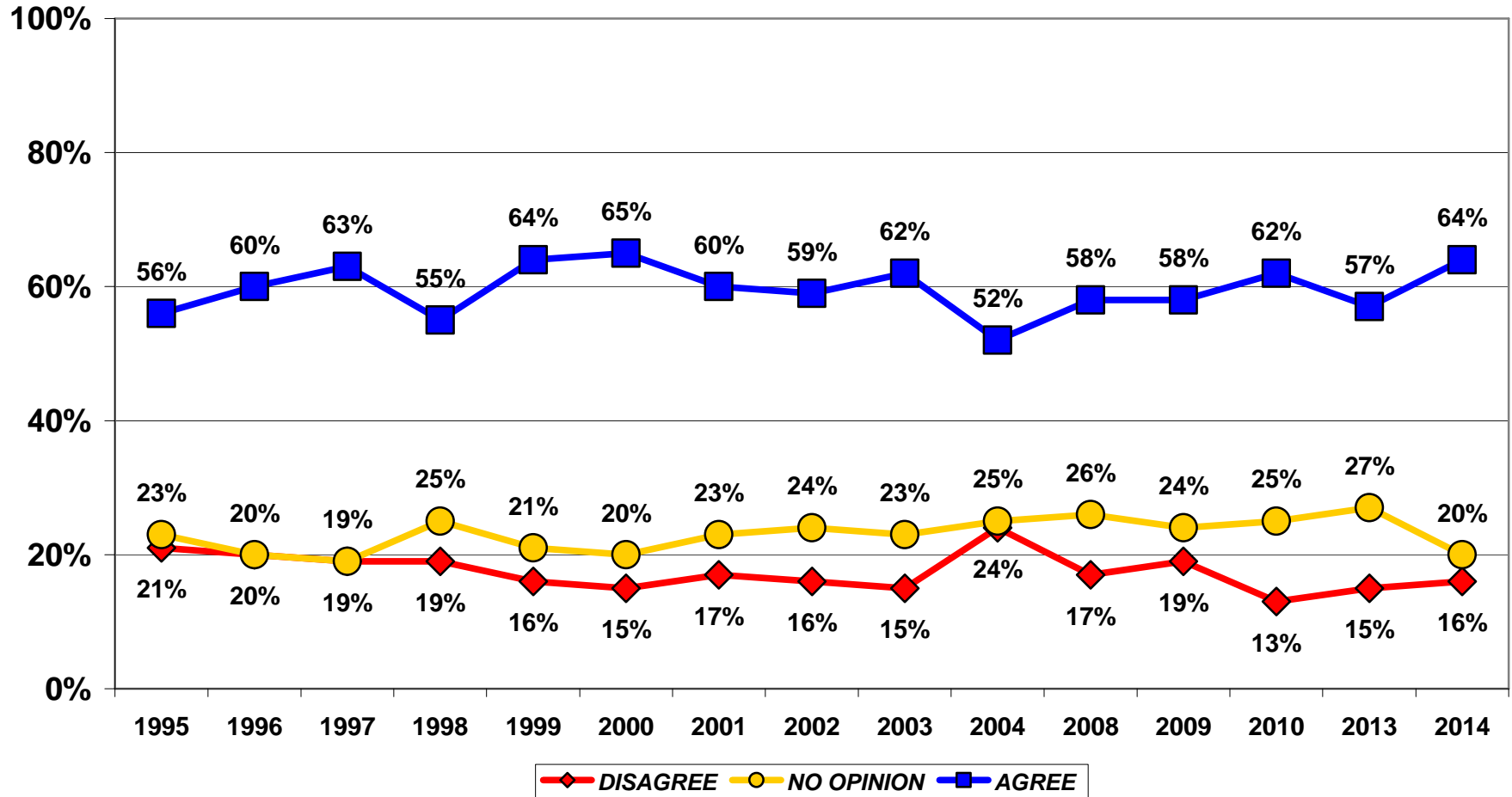


Figure 13  
**"LOTTERY HAS DONE GOOD JOB OF FUNDING PARKS & RECREATION  
 PROJECTS IN THE STATE": 1991 - 2014**





**Figure 14**  
**"LOTTERY HAS DONE GOOD JOB OF FUNDING PARKS & RECREATION**  
**PROJECTS IN YOUR COMMUNITY": 1995 - 2014**



### ■ **Support for Current Uses of Proceeds**

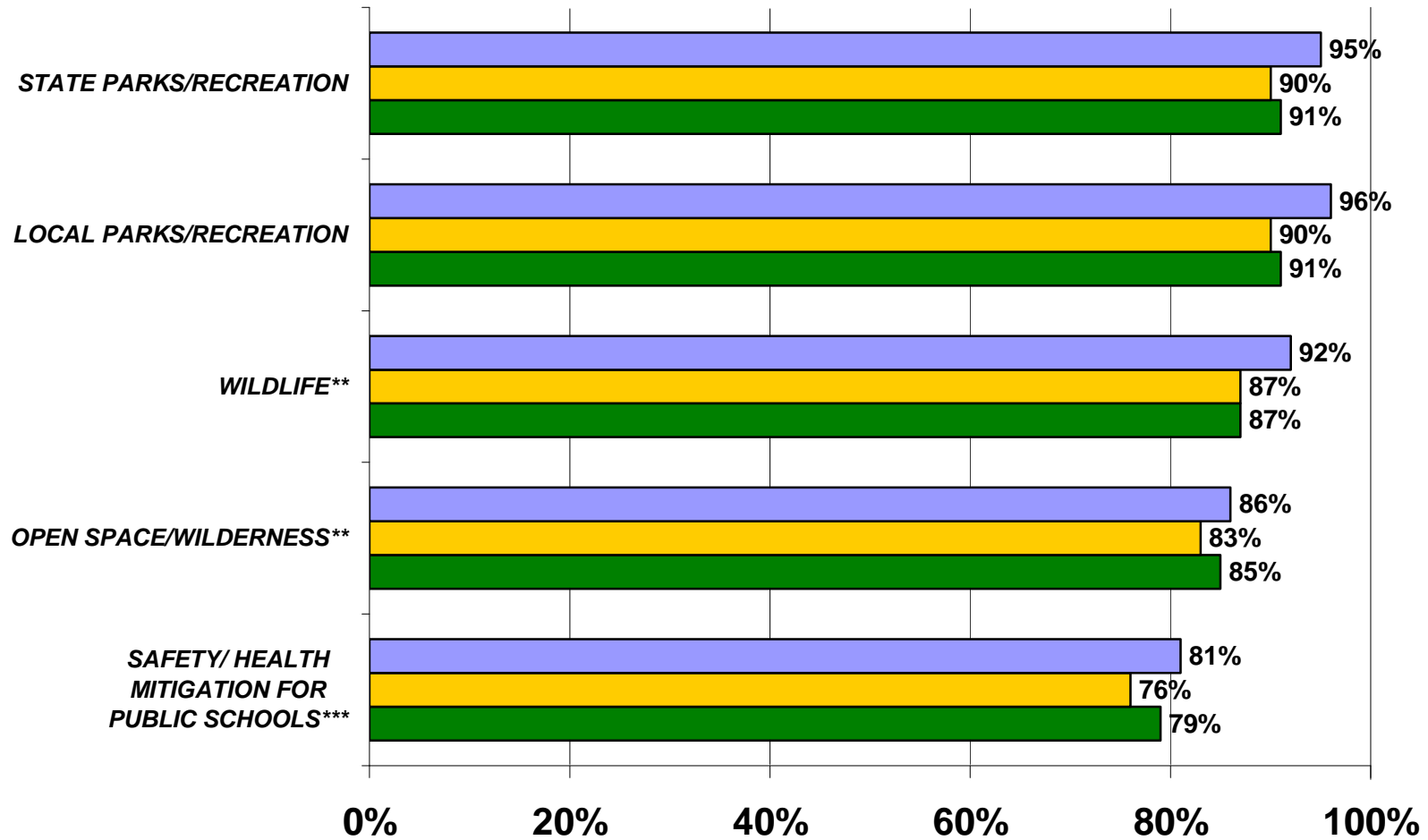
In 2014, nine out of ten respondents supported the use of Lottery proceeds for state parks and recreation (91%) and local parks and recreation (91%). Nearly nine out of ten supported the use of Lottery proceeds for wildlife resources (87%), and 85% supported open space/wilderness areas. About eight out of ten respondents (79%) expressed support for using Lottery proceeds for partially funding a program to address safety and health concerns in public schools. (Refer to Figure 15.)

Since 1991, nearly all respondents have expressed support for the Lottery proceeds being used to fund state and local parks. After the approval of Amendment 8 in 1992, wildlife and open space/wilderness areas became uses for Lottery proceeds. Support for wildlife resources has varied between 83% (2009) and 94% (1997). Support in 2014 (87%) was slightly lower than 1991 (92%) and the same as 2013 (87%). Similarly, support for open space/wilderness areas has varied between 83% (2010 and 2013) and 92% (1997, 1998 and 2000). Support for using proceeds for addressing safety and health concerns in public schools was first measured in 2008 and had slightly declined from 81% to 76% in 2013. Support improved slightly between 2013 and 2014 (76% to 79%).

There were a few variances in support for use of Lottery proceeds among demographic and geographic segments:

- ▶ Women were somewhat more likely than men to express support for safety/health mitigation for public schools (83% vs. 75%). Support for other purposes did not vary significantly by gender.
- ▶ Persons under 45 were somewhat more likely than persons 45 and older to support each of the purposes.
- ▶ Non-Front Range residents were somewhat less likely than all Front Range residents to support use of proceeds for open space/wilderness areas (80% vs. 86%) and wildlife resources (83% vs. 88%).

**Figure 15**  
**SUPPORT FOR CURRENT USES OF LOTTERY PROCEEDS:**  
**BASELINE (1991/1994/2008), 2013 & 2014**



\* Baseline is 1991, except as otherwise noted

\*\* Baseline is 1994

\*\*\* Baseline is 2008

■ 2014    ■ 2013    ■ 1991

## **AWARENESS OF LOTTERY GAMES**

Nearly all Colorado residents are aware of at least one Colorado Lottery game. In 2014, 94% of the respondents were aware of at least one game. Nearly nine out of ten were aware of Instant/Scratch (87%), while more than eight out of ten were aware of Powerball (84%) and Lotto (81%). More than seven out of ten respondents (76%) were aware of Mega Millions, while 59% were aware of Cash 5. Pick 3 which was introduced as a game in 2013 had an awareness level of 62% exceeding that of Cash 5 which has been a game since 1997. (Refer to Table 8 and Figure 16.)

Awareness of at least one game has remained consistent over time and the 2014 awareness (94%) was essentially the same as the 1991 baseline (95%) and 2013 (96%). Instant/Scratch was the Lottery's first game introduced in 1983. 2014 awareness of Instant/Scratch (87%) was slightly lower than 1991 (91%) and the same as 2013 (87%). Powerball (a multi-state jackpot game), introduced in 2002, has experienced increased awareness since 2002 (78% to 84%). Awareness in 2013 at 86% was the highest ever measured.

Lotto was the Lottery's first jackpot game introduced in 1989. Awareness of Lotto has declined from the 1991 baseline (91% to 81% in 2014). Decline in awareness is due in part to the more recent introductions of the multi-state, large jackpot games, Powerball and Mega Millions.

The Lottery introduced Mega Millions (second multi-state jackpot game) in 2010. Awareness of Mega Millions was 52% in 2010 and has significantly increased to 76% in 2014. The Lottery introduced Cash 5 in 1997 and awareness was at 74% that year. Awareness had generally declined over the past several years to its lowest level in 2013 (56%) and then slightly increased to 59% in 2014.

Incorrect awareness of non-Lottery games had increased over time from 19% in 1991 to an all time high of 59% in 2013. The high incorrect awareness in 2013 was due to the inclusion of "Pick 3" in the question. Pick 3 was not a Colorado Lottery game at the time of the survey, but became a game later that year. The high awareness of Pick 3 was probably due to some preliminary brochures/information available at Lottery retailers and the fact that Pick 3 is a game offered by 45 other state lotteries. In 2014, incorrect awareness of at least one game was at 40% which represents a doubling from the 1991 baseline (19%).

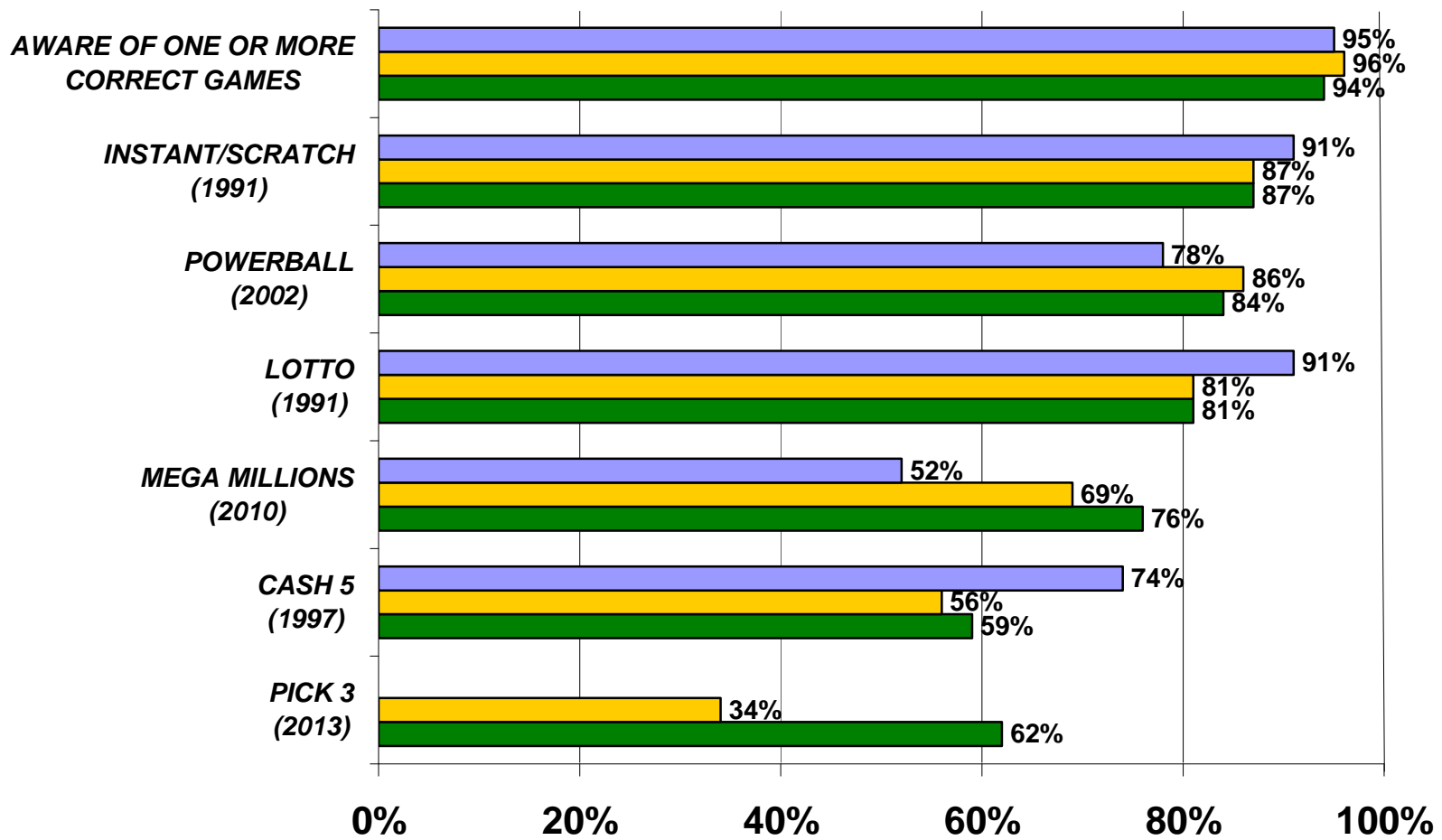
One out of three respondents (34%) incorrectly believed that limited stakes gambling in mountain towns is a Lottery game. Smaller percentages incorrectly thought that bingo in bingo halls/parlors (19%) and video poker/video blackjack (13%) were Lottery games.

Correct awareness of Lottery games did not vary significantly by the demographic or geographic characteristics of the respondents. As expected, recent and past players had significantly higher awareness of each game compared to never players. Recent players (47%) were also more likely than past (36%) or never players (36%) to have incorrect awareness of non-Lottery games.

**Table 8 Awareness of Different Games Offered by Colorado Lottery: Baseline, 2013 & 2014**

<u>Games*</u>	<u>Baseline</u>	<u>2013</u>	<u>2014</u>
<b>Aware of One or More (Net)</b>	<b>95%</b>	<b>96%</b>	<b>94%</b>
Instant/Scratch	91	87	87
Powerball**	78	86	84
Lotto	91	81	81
Mega Millions**	52	69	76
Cash 5**	74	56	59
Pick 3**	-	34	62
<b>Not Aware of Any Lottery Games</b>	<b>5</b>	<b>4</b>	<b>6</b>
<b>Incorrect Awareness (Net)</b>	<b>19</b>	<b>59</b>	<b>40</b>
Limited Stakes Gambling/Mountain Towns	14	34	32
Bingo in Bingo Halls/Parlors	5	15	19
Video Poker/Video Blackjack**	5	13	13
Base	(501)	(501)	(501)
* Reflects multiple responses.			
** Baseline is 1991 except for Cash 5 (1997), Powerball (2002), Mega Millions (2010), Video Poker/Blackjack (1994) and Pick 3 (2013).			
Source: The Howell Research Group			

**FIGURE 16**  
**AWARENESS OF WHICH GAMES ARE OFFERED BY THE LOTTERY:**  
**BASELINE, 2013 & 2014**



\* Baseline for each game is shown in ( )

■ 2014    ■ 2013    ■ BASELINE\*

## **APPROPRIATENESS OF LOTTERY GAMES**

When asked if they thought it was appropriate for the Colorado Lottery to offer each of its six current games, Colorado residents were very supportive. In 2014, more than eight out of ten respondents said it was appropriate for the Lottery to offer Instant/Scratch (86%), Powerball (84%), Lotto (85%) and Mega Millions (81%). Smaller but very large percentages thought it was appropriate for the Lottery to offer Cash 5 (78%) and Pick 3 (77%). (Refer to Table 9.)

The percentages of respondents who said it was not appropriate for the Lottery to offer each game was very small for each game (5% - 6%). The differences in perceived appropriateness were in the percentages of respondents who had no opinion. The two Lottery games with lowest awareness (Cash 5 and Pick 3) had much higher percentages of respondents with no opinion, thus, reducing the percentages who said the game was appropriate.

Perceived appropriateness of each game in 2014 was similar or slightly lower compared to 2013. The perceived appropriateness of Instant/Scratch, Lotto and Cash 5 was slightly lower in 2014 than the baseline year for each of these games. Perceived appropriateness of Powerball was first asked in 2002 and has increased slightly from 81% in 2002 to 84% in 2014. The appropriateness of Mega Millions was similar in 2014 as its 2010 baseline (81% vs. 80%). (Refer to Figure 17.)

In total, 88% of all respondents in 2014 thought it was appropriate for the Lottery to offer at least one of these games. Perceived appropriateness of specific games did not vary significantly by the geographic location of survey respondents. Persons 55 and older were less likely to perceive it was appropriate for the Lottery to offer each game.

Nearly all of those who have ever played one of the Lottery games (95%) think it is appropriate for the Lottery to offer one or more of these games. Although significantly lower, a majority of those who have never played any of the games (61%) thought it was appropriate for the Lottery to offer one or more of these games.

As expected, those who are **not in favor** or **very opposed** to the Lottery in general were far less likely to think it is appropriate for the Lottery to offer each of these games. However, not all of the opposition to any one game comes from those **not in favor** or **very opposed** to the Lottery. It appears that while most opposition to these games is based on the moral issues of gambling or hurting the poor, some of the opposition for any one game is based on the attributes of the game itself such as odds, prizes and how the game is played. A large percentage (not a majority) of the opposition to each game is from persons with a favorable impression of the Colorado Lottery.

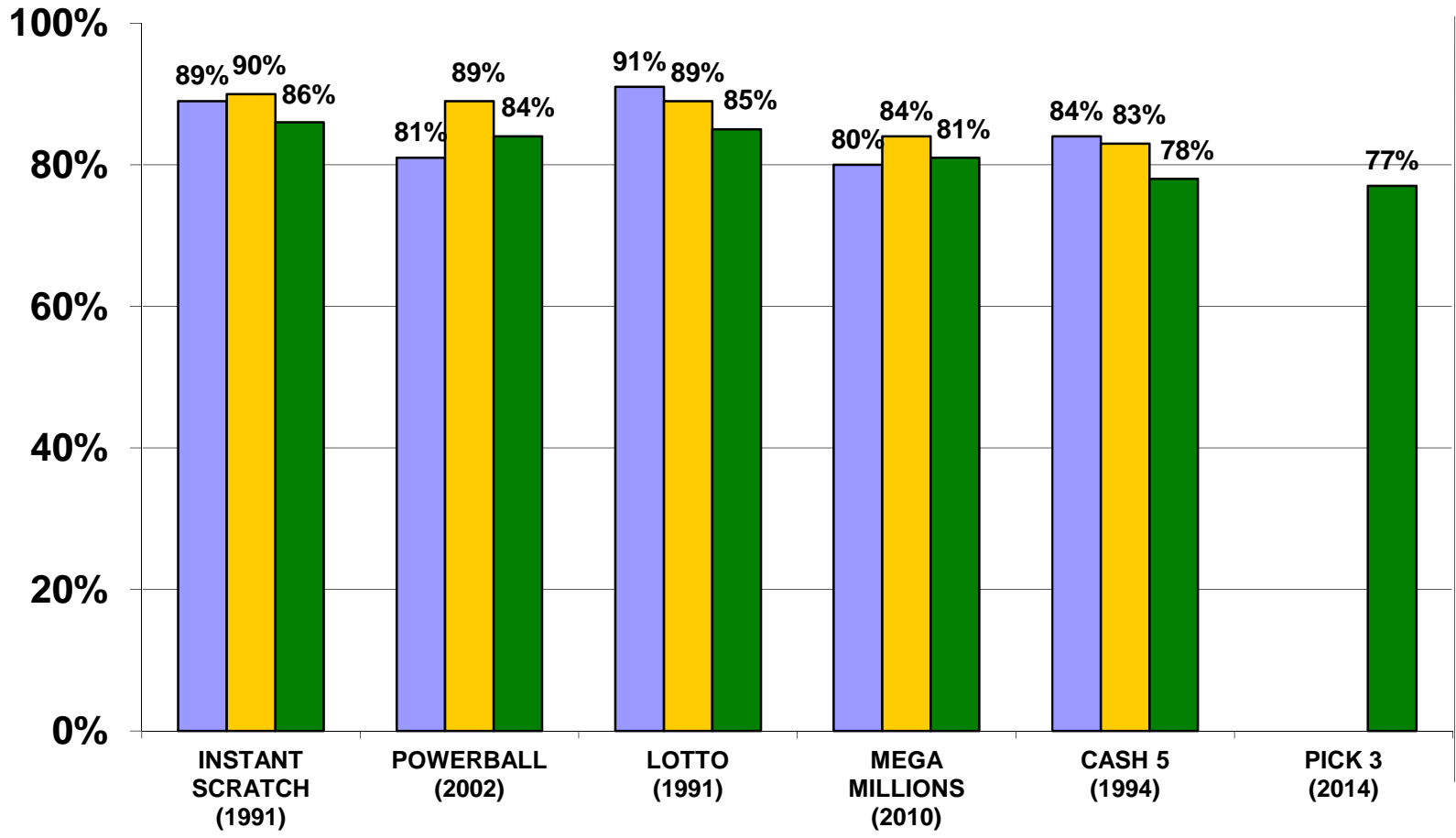
**Table 9 Perceived Appropriateness of Lottery Games: 2014**

<i>Is It Appropriate for Lottery to Offer:</i>	<u>Instant/ Scratch</u>	<u>Powerball</u>	<u>Lotto</u>	<u>Mega Millions</u>	<u>Cash 5</u>	<u>Pick 3</u>
Yes	86%	84%	85%	81%	78%	77%
No	5	5	5	6	5	6
No Opinion	<u>9</u>	<u>11</u>	<u>10</u>	<u>13</u>	<u>17</u>	<u>16</u>
Total*	100%	100%	100%	100%	100%	99%
Base	- - -	- - -	- - -	(501)	- - -	- - -

\* May add to less than 100% due to rounding.  
Source: The Howell Research Group



**Figure 17**  
**PERCEIVED APPROPRIATENESS OF LOTTERY GAMES:**  
**BASELINE, 2013 & 2014**



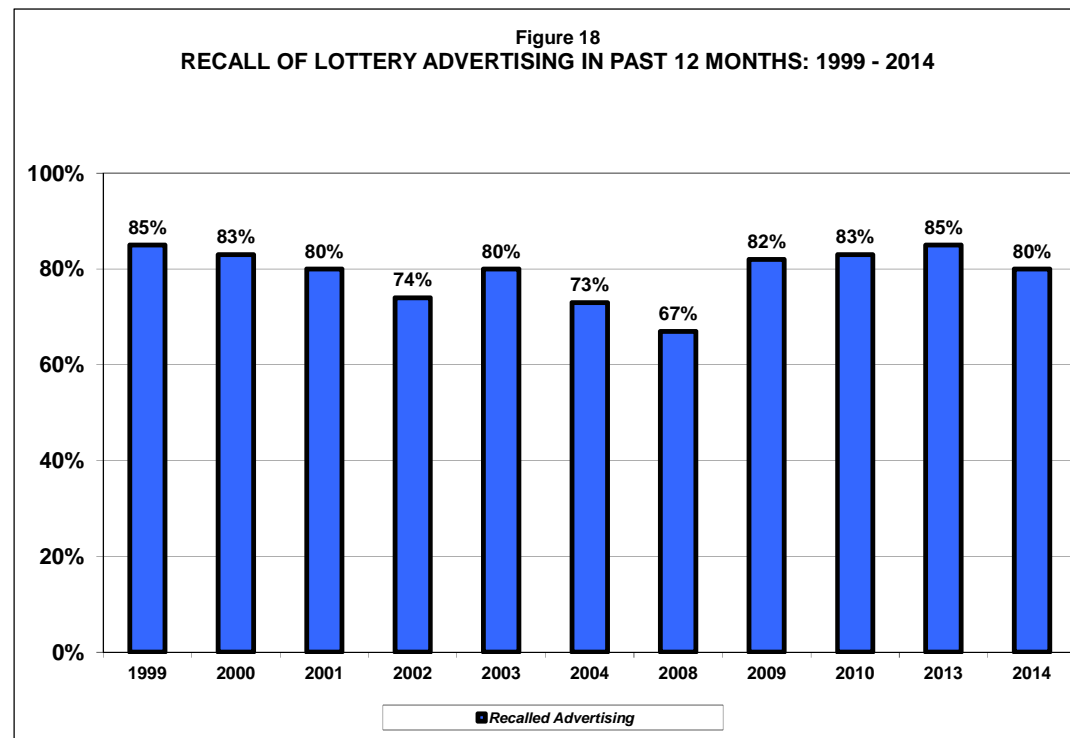
\* Baseline is indicated in ( ) under each game

■ **BASELINE\***     
 ■ **2013**     
 ■ **2014**

## **AWARENESS OF AND PERCEPTIONS ABOUT LOTTERY'S ADVERTISING/COMMUNICATIONS**

### ■ **Advertising Recall**

Starting in 1999, perceptions about the Lottery's advertising were tested by asking respondents if they had seen or heard any Colorado Lottery advertising within the past 12 months and their level of agreement/disagreement with several statements regarding the Lottery's advertising. In 2014, eight out of ten respondents (80%) recalled having seen or heard Lottery advertising within the past 12 months. Ad recall in 2014 was somewhat lower than the 1999 baseline (85%) and 2013 (85%). Since 1999, the percentage of survey respondents with advertising recall has fluctuated. Awareness was highest in 1999 and 2013 (85%) and lowest in 2008 (67%). The awareness increases after 2008 correspond to a marketing budget increase initiated in fiscal year 2008 that restored the advertising buying power the Lottery had in the late 1990's. In 2014, advertising recall was higher among persons under 65 years of age compared to persons 65 and older (82% vs. 66%) and persons with household incomes of \$25,000 or more compared to those with incomes under \$25,000 (83% vs. 68%). (Refer to Figure 18.)



### ■ **Attitudes Regarding Advertising**

Among those with recall of the Lottery's advertising in 2014, 88% **agreed** either **strongly** (38%) or **somewhat** (50%) that *overall, Lottery's advertising is done in good taste*. Total agreement has remained consistent since 1999, although those who **strongly agreed** has declined from 58% to 38%. (Refer to Table 10 and Figure 19.)

In 2014, nearly six out of ten respondents (59%) **agreed** (14% **strongly** and 45% **somewhat**) that the *Lottery's advertising is entertaining*. Agreement was lower than the 1999 baseline (66%) and the same as 2013 (59%).

Perceptions about whether the *Lottery's advertising gives you information about how proceeds are used* are mixed. While a majority of the respondents (56%) **agreed**, about four out of ten (39%) **disagreed** and 5% had **no opinion**. Agreement in 2014 (56%) was higher than the 1999 baseline (45%) and 2013 (51%). Perceptions regarding *Lottery's advertising gives you information about how proceeds are used* have greatly fluctuated over time. Agreement with this statement increased significantly between 1991 and 2001 (45% to 69%), then significantly declined to 48% in 2004 before rebounding in the following surveys. The increase in agreement between 2013 and 2014 is further indication that the Proceeds Campaign was able to impact resident awareness.

In 2014, the majority of respondents (53%) **agreed** that the *Lottery's advertising makes you feel good about playing the Lottery*, while 31% **disagreed** and a relatively large percentage (16%) had **no opinion**. Agreement was significantly higher than 1999 (41%) and somewhat higher than 2013 (48%).

In all years, the majority of respondents **disagreed** that the *Lottery's advertising creates unrealistic expectations* (57% in 1999, 56% in 2013 and 55% in 2014). In 2014, 39% of the survey respondents **agreed** with this statement.

Survey respondents have consistently **disagreed** that the *Lottery's advertising encourages people to waste their money* (65% in 1999, 64% in 2013 and 63% in 2014). About one-third of the respondents with advertising recall (32%) **agreed** with this statement in 2014 which represents an increase since 1999 (25% to 32%). Persons with lower household incomes (under \$25,000) were far more likely to **agree** that the *Lottery's advertising encourages people to waste their money* than persons with higher incomes (54% vs. 34%).

**Table 10 Attitudes Regarding the Colorado Lottery's Advertising: 1999, 2013 & 2014**

	<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Agreement Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>No Opinion</u>	<u>Mean Score**</u>
<b><i>Overall, Lottery's advertising is done in good taste</i></b>						
1999	58%	27%	5%	4%	6%	3.5
2013	36	49	6	2	7	3.3
2014	38	50	5	3	5	3.3
<b><i>Lottery's advertising is entertaining</i></b>						
1999	27	39	14	11	9	2.9
2013	16	43	18	7	16	2.8
2014	14	45	19	10	12	2.7
<b><i>Lottery's advertising gives you information about how proceeds are used</i></b>						
1999	18	27	22	24	9	2.4
2013	15	36	25	17	7	2.5
2014	17	39	25	14	5	2.6
<b><i>Lottery's advertising makes you feel good about playing the Lottery</i></b>						
1999	13	28	15	23	21	2.4
2013	12	36	20	11	21	2.6
2014	10	43	19	12	16	2.6

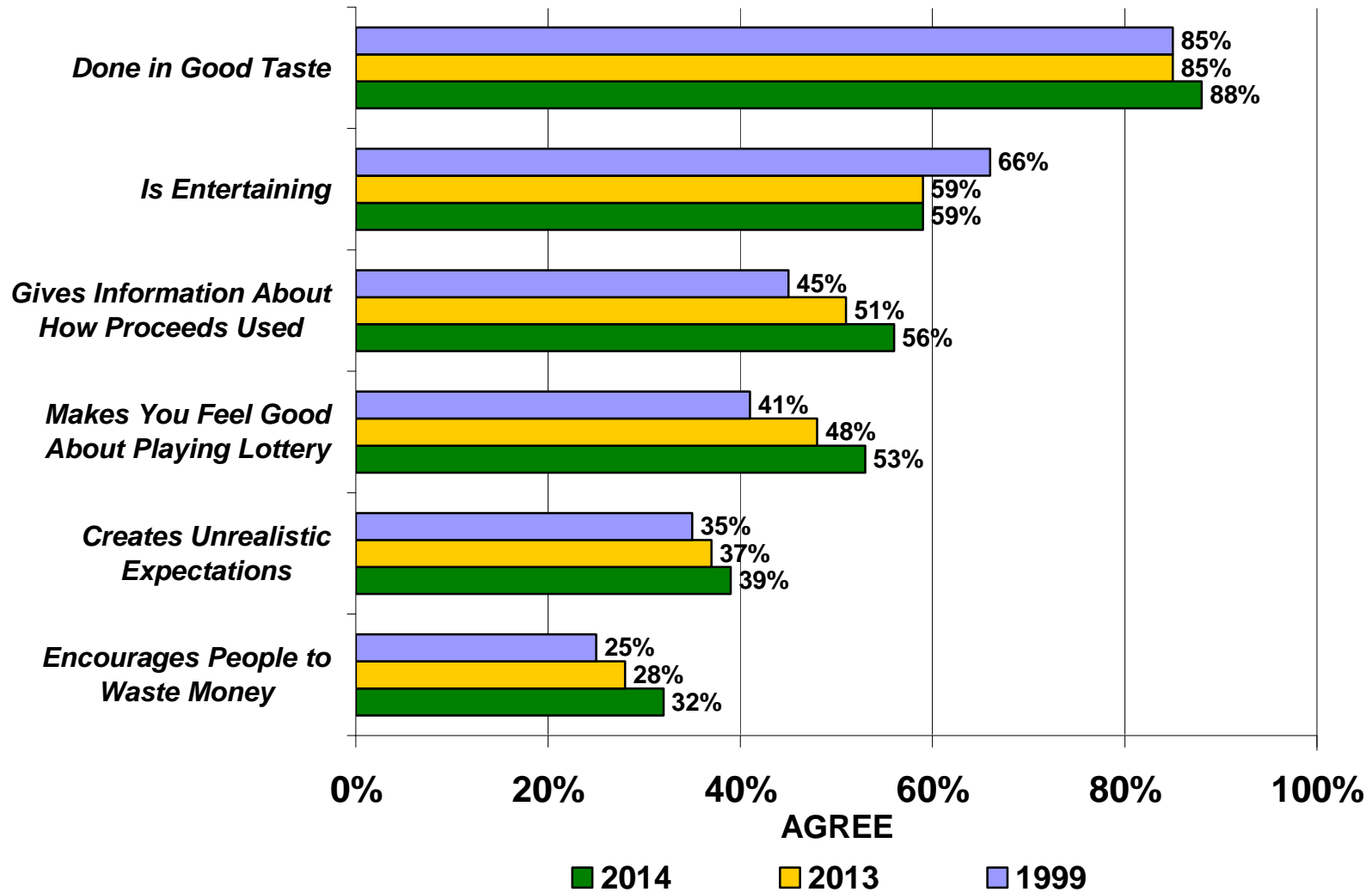
**Table 10 Attitudes Regarding the Colorado Lottery’s Advertising: 1999, 2013 & 2014 (Continued)**

	<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Agreement Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>No Opinion</u>	<u>Mean Score**</u>
<b><i>Lottery’s advertising creates unrealistic expectations</i></b>						
1999	16	19	20	37	9	2.2
2013	13	24	35	21	8	2.3
2014	14	25	34	21	5	2.4
<b><i>Lottery’s advertising encourages people to waste their money</i></b>						
1999	11	14	22	43	10	1.9
2013	11	17	30	34	8	2.1
2014	10	22	31	32	5	2.1
Base - 1999*	- - - - -	- - - - -	(424)	- - - - -	- - - - -	
Base - 2013*	- - - - -	- - - - -	(425)	- - - - -	- - - - -	
Base – 2014*	- - - - -	- - - - -	(395)	- - - - -	- - - - -	

\* Respondents who had seen or heard any of the Lottery’s advertising (85% of total in 1999, 85% in 2013 and 80% in 2014).  
 \*\* Mean score is calculated by assigning integer values of “4” to **strongly agree**, “3” to **somewhat agree**, “2” to **somewhat disagree**, “1” to **strongly disagree** and disregarding the **no opinions**.

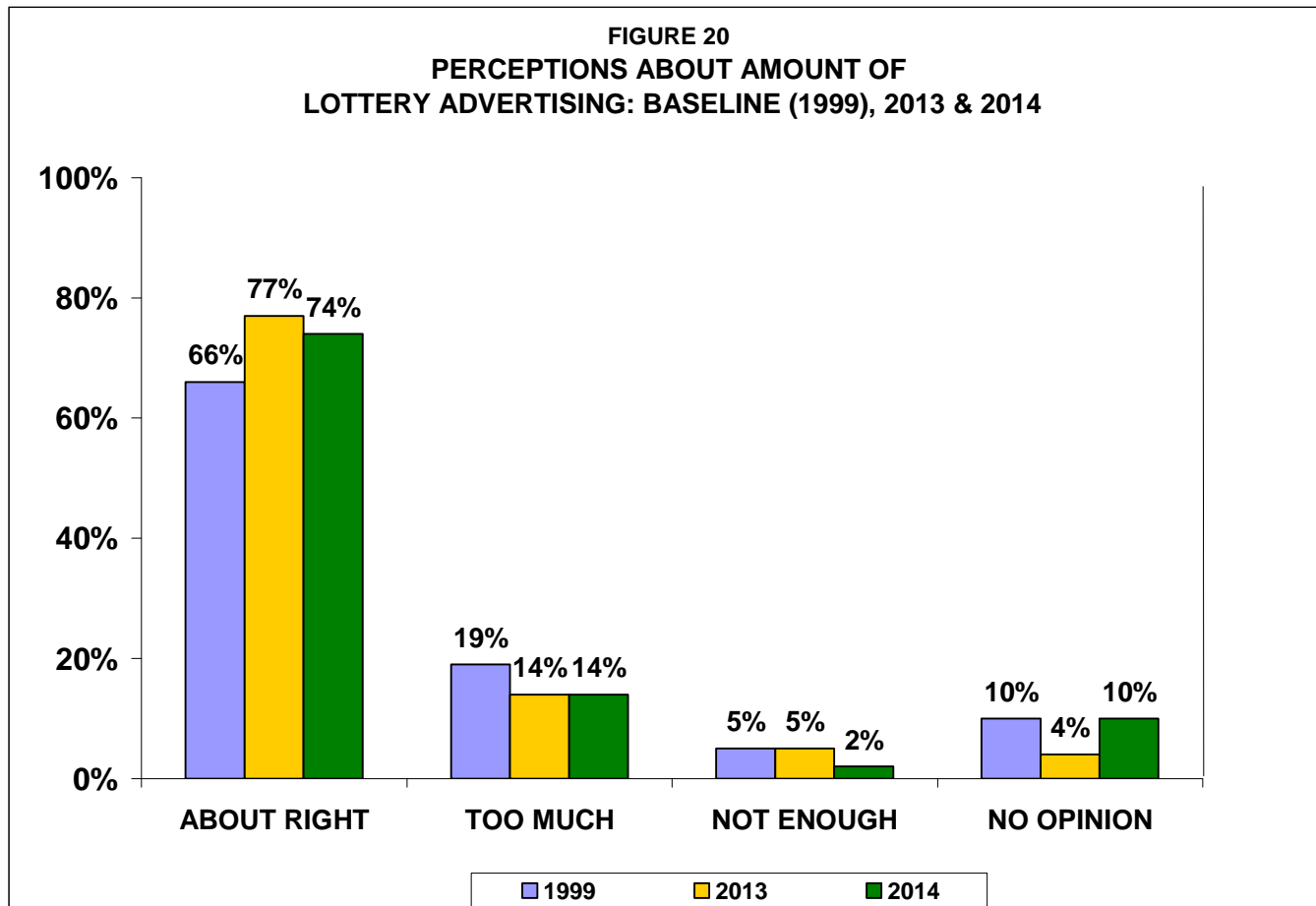
Source: The Howell Research Group

**Figure 19**  
**ATTITUDES ABOUT THE LOTTERY'S ADVERTISING:**  
**BASELINE (1999), 2013 & 2014**



■ **Amount of Advertising**

In 2014, three out of four respondents with advertising recall (74%) thought that the amount of advertising by the Colorado Lottery was **about right**. A small percentage (14%) thought that the amount of advertising was **too much**, while only 5% thought it was **not enough**. The perception that the amount of Lottery advertising is **about right** has increased from the 1999 baseline (66% to 74%), while the perception that it is **too much** has declined (19% to 14%). (Refer to Figure 20.)



■ **Awareness of “Play Responsibly” Message**

In 1998, the Colorado Lottery initiated a “Play Responsibly” campaign to convey the message that Lottery players should “play responsibly,” and if they felt their playing had become a problem, they could call a 1-800 number for help. In 1998 and 1999, this campaign was limited to brochures and posters at points of sale and to messages on the back of Instant/Scratch tickets. In 2000, the campaign was expanded to include:

- “Play responsibly” references in media interviews with Lottery officials regarding large jackpots.
- Public service announcements directed to “problem gamblers” sponsored by the Colorado Council on Problem Gambling (CCPG) and produced by the Lottery.

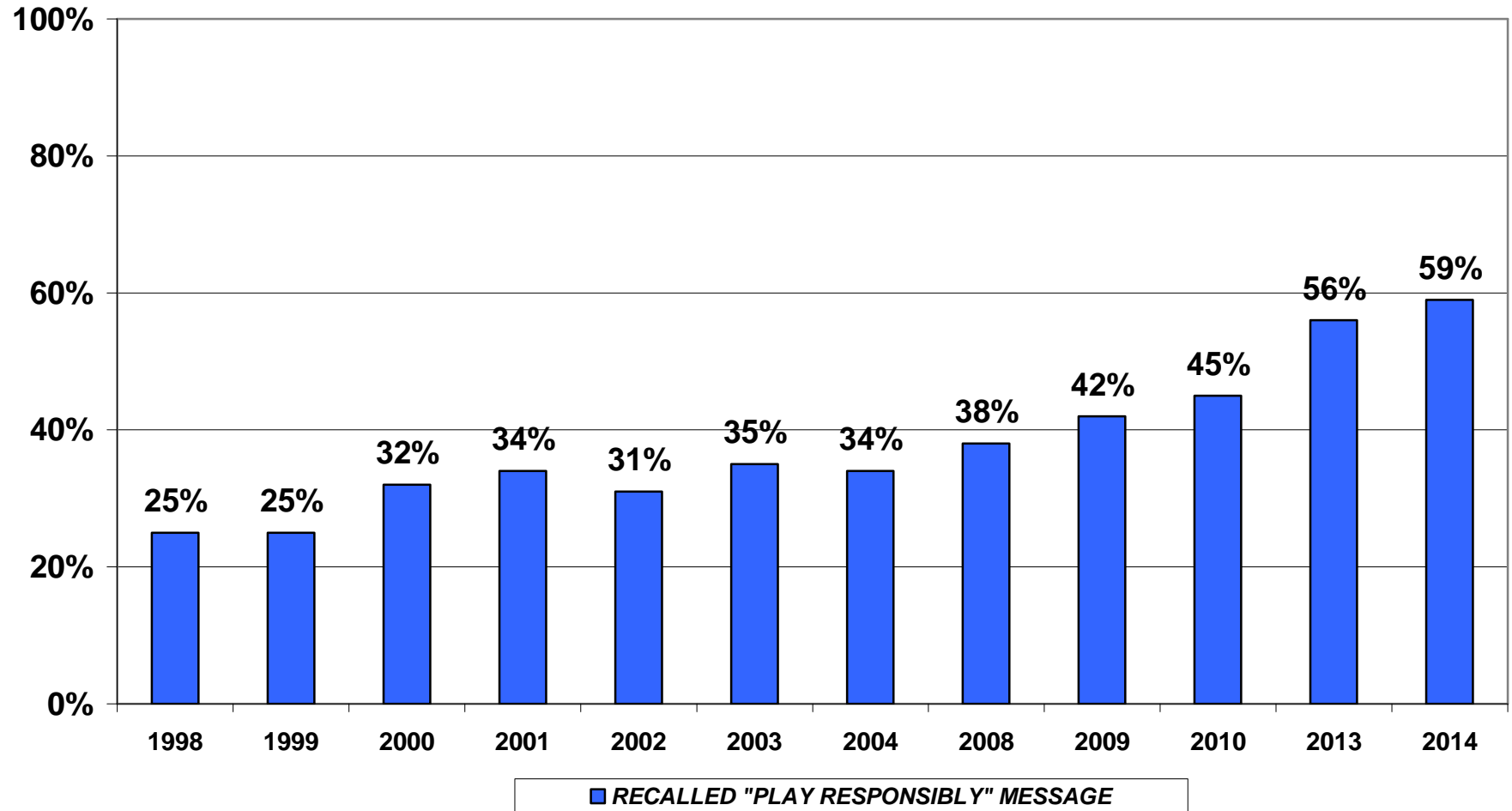
In both 1998 (25%) and 1999 (26%), one-fourth of all respondents claimed to have seen or heard one of the “Play Responsibly” messages. With the changes in the campaign, awareness increased to 32% in 2000. Since the expansion of the campaign, awareness of the “Play Responsibly” message has steadily increased to its highest level in 2014 (59%) – more than double the 1998 baseline (25%). (Refer to Figures 21 and 22.)

In the early years of the campaign, awareness was significantly higher among Denver Metro residents than residents in the remainder of the state. Over time, the gap in awareness by location has narrowed to a point where awareness in 2014 was nearly equal (60% Denver Metro vs. 57% remainder of state).

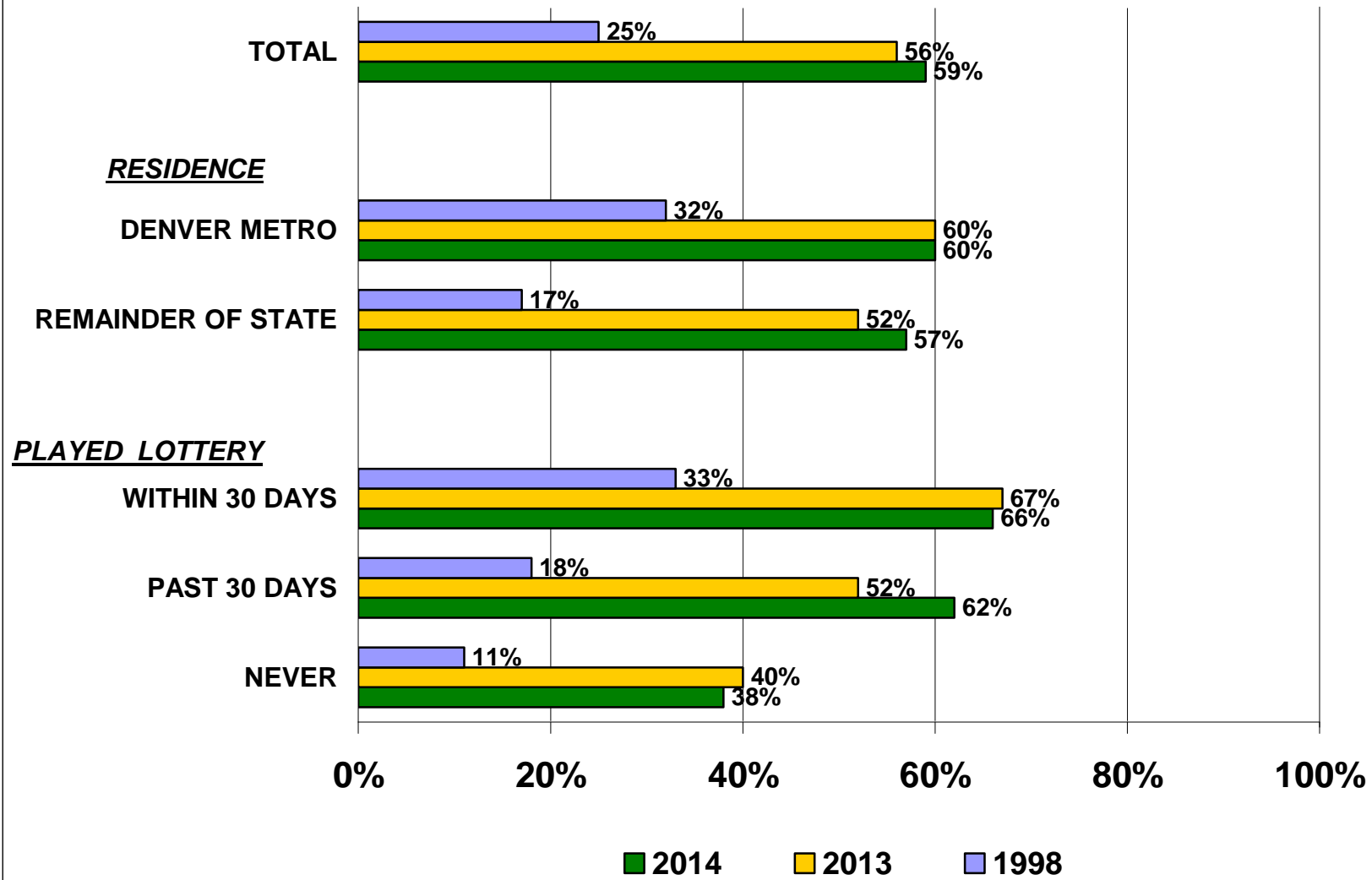
Awareness is significantly higher among recent players which is a desired outcome. In 2014, 66% of those playing a Lottery game within 30 days recalled the message, compared to 62% of those having played more than 30 days ago and 38% of those who have never played.



Figure 21  
RECALL OF "PLAY RESPONSIBLY" MESSAGE: 1998 - 2014



**FIGURE 22**  
**AWARENESS OF "PLAY RESPONSIBLY" MESSAGE:**  
**BASELINE (1998), 2013 & 2014**

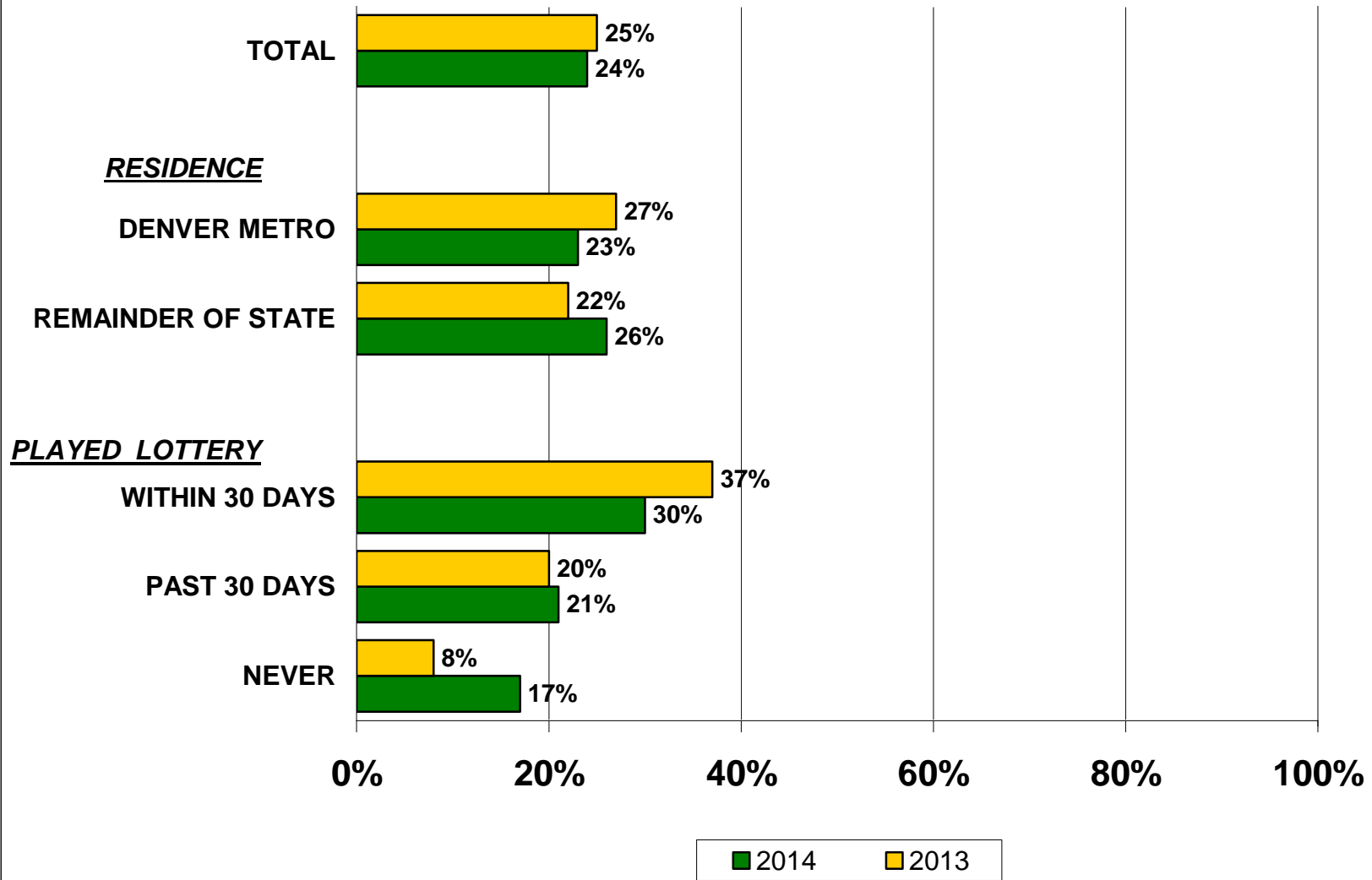


■ ***Awareness of Messages about Avoiding Lottery Scams/Criminal Activities***

In February 2011, the Colorado Lottery initiated a campaign directed at alerting players to potential scams and criminal activities directed toward winners. A focus of this campaign is to encourage players to sign their tickets when purchased. The campaign was initiated with press releases and supplemented with messages on the back of Scratch tickets, messages and alerts on the Lottery's website and a point of purchase brochure titled "Help Stop Lottery Scams."

Recall of Colorado Lottery messages about avoiding Lottery scams and criminal activities directed toward winners was asked for the first time in the 2013 survey. In 2013 (25%) and 2014 (24%) about one-fourth of all respondents recalled having seen or heard such messages. In 2013, awareness of messages about avoiding scams/criminal activities was slightly higher among Metro Denver Area residents than Non-Denver Metro residents (27% vs. 22%). However, in 2014, this switched and Metro Denver Area residents were slightly less likely than Non-Denver Metro residents to be aware of this message (23% vs. 26%). In 2014, awareness was highest among recent players (30%) compared to past players (21%) and non-players (17%). However, awareness among recent players declined between 2013 and 2014 (37% to 30%), while awareness among non-players increased (8% to 17%). (Refer to Figure 23.)

**FIGURE 23  
AWARENESS OF MESSAGES ABOUT AVOIDING LOTTERY SCAMS/  
CRIMINAL ACTIVITIES: 2013 & 2014**



## **CHARACTERISTICS OF SURVEY RESPONDENTS**

### **■ *Playing Frequency***

In 2014, 78% of the respondents had played at least one of the Colorado Lottery's games. This was a decline from the baseline year of 1998 (84%) and slightly lower than 2013 (80%). Nearly one-half of the 2014 respondents (49%) had played at least one Lottery game within the past 30 days. Lottery play within the past 30 days was lower in 2014 (49%) than in 1998 (54%) but higher than 2013 (43%). In 2014, Colorado residents were most likely to have played Powerball (35%), Instant/Scratch (34%) and Lotto (28%). Recent play of Mega Millions jumped from 16% to 26% between 2013 and 2014. Recent play of Cash 5 continues to be low at 12% of all respondents, while recent play of the newest game, Pick 3, was 8%. (Refer to Figure 24.)

Past 30-day play of Lotto has dramatically declined since 1998 (47% to 28%). At large part of this decline is most probably due to people playing the new multi-state, larger jackpot games (Powerball and Mega Millions) in place of Lotto.

### **■ *Demographic Characteristics***

The demographic characteristics of the survey respondents are profiled in Table 11. This table also profiles the 2014 demographic characteristics of persons who had played the Colorado Lottery within the past 30 days.

The demographic characteristics of the 1991, 2013 and 2014 survey samples are similar except for age and ethnicity. The percentage of respondents who were ethnic minorities has more than doubled from 12% in 1991 to 26% in 2014 as a result of the quota sampling described in Section I. The prescribed age quotas have significantly increased the percentage of respondents under 35 from 7% in 1991 to 33% in 2014.

The categories used in the demographic profiles presented in Table 11 are directly comparable to the 2010 U.S. Census data categories or a combination of those categories.

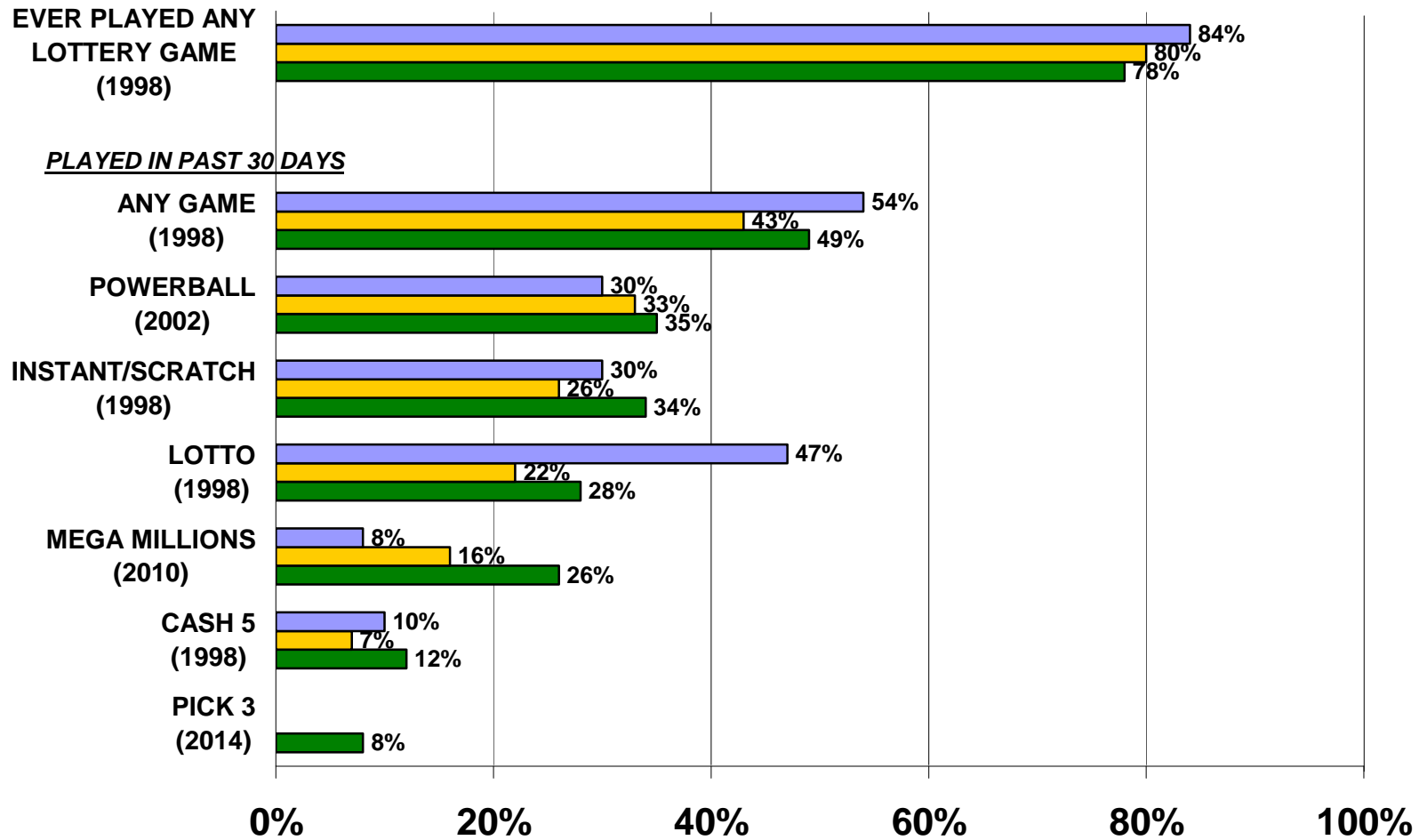
The demographic characteristics of persons who have played the Colorado Lottery within the past 30 days were similar to all survey respondents with slight variations:

- ▶ Recent players were more likely to be men than women (52% vs. 48%), although they represent equal proportions of the survey sample.
- ▶ A slightly higher percentage of persons with lower educational attainment (high school or less) were recent players compared to their proportion of all survey respondents (19% vs. 14%).
- ▶ A slightly higher percentage of minority persons were recent players compared to their proportion of all survey respondents (30% vs. 26%).
- ▶ Persons with household incomes under \$35,000 were slightly more likely to be recent players compared to their proportion of all respondents (25% vs. 20%).

#### ■ ***County of Residence***

The survey sample was stratified to reflect the distribution of population within Colorado based on the most recent 2010 U.S. Census population estimates. More than one-half of the sample (56%) lived in the Denver Metropolitan Area, while one-fourth (25%) lived in other counties of Front Range Colorado. The remaining respondents (19%) lived in the eastern plains or the western slope. (Refer to Table 12.)

**FIGURE 24**  
**LOTTERY GAMES PLAYED: BASELINE, 2013 & 2014**



\* Baseline is indicated by ( ) under each game

■ 2014   ■ 2013   ■ BASELINE\*

**Table 11 Demographic Profile of Survey Respondents: 1991, 2013 & 2014**

		Total <u>1991</u>	Total <u>2013</u>	<u>2014</u> Total Survey	Past 30 Day Players
<u>Gender</u>					
Male		50%	50%	50%	52%
Female		<u>50</u>	<u>50</u>	<u>50</u>	<u>48</u>
Total		100%	100%	100%	100%
Base		(501)	(501)	(501)	(246)
<u>Age</u>					
18-24		12%	6%	4%	4%
25-34		24	26	28	29
35-44		31	18	18	18
45-54		14	20	19	20
55-64		11	16	16	14
65 or older		<u>9</u>	<u>14</u>	<u>14</u>	<u>15</u>
Total**		101%	100%	99%	100%
Base		(501)	(501)	(501)	(246)
<u>Education</u>					
Less than 12 years		7%	2%	2%	2%
High school graduate		30	17	12	17
Some college		29	26	29	28
College graduate		22	35	39	38
Post graduate degree		<u>12</u>	<u>20</u>	<u>19</u>	<u>16</u>
Total**		100%	100%	101%	101%
Base		(499)	(498)	(496)	(245)
<u>Annual Household Income</u>					
Under \$15,000		13%	5%	6%	7%
\$15,000 - \$24,999		21	6	5	7
\$25,000 - \$34,999		17	9	9	11
\$35,000 - \$49,999		17	12	14	16
\$50,000 - \$74,999		13	18	20	16
\$75,000 - \$ 99,999***		6	16	13	11
\$100,000 or more***			23	21	22
Refused		<u>13</u>	<u>11</u>	<u>12</u>	<u>11</u>
Total		100%	100%	100%	100%
Base		(501)	(501)	(501)	(246)



**Table 11 Demographic Profile of Survey Respondents: 1991, 2013 & 2014 (Continued)**

		<u>Total</u> <u>1991</u>	<u>Total</u> <u>2013</u>	<u>2014</u>	
				<u>Total Survey</u>	<u>Past 30 Day</u> <u>Players</u>
<u>Ethnic Origin</u>					
White/Not Hispanic		88%	74%	75%	71%
Hispanic		8	17	18	21
African American		2	4	3	4
Asian		2	2	3	4
Native American		<1	2	1	1
Other		<u>&lt;1</u>	<u>1</u>	<u>1</u>	<u>0</u>
	Total**	100%	100%	101%	101%
	Base	(496)	(501)	(495)	(243)

\* Less than 1%.  
 \*\* May add to more or less than 100% due to rounding.  
 \*\*\* Prior to 2008, the largest household income category was \$75,000 or more.

Source: The Howell Research Group

**Table 12 County of Residence: 1991, 2013 & 2014**

<u>County</u>	<u>1991</u>	<u>2013</u>	<u>2014</u>
Adams	10%	9%	9%
Arapahoe	14	10	12
Boulder	6	6	6
Broomfield*	-	1	1
Denver	10	12	12
Douglas	1	6	6
Jefferson	<u>14</u>	<u>10</u>	<u>11</u>
Denver Metro Area**	55%	56%**	56%**
El Paso	12%	12%	12%
Larimer	6	6	6
Pueblo	4	3	3
Weld	<u>4</u>	<u>4</u>	<u>4</u>
Non-Denver/Front Range	26%	25%	25%
Remainder of State (17 Counties)	<u>19%</u>	<u>19%</u>	<u>19%</u>
Total	100%	100%	100%
Base	(500)	(501)	(501)
<p>* Broomfield became a county in 2001.  ** Due to rounding, the sum of all Denver Metro Area counties does not add to 56% in 2013 and 2014, but the total sample for the Denver Metro Area was 56%.</p>			
Source: The Howell Research Group			

## ***APPENDIX A***

**Questionnaire Used for the  
Colorado Lottery 2014 Image Survey**

## 2014 COLORADO LOTTERY IMAGE SURVEY

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ City: \_\_\_\_\_

Date of Interview: \_\_\_\_\_ Time: Began: \_\_\_\_\_ Ended: \_\_\_\_\_

HELLO, I'M \_\_\_\_\_ WITH \_\_\_\_\_, A PUBLIC OPINION RESEARCH FIRM LOCATED IN COLORADO. WE ARE CONDUCTING A SURVEY OF COLORADO RESIDENTS REGARDING THE COLORADO LOTTERY. THIS SURVEY IS BEING DONE FOR RESEARCH PURPOSES AND YOUR RESPONSES ARE COMPLETELY CONFIDENTIAL.

1. First, I would like to ask you which of the following categories contains your age? I need to make sure we include a representative sample of residents. Are you ...? (*READ LIST*)

Under 18.....	1	( <i>TERMINATE.</i> )
18 - 24 .....	2	( <i>CHECK QUOTAS</i> )
25 - 34 .....	3	( <i>CHECK QUOTAS</i> )
35 - 44 .....	4	( <i>CHECK QUOTAS</i> )
45 - 54 .....	5	( <i>CHECK QUOTAS</i> )
55 - 64 .....	6	( <i>CHECK QUOTAS</i> )
65 or older .....	7	( <i>CHECK QUOTAS</i> )
Refused .....	8	( <i>TERMINATE</i> )

2. In general, would you say you are ...? (*READ LIST THROUGH - EXCEPT "DON'T KNOW"*)

Strongly in Favor of the Colorado Lottery .....	5
Somewhat in Favor of the Colorado Lottery .....	4
Only Slightly in Favor of the Colorado Lottery .....	3
Not in Favor of the Colorado Lottery.....	2
Very Opposed to the Colorado Lottery .....	1
Don't Know .....	0

3a. What do you **like** about the Colorado Lottery? (**PROBE & CLARIFY!**) Are there any other things you like about the Colorado Lottery?

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3b. What do you **dislike** about the Colorado Lottery (**PROBE & CLARIFY!**) Are there any other things you dislike about the Colorado Lottery?

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4. To your knowledge, which of the following types of games are offered by the Colorado Lottery? (*READ LIST*)

	<u>Yes</u>	<u>No/DK</u>
a. Instant/scratch games .....	1	2
b. Bingo in bingo halls and parlors .....	1	2
c. Video Poker/Video Blackjack .....	1	2
d. Lotto .....	1	2
e. Limited stakes gambling in mountain towns.....	1	2
f. Cash 5.....	1	2
g. Powerball.....	1	2
h. Pick 3 .....	1	2
i. Mega Millions .....	1	2

5. Other than for prize money and administration, can you tell me how the proceeds from the Colorado Lottery are used? (**PROBE**) Can you think of any other uses for Lottery proceeds? (*DO NOT READ LIST*)

State budget (general).....	1
Education/schools .....	2
Law enforcement.....	3
Open space/wilderness areas .....	4
Parks/recreation .....	5
Prisons .....	6
Public buildings.....	7
Roads and highways .....	8
Wildlife.....	9
Don't know.....	10
Other (specify) .....	11

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6. I will read you some statements about how the lottery proceeds are used. Please tell me if you **strongly agree, somewhat agree, somewhat disagree or strongly disagree** with each statement.

<i>(ROTATE)</i>	<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>No Opinion</u>
a. The Colorado Lottery has done a good job of funding parks and recreation projects in the state .....	4	3	2	1	0
b. The Colorado Lottery has done a good job of funding open space and wilderness areas .....	4	3	2	1	0
c. The Colorado Lottery has done a good job of providing funds for park and recreation projects in your community .....	4	3	2	1	0
d. The Colorado Lottery is an appropriate method for the state to raise revenues .....	4	3	2	1	0

7. Currently, Lottery profits are used for state parks, local parks, buying and preserving open space and wilderness areas, for wildlife resources, and addressing safety hazards and health concerns in public schools. Do you favor or not favor Lottery proceeds being used for each of these purposes? (*READ LIST*)

	<u>Favor</u>	<u>Not Favor</u>	<u>No Opinion</u>
a. State park and recreation projects.....	1	2	3
b. Local park and recreation projects.....	1	2	3
c. Buying and preserving open space and wilderness areas.....	1	2	3
d. Wildlife resources .....	1	2	3
e. Partially funding a program that addresses safety hazards and health concerns at existing public schools .....	1	2	3

8. The Colorado Lottery currently offers six types of games: the Instant Scratch game, Lotto, Cash 5, Powerball, Mega Millions and Pick 3. Do you think it is appropriate for the lottery to offer: (*READ LIST*)

	<u>Yes</u>	<u>No</u>	<u>Don't Know</u>
a. Instant scratch games .....	1	2	3
b. Lotto .....	1	2	3
c. Cash 5 .....	1	2	3
d. Powerball.....	1	2	3
e. Mega Millions.....	1	2	3
f. Pick 3.....	1	2	3

9. I will read you some statements about the Colorado Lottery. Please tell me if you **strongly agree, somewhat agree, somewhat disagree or strongly disagree** with each statement.

(ROTATE- EXCEPT A)

	<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>No Opinion</u>
a. It is appropriate for the Colorado Lottery to offer new and different games besides Scratch, Lotto, Cash 5, Powerball, Mega Millions or Pick 3 in order to generate more funds.....	4	3	2	1	0
b. You support the operation of a state run lottery in Colorado.....	4	3	2	1	0
c. The state is doing a good job of ensuring an honest lottery.....	4	3	2	1	0
d. Colorado Lottery officials are doing a good job of running the lottery .....	4	3	2	1	0
e. It is appropriate for the lottery to promote and advertise itself just like any other business would do.....	4	3	2	1	0
f. The Colorado Lottery promotes addiction to gambling .....	4	3	2	1	0
g. The lottery is primarily played by people in lower income groups ...	4	3	2	1	0



- h. The lottery encourages lower income people to waste money instead of taking care of their basic needs..... 4      3      2      1      0
- i. The lottery should spend more money on prizes for winners and less for public purposes ..... 4      3      2      1      0
- j. Addiction to gambling among Colorado residents is primarily due to the Colorado Lottery..... 4      3      2      1      0

10. Have you ever played one of the Colorado Lottery's games: Scratch, Lotto, Cash 5, Powerball, Mega Millions or Pick 3?

- Yes ..... 1    (*ASK Q.11*)
- No..... 2    (*SKIP TO Q.12*)
- Don't remember..... 3    (*SKIP TO Q.12*)

11. Have you played any of these Lottery games within the past 30 days? (*READ LIST*)

	<u>Yes</u>	<u>No</u>	<u>Don't Know</u>
a. Instant scratch games .....	1	2	3
b. Lotto .....	1	2	3
c. Cash 5 .....	1	2	3
d. Powerball.....	1	2	3
e. Mega Millions.....	1	2	3
f. Pick 3.....	1	2	3

12. Have you ever seen or heard any of the Colorado Lottery’s messages about playing responsibly or getting help for problem gambling?

Yes ..... 1  
 No..... 2  
 Don’t know ..... 3

12a. Have you ever seen or heard any of the Colorado Lottery’s messages about avoiding Lottery scams or criminal activities directed toward Lottery winners?

Yes ..... 1  
 No..... 2  
 Don’t know ..... 3

13. Within the past 12 months, have you seen or heard any of the Lottery’s advertising on radio, TV, the Internet, the newspaper, signs, billboards, brochures, social media or any other media sources?

Yes ..... 1 (GO TO Q.14)  
 No..... 2 (SKIP TO Q.16)  
 Don’t Know ..... 3 (SKIP TO Q.16)

14. Do you **strongly agree, somewhat agree, somewhat disagree or strongly disagree** with each of the following statements about the Colorado Lottery’s advertising. (READ & ROTATE)

	<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>No Opinion</u>
a. Overall, the Lottery’s advertising is done in good taste.....	4	3	2	1	0
b. The Lottery’s advertising creates unrealistic expectations.....	4	3	2	1	0
c. The Lottery’s advertising is entertaining.....	4	3	2	1	0

- d. The Lottery's advertising makes you feel good about playing the lottery ..... 4      3      2      1      0
- e. The Lottery's advertising gives you information about how the proceeds are used ..... 4      3      2      1      0
- f. The Lottery's advertising encourages people to waste their money ..... 4      3      2      1      0

15. Would you say that the amount of advertising done by the Colorado Lottery is **too much, about right** or **not enough**?

- Too much ..... 1
- About right..... 2
- Not enough..... 3
- Don't know..... 4

MY LAST QUESTIONS ARE ABOUT YOU AND YOUR FAMILY. WE NEED TO FIND OUT A LITTLE ABOUT YOU SO WE CAN GROUP THE DIFFERENT RESPONSES WE GET TO THE SURVEY. THIS INFORMATION WILL BE KEPT IN STRICT CONFIDENCE.

16. In what county do you live? \_\_\_\_\_

17. What was the last year of formal education that you have personally completed?

- Less than 12 years ..... 1
- High School graduate ..... 2
- Some college..... 3
- College graduate ..... 4
- Postgraduate degree ..... 5
- Refused ..... 6

18. Which of these categories best describes your ethnic origin?

*(READ LIST "A" THROUGH "E" - ONE RESPONSE ONLY – CHECK QUOTAS)*

- a. African American..... 1
- b. American Indian ..... 2
- c. Asian ..... 3
- d. Hispanic or Latino ..... 4
- e. White - Not Hispanic ..... 5
- f. Other (specify) \_\_\_\_\_ 6
- g. Refused..... 7

19. As I read the following list of income groups, please stop me when I reach the one that best represents your total annual household income before taxes.

*(READ LIST - EXCEPT "REFUSED")*

- Under \$15,000..... 1
- \$15,000 - \$24,999 ..... 2
- \$25,000 - \$34,999 ..... 3
- \$35,000 - \$49,999 ..... 4
- \$50,000 - \$74,999 ..... 5
- \$75,000 - \$99,999 ..... 6
- \$100,000 or more ..... 7
- Refused ..... 8

THANK YOU FOR YOUR HELP IN ANSWERING OUR QUESTIONS.

INTERVIEWER: PLEASE RECORD THE FOLLOWING AFTER YOU HAVE COMPLETED THE INTERVIEW

20. Gender: BY OBSERVATION

- Male..... 1
- Female ..... 2

**THAN YOU FOR YOUR HELP IN ANSWERING OUR QUESTIONS**