



Colorado Lottery Tracking Study Full Report

Wave 35

Field dates: April 6 – May 11, 2021



➤ **Leger is conducting a point-in-time tracking study for Colorado Lottery and Scientific Games:**

- Wave 9: September 20 – October 7, 2013
- Wave 10: January 29 – February 11, 2014
- Wave 11: May 16 – June 2, 2014
- Wave 12: August 7 – August 19, 2014
- Wave 13: December 16 – December 29, 2017
- Wave 14: March 6 – March 23, 2015
- Wave 15: June 18 – July 3, 2015
- Wave 16: September 8 – September 23, 2015
- Wave 17: December 7 – December 23, 2015
- Wave 18: April 18 – April 29, 2016
- Wave 19: August 18 – August 31, 2016
- Wave 19: August 18 – August 31, 2016
- Wave 20: October 17 – October 31, 2016
- Wave 21: January 17 – January 27, 2017
- Wave 22: June 5 – June 20, 2017
- Wave 23: October 2 – October 12, 2017
- Wave 24: January 15 – January 25, 2018
- Wave 25: April 23 – May 17, 2018
- Wave 26: August 20 – September 8, 2018
- Wave 27: December 3 – December 17, 2018
- Wave 28: March 11 – March 27, 2019
- Wave 29: May 27 – June 7, 2019
- Wave 30: November 4 – 12, 2019
- Wave 31: January 28 – February 9, 2020
- Wave 32: April 27 – May 10, 2020
- Wave 33: September 14 – October 6, 2020
- Wave 34: Dec 8, 2020 – Jan 2, 2021
- Wave 35: April 6 – May 11, 2021

➤ **Leger has been conducting this study with the following focal points:**

1. Data Continuity with historical Colorado Lottery tracking studies
2. Ensuring data collected online comports with previous RDD only studies
3. Managing sample to be reflective of overall Colorado population

➤ **There are two key goals for this Colorado Lottery Point-In-Time Tracking Study:**

1. To give the Lottery and Scientific Games accurate and relevant information, to enable both parties to make sound business decisions based upon market trends.
2. To enable the Lottery to use the new Tracking Data in conjunction with the historical information captured over the previous Telephone Tracking Study, and to make both the study and the data a seamless integration into the lottery's business plan, on a weekly, monthly and annual basis.

- **600 Colorado respondents** participated in a **20-minute online survey** in Wave 35.
- The respondents:
 - Must be older than 18 years of age
 - Must not have moral objections to Colorado running a state lottery
 - Must not work for an advertising agency, market research company, marketing consultant, any type of Lottery or a store that sells lottery tickets
- Margin of Error – Statistical Sample Accuracy at 90% confidence on 600 completes is +/- 3.4%.
- Quotas are set in place so that the proportions of the sample by demographics such as Gender, Age, Race/Ethnicity represent the state of Colorado (*see page 6 for sample frame*)

Sample Frame

- The sample size for the CO Lottery Tracking Study has typically ranged between 600-630 each wave.
- As with previous waves, the demographic composition of the sample closely represents the population of Colorado.

	W35 (n=600)	Colorado Population
○ Gender		
- Female	53%	51%
- Male	47%	49%
○ Age		
- 18-34	32%	31%
- 35-54	39%	40%
- 55+	29%	29%
○ Ethnicity		
- Caucasian	70%	69%
- Hispanic	20%	22%
- African American	4%	4%
- Asian	3%	3%
- Other	3%	2%



Key Findings & Recommendations

Key Findings (1)

Metrics Added in W33:

- More than two in five Coloradans (44%) cite appeal of **more cashless/contactless options** to purchase Lottery games due to the COVID-19 pandemic, **down significantly** from last wave, driven in part by a **significant decrease** for those saying, '*very appealing*'. Perhaps a reflection of people becoming more comfortable using the clerk again, as COVID cases decline.
- Once again, more than two in five (44%) residents recall how Colorado Lottery proceeds are spent. The top channel for recollection is the **Colorado Lottery website** (56%).
- Comparable to the two previous waves, 42% of residents say they would be **likely to buy or play Colorado Lottery game online**, if offered by the Lottery.

COVID-19 Pandemic:

- During the pandemic, nearly half of past year lottery players (48%) bought lottery tickets from the **store clerk**, a **significant decline** from last wave, while more than one in five (23%) purchasing from **vending machines**, stable since W33.
- One-third of residents (32%) are spending '**more**' or '**at their usual level**' on lottery, stable from W34, although **significantly fewer** say they are **spending more on lottery than usual**.
- Half of total respondents (49%) are concerned about the state of Colorado not receiving funding for outdoor projects during the pandemic, down 5% from W34, driven by a **significant dip** among those saying, "**very concerned**" (a **positive** sign).
- **Significantly more** Coloradans (31%) are **spending more time in parks and open spaces** compared to W34.
- In W35, **significantly fewer** residents feel the Coronavirus is **serious** (67%) to them and their family's wellbeing and are afraid that someone in their HH **will contract the virus** (46%), while **significantly more** feel **safe** (60%) going out in public, all **positive** indications.

Key Findings (2)

Responsible Gambling:

- More than two in five of residents (44%) cite recall of the **Colorado Lottery's Play Responsibly message**, an **upward trend** since W33.
- 38% of Coloradans state awareness or usage of the gambling resource **"Play Responsibly"**. This is followed by **"Know Your Limits"** (12%). Further, 63% of those aware of the **"Know Your Limits"** message say they saw the message on the CO Lottery website.
- In W35, 45% of residents agree that the **"Lottery promotes responsible gambling"**, generally trending up since Wave 31.

Advertising Recall:

- For aided game advertising awareness, **Powerball** (30%, -6%) keeps the lead, despite **dipping significantly** since W34. Mega Millions (27%, -3%), Scratch games (27%, +2%), CO Lotto+ (21%) and Lucky for Life (17%, +2%) follow next.
- **"Casino Nights"** (7%) garners the highest unaided ad Scratch game awareness in W35, followed by **"Instant / Scratch games (unspecified)"** (6%), **"7-11-21"** (6%), **"Crossword (unspecified)"** (5%) and **"Mega Money"** (4%).
- Once prompted, **\$10 Willy Wonka Golden Ticket** (21%, -4% from last wave) is recalled the most, followed by **\$50 \$3m Mega Money** (17%, +3%), **\$5 Power Shot** (15%, +5%) and **\$1 \$10k Casino Nights** (15%).

Key Findings (3)

Playership and Buying Behavior

- Vending machines play is up significantly again in W35. **Significantly more Coloradoans** say they are **buying more lottery from VMs and less from the clerk**. The big shift in W35 means a **majority of players** used the vending machines for a Lottery purchase in W35 (**52% net**).
- Once again, two in five players (39%, -1%) cite playing any CO Lottery game in the **past week or month**. In addition, **past 6-month** play (but not in the past week or month) has **significantly grown**, while **past year** playership has **significantly declined** since last wave.
- Purchase at **liquor stores** has **declined significantly** from last wave (from 16% to 8%).
- Two in five past year players (39%) cite recall of **in-store video monitors**, a **significant decrease** this wave, returning to the portion seen in W33.
- 8% of Mega Millions players are spending more on the game compared to a year ago, showing a **significant decrease** since last wave.

Colorado Lotto+ Game:

- Nearly three in five of CO Lotto+ players (56%) mention playing the game in the **past month**, a 5% marginal dip since W34, but a higher portion compared to W31 - W33.
- In W35, fewer Colorado Lotto+ players (14%, -8%) say they are spending more on Colorado Lotto+ or Lotto compared to one year ago, returning to portions similar in W31 and W33.
- 36% of players mention **seeing ads** for the CO Lotto+ game in the past month this wave, a 10% directional decrease from the preceding wave.
- 58% of CO Lotto+ players say they have played the bonus draw add-on feature called **PLUS** for an extra \$1 in W34, up 4% from W34, reaching a 5-wave high.
- **Ease to understand and play** the game continues to trend upward since W31 (56% to 71%).

Key Findings (4)

Scratch Games:

- Nearly one in ten of Scratch game players (8%) indicate they are spending more on the game compared to a year ago in W35, mostly stable since W32. Furthermore, fewer players (24%, -7%) state they are spending less.
- The main reason for spending less in W35 is “**COVID-19**,” at nearly a third (32%), rising directionally by 7% from last wave. “**Don’t have the money**” has **dipped significantly** this wave, a **positive** indication.
- Average Scratch spend **per play** (\$19) and **per month** (\$43, a **significant lift**) both grew this wave perhaps due in part to the **\$50 ‘\$3m Mega Money’** tickets.
- Nearly three-quarters of Scratch players (73%) aware of vending machines have **purchased tickets from VMs** in W35, a 5% increase this wave.

Recommendations

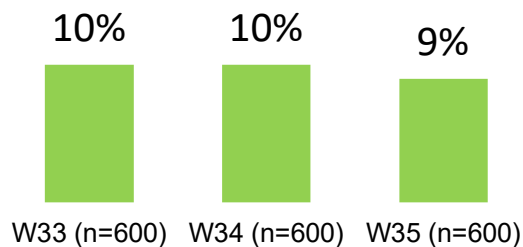
- For the third straight wave, more than two in five Coloradoans recall **how Colorado Lottery proceeds are spent**. The CO Lottery website dominates channel recall, with all other channels below 13%. Perhaps an emphasis with other channels such as TV and/or online (Facebook, Instagram, Twitter and YouTube) could be used.
- Comparable to the previous waves, more than two in five residents mention they would **likely buy or play Colorado Lottery game online**, if offered by the Lottery. More than a third of past year Lottery players (35%) say their **Lottery spend would increase** if they could purchase and/or play Colorado Lottery games online. Providing online lottery games would resonate with residents and players.
- **Vending machine use hit over 50% for the first time ever in W35. Can we ensure these machines are fully stocked on a regular basis, with the optimal range of games?**
- **‘Don’t know about new games’ spiked (more than doubling to 12%)** in W35 among ‘ever played Lottery’, so perhaps the Lottery could refocus on that area for Scratch ticket and other launches.
- The main methods to encourage ‘non-recommenders’ to endorse the Colorado Lottery are **winning / more winners**” and **“better odds / chances to win”**. Secondary methods include **advertising clearly stating where the money goes, incentives to recommend (cash, giveaways)** and **better / more prizes**. Can any of these approaches be implemented by the CO Lottery?



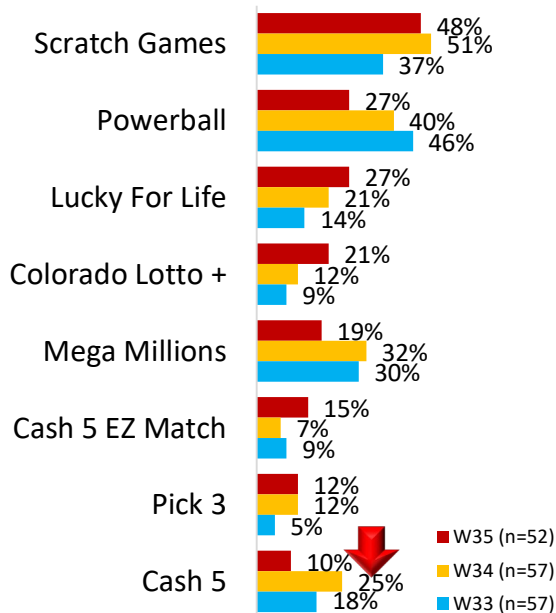
Metrics Added in W33

- In W35, 9% of residents say they played any CO Lottery game for the first time during the pandemic, mostly stable.
- **Scratchers** (48%) continue to be the top game played; Cash 5 reports a **significant dip** since last wave.
- Satisfaction with the games played has **declined significantly** in W35, returning to the level seen in W33.

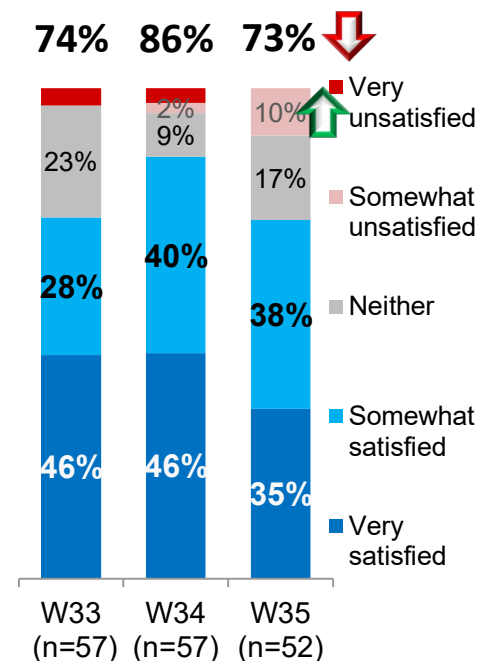
Played a game for the first-time during Pandemic [Total]



Games played for first time during Pandemic [First Time Game Pandemic Players]



Satisfaction with first time game(s) played [First Time Game Pandemic Players]



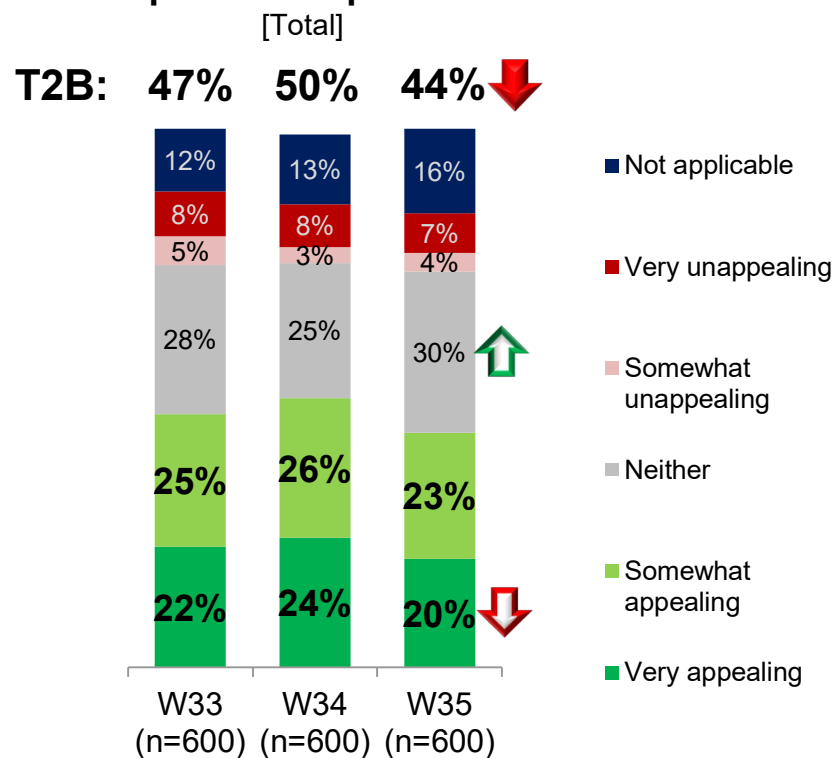
CV6a. Did you play any Colorado Lottery game for the first time during the COVID-19 pandemic?

CV6b. Which Colorado Lottery game(s) did you play for the first time during the COVID-19 pandemic?

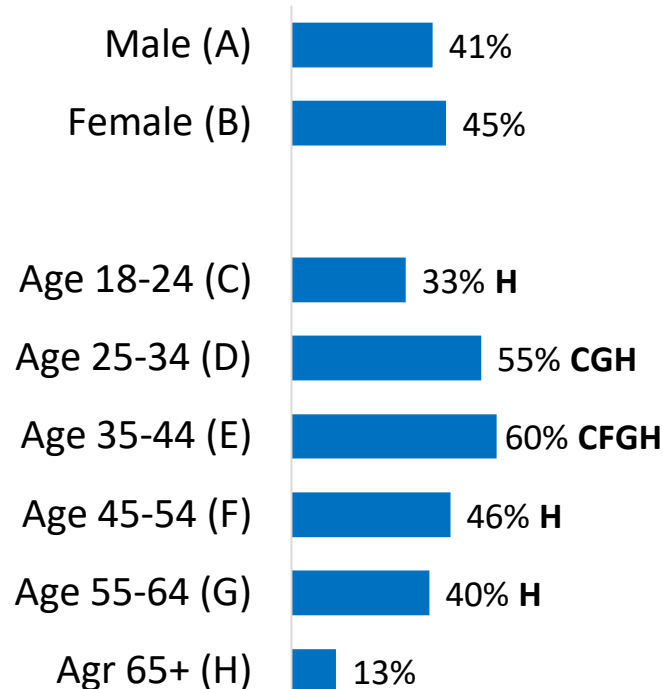
CV6c. How satisfied were you with the game(s) you played for the first time during the COVID-19 pandemic?

- 44% of Coloradans cite appeal of **more cashless/contactless options** to purchase Lottery games due to the COVID-19 pandemic, **down significantly** from last wave, driven in part by a **significant decrease** for those saying, 'very appealing'. This appeal skews age 25-44, as around three in five of those age 25-34 (55%) and age 35-44 (60%) feel this would be appealing, generally **significantly higher** than all other age groups.

Appeal of more cashless/contactless purchase options



Appeal (T2B%): W35



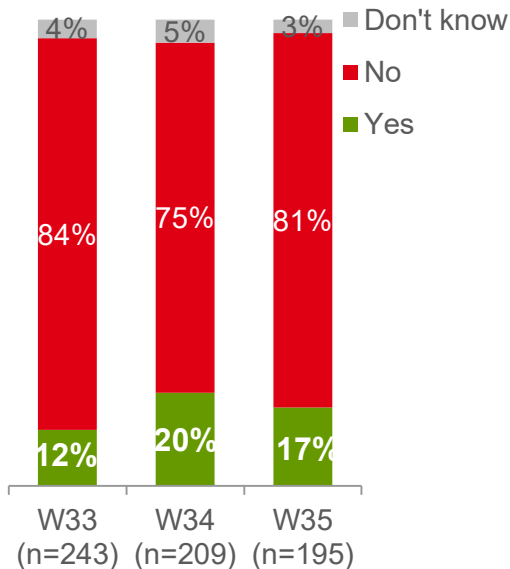
W33_3. How appealing would it be to have more cashless/contactless options (such as credit cards, debit cards, Apple pay, Google pay, etc.) to purchase lottery games due to the COVID-19 pandemic?

Note: Capital letter indicates significantly higher/lower at 95% confidence level between groups

- About one in six past year Powerball players (17%) cite awareness that the starting PB jackpot has been lowered due to the COVID-19 pandemic, a 3% decrease in W35.
- Among those aware, 18% mention their PB spend has **increased**, down marginally (-4%) from last wave.
- Once again, two-thirds say they will continue to play at the same level even if the jackpot is returned to its regular level.

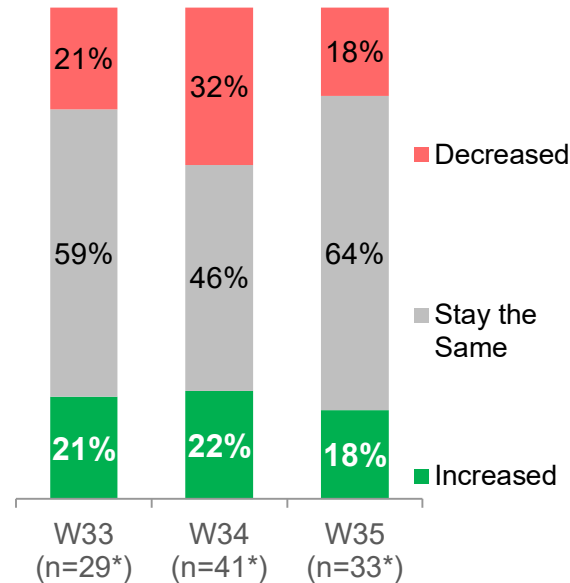
Aware of lowered starting Powerball jackpot

[Past year PB player]



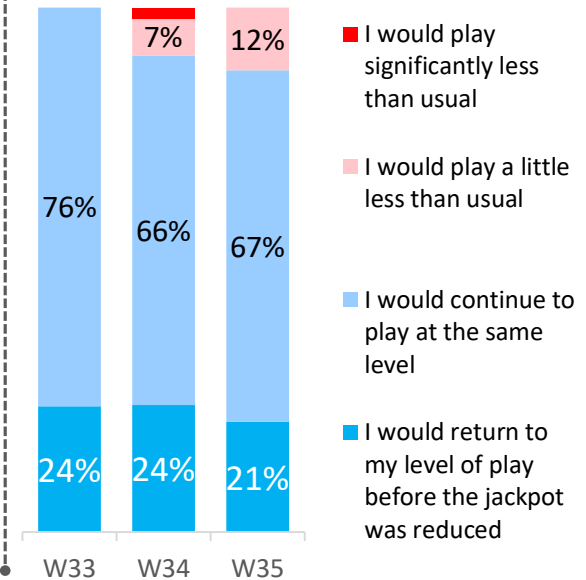
Change in Powerball play based on lowered starting jackpot

[Those aware of lowered starting jackpot]



COVID-19 affect on spend

[Those aware of lowered starting jackpot]



Q37A. Are you aware that the starting jackpot for Powerball has been lowered due to the COVID-19 pandemic? (n=29*) (n=41*) (n=33*)

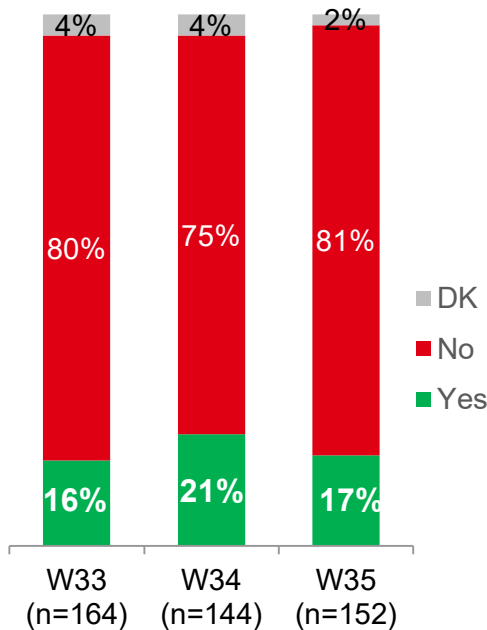
Q37B. Has your Powerball play increased, decreased, or stayed the same based on the lowered starting jackpot?

Q37C. If the starting jackpot returns to its regular level, how would that affect your play of the Powerball game?

- Retention that the starting Mega Millions jackpot (17%) has been lowered due to the pandemic is the same as PB, decreasing 4% in W35.
- Among those aware, 12% mention their MM spend has **increased**, a decline from the prior wave.
- 73% indicate they will continue to play at the same level even if the jackpot is returned to its regular level, a 16% boost since W34.

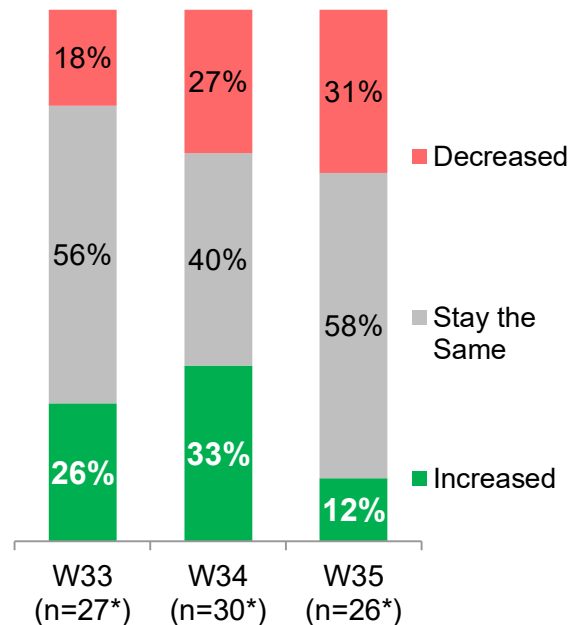
Aware of lowered starting Mega Millions jackpot

[Past year MM players]



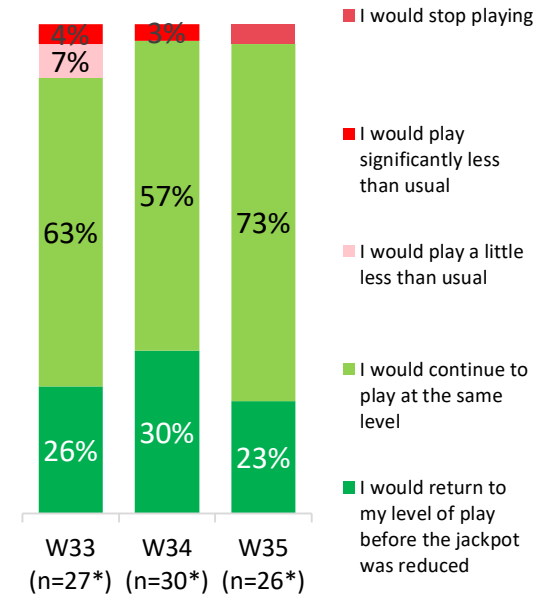
Change in Mega Millions play based on lowered starting jackpot

[Those aware of lowered starting jackpot]



COVID-19 affect on spend

[Those aware of lowered starting jackpot, n=27*]

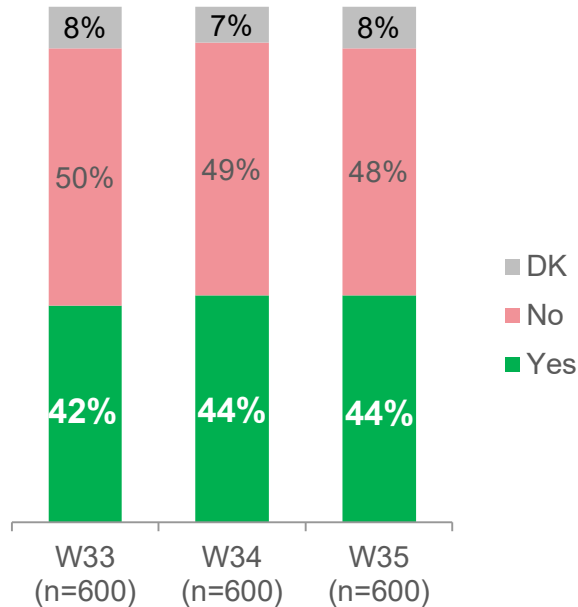


Q48B_1. Are you aware that the starting jackpot for Mega Millions has been lowered due to the COVID-19 pandemic?
 Q48B_2. Has your Mega Millions play increased, decreased or stayed the same based on the lowered starting jackpot?
 Q48B_3. If the starting jackpot returns to its regular level, how would that affect your play of the Mega Millions game?

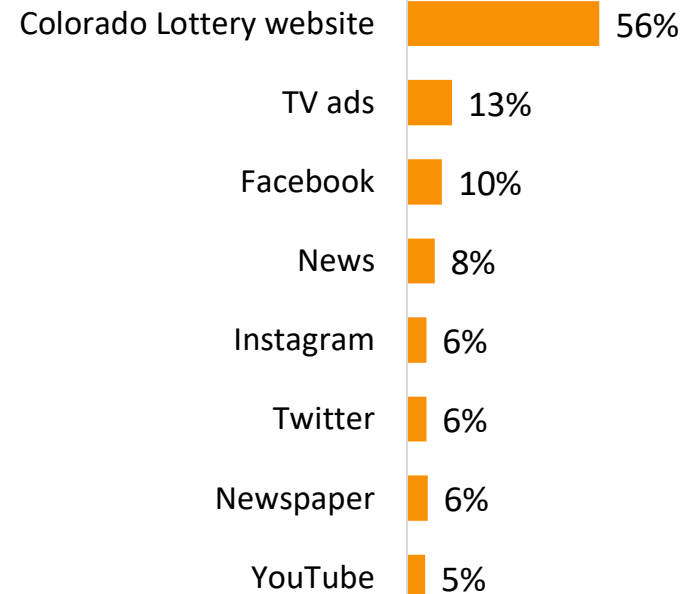
*Low base size

- Once again, more than two in five (44%) residents recall how Colorado Lottery proceeds are spent.
- The top channel for recollection is the **Colorado Lottery website** (56%).

Aware of how Colorado Lottery proceeds are spent
[Total]



Channel Recall
[Aware, n=266]



W33_1. Are you aware of how Colorado Lottery proceeds are spent?

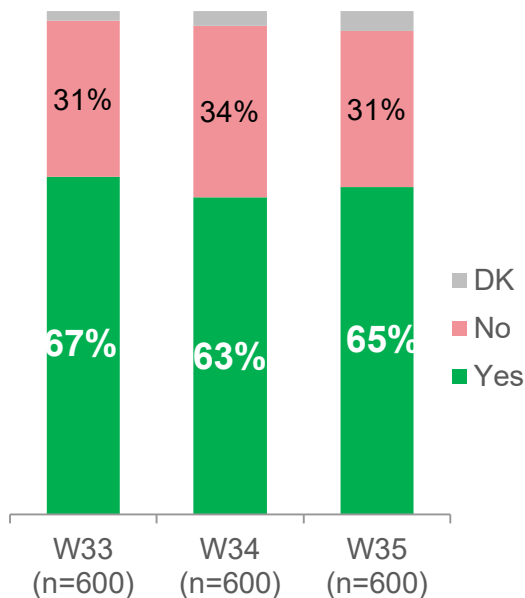
W35_1: Where did you learn what Colorado Lottery proceeds fund? **[Added in W35]**

*Low base size

- Consistent with the previous 2 waves, 65% of Coloradoans say they are aware that Colorado has legal sports betting in W35.
- 18% of those aware say they have placed a bet since sports betting, a 3% dip from last wave.

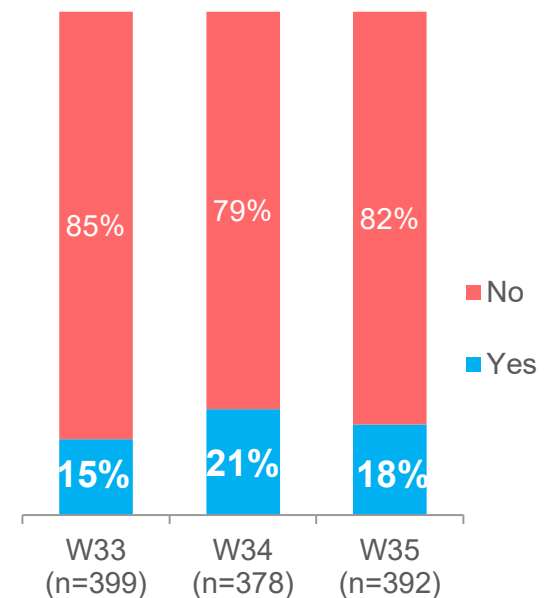
Legal sports betting awareness

[Total]



Placed sports bet

[Aware of legalized betting]



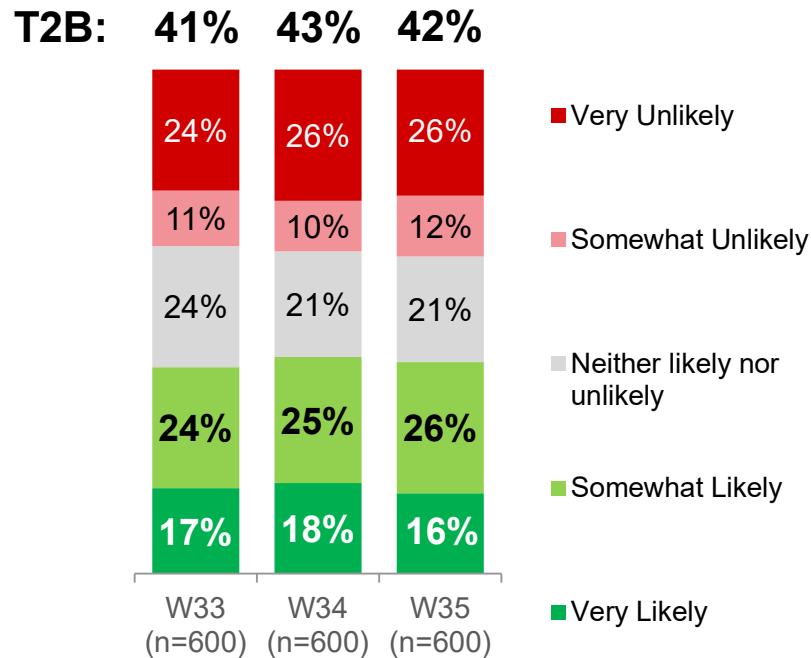
W33_4. Were you aware that Colorado now has legal sports betting?

W33_5. Have you placed a bet on any sports in Colorado since it became legal?

- Comparable to the previous waves, more than two in five residents (42%) mention they would be **likely to buy or play Colorado Lottery game online**, if offered by the Lottery.
- 35% of past year Lottery players say their **Lottery spend would increase** if they could purchase and/or play Colorado Lottery games online, down 4% from W34.

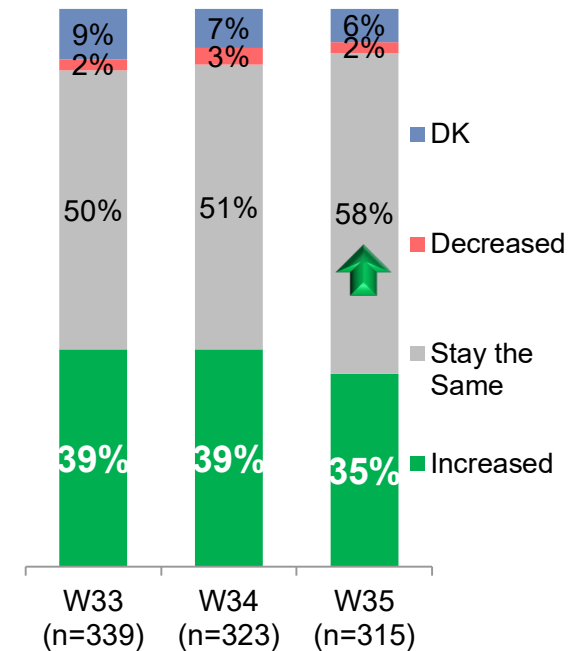
Likelihood to play games online

[Total]



Change in purchase based on online play

[Past year players, n=339]



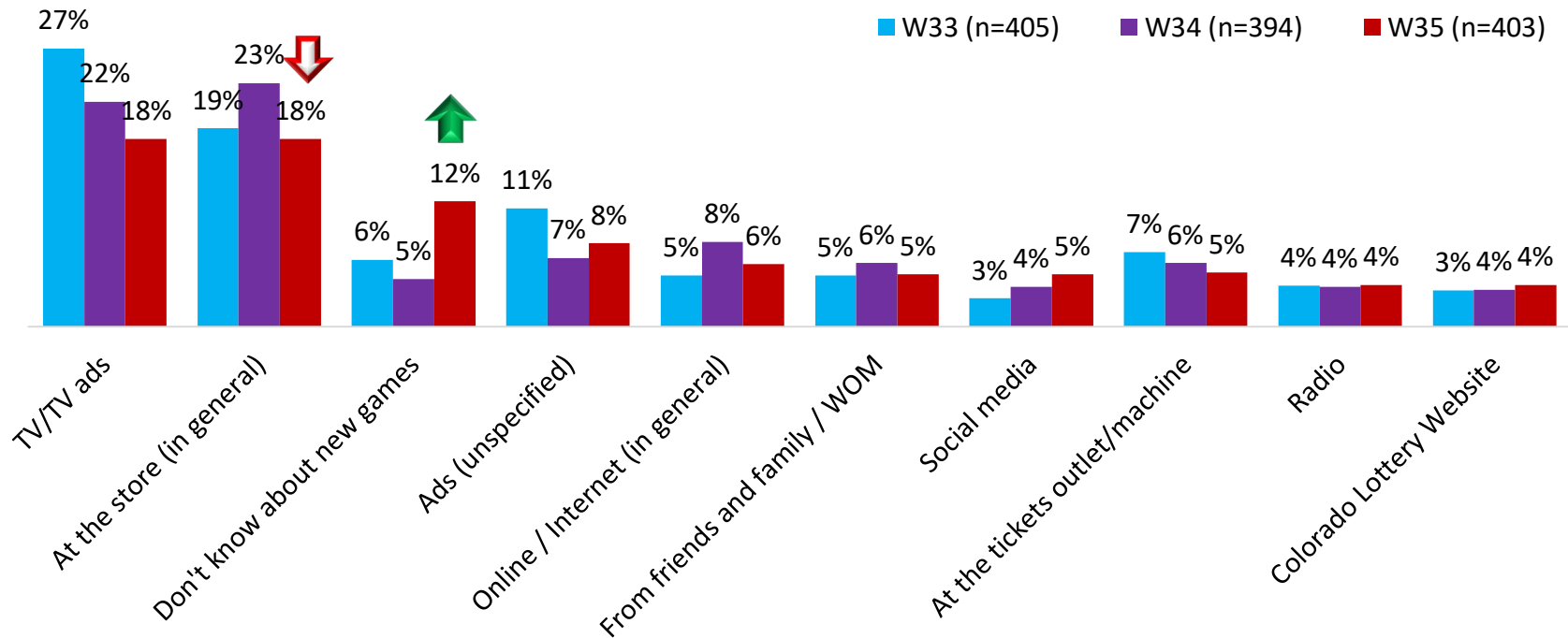
W33_8. How likely would you be to buy or play Colorado Lottery games online (if offered by the Colorado Lottery)?

W33_9. If you could purchase and/or play Colorado Lottery games online, do you think your Lottery spend would increase, decrease or stay the same?

- Top methods for finding out about new games continues to be **TV / TV ads** (18%, a downward trend since W33) and **at the store** (18%, a **significant decline** since W34).
- With a **significant increase** this wave, 12% of players mention they “**don’t know about new games**”, indicating educational opportunities exist.

Method for finding out about new games

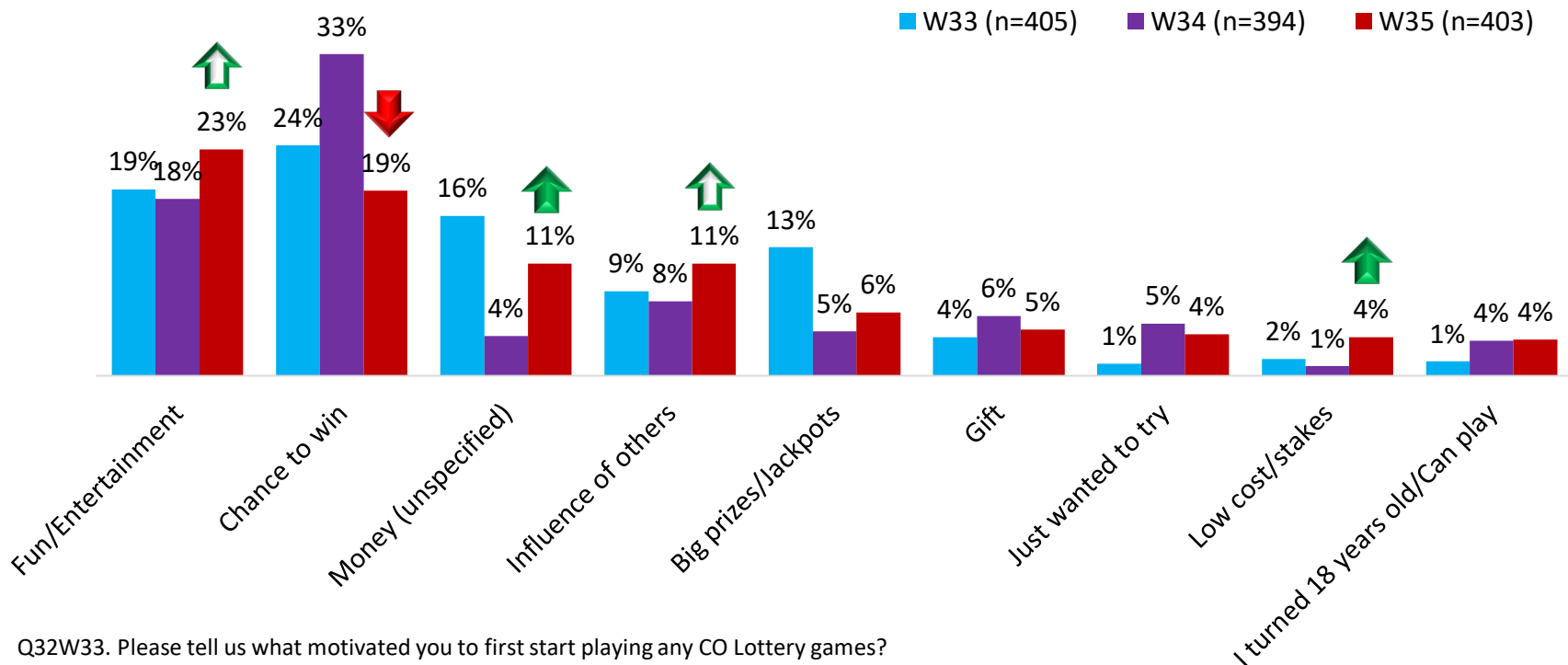
[Ever played]



W33_2. How do you typically find out about new games introduced in the market?

- With a **significant lift** in W35, “**Fun/Entertainment**” (23%) is the top motivation to first start playing CO Lottery games.
- “**Chance to win**” (19%, a **significant decline**), “**money**” (11%, a **significant boost**) and “**influence of others**” (11%, a **significant improvement**) follow next as motivations.

Motivation to first start playing [Ever played]

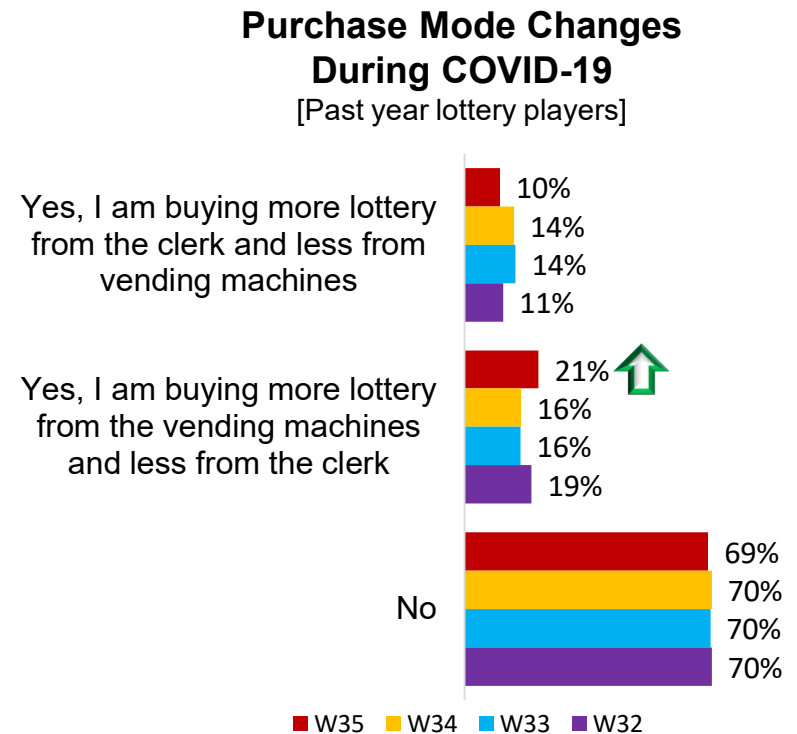
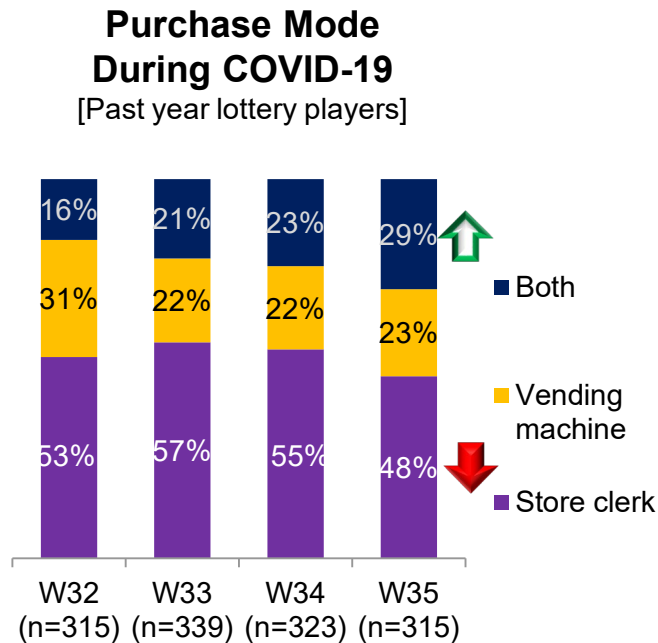


Q32W33. Please tell us what motivated you to first start playing any CO Lottery games?



Metrics Added in W32

- The big shift in W35 is players using **both** the Vending Machine and Store Clerk to play, up significantly from the previous wave (up from 23% to 29%), the highest recorded level of this. More than one in five (23%) purchasing from **vending machines**, stable since W33, which means **a majority of players** used the vending machines in W35.
- For the fourth consecutive wave, three in ten players (31% in W35) mention they have changed the way they purchase lottery tickets during the COVID-19 crisis. **Significantly more** say they are **buying more lottery from VMs and less from the clerk**.



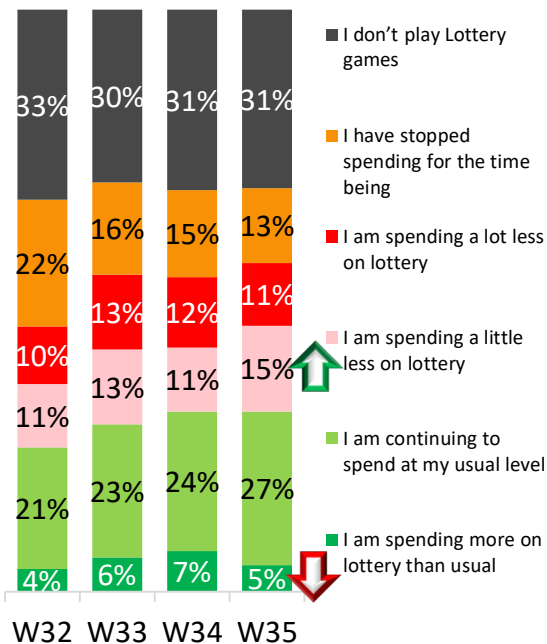
CV3. During the COVID-19 crisis, have you bought lottery tickets from the store clerk, the vending machine or both at your regular store?

CV4. During the COVID-19 crisis, has the mode by which you purchase lottery tickets changed?

- In W35, 32% of residents are spending 'more' or 'at their usual level' on lottery, stable from W34, although **significantly fewer** say they are **spending more on lottery than usual**.
- The main reasons for spending less or stopping are "current financial situation has been impacted" (41%, a **significant decline** from last wave) or 'not going to the store as frequently' (41%, a downward trend since W32).

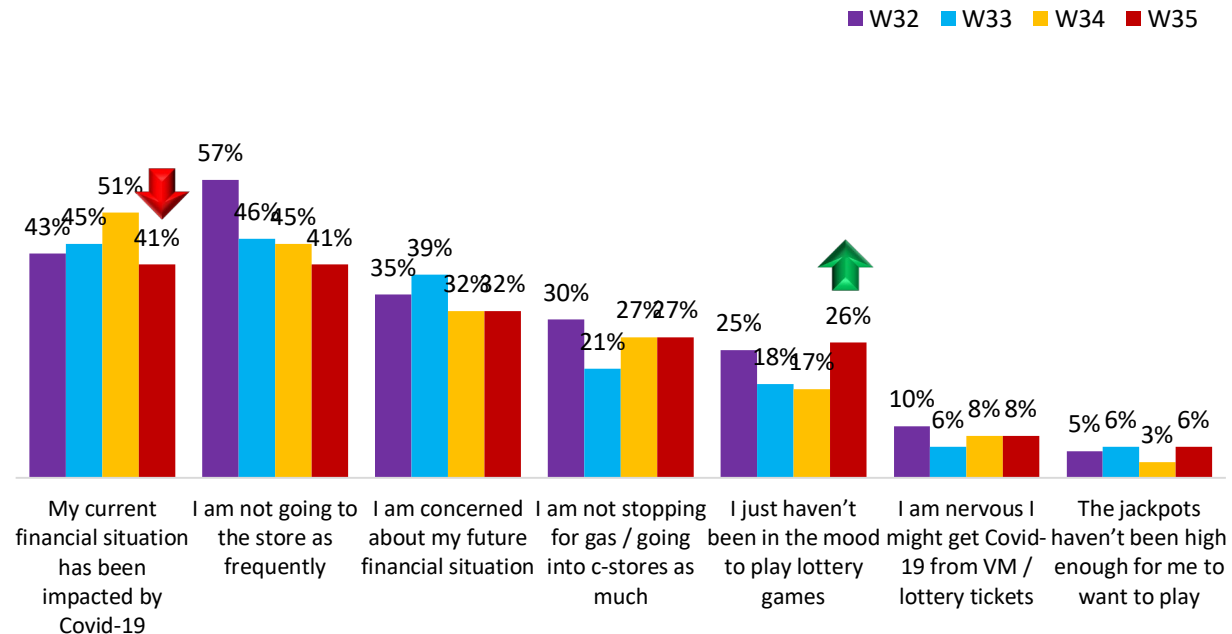
COVID-19 Affect on Lottery Spend

[Total, n=600]



Reasons for Decline in Lottery Purchase

[Spending less or stopped, W32 n=253, W33 n=248, W34 n=226, W35 n=227]



CV5. How is the current Coronavirus situation affecting your spending on lottery?

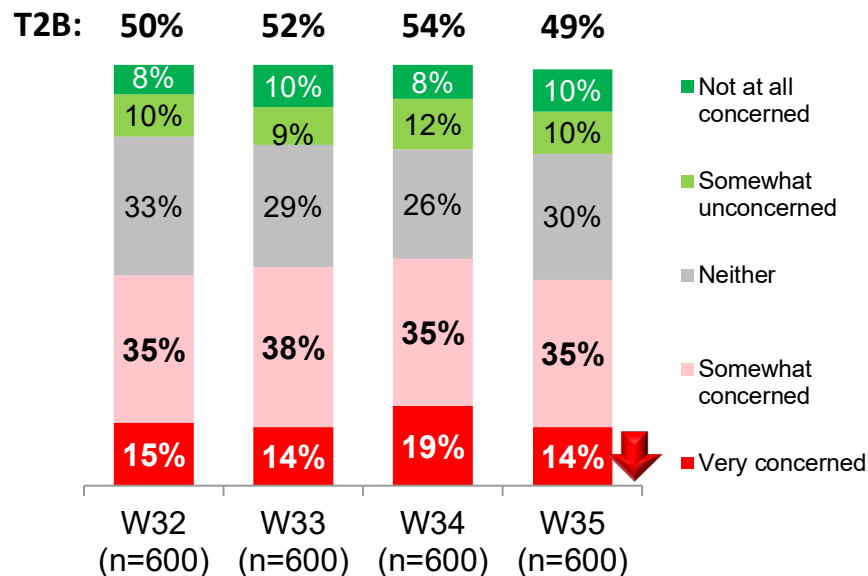
CV6. Which of the following are reasons your lottery purchases decreased?

Concern of Allocation of Funds and Affect on Lottery Spend

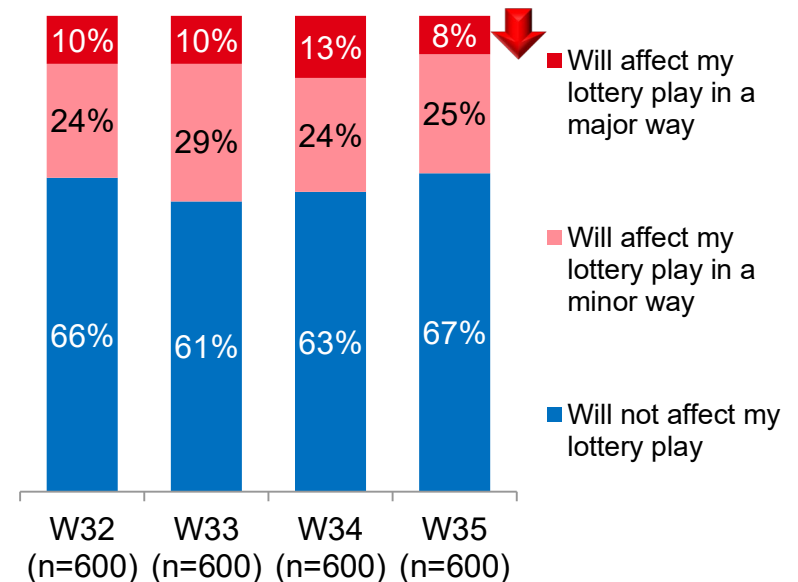
New in W32

- 49% of residents are concerned about the state of Colorado not receiving funding for outdoor projects during the pandemic, down 5% from W34, driven by a **significant dip** among those saying, “**very concerned**” (a positive sign).
- Two in three Coloradans say their lottery spend will not be affected even though proceeds toward helping protect and enhance parks/recreation may decline (an upward trend since W33). In addition, **significantly fewer** this wave say it will affect their spend in a major way (a positive indication).

Concern About CO Receiving Funds During COVID-19



Affect on Spending



CV7. On a scale from 1 to 5, where 1 is not at all concerned and 5 is very concerned, how **concerned** are you about the state of Colorado not receiving funding for outdoor projects such as parks and recreation, wildlife, and open spaces. during the Coronavirus pandemic

CV8. Proceeds from the Colorado Lottery go towards helping protect and enhance parks, wildlife, recreation, and open space in Colorado. A decrease in lottery sales may have a direct effect on the Colorado parks environment. Knowing this, how will it affect how you play the Lottery in the future?

- Weekly store visitation since the COVID-19 pandemic has trended up since W32 from 42% to 58%, suggesting residents are heading out to stores more often.
- This portion (58%) is still **significantly lower** than weekly visitations prior to COVID19 (79%).

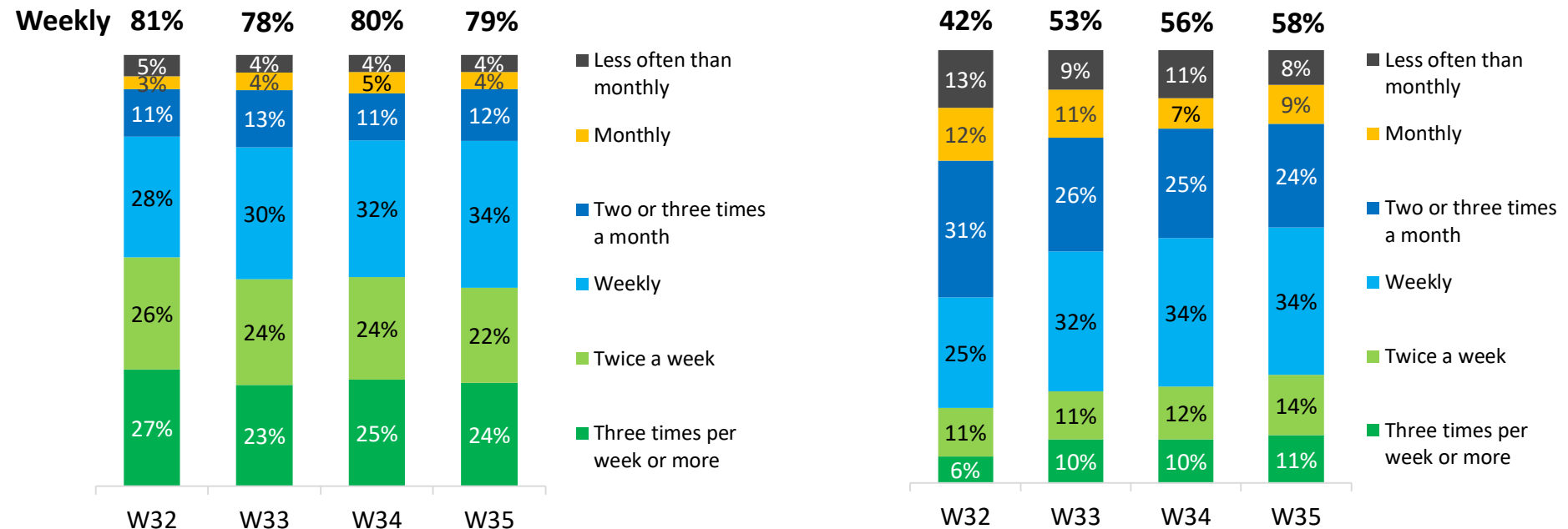
Store Visitation PRIOR to COVID-19

[Total, n=600]



Store Visitation SINCE COVID-19

[Total, n=600]



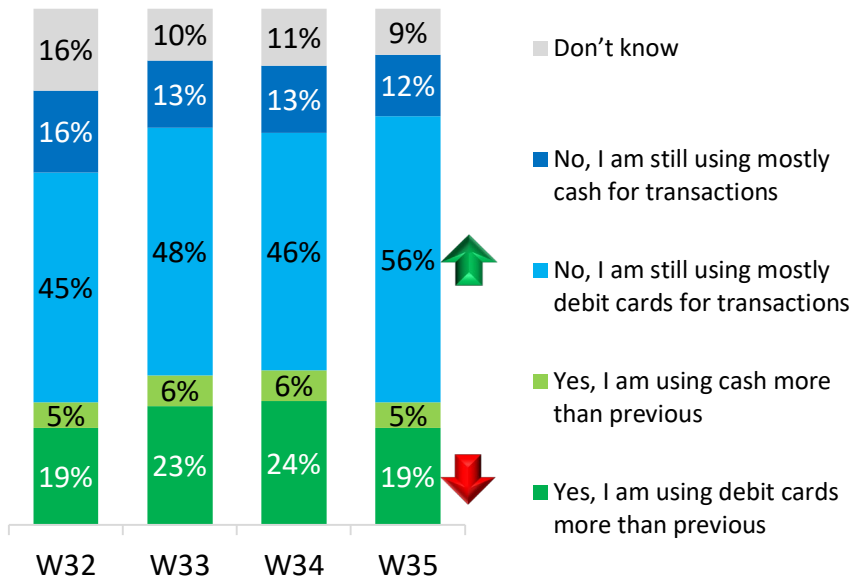
CV9. How often did you go to the store **prior** to the COVID-19 pandemic?

CV10. How often are you going to the store **since** the COVID-19 pandemic?

- In W35, 19% of Coloradoans mention using **debit cards more than previously** to make purchases in stores, a **significant dip** this wave (and returning to the level seen in W32). Additionally, **significantly more** are **still using mostly debit cards**.
- Once again, two in five residents have changed their shopping behavior by *making fewer trips to the store*. Further, **significantly more** say their *shopping activities have not changed* due to the pandemic.

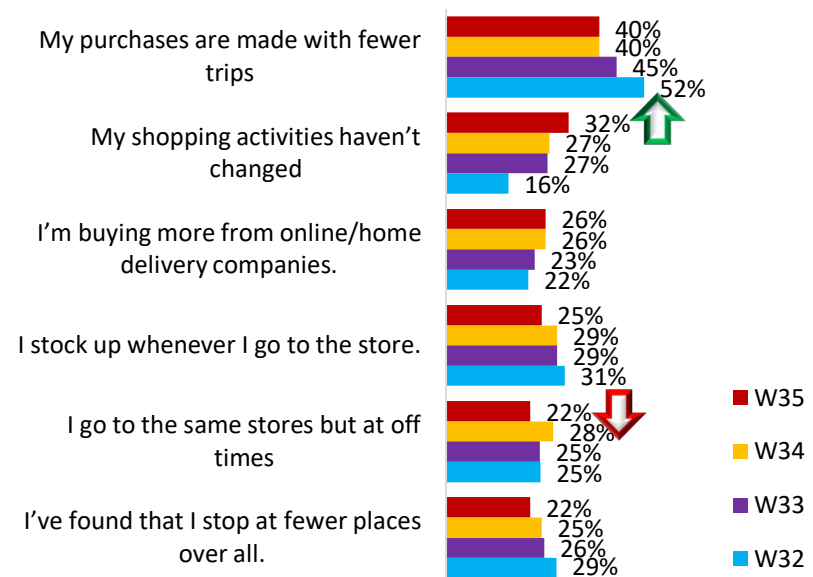
Changed the Method for Making Purchase During COVID-19

[Total, n=600]



Shopping Behavior Changed During COVID-19

[Total, n=600]



CV11. During the Coronavirus pandemic, have you changed the way you are making purchases in store?

CV16. Has the recent COVID-19 pandemic (coronavirus) affected your shopping activities? (What have you changed because of this virus?)

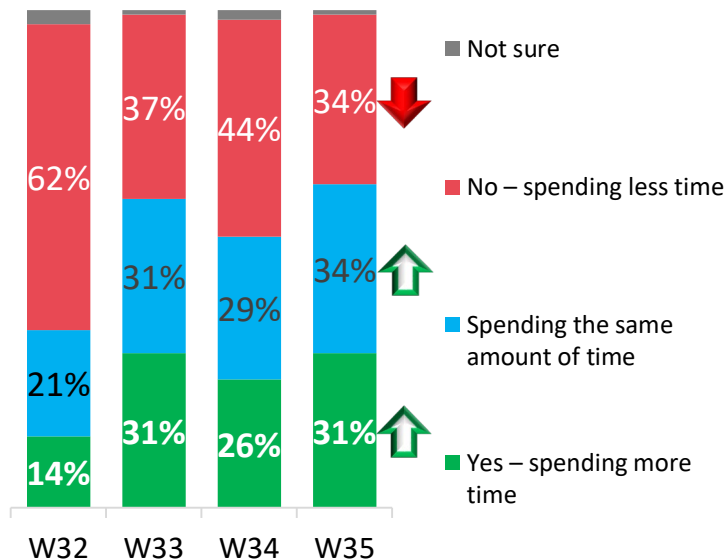
Spending Time in Parks; Appropriateness of Advertising

New in W32

- **Significantly more** Coloradans (31%) are spending more time in parks and open spaces compared to last wave. In conjunction, **significantly fewer** are spending less time (34%) since W34.
- 44% of residents feel it is appropriate for the CO Lottery to advertise games or jackpots during the COVID-19 pandemic, a 3% boost in W35, driven in part by a **significant increase** for “*somewhat appropriate*”.

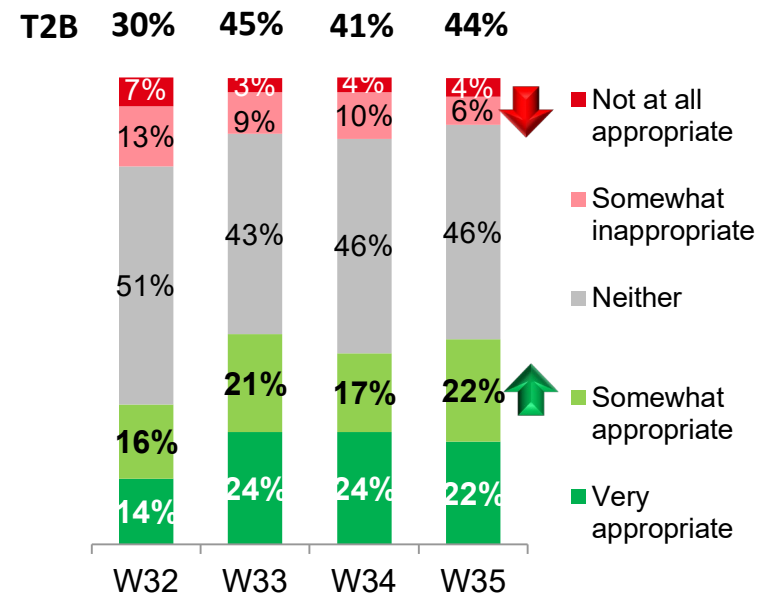
Spending Time in Parks/Open Space During COVID-19

[Total, n=600]



Appropriateness of Advertising During COVID-19

[Total, n=600]

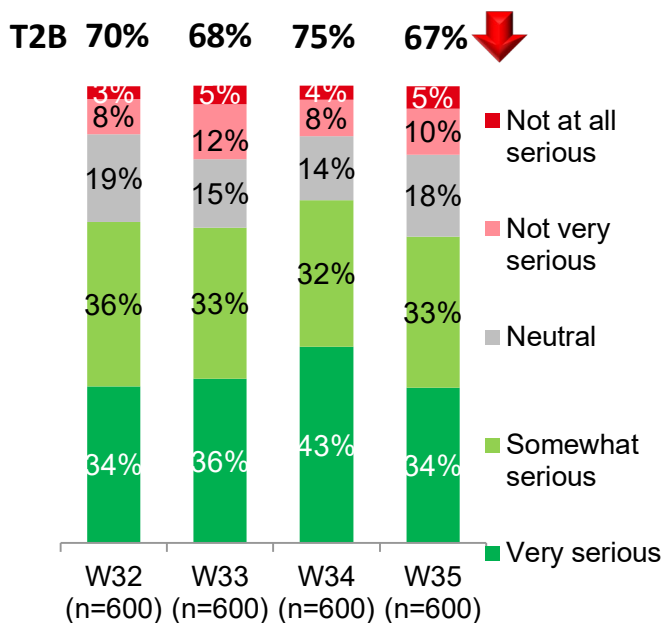


CV1. Have you spent more time in parks and open spaces during the Coronavirus pandemic?

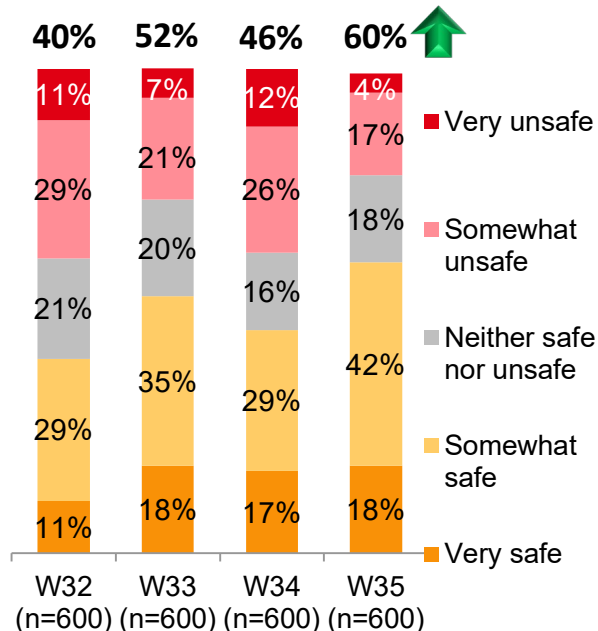
CV2. On a scale from 1 to 5, where 1 is not at all appropriate and 5 is very appropriate, how **appropriate** is it for the Colorado Lottery to advertise games or jackpots during the Coronavirus pandemic?

- In W35, **significantly fewer** residents feel the Coronavirus is **serious** (67%) to them and their family's wellbeing, while **significantly more** feel **safe** (60%) going out in public, both positive indications.
- Nearly half of Coloradoans (46%) are afraid that someone in their household will contract Coronavirus, **down significant** this wave, and another positive sign.

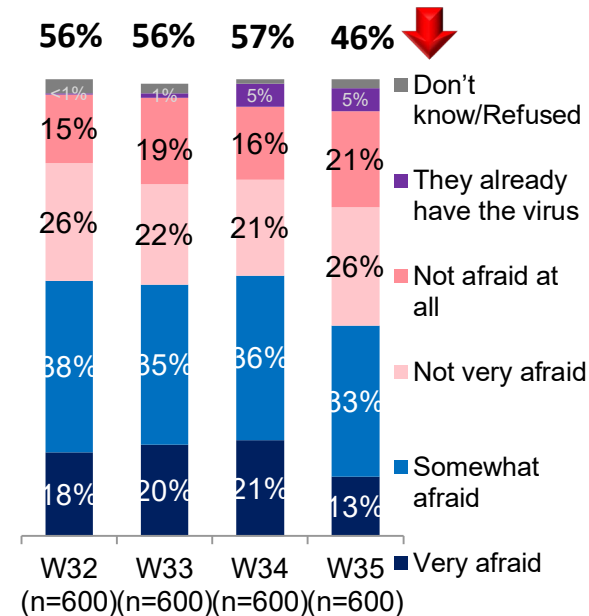
Seriousness of Coronavirus to Family's Wellbeing



Safety Level of Going Outside



Fear of Someone in HH Contracting Coronavirus

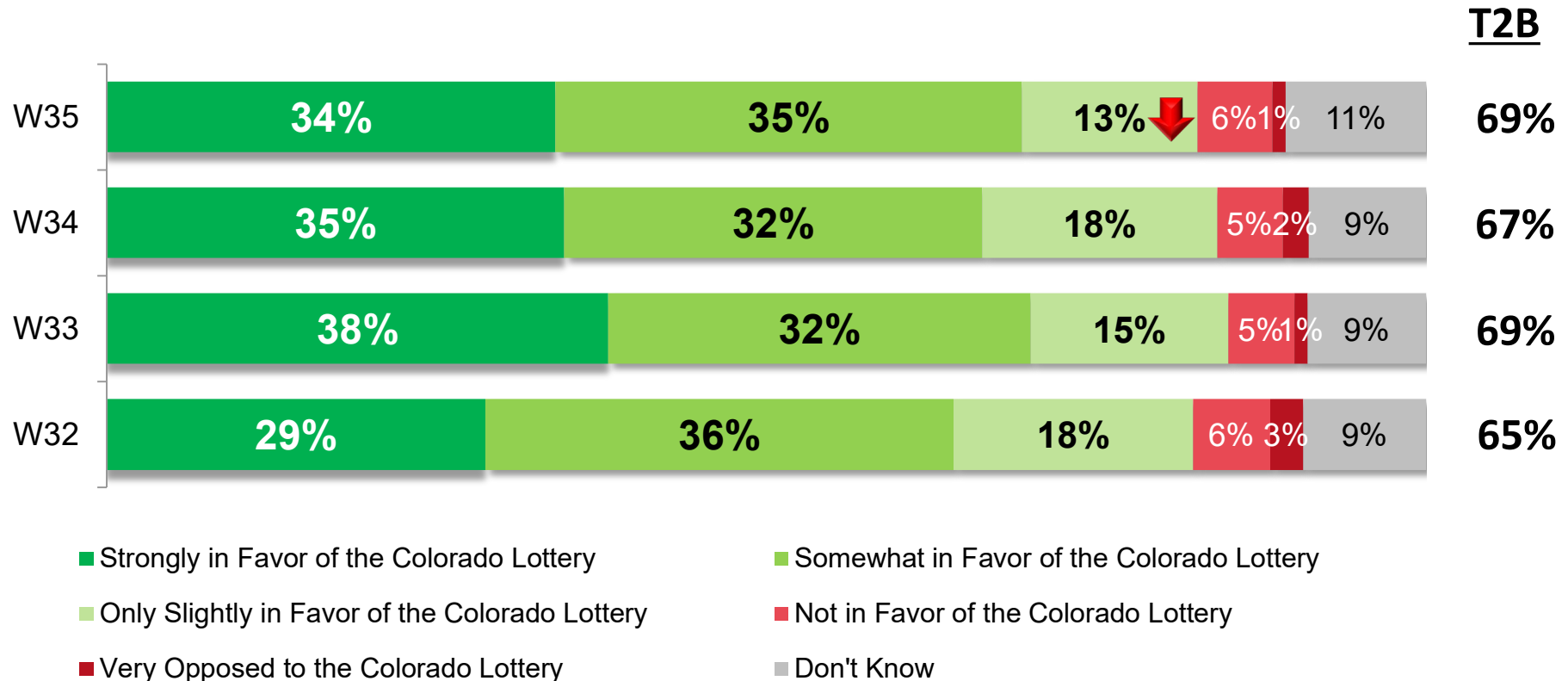


CV19. How serious do you feel the Coronavirus is to you and your family's wellbeing?

CV20. On a scale from 1 to 5, where 5 is very safe and 1 is very unsafe, how safe do you feel going out in public?

CV21. Are you afraid that someone in your household will contract the COVID-19 (Coronavirus)?

- Once again, about two in three residents (69%) are **strongly or somewhat in favor** of the CO Lottery, mostly consistent over the past 4 waves.

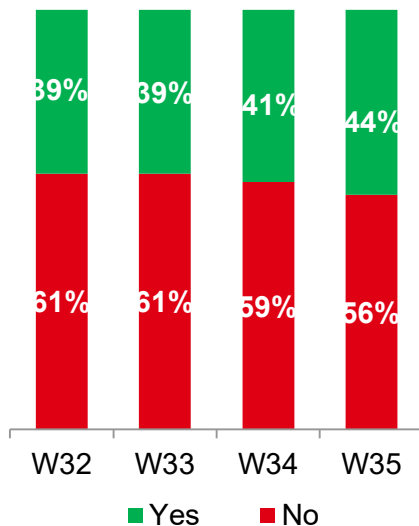


Q57W32. In general, would you say you are? (Total, n=600)

- 44% of total cite recall of the Colorado Lottery's Play Responsibly message, an upward trend since W33.
- The top channels for recall are **posters** (32%, a **significant dip** this wave), **coloradolottery.com** (31%), **video monitors** at retail (29%) and brochures at retail (29%, a **significant lift**). **Facebook** (14%) shows a **significant decline** this wave.
- **Gamblersanonymous.org** (31%) and **coloradolottery.com** (27%) continue as the main problem gambling resources recalled.

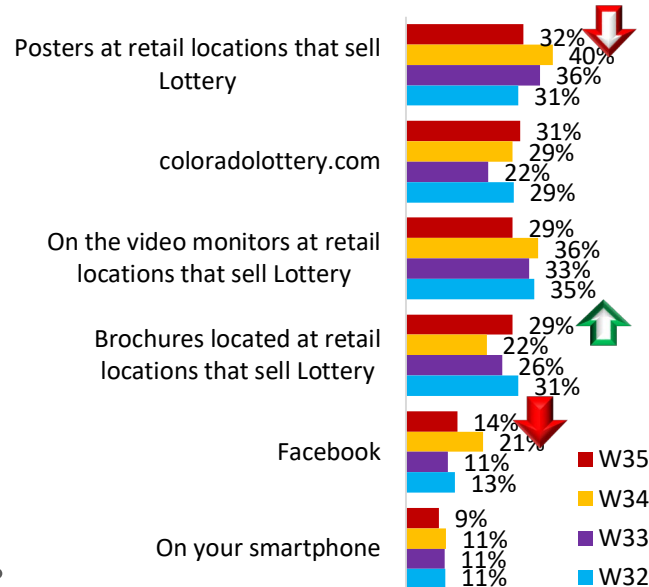
Message Awareness

[Total, n=600]



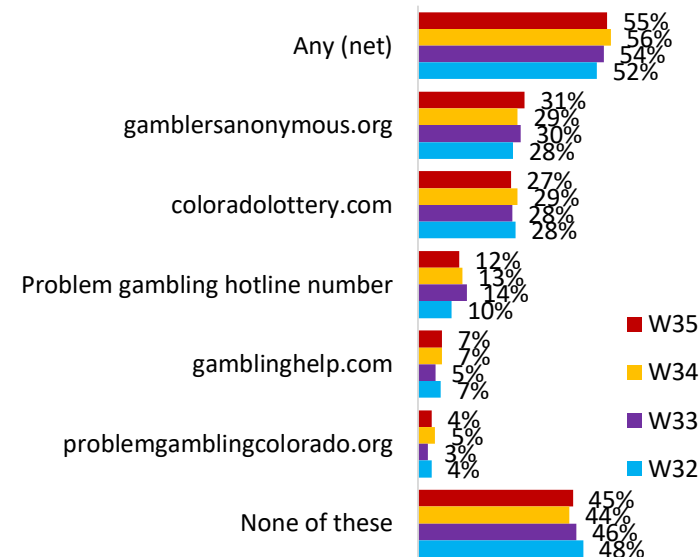
Message Recall

[Aware, n=232, n=236, n=246, n=265]



Problem Gambling Resource Recall

[Total, n=600]



Q7AW32. Are you aware of the Colorado Lottery's Play Responsibly message?

Q7BW32. Where have you seen the Colorado Lottery's Play Responsibly message?

Q7CW32. Which of the following problem gambling resources are you aware of?

- Nearly two in five Coloradoans (38%) state awareness or usage of the **“Play Responsibly”** message on CO Lottery advertising. This is followed by **“Know Your Limits”** (12%).
- 63% of those aware of the **“Know Your Limits”** message say they saw the message on the CO Lottery website.

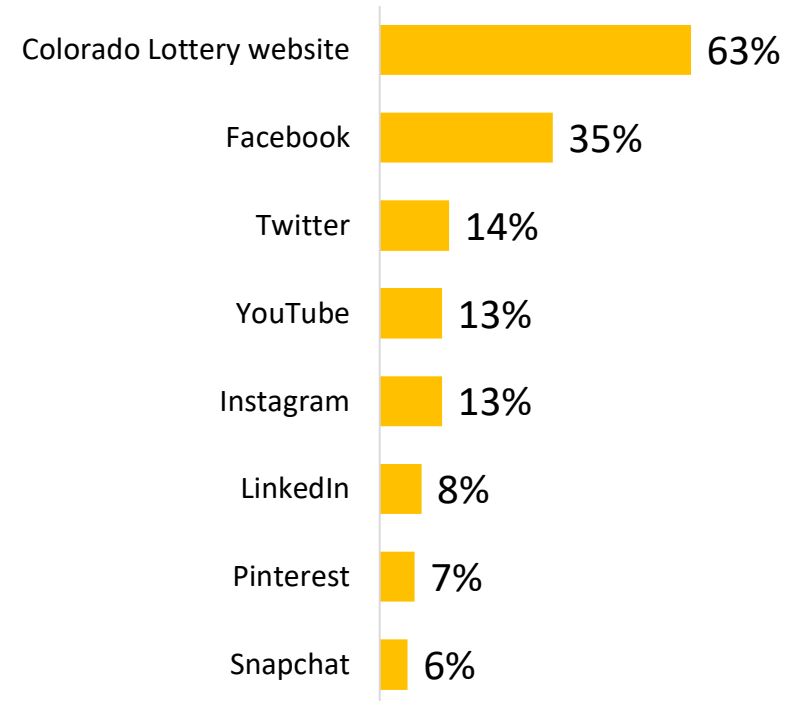
Responsible Gambling Resource Recall

[Among total, n=600]



“Know Your Limits” Channel Recall

[Aware of 'Know Your Limits', n=71]



W35_2: Which Colorado Lottery responsible gambling resources have you seen or used?
W35_3: Where did you see the “Know Your Limits” message from the CO Lottery?



Responsible Gambling, Behaviors

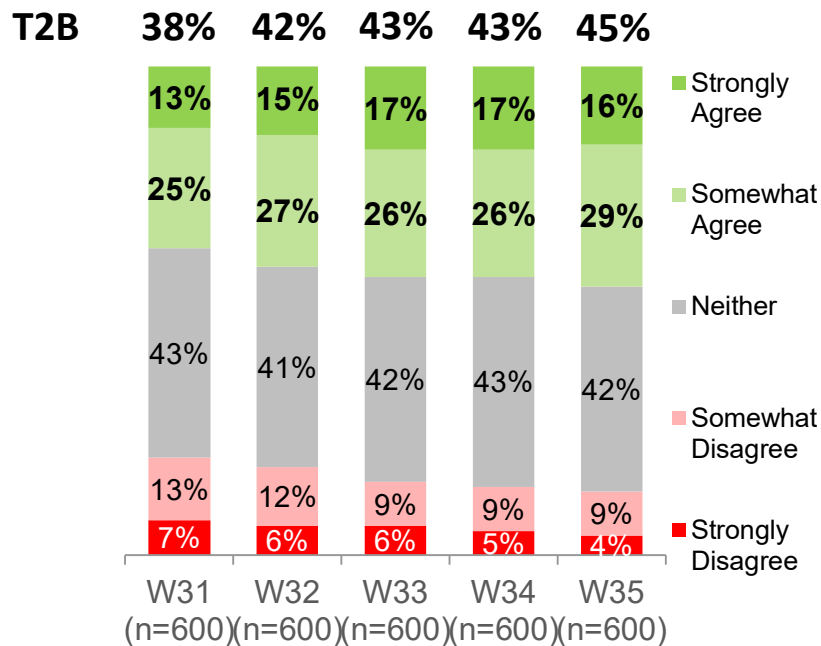
[Added in W31]

Responsible Gambling

- In W35, 45% of residents agree that the “**Lottery promotes responsible gambling**”, generally trending up since Wave 31.
- A similar portion (39%) compared to the previous 2 waves feel that the “**Lottery advertising does not encourage individuals to play beyond their means**”.

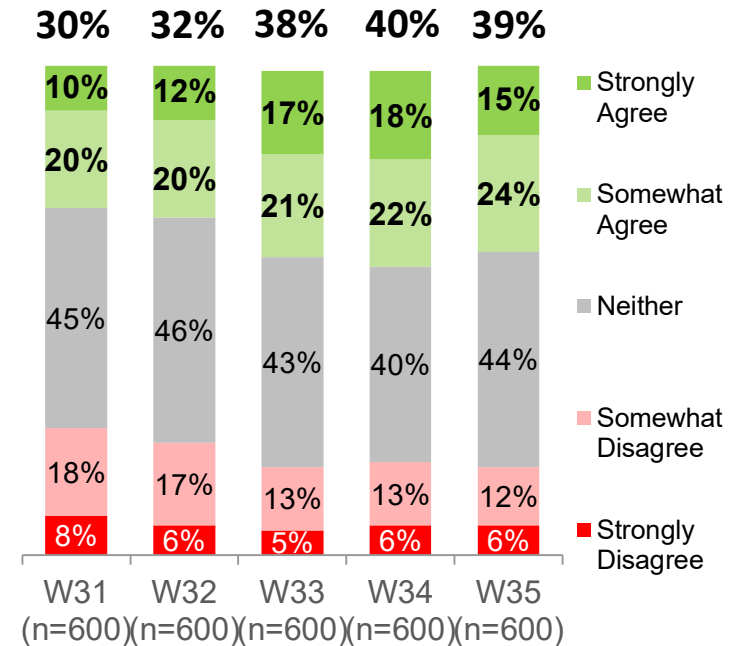
“The Lottery promotes responsible gambling”

[Total]



“Lottery advertising does not encourage individuals to play beyond their means”

[Total]



QA. Please tell us how much you agree with the following statement: The Lottery promotes responsible gambling.

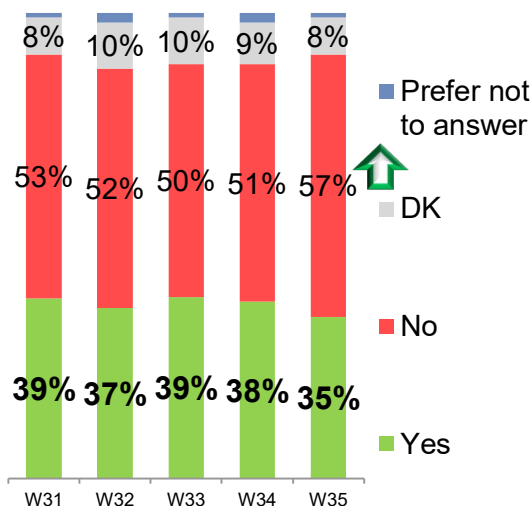
QB. Please tell us how much you agree with the following statement: Lottery advertising does not encourage individuals to play beyond their means .

Gambling Behavior

- More than a third of Coloradoans (35%) have played the Lottery, bingo card games, slot machines or any other betting games for money or something else of value in the past 12 months, a 3% dip in W35.
- One in ten past year gamblers say the money they have spent on gambling has led to **financial** problems or **family, work or personal life** problems, although the former has trended down.

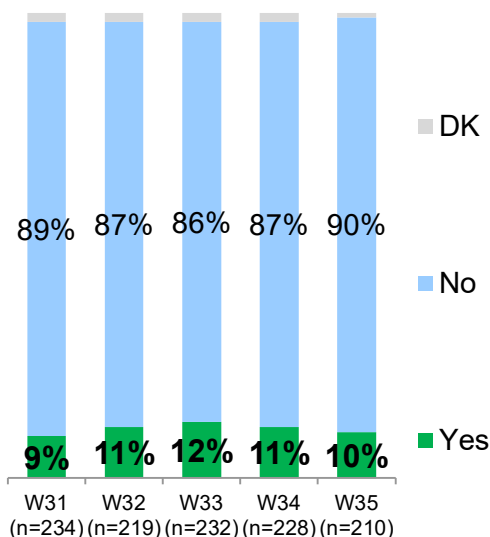
Gambled past 12 months

[Total, n=60]



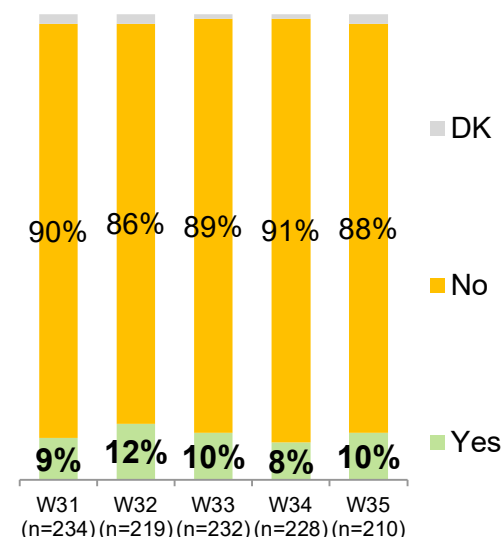
Gambling led to financial problems

[Past year gambler]



Gambling led to problems in family, work or personal life

[Past year gambler]

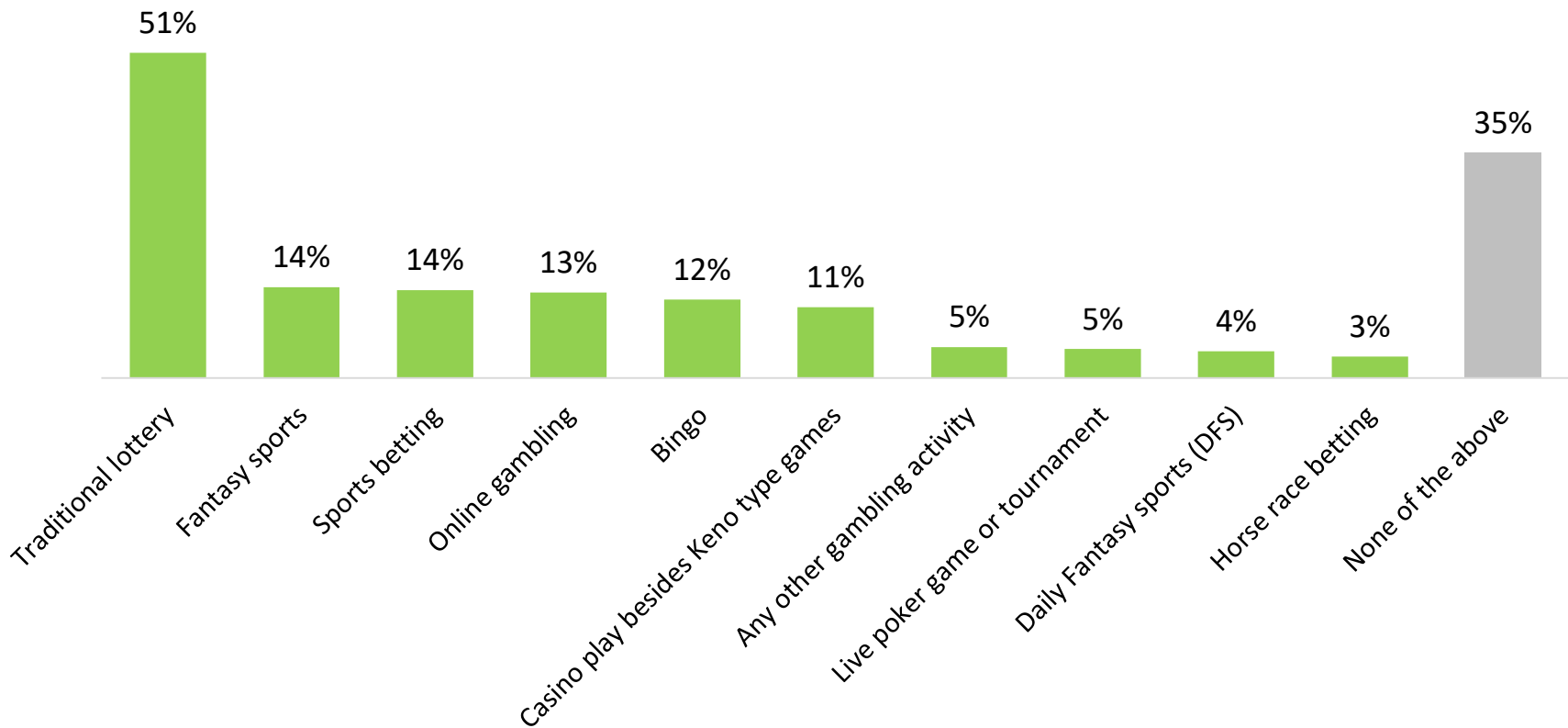


QC. In the past 12 months have you played the Lottery, bingo card games, slot machines, or any other betting games for money or something else of value?

QD. Has the money you have spent on gambling led to financial problems?

QE. Has the time you spent gambling led to problems in your family, work, or personal life?

- Half of CO residents (51%) mention they have participated in **traditional lottery games** in the past year.
- This is followed by **fantasy sports** (14%), **sports betting** (14%), **online gambling** (13%), **bingo** (12%) and **casino play besides Keno type games** (11%).



K3: Have you participated in any of the following activities in the past year? Total, n=600



Colorado LOTTO +

[Added in W30]

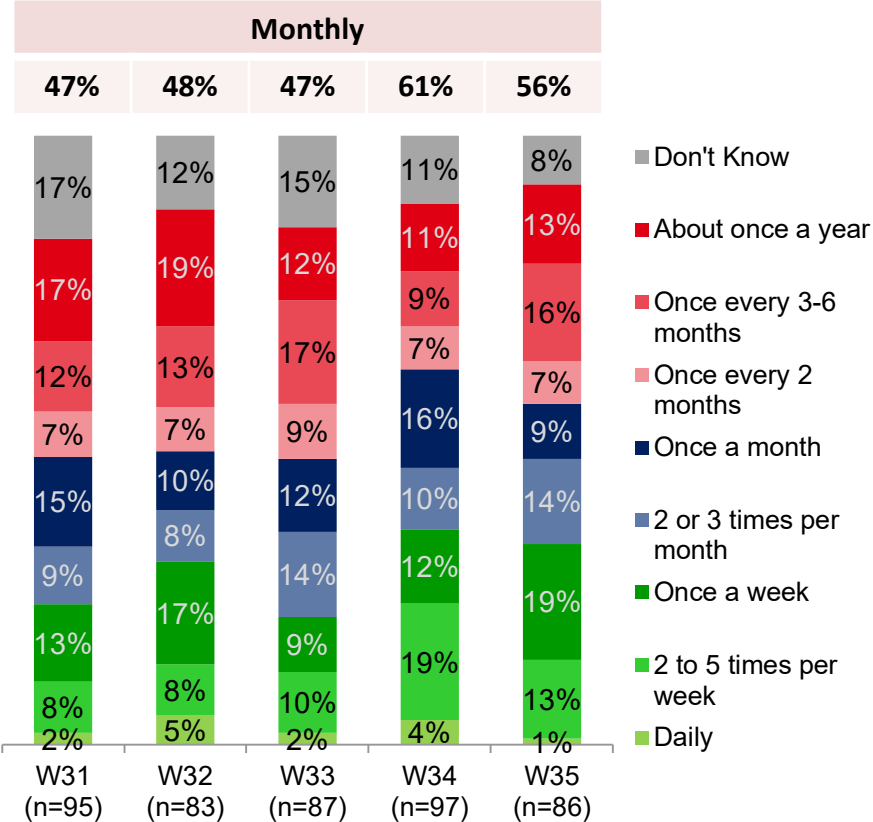




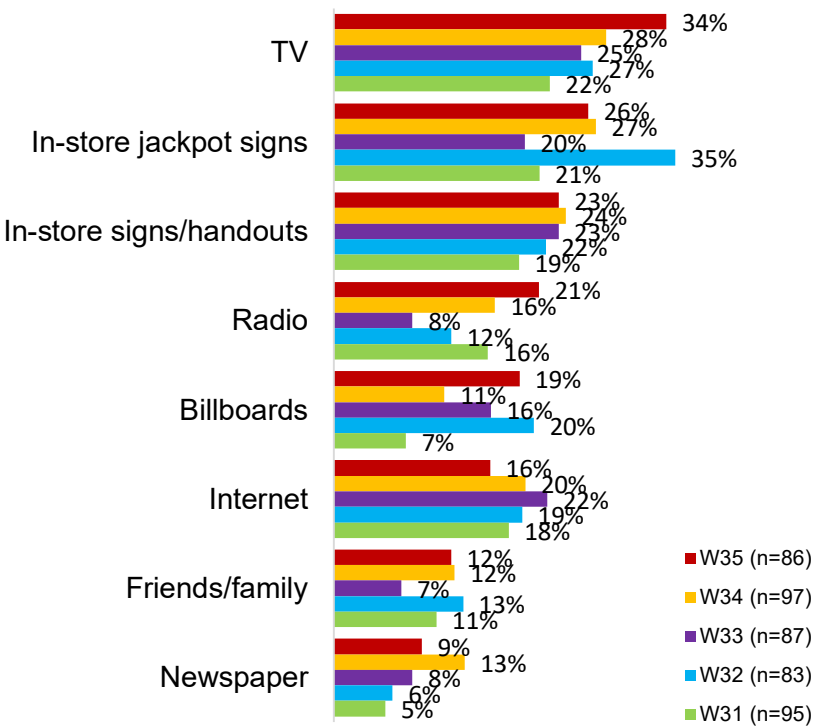
Play Frequency and Channel Recall

- 56% of CO Lotto+ players mention playing the game in the **past month**, a 5% marginal dip since W34.
- Top channels for game recall include **TV** (34%, +6%), **in-store jackpot signs** (26%, -1%), **in-store signs/handouts** (23%, -1%), **radio** (21%, +5%) and billboards (19%, +8%). **TV and radio recall have trended up since W33.**

COLORADO LOTTO+ Play Frequency



COLORADO LOTTO+ Channel Recall



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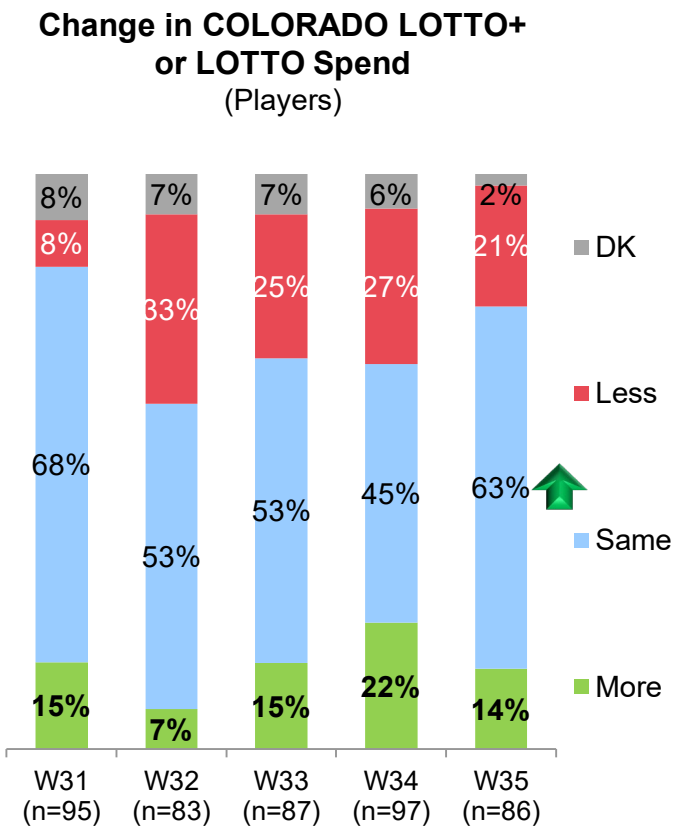
Note: Solid arrows indicate Wave 35 significantly higher/lower than Wave 34 at 95% confidence level
Arrow outlines indicate Wave 35 significantly higher/lower than Wave 34 at 90% confidence level

Q43. How often do you play COLORADO LOTTO +?
Q43A. Where do you hear about COLORADO LOTTO +?

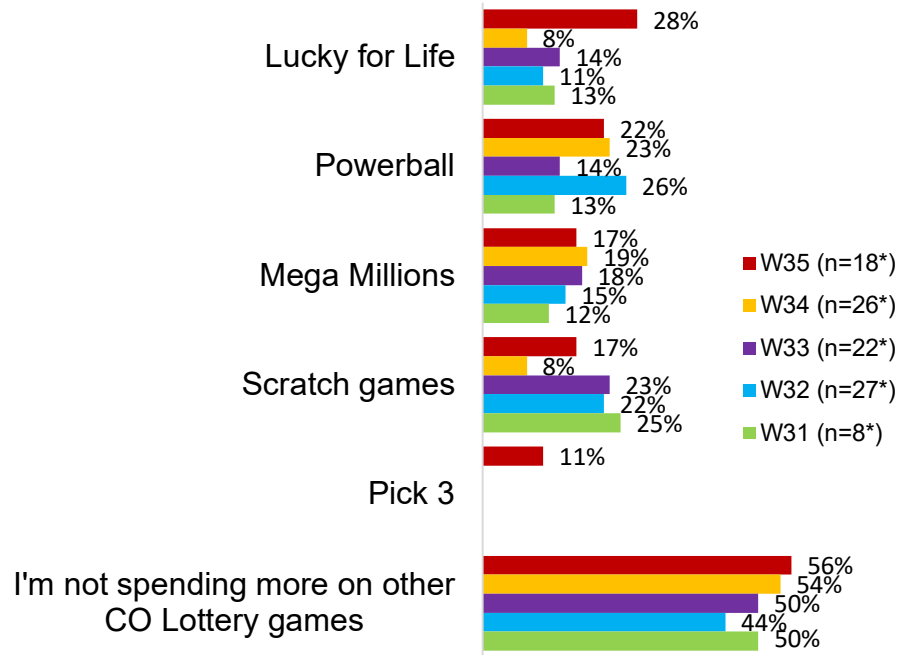


Change in COLORADO LOTTO+ or Lotto Spend

- In W35, fewer Colorado Lotto+ players (14%, -8%) say they are spending **more** on Colorado Lotto+ or Lotto compared to one year ago.
- In addition, fewer players are spending **less**, a positive indication, while **significantly more** say they are spending the **same** compared to a year ago.



Colorado Games Spending More on When Spending Less on COLORADO LOTTO+ (Those spending less)



Q46a. Would you say you are spending more, less, or about the same on COLORADO LOTTO + or LOTTO, as you were a year ago?
Q46b. On which Colorado games do you increase your spending when you spend less on COLORADO LOTTO +?



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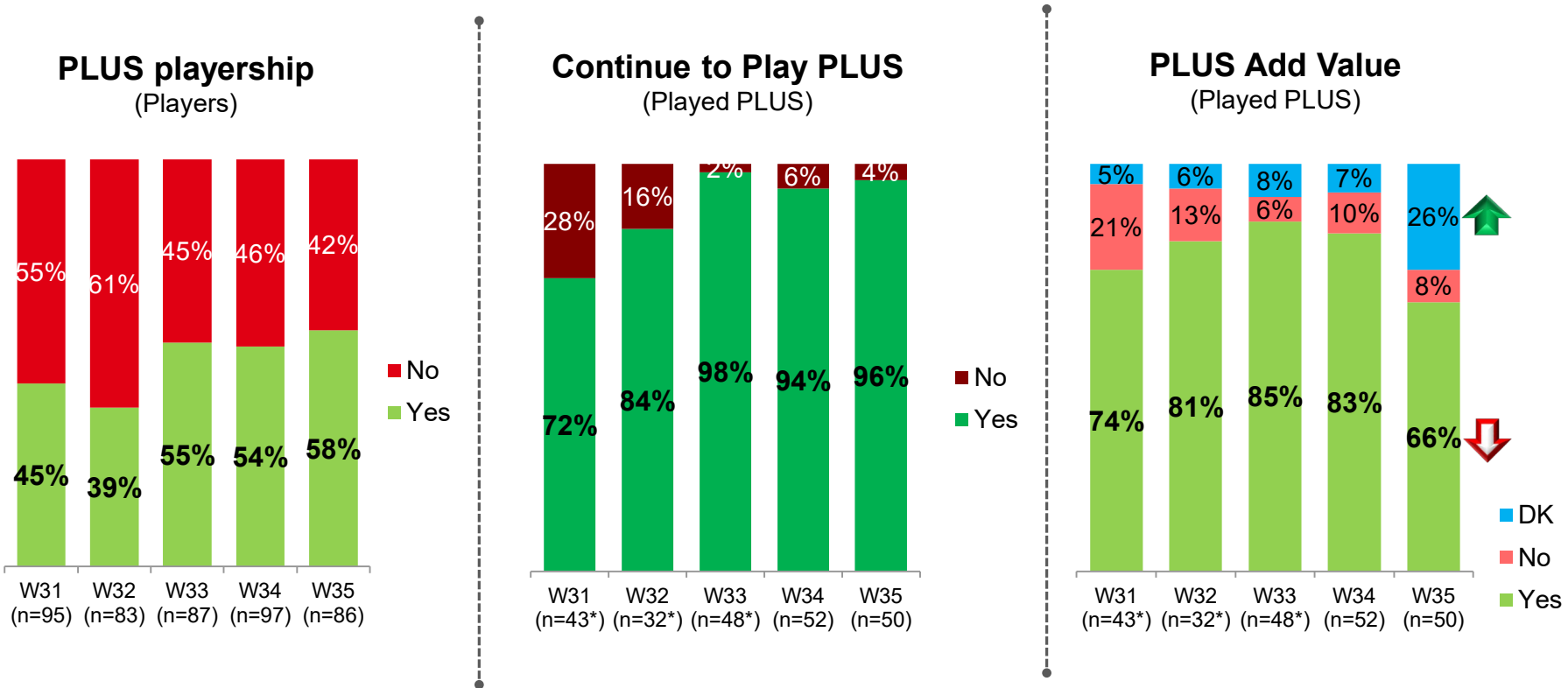
Note: Solid arrows indicate Wave 35 significantly higher/lower than Wave 34 at 95% confidence level
Arrow outlines indicate Wave 35 significantly higher/lower than Wave 34 at 90% confidence level

* Caution small sample size



Bonus Draw Add-on Feature PLUS

- Nearly three in five CO Lotto+ players (58%) mention they have played the bonus draw add-on feature called **PLUS** for an extra \$1 in W34, up 4% from W34, reaching a 5-wave high.
- Once again, most players (96%) who played **PLUS** will continue to play the add-on feature. In addition, **significantly fewer** state that the add-on feature **adds value** to the Colorado Lotto+ game (66%), dipping to a 5-wave low.



QCLPa. Have you played the additional bonus drawing add-on feature for **COLORADO LOTTO +** called **PLUS** for an extra \$1?
QCLPb. Will you continue to play **PLUS**?
QCLPc. Does **PLUS** add value to the **COLORADO LOTTO +** game?



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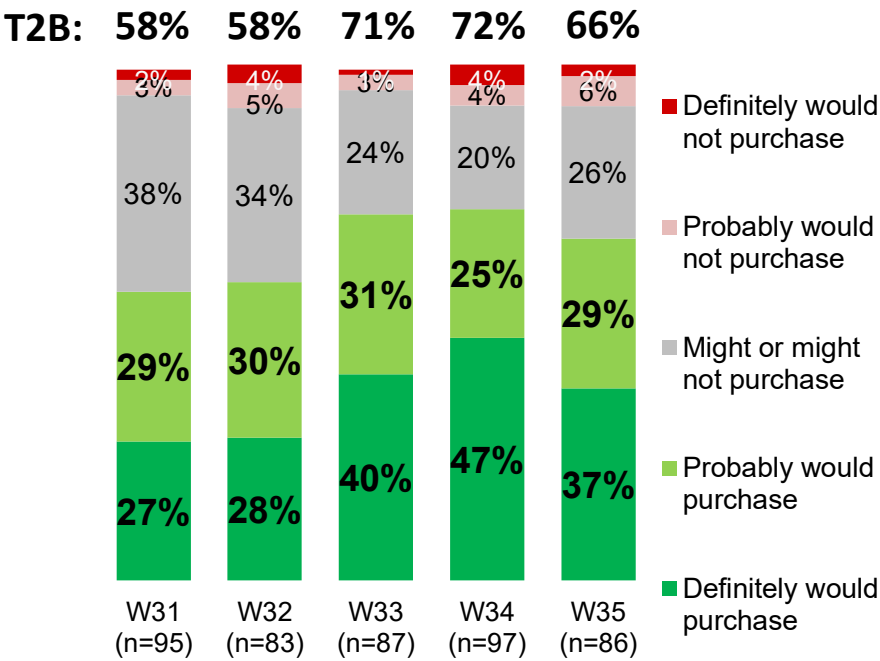
Note: Solid arrows indicate Wave 35 significantly higher/lower than Wave 34 at 95% confidence level
Arrow outlines indicate Wave 35 significantly higher/lower than Wave 34 at 90% confidence level

* Caution small sample size

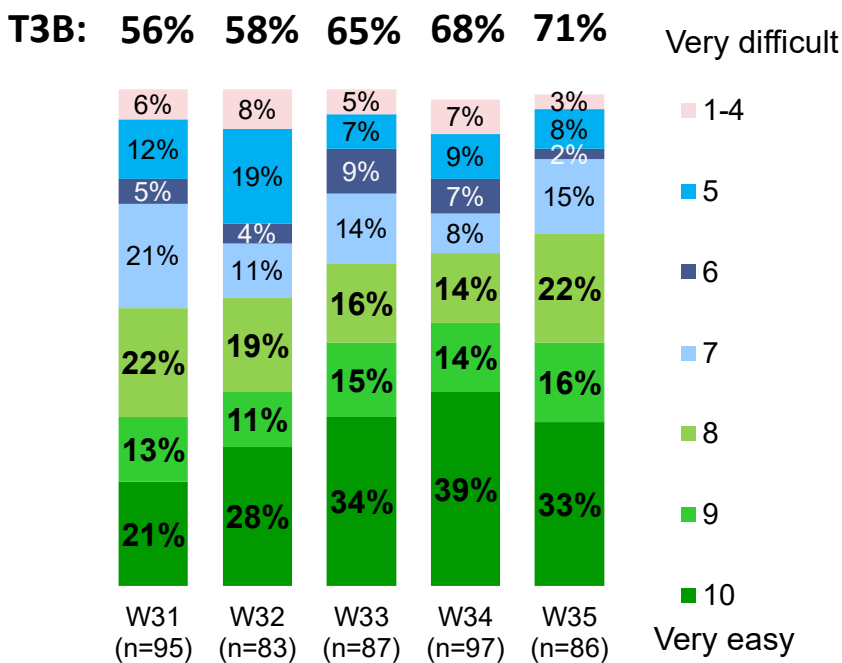
Future Purchase and Ease to Understand & Play

- Two-thirds of players say they are **likely to purchase** a CO Lotto+ ticket in the future, down marginally (-6%) from last wave, but higher than the portions seen between W31 and W32. This decline is partly due to a 10% dip among those saying, *'definitely would purchase'* (37%) this wave.
- Additionally, 71% mention the game is **easy to understand and play**, continuing to rise since W31.

Likelihood of Future Purchase
(Players)



Ease to Understand & Play
(Players)

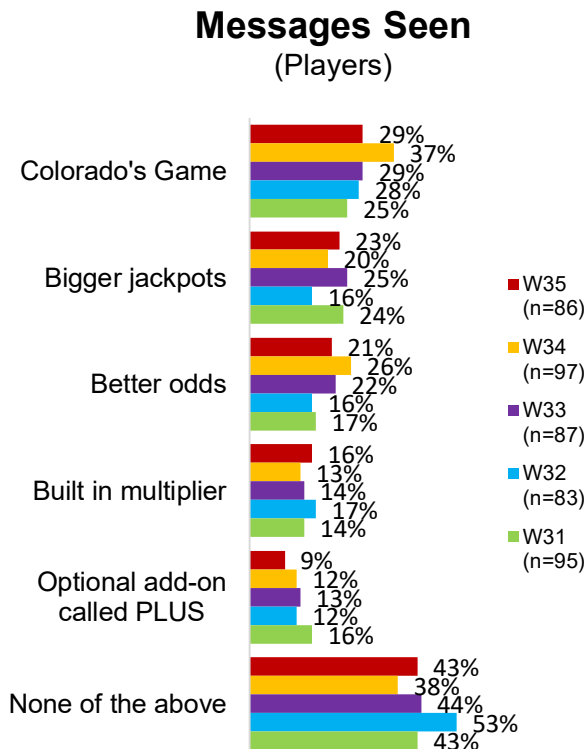
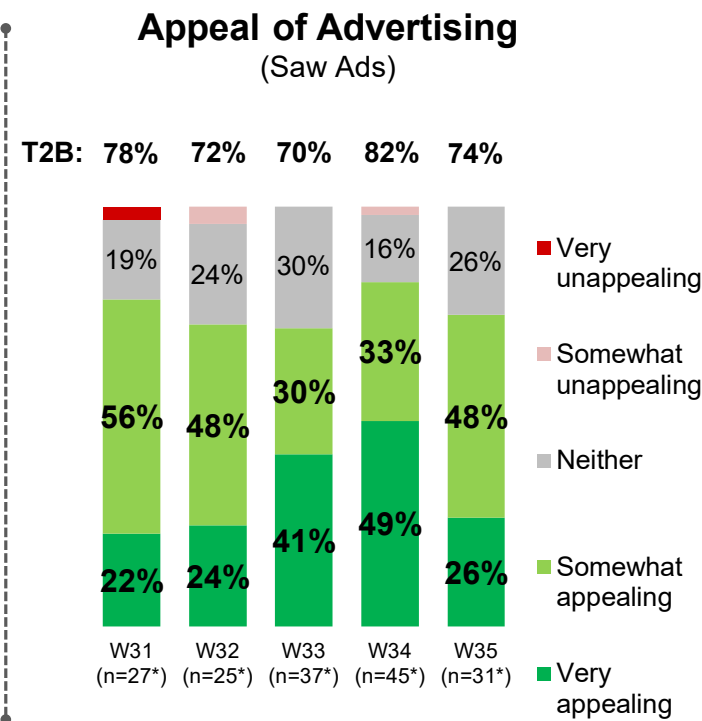
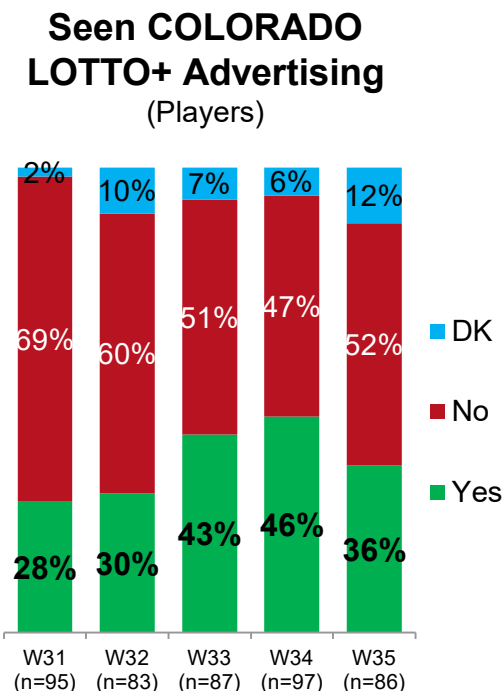


QCLP1. How would you rate your likelihood to purchase a ticket in the future for the **COLORADO LOTTO +** game from the Colorado Lottery?
 QCLP2. On a scale from 1 to 10, where 10 is very easy and 1 is very difficult, how easy is the **COLORADO LOTTO +** game to understand and play?



Advertising and Messages Seen

- 36% of players mention seeing ads for the CO Lotto+ game in the past month this wave, a 10% directional decrease from the preceding wave.
- **Appeal** of the ads remains strong (74%), however has dipped 8% directionally in W35.
- “**Colorado’s Game**” (29%) continues as the top message seen, although has declined this wave. “**Bigger jackpots**” (23%, +3%) and “**better odds**” (21%, -5%) follow next.



QCLP4. Have you seen advertising for COLORADO LOTTO + in the last month?
QCLP7. How would you rate the COLORADO LOTTO + advertisement you have seen?
QCLP6. What messages have you seen for COLORADO LOTTO +?



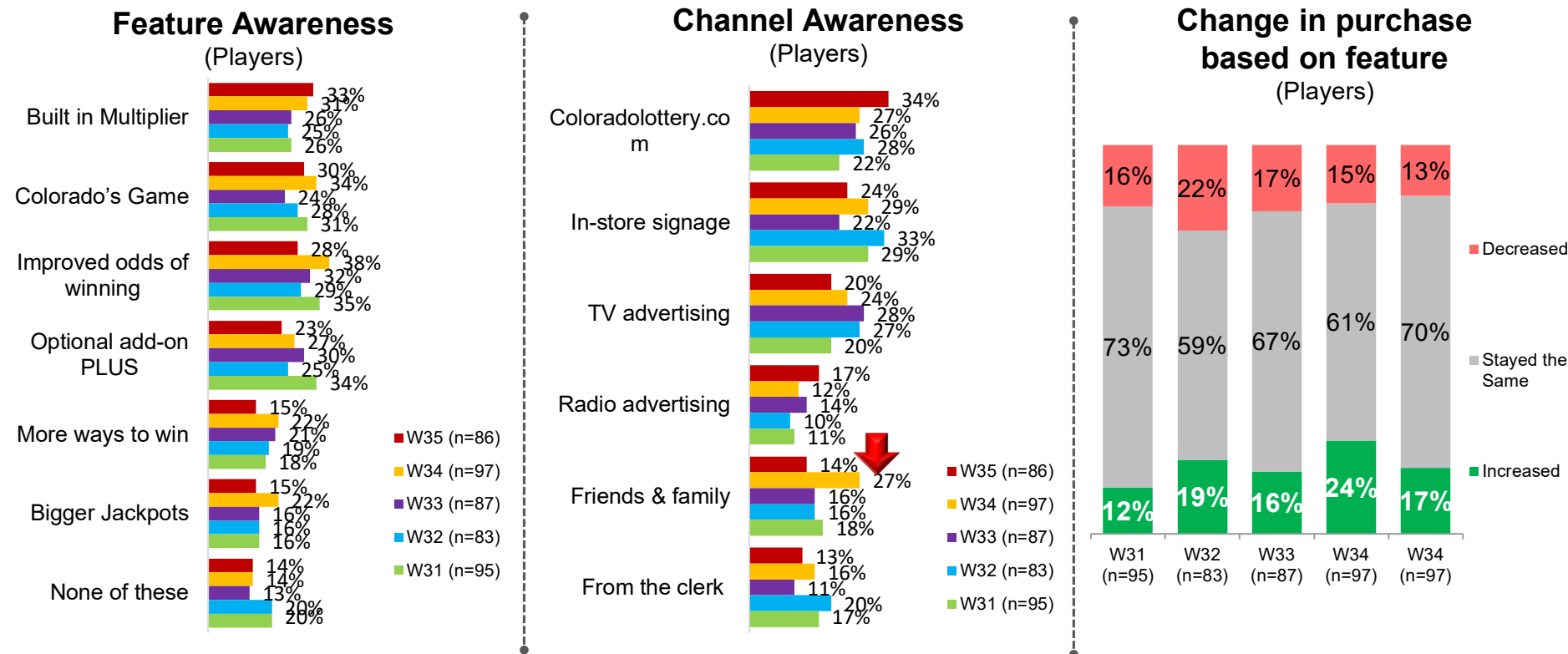
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Note: Solid arrows indicate Wave 35 significantly higher/lower than Wave 34 at 95% confidence level
Arrow outlines indicate Wave 35 significantly higher/lower than Wave 34 at 90% confidence level

* Caution small sample size

Features and Change in Purchase

- **“Built in Multiplier”** (33%) and **“Colorado’s Game”** (30%) are the top features recalled by players in W35.
- Top channels for feature recall are **Coloradolottery.com** (34%, +7%), **in-store signage** (24%, -5%), **tv ads** (20%, -4%) and **radio ads** (17%, +5%). In addition, **friends/ family** (14%) reports a **significant decrease**.
- One in six players (17%) mention their purchase has increased based on the new features for the CO Lotto+ game, an 8% decrease from the prior wave, returning to a similar level seen in W33.



QCLP8. What features of the **COLORADO LOTTO +** game are you aware of?

QCLP10. How did you become aware of the features of the **COLORADO LOTTO +** game?

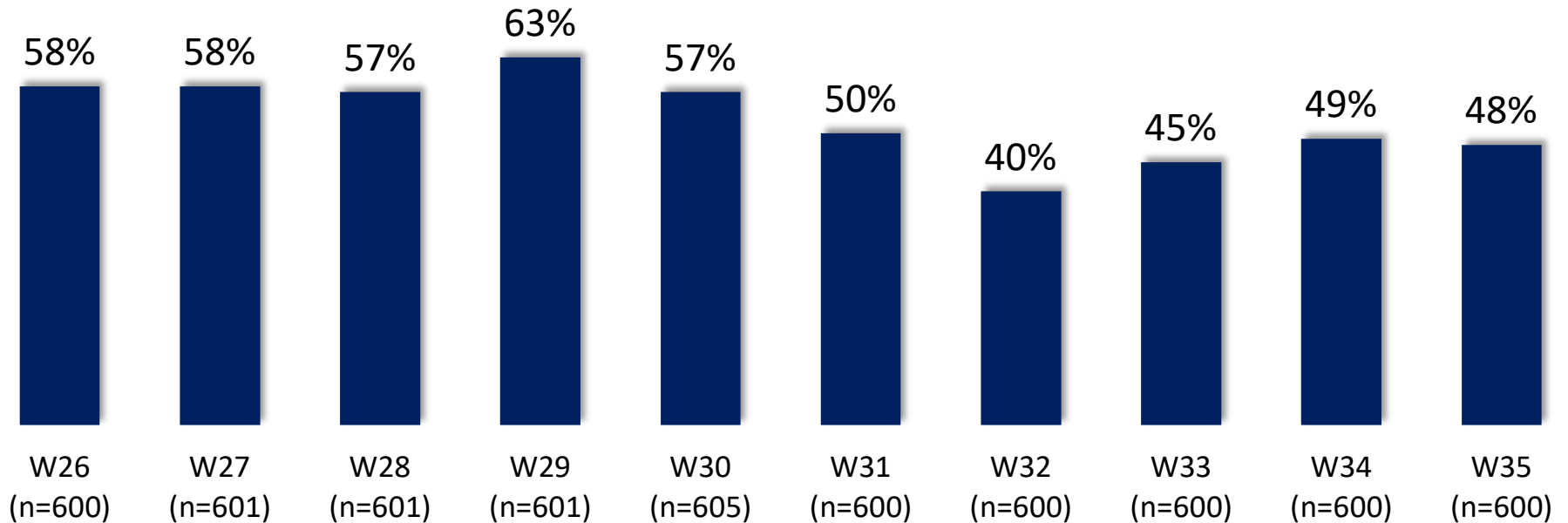
QCLP11. Has your Lotto purchase increased, decreased or stayed the same based on the new features for the **COLORADO LOTTO +** game?



Advertising Awareness

Past Month Colorado Lottery Ad Awareness

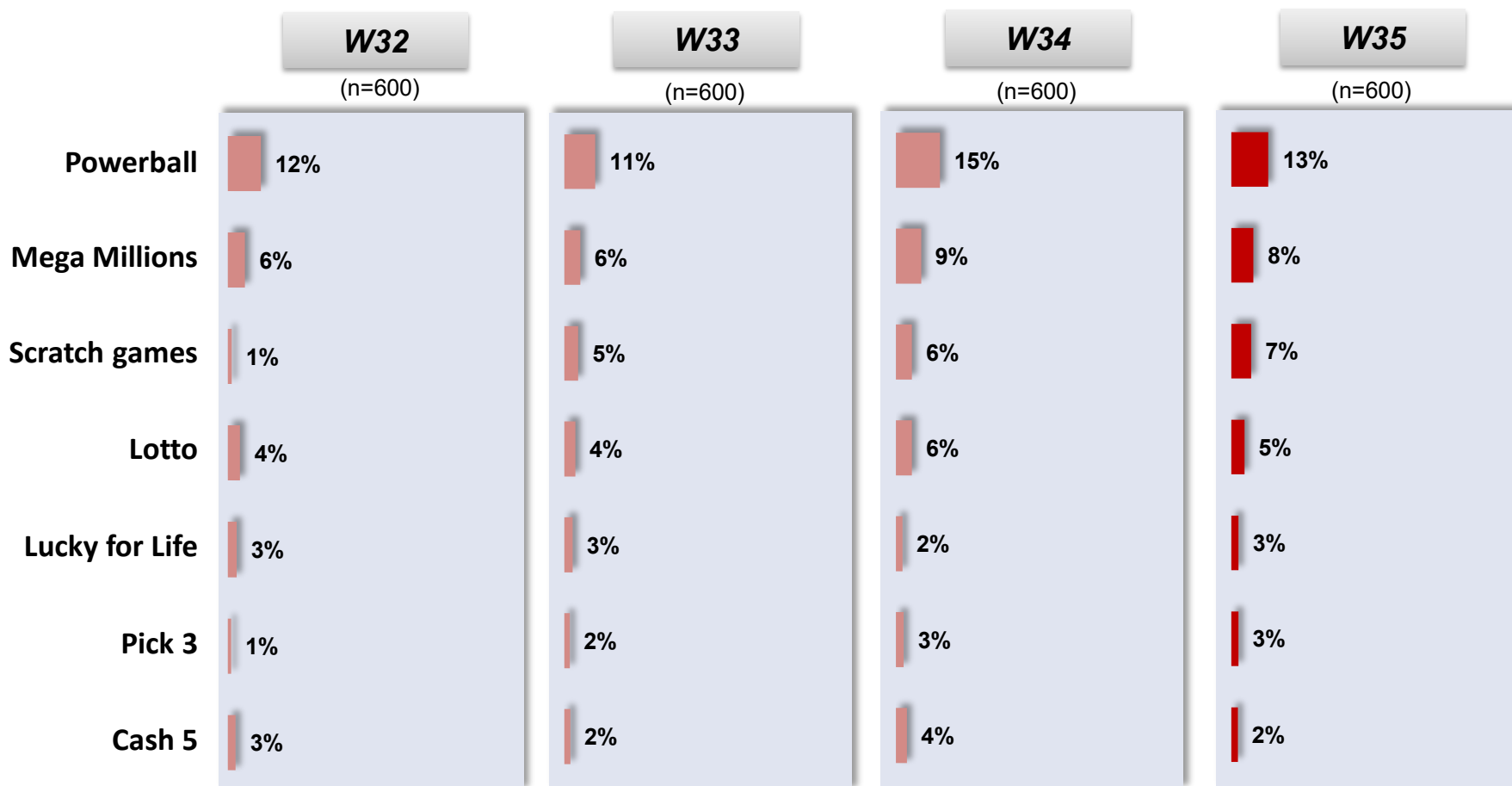
- Once again, nearly half of residents (48%) mention recall of any Colorado Lottery advertising.



Q1. In the past month have you seen or heard any advertising for the Colorado Lottery?

Games Advertised Past Month – Unaided Ad Awareness (Total Market)

- Unaided ad awareness continues to be led by **Powerball** (13%, -2%), with **Mega Millions** remaining in second. In addition, recall of **Scratch** ads (7%) has trended up since Wave 32.

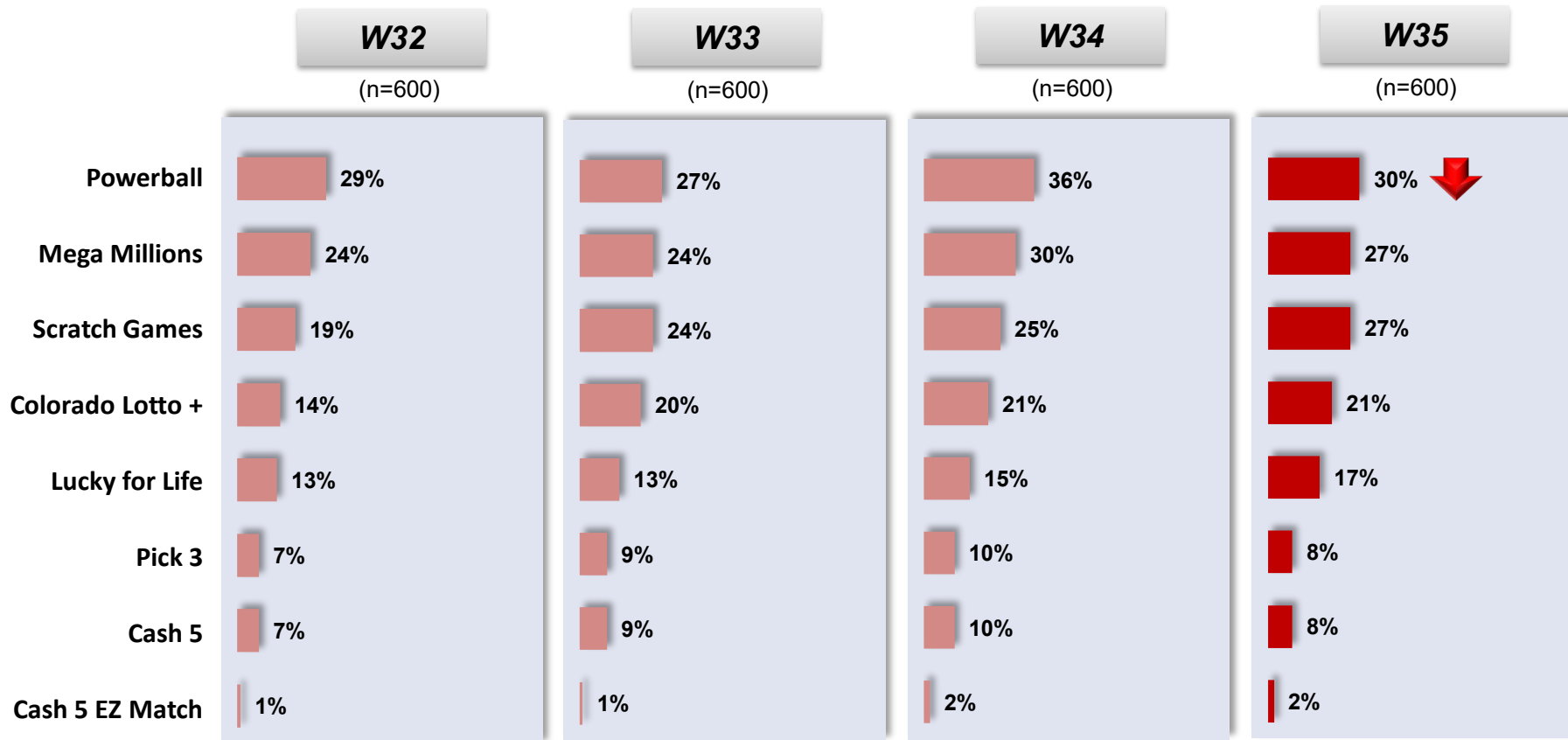


Q2. Please list which Colorado Lottery games, including any specific Scratch games, you have seen or heard advertised recently?

Top mentions reported.

Games Advertised Past Month – Aided Ad Awareness (Total Market)

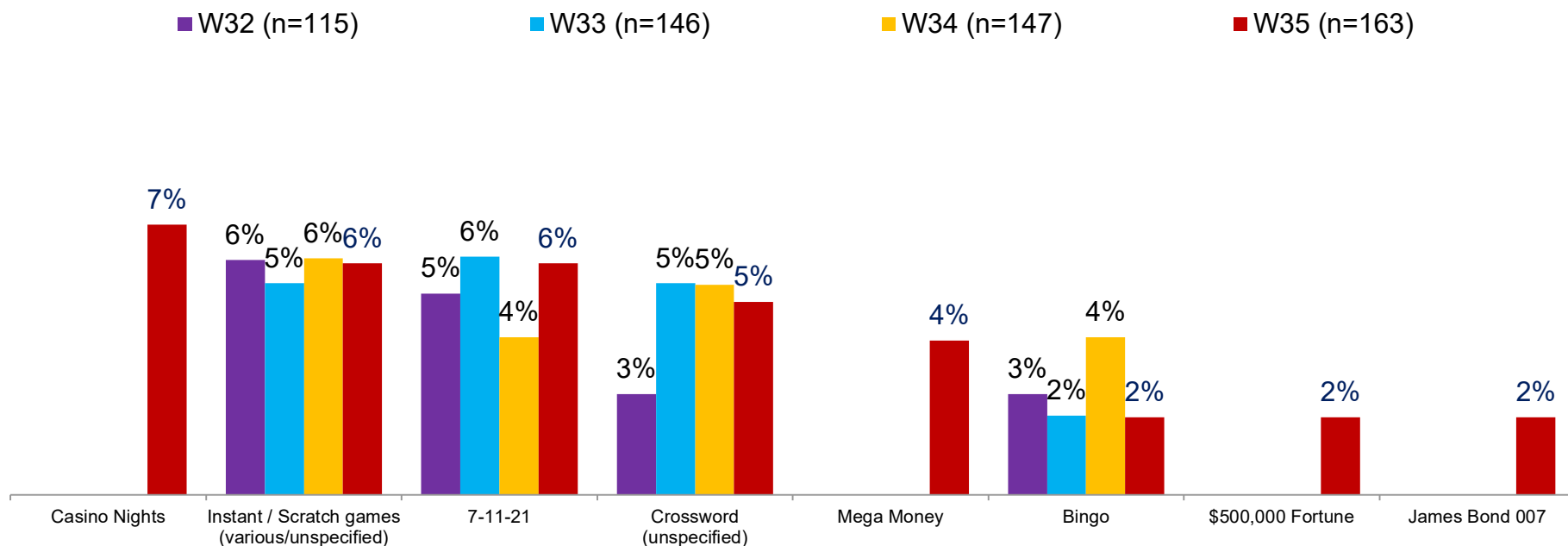
- For aided game advertising awareness, **Powerball** (30%, -6%) keeps the lead, despite **dipping significantly** since W34.
- **Mega Millions** (27%, -3%), **Scratch games** (27%, +2%), **CO Lotto+** (21%) and **Lucky for Life** (17%, +2%) follow next.



Q3. Which of the Colorado Lottery games have you seen or heard advertising for in the past month?

Scratch Games Advertised Past Month: Unaided Ad Awareness

- **“Casino Nights”** (7%) garners the highest unaided ad Scratch game awareness in W35, followed by **“Instant / Scratch games (unspecified)”** (6%), **“7-11-21”** (6%), **“Crossword (unspecified)”** (5%) and **“Mega Money”** (4%).

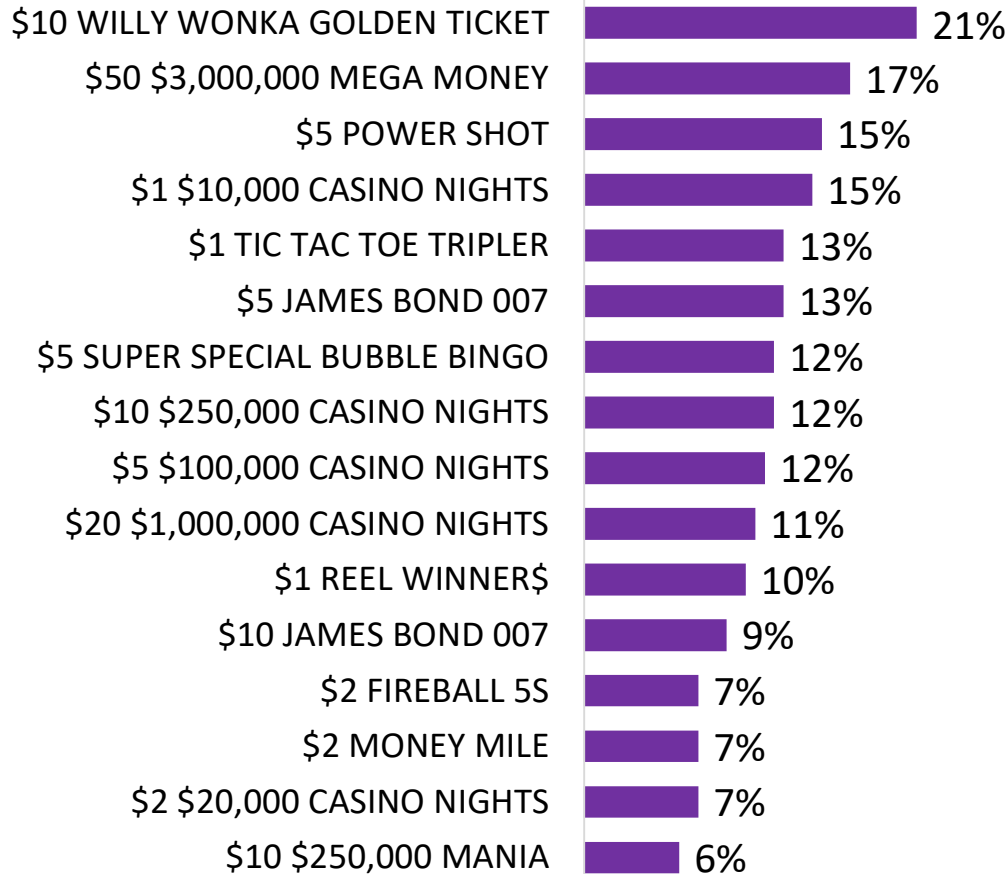


Q3a. Specific to Scratch games, which Colorado Lottery Scratch games have you seen or heard advertising for in the past month?

*Base=Respondents who recall Scratch ads.
Top mentions reported.

Scratch Games Advertised Past Month: Aided Ad Awareness

- Once prompted, **\$10 Willy Wonka Golden Ticket** (21%, -4% from last wave) is recalled the most, followed by **\$50 \$3m Mega Money** (17%, +3%), **\$5 Power Shot** (15%, +5%) and **\$1 \$10k Casino Nights** (15%).



*Base=Respondents who recall Scratch ads (n=163).

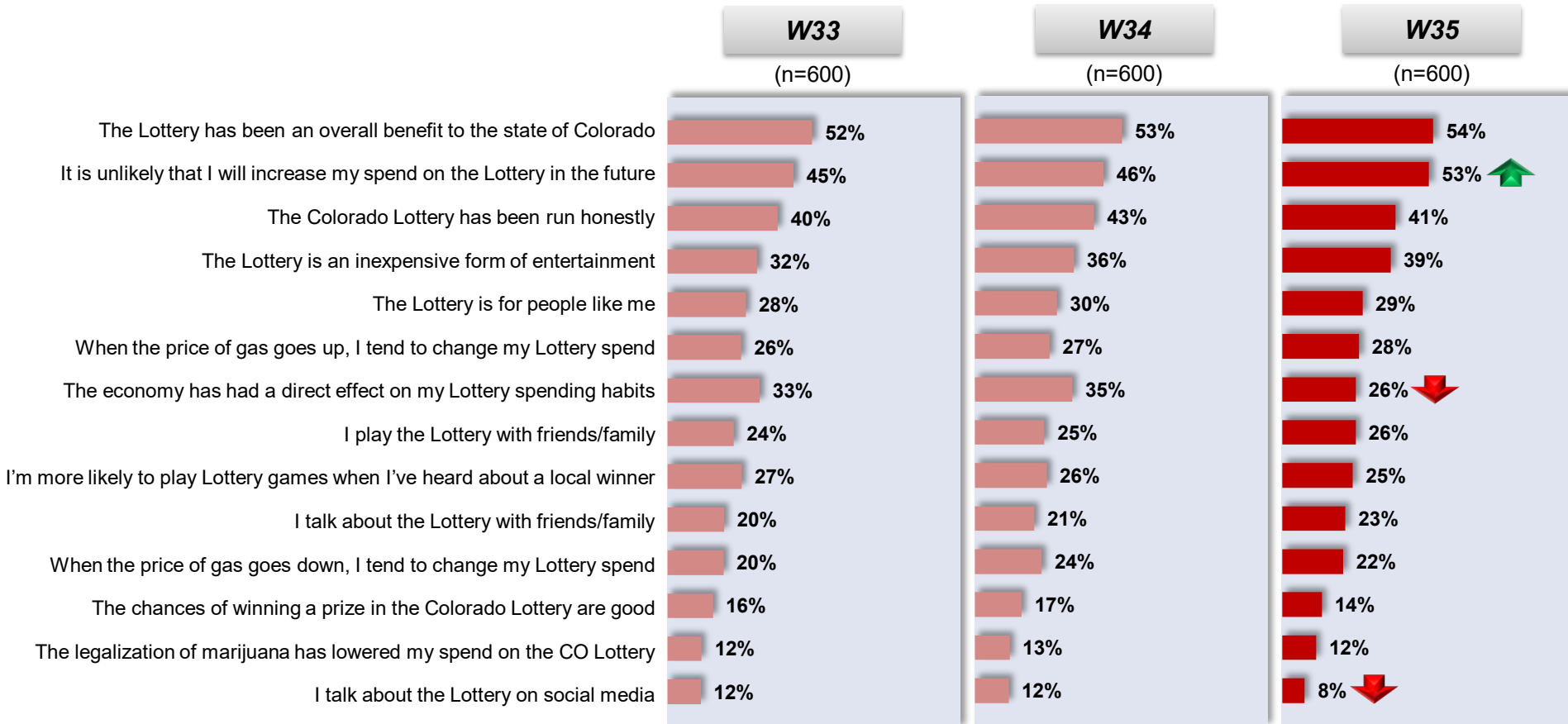
Note: Games added and removed from list in W35.



Lottery Attitudes and Feelings Toward CO Lottery

Lottery Attitudes

- More than half of total agree that ***the Lottery has been an overall benefit for the state of CO*** (54%) and ***it's unlikely they will increase their Lottery spend in the future*** (53%, a **significant increase** and a negative indication).
- Agreement that '***the economy has had a direct effect on my Lottery spending habits***' (26%, a positive sign) and "***I talk about the Lottery on social media***" (8%, a negative sign) **decreased significantly** from last wave.



Q63. On a 1 to 5 scale, where 5 is Strongly Agree and 1 is Strongly Disagree, please rate how much you agree or disagree with each of the following Lottery statements (TOP 2 BOX reported).

Feelings Towards & Likelihood to Recommend CO Lottery

- Overall feelings toward the Colorado Lottery improved marginally (+2%) this wave, with 64% of total citing a **very or somewhat** positive feeling toward the Lottery.
- Further, 36% would recommend the Lottery to a friend/colleague/relative this wave (-2% from W34), marginally reducing the NPS (-31%). The NPS has been mostly consistent since W33.

Current Feelings Towards the CO Lottery

Mean 1 out of 5, n=600

Somewhat
Negative

3%

Somewhat
Positive

33%



Very Negative

1%

T2B
64%

Very Positive

31%

62% in W34
65% in W33
58% in W32
48% in W31

Likelihood to Recommend CO Lottery

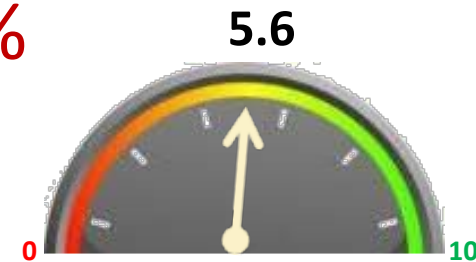
Mean 0 out of 10, n=600

Bottom 3 Box

21%

Top 3 Box

36%



NPS

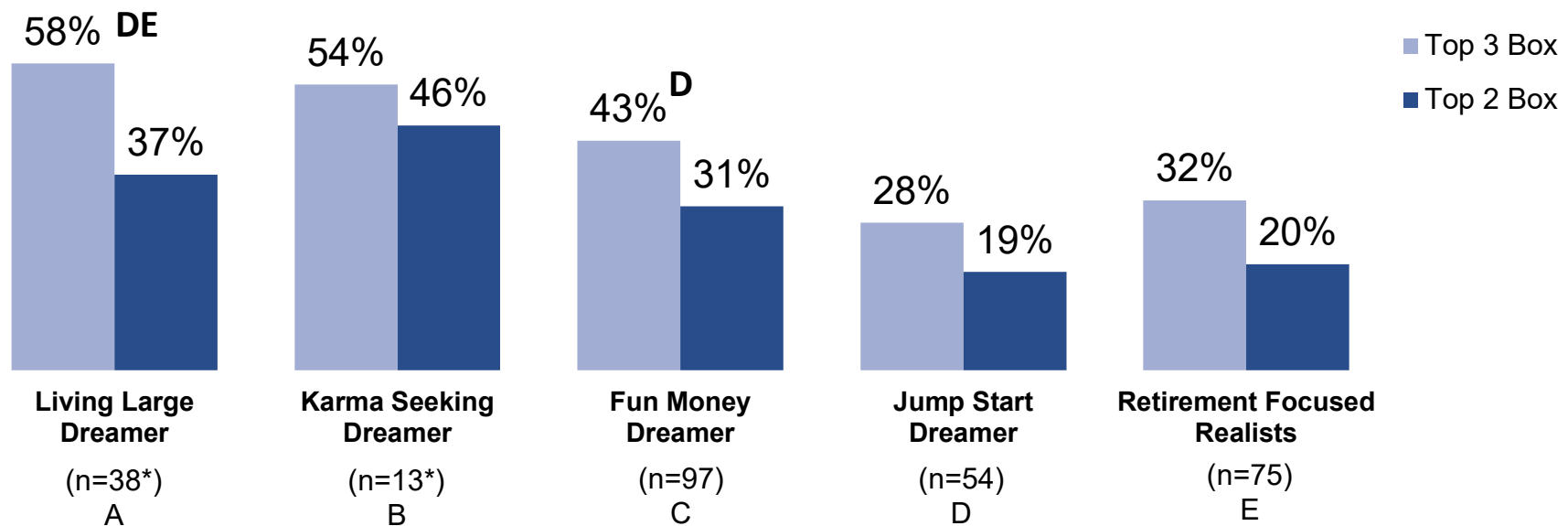
-31

(-28) in W34
(-30) in W33
(-36) in W32
(-40) in W31

Likelihood to Recommend CO Lottery by Segment

- **Living Large Dreamers*** (+16%) and **Karma Seeking Dreamers*** (+47%) lead the way among the reported segments most likely to recommend the CO Lottery in W35, both displaying a **positive** NPS.

Mean:	7.6 CDE	6.5	6.6	5.7	5.3
NPS:	+16	+8	-10	-35	-44

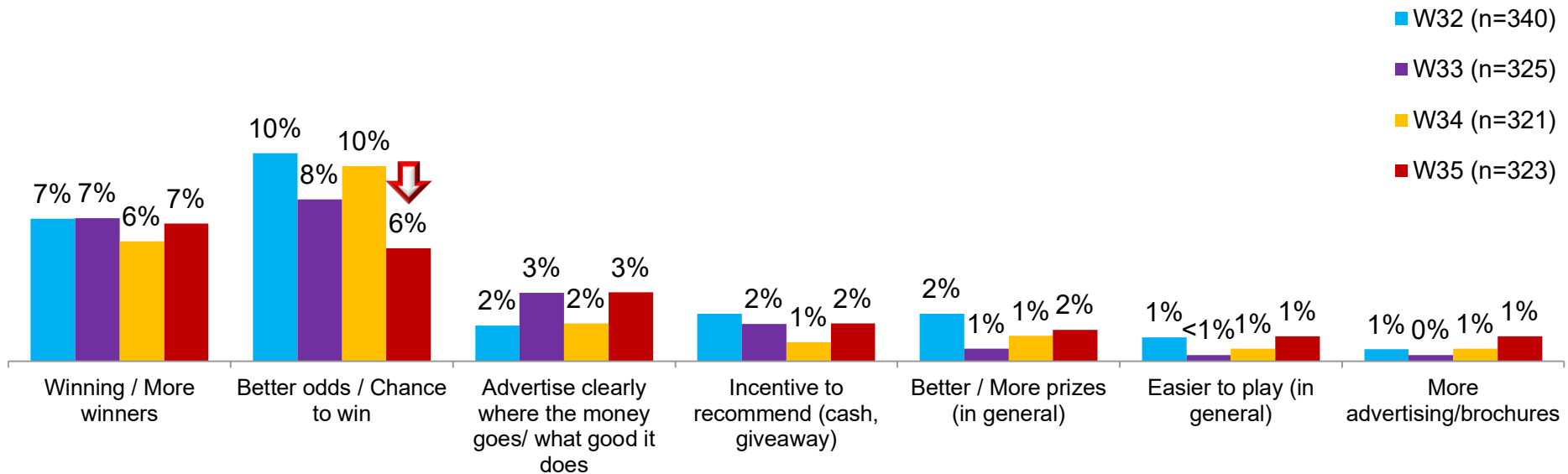


Q58AW6. How likely are you to recommend Colorado Lottery games to friends?

*Caution: small base size (no stat testing)

Methods to Encourage “Non-Recommendors”

- The main methods to encourage ‘non-recommenders’ to endorse the Colorado Lottery in W35 are **winning / more winners** (7%, +1%) and **“better odds / chances to win”** (6%, a significant decrease).
- **Advertising clearly where the money goes, incentives to recommend (cash, giveaways) and better / more prizes** could be possible methods to emphasis.



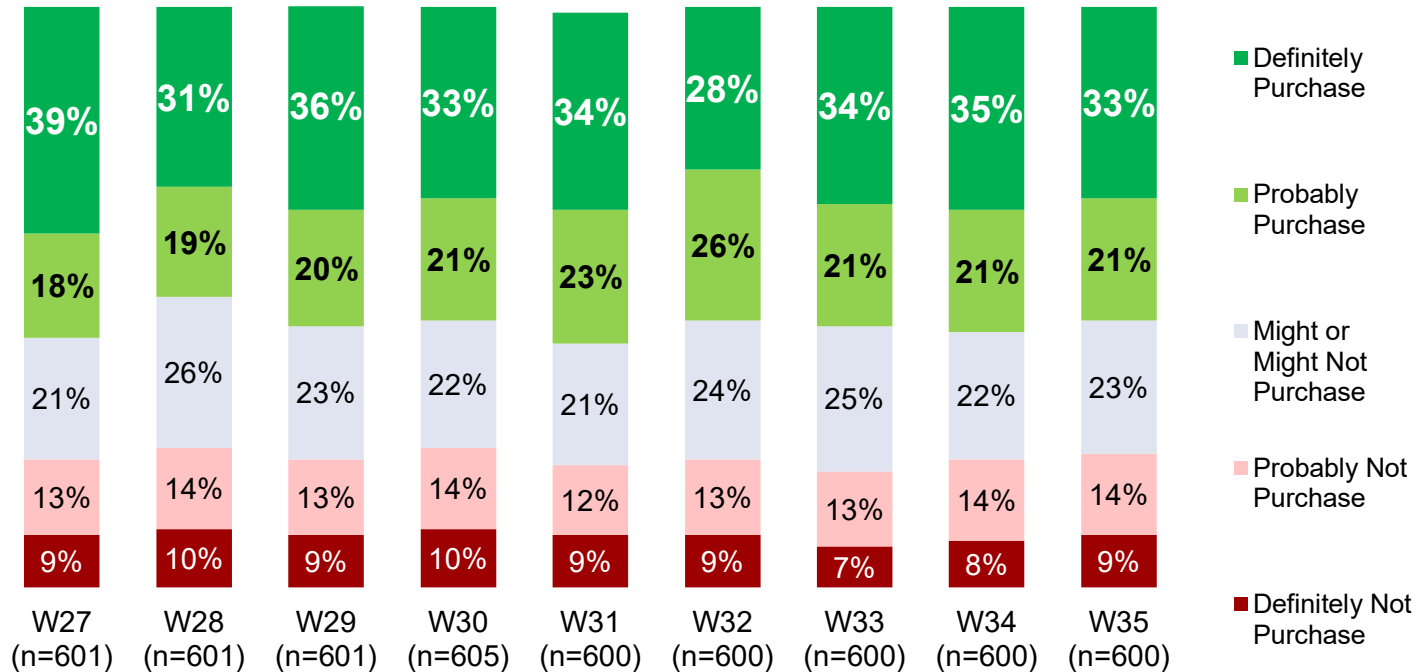
Q58AW26. You mentioned that you would not recommend the Colorado Lottery to a friend/colleague/relative. Please tell us what the Lottery could do to encourage you to recommend the CO Lottery?

Base: Those who would not recommend the CO Lottery

Likelihood to Purchase CO Games in the Future

- More than half of Coloradoans (54%) cite a likelihood to purchase lottery games in the future, mostly steady since W32.
- One in three mention they are '**definitely**' likely to purchase in the future, relatively consistent since W31.

Top 2 Box: 57% 51% 56% 54% 58% 54% 55% 56% 54%



Q23. How likely are you to purchase Colorado Lottery games in the future?

Likelihood to Purchase CO Games in the Future by Segment

- In W35, **Living Large Dreamers** (82%) cite the strongest likelihood to purchase CO Lottery games in the future (%T2B), at a **significantly higher** rate than most other key segments.

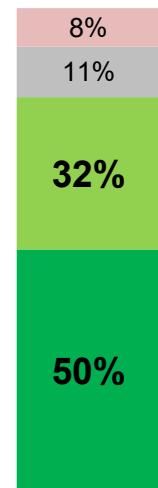
T2B: 82% CDE

69%

65%

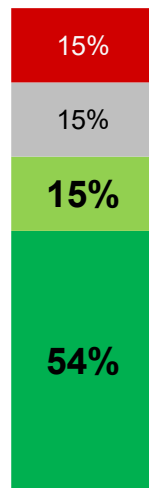
50%

56%



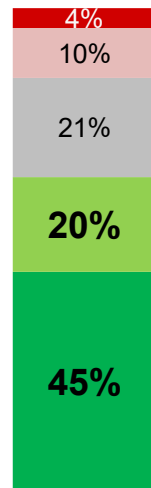
Living Large Dreamer

(n=38*)
A



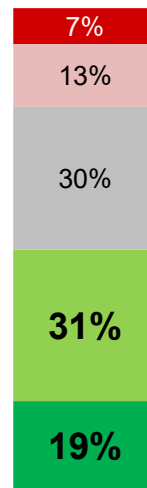
Karma Seeking Dreamer

(n=13*)
B



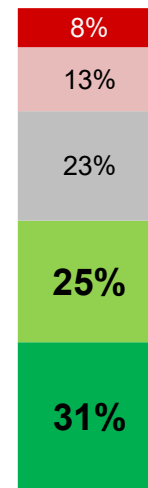
Fun Money Dreamer

(n=97)
C



Jump Start Dreamer

(n=54)
D



Retirement Focused Realist

(n=75)
E

- Definitely Not Purchase
- Probably Not Purchase
- Might or Might Not Purchase
- Probably Purchase
- Definitely Purchase

Note: Only %T2B stat tested

*Caution: small base size (no stat testing)

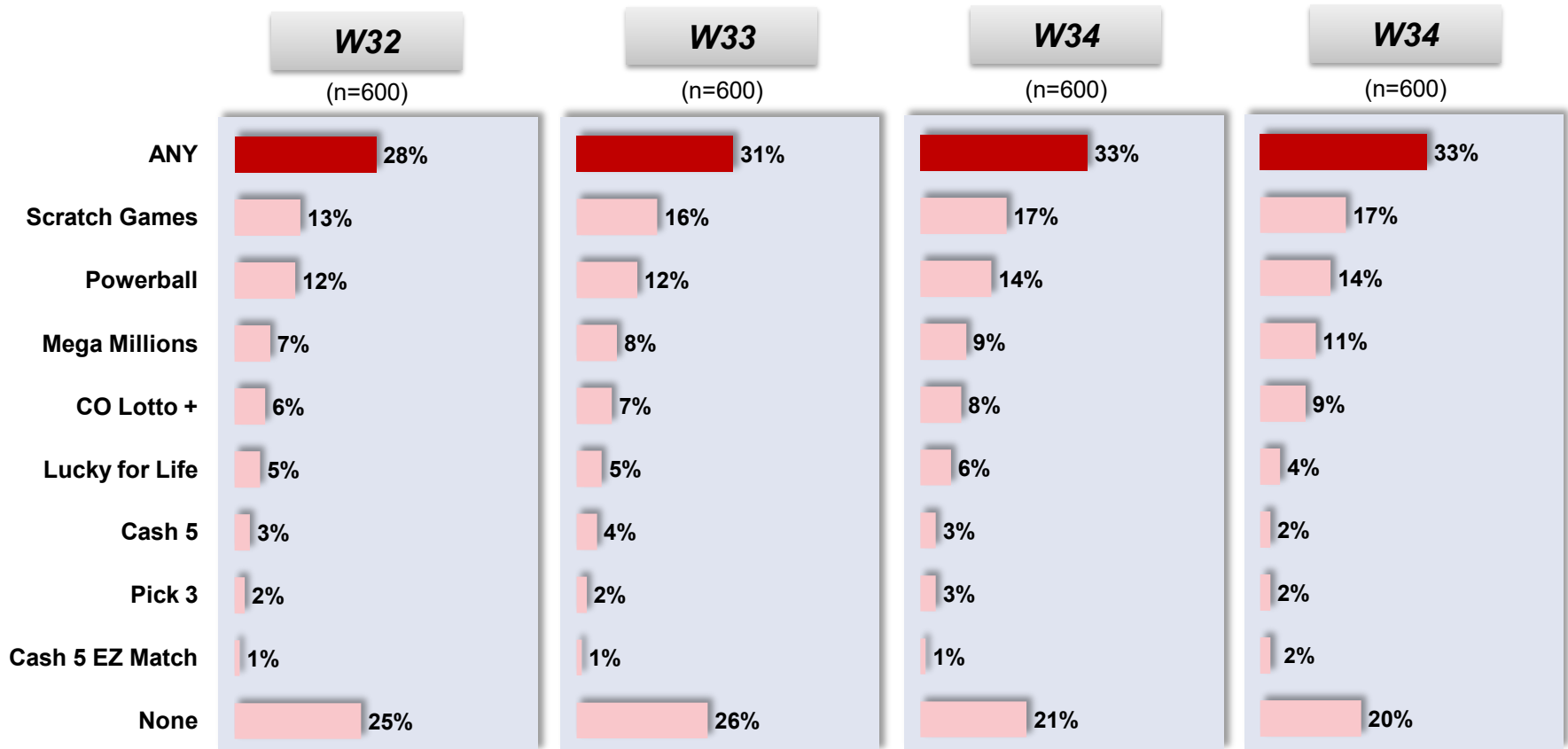
Note: Capital letter indicates significantly higher/lower at 95% confidence level between segments



Playership, Purchase & Buying Behavior

Past Month Playership Among Total

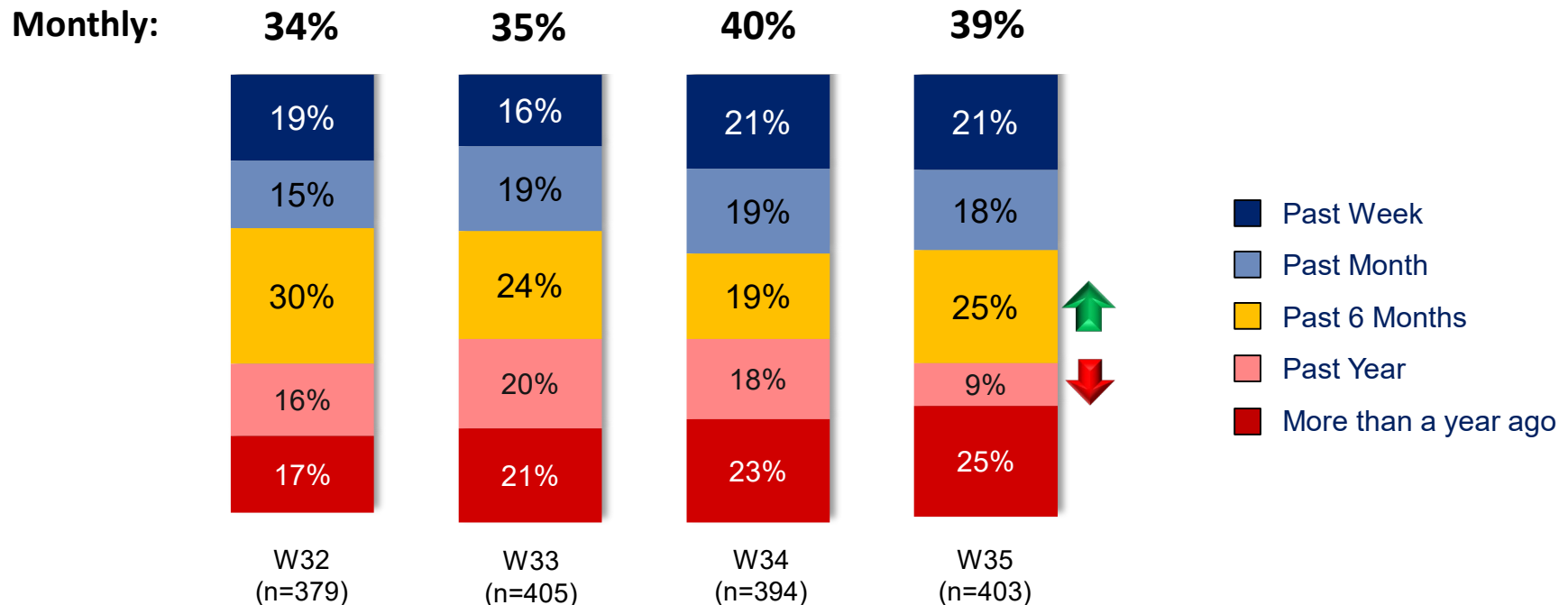
- Consistent with last wave, one in three residents report playing **any Colorado Lottery game** in the past month, with **Scratch games** (17%) and **Powerball** (14%) continuing to lead.
- **Mega Millions** (11%) and **CO Lotto+** (11%) past moth play have both trended up since W32.
- Playing no games continues to drop, a positive sign.



Q16. IN THE PAST MONTH, which of these Colorado Lottery games have you played?

CO Lottery Games – Last Time Played

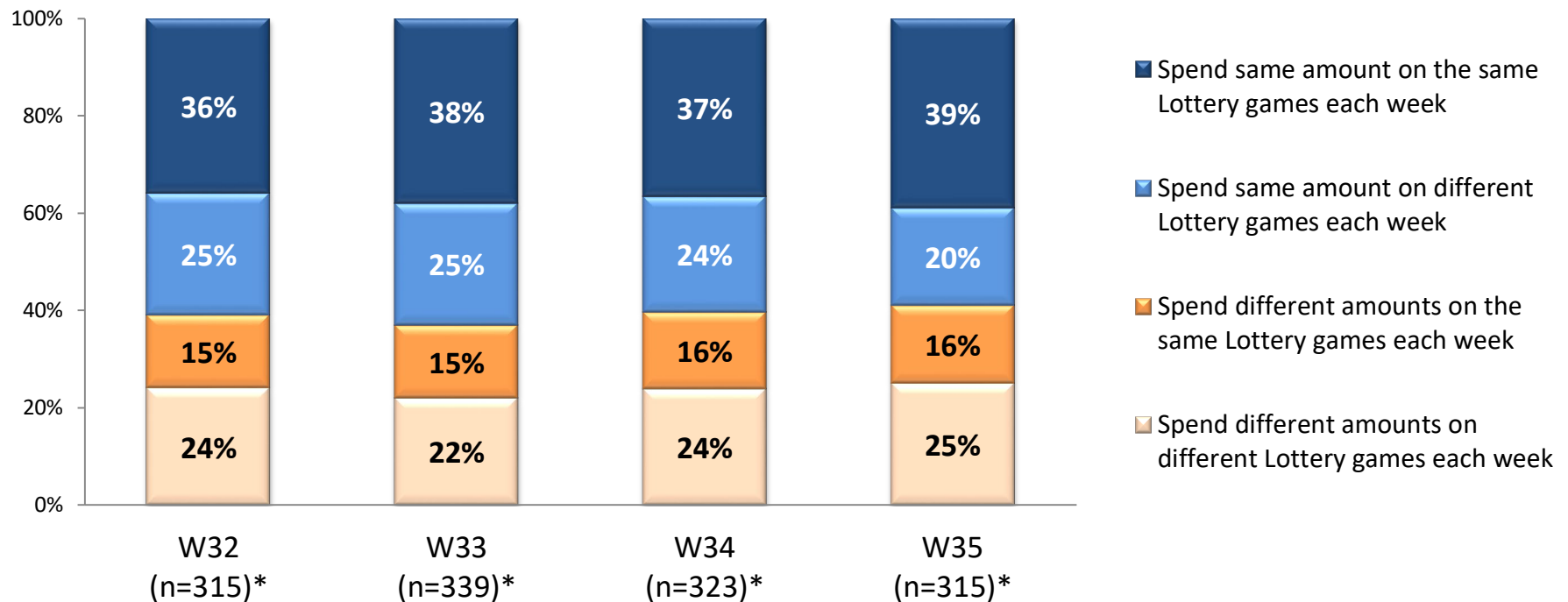
- Once again, two in five players (39%, -1%) this wave cite playing any CO Lottery game in the **past week** or **month**.
- In addition, **past 6-month** play (but not in the past week or month) has **significantly grown**, while **past year** playership has **significantly declined** since last wave.
- Playing **more than a year ago** has trended up since W32, a negative indication.



Q13a. When was the last time you played any Colorado Lottery games? (BASE=Ever played)

Type of Lottery Player (Self Described)

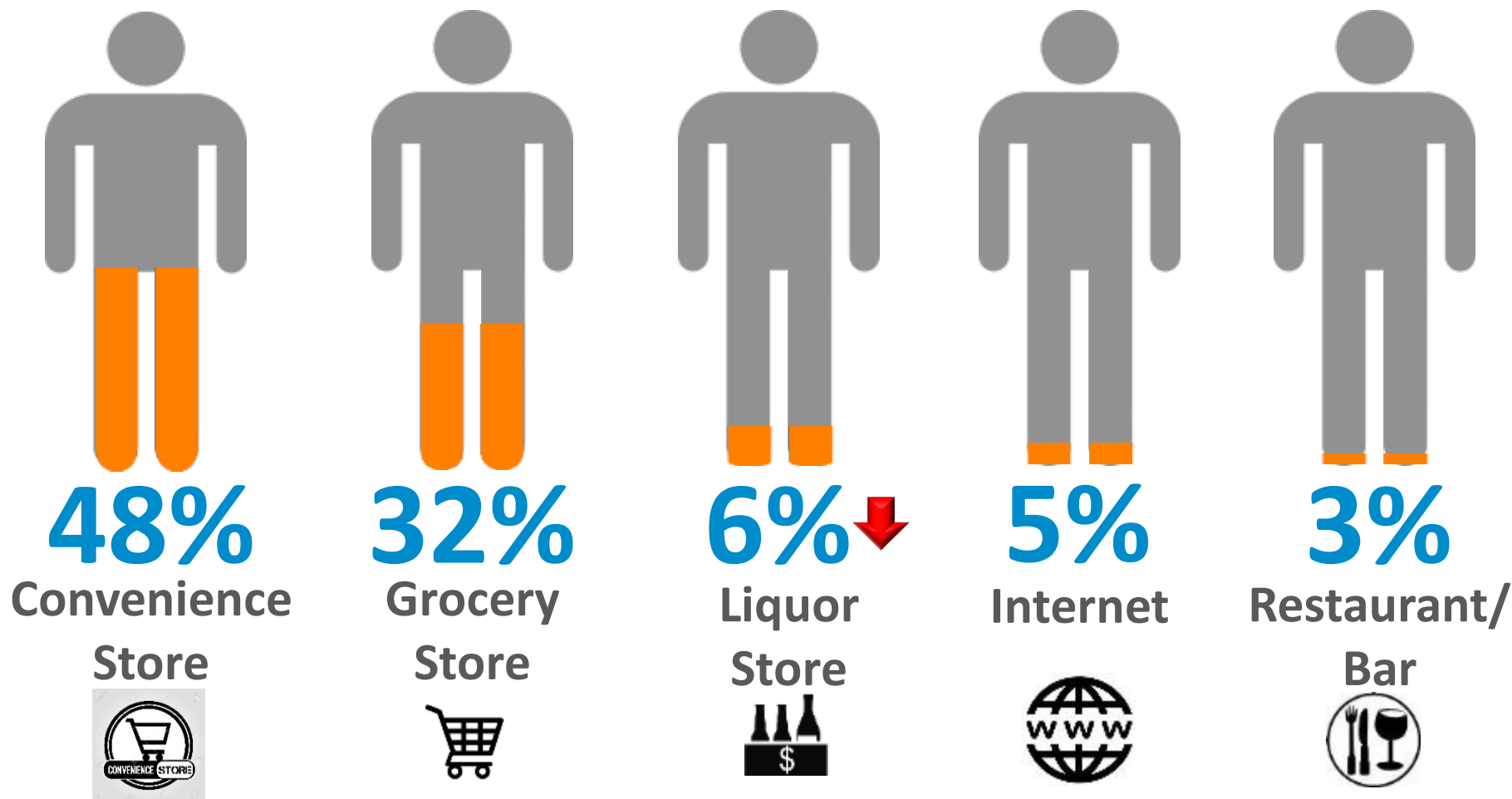
- Mostly comparable since W33, nearly two in five past year players (39%) are **spending the same amount on the same Lottery games each week**.
- In addition, one in five or more players are **spending the same amount on different games (25%) or different amounts on different lottery games (20%)**.



Q60. Which of the following statements best describes the type of Lottery player you are?

*Base: Respondents who have played CO Lottery games in the past year.

Outlets Where CO Lottery Tickets Purchased Regularly [Total Market]

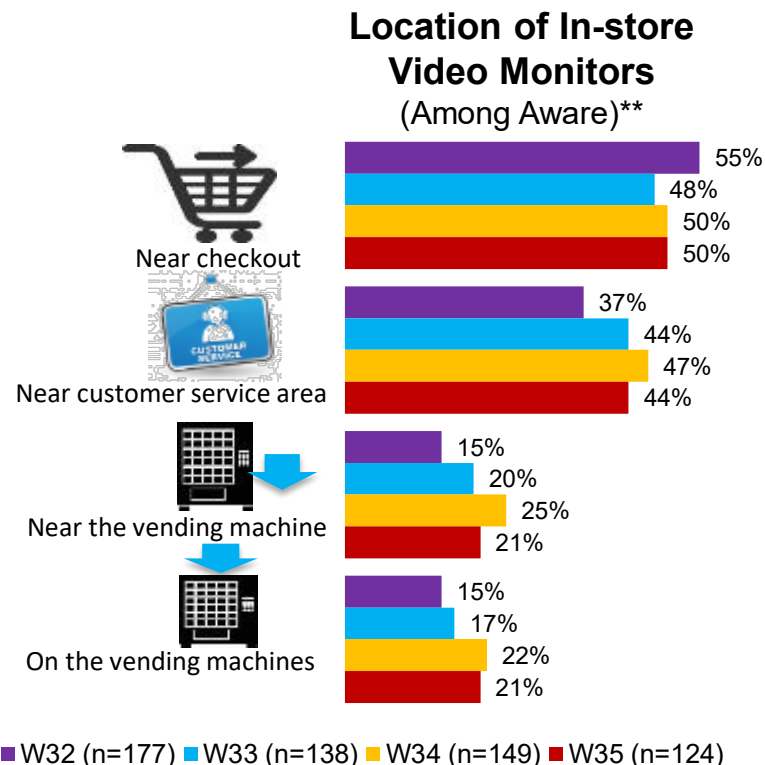
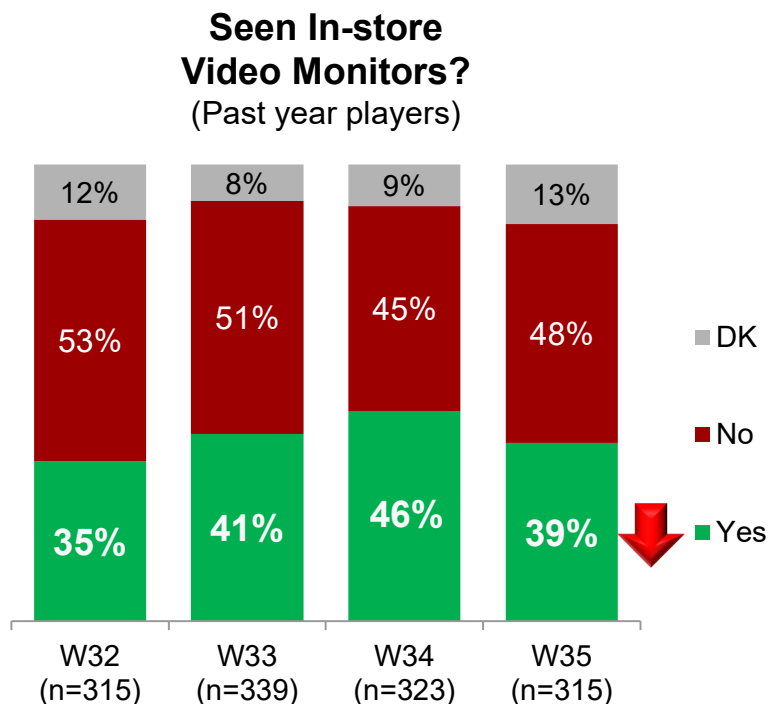


Most money is spent at **Convenience stores** (40%) and **Grocery Stores** (21%).

Question Q18A added in W31
Q18: Multiple answers accepted

Video Monitor Messaging Awareness

- Two in five past year players (39%) cite recall of **in-store video monitors**, a **significant decrease** this wave, returning to the level seen in W33.
- *Near the checkout* (50%) and *near the customer service area* (44%) continue to lead for location recall of the monitors.



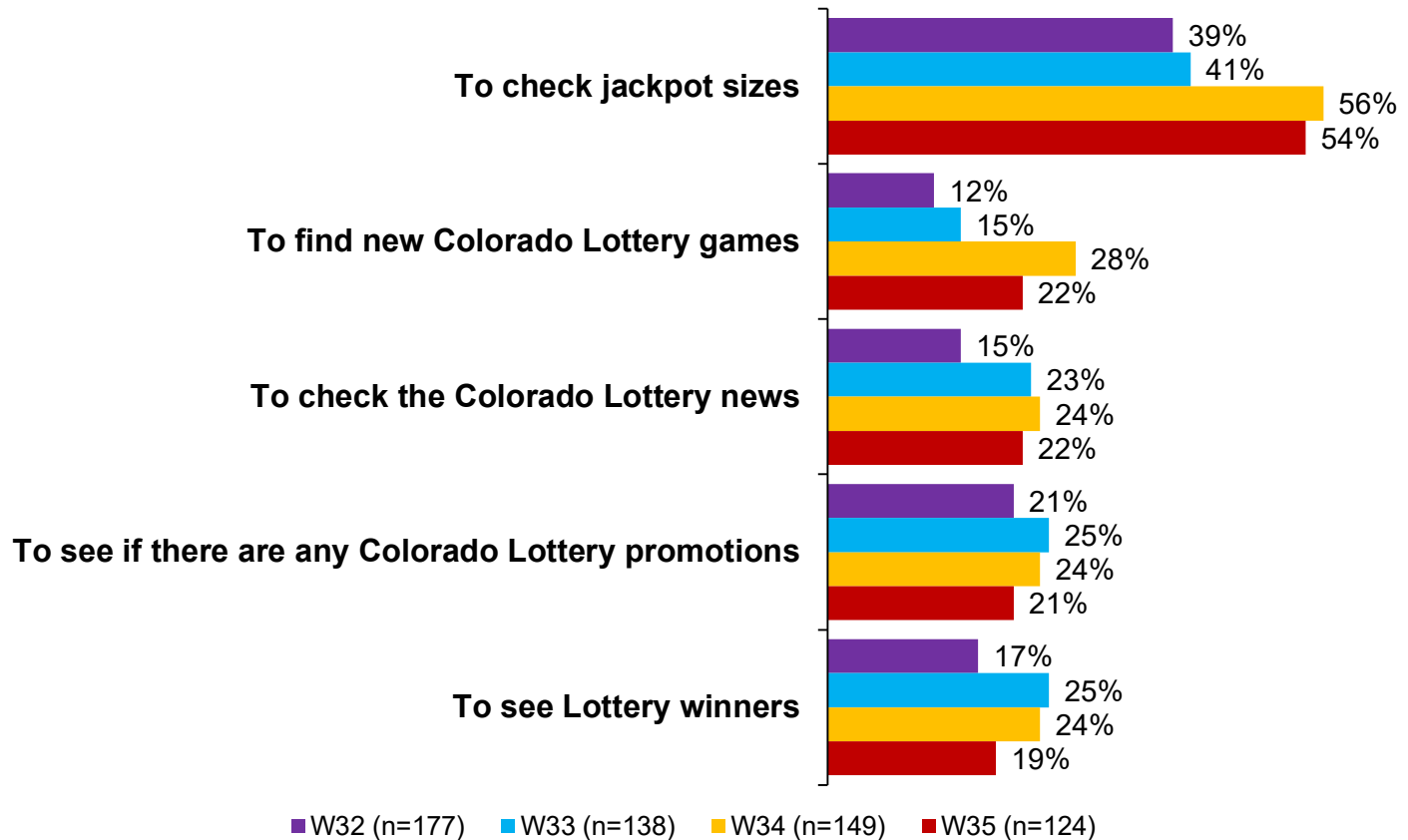
Q23AW7. Have you seen video monitors at stores where you buy lottery tickets that feature messages from the Colorado Lottery?

Q23BW7. Where in the retail store did you see the in-store Colorado Lottery video monitor?

** Base=Respondents who have seen in-store video monitors.

Reasons for Using Video Monitor

- The main reason for using CO Lottery in-store monitors continues to be **'to check jackpot sizes'** (54%).
- This is followed by **'to find new CO Lottery games'**, **'to check the CO Lottery news'**, **'to see if there are any CO Lottery promos'** and **'to see Lottery winners'** each at about one in five



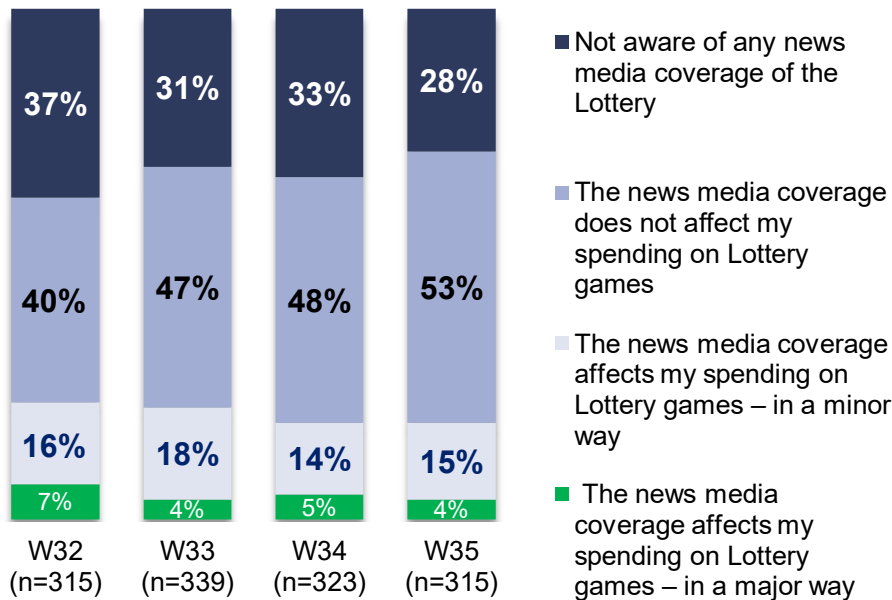
* Base=Respondents who have seen in-store video monitors
Q23DW7. For what reasons are you using the Colorado Lottery video monitors in stores?

Top mentions reported.

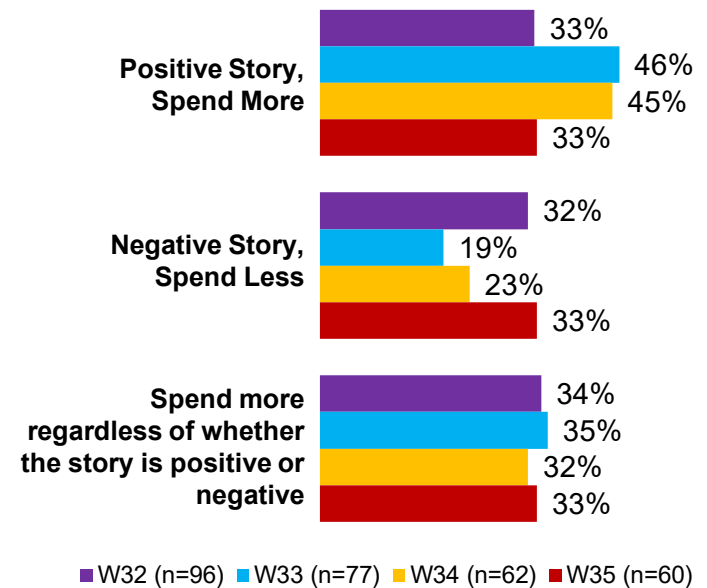
Lottery Media Coverage and Affect on Lottery Spend

- More than half of Coloradoans (53%) state **the news media coverage does not affect their spending on Lottery games**, a 5% boost from last wave, attaining a 4-wave high.
- However, one in three say if a news story is negative, they tend to spend less money on Lottery games, an upward trend since W33.

Affect of Media Coverage on Lottery Spend (Past year players)



Media Coverage Impact*



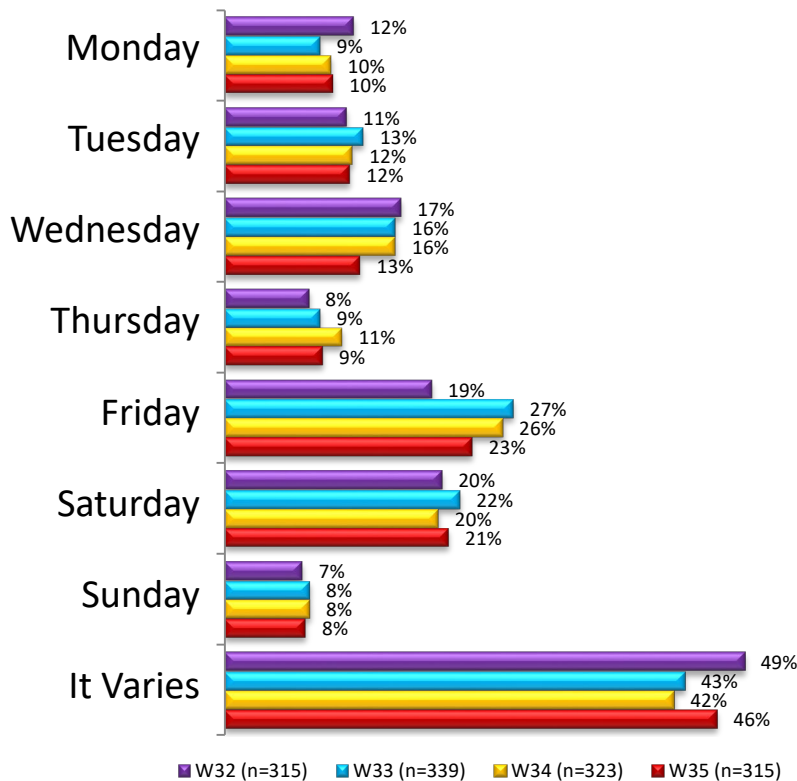
Q62W10. In general, how does the news media coverage of the Lottery affect your spending on Lottery games?
Q62BW10. Please indicate which statement(s) best describes the impact on your spending on Lottery games.

* Base=Respondents whose Lottery spend is affected by news media coverage

Day of the Week for Lottery Purchase

- **Friday** (23%) and **Saturday** (21%) continue to be the most typical days to purchase lottery tickets in W34.
- The top reasons for varying the day of purchase are “***depends when/if I go to the store***” (19%, trending down since W33) and ***purchase on impulse***” (18%).

Typical Day to Buy Tickets*



Reasons For Varying**

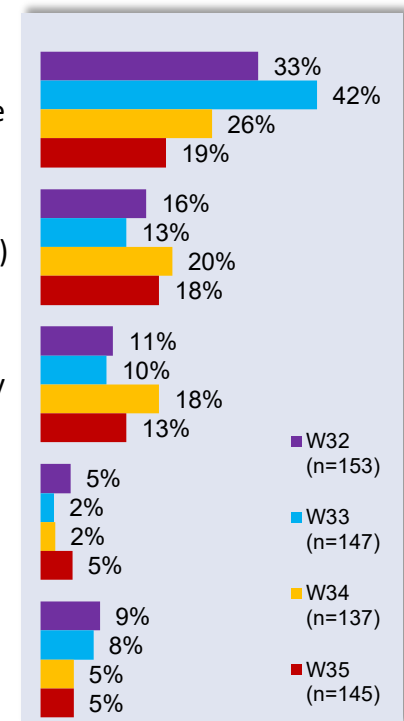
Depends when/if I go to the store

Purchase on impulse (in general)

Depends when/if I have the money

If I have free time/am available

Depends on the jackpot/prize



*Base=Respondents who have played games in the past year.
Q61. On which days of the week do you typically buy Lottery tickets?

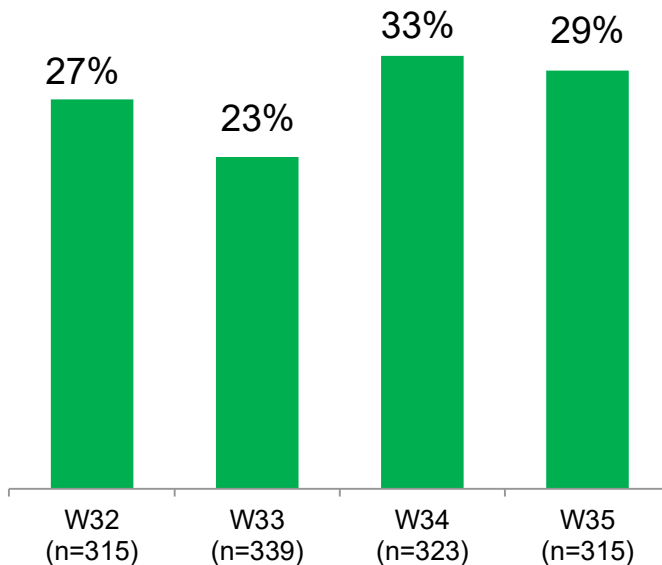
** Base=Respondents who cite the day can vary
Q61a. Why does the day of your purchase vary ?

Multiple answers accepted
Top mentions reported

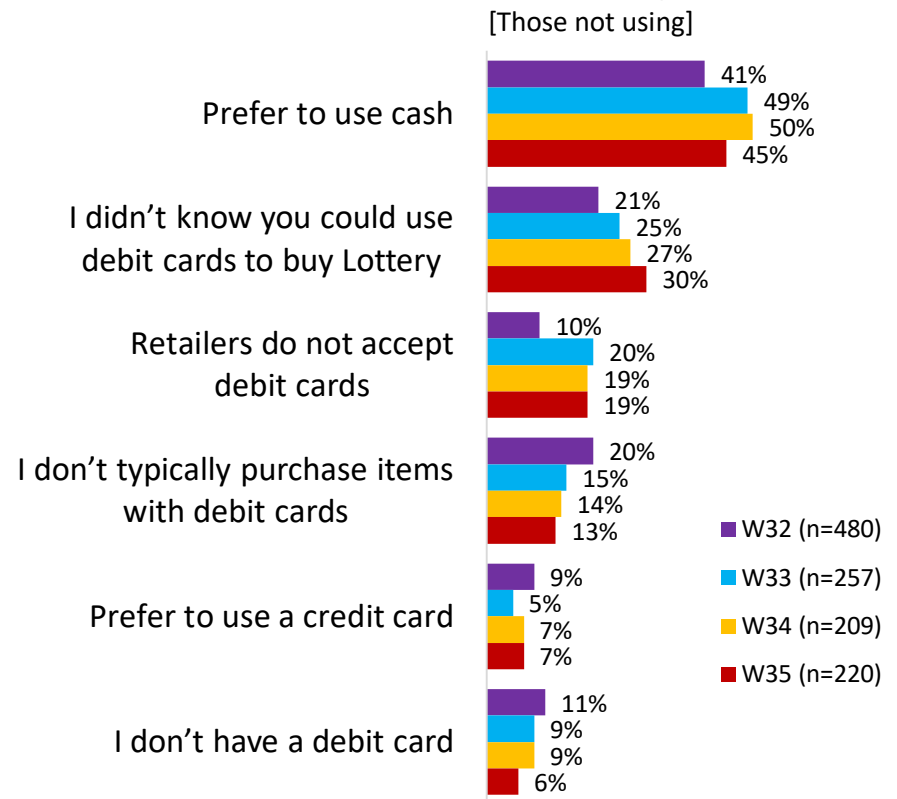
Debit Card Usage and Reasons for NOT Using

- 29% of past year players say they use **debit cards** to purchase Lottery tickets in W35, dipping (-4%) slightly since last wave.
- **“Preference to use cash”** (45%) remains the main reason for not using debit cards to buy lottery tickets. Nearly a third (30%) indicate an *unawareness*, rising for the third straight wave.

Debit Card Used to Purchase Lottery tickets
(Past year players)



Reasons for Not Using a Debit Card



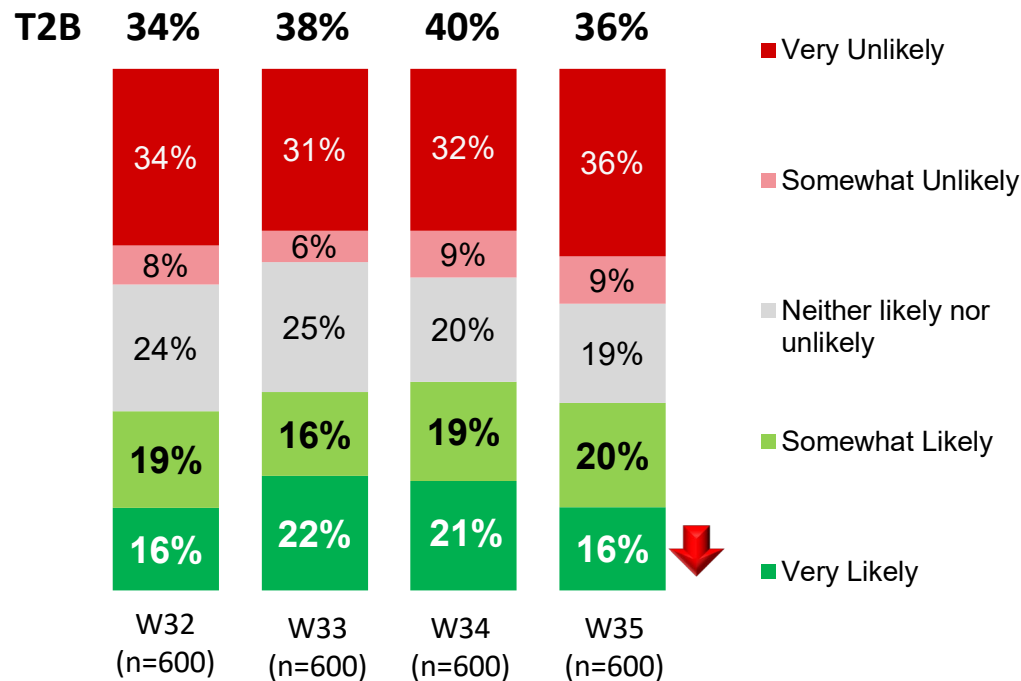
Q80. Have you ever used your debit card to purchase Lottery tickets?

Q81. You mentioned not using a debit card to purchase Lottery tickets, please tell us why.

Credit Card Likelihood and Purchase Patterns

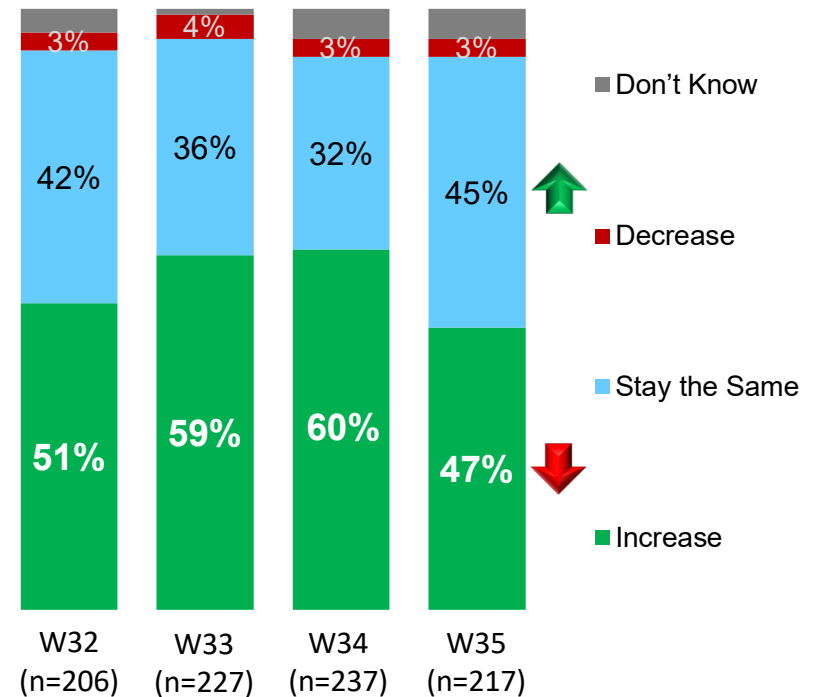
- Nearly two in five residents (36%) indicate they would be **very or somewhat likely** to purchase CO Lottery tickets with a credit card if this method was allowed, dipping 4% since W34, due in part to a **significant decline** for those saying, “very likely”.
- Among those who would use this payment method, 47% state their Lottery spend would **increase** in W35, a **significant decline** compared to last wave.

Likelihood to use Credit Card to Buy Lottery Tickets



Purchase Pattern

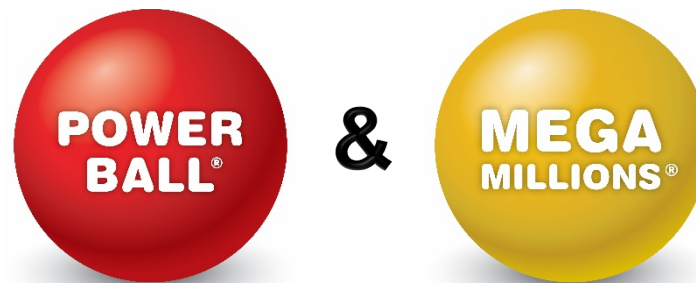
[Among those likely to buy]



Q82. If you were allowed to purchase Lottery tickets with a credit card, how likely would you be to buy Lottery tickets with a credit card?

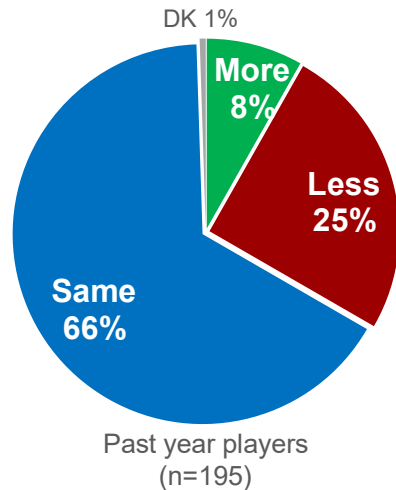
Q83. You mentioned a likelihood of buying Lottery tickets with a credit card if available. Do you think your Lottery spend would increase, decrease or stay the same.

Multi-State Games



Change in Powerball Spend

- The portion of Powerball players (8%) who are spending more on the game compared to a year ago has declined by 5%, while fewer cite spending less compared to last year (25%, -10%) in W35.
- **Scratch Games** continue to be what players are buying when spending less on Powerball.



	More	Less	Same
Wave 32	6%	35%	56%
Wave 33	4%	37%	58%
Wave 34	13%	26%	59%

Colorado Games Spending More on When Spending Less on Powerball (MULTI-ANSWERS ACCEPTED)

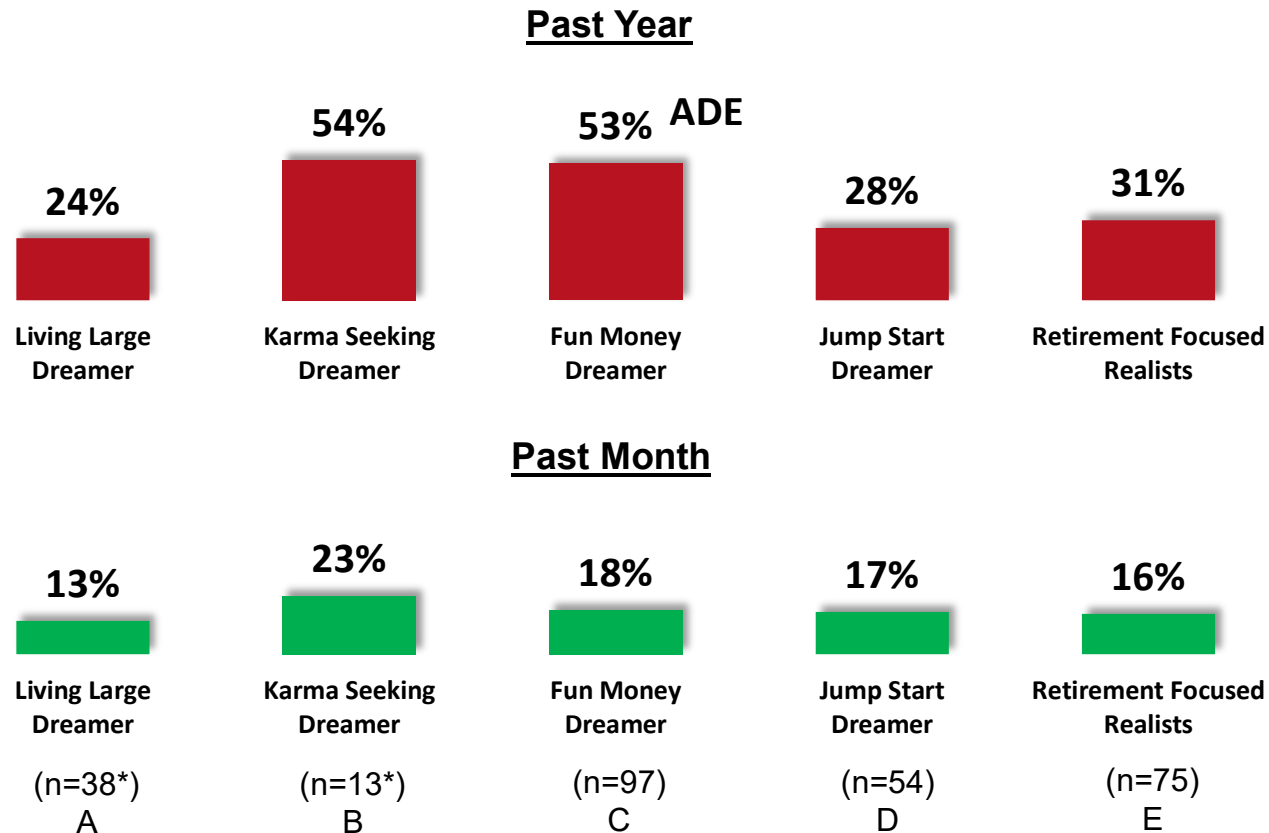
	W32 (n=73)	W33 (n=89)	W34 (n=54)	W35 (n=49*)
Scratch Games	21%	25%	20%	27%
Mega Millions	7%	12%	7%	14%
CO Lotto +	7%	9%	6%	14%
Lucky for Life	8%	2%	7%	6%
Pick 3	3%	1%	6%	4%
I am not spending more on other CO Lottery games	56%	55%	63%	41%

Q35a. Would you say you are spending more, less or about the same on Powerball, as you were a year ago?
Q35b. On which Colorado Games do you increase your spending when you spend less on Powerball?

^ Caution small sample size

Powerball Playership by Segment

- In W35, more than half of **Karma Seeking Dreamers*** (54%) and **Fun Money Dreamers** (53%) report **past year** Powerball play, with other key segments playing between 24% and 31%.
- **KSD*** (23%) lead the key segments in **past month** PB play this wave.

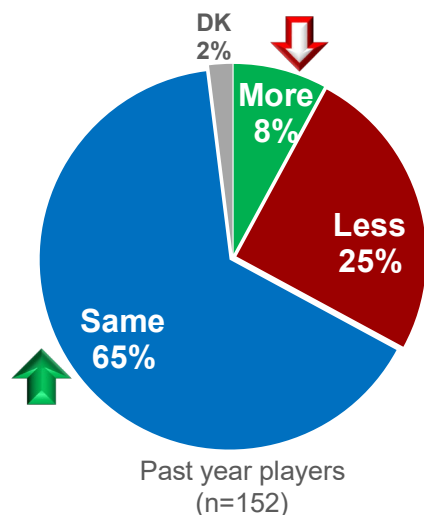


Note: Capital letter indicates significantly higher/lower at 95% confidence level between segments

*Caution: small base size

Change in Mega Millions Spend

- 8% of Mega Millions players are spending more on the game compared to a year ago, showing a **significant decrease** since last wave. In addition, 25% mention playing less, down 6% since W34.
- **Scratch Games** and **Powerball** are what players are buying when spending less on Mega Millions in W35.



	More	Less	Same
Wave 32	6%	31%	59%
Wave 33	6%	35%	58%
Wave 34	14%	31%	53%

Colorado Games Spending More on When Spending Less on Mega Millions (MULTI-ANSWERS ACCEPTED)

	W32 (n=44)^	W33 (n=57)	W34 (n=45)^	W35 (n=38)^
Scratch Games	16%	18%	18%	32%
Powerball	5%	21%	22%	11%
Lucky for Life	5%	7%	11%	5%
CO Lotto+	2%	9%	9%	5%
Cash 5	2%	2%	4%	3%
I am not spending more on other CO Lottery games	68%	54%	49%	45%

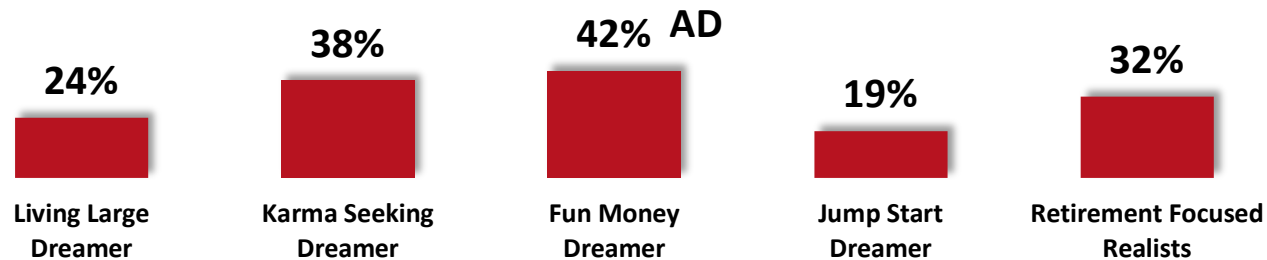
^ Caution small sample size

Q48b. Would you say you are spending more, less or about the same on Mega Millions, as you were a year ago?
Q48c. On which Colorado Games do you increase your spending when you spend less on Mega Millions?

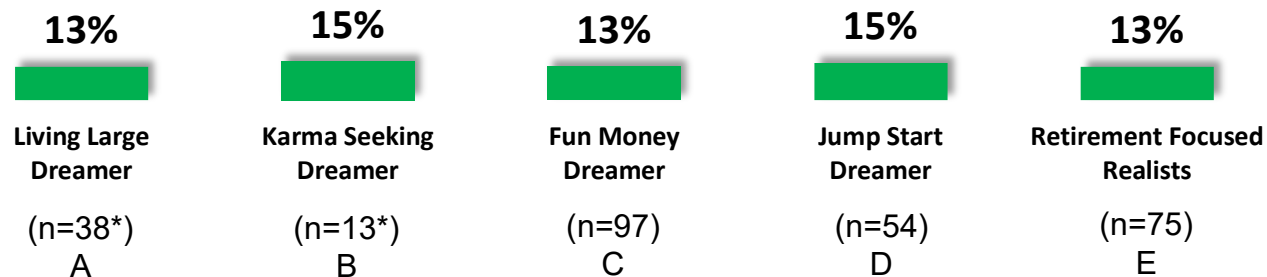
Mega Millions Playership by Segment

- **Fun Money Dreamers** (42%) and **Karma Seeking Dreamers*** (38%) lead in **past year** Mega Millions play this wave. **FMDs** are **significantly more** likely to play than Living Large Dreamers and Jump Start Dreamers.
- **Past month** play is mostly consistent across the key segments, at about one in seven.

Past Year



Past Month



Note: Capital letter indicates significantly higher/lower at 95% confidence level between segments

*Caution: small base size

Amount Spent on Powerball & Mega Millions

- Powerball and Mega Millions players are spending similar amounts **per play** and on a **monthly basis** compared to the previous wave.

Spend Last Time Played – Mean \$

W32	W33	W34	W35
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Spend In Typical Month – Mean \$

W32	W33	W34	W35
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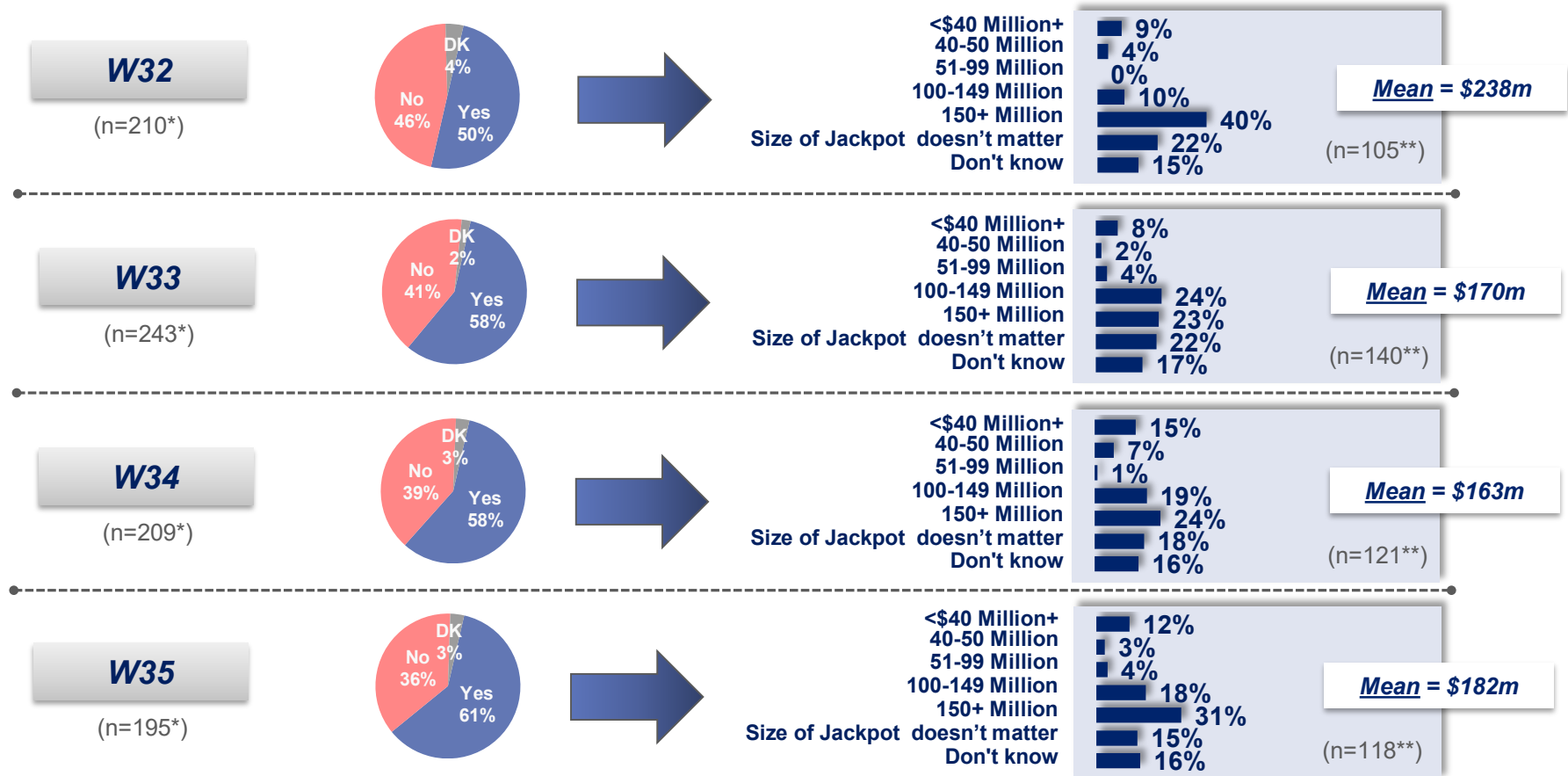


*Base=Respondents who have played Powerball or Mega Millions in the past year
 Q34/47. How much did you spend the last time you played Powerball/Mega Millions?
 Q35/48. Approximately how much do you spend on Powerball/Mega Millions in a typical month?

W35
 Powerball, n= 295
 Mega Millions, n = 152

Powerball Jackpot Spend Trends

- Once again, about three in five Powerball players (61%) cite that they spend more as the jackpot rises.
- The average jackpot level at which players claim to spend more is about **\$182m**, a directional lift this wave.



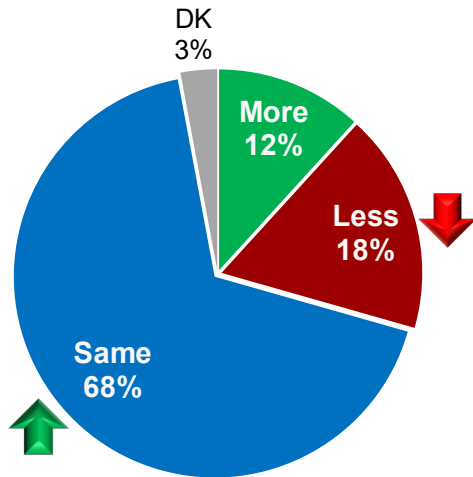


Cash 5, Pick 3, Lucky for Life

Change in CASH 5 and Pick 3 Spend

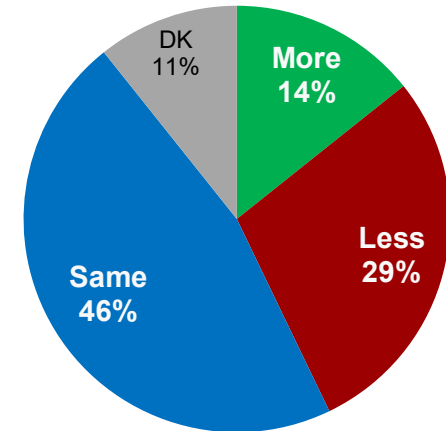
- In W35, fewer **Pick 3** players (12%) state spending more, while **significantly fewer** are spending 'less' and **significantly more** are spending the 'same' compared to a year ago.
- More **Cash 5** players (14%, +3%) are spending more this wave, while fewer are spending less compared to W34.

CASH 5



	More	Less	Same
Wave 32	16%	27%	51%
Wave 33	9%	30%	56%
Wave 34	25%	39%	34%

PICK 3

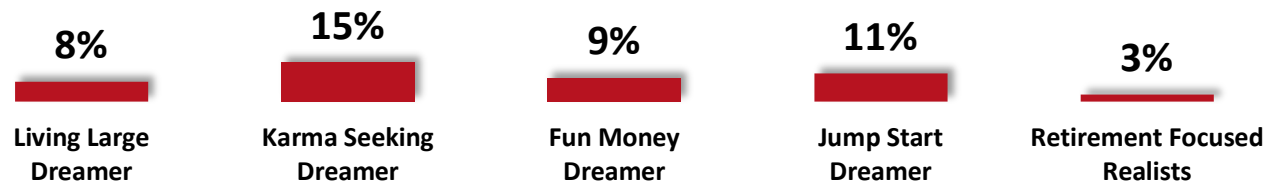


	More	Less	Same
Wave 32	6%	33%	54%
Wave 33	12%	15%	68%
Wave 34	11%	37%	48%

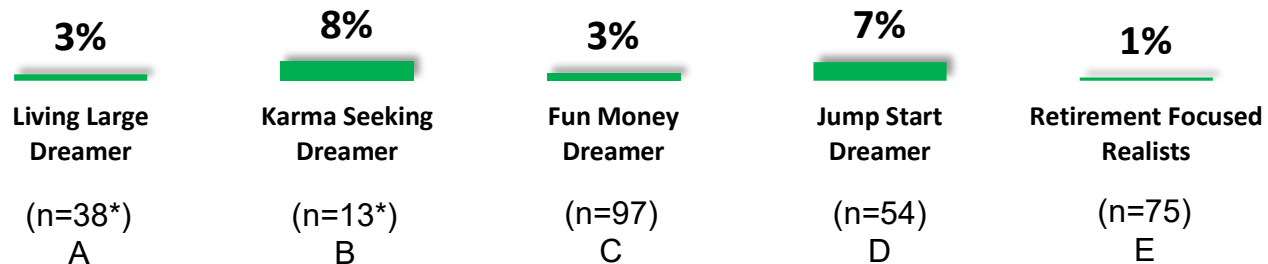
Cash 5 Playership by Segment

- **Karma Seeking Dreamers*** (15%) lead the key segments in past year playership.
- For past month play, **Karma Seeking Dreamers*** (8%) and **Jump Start Dreamers** (7%) top the segments in W35.

Past Year



Past Month



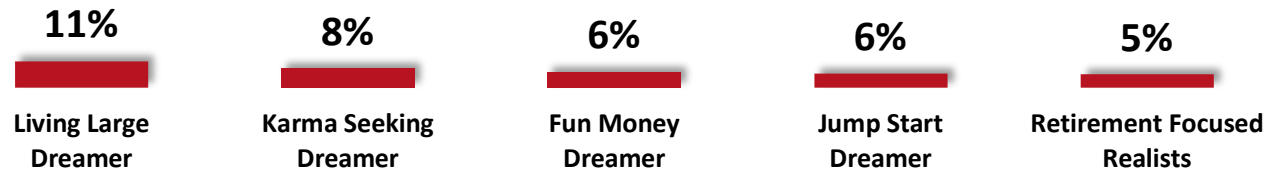
Note: Capital letter indicates significantly higher/lower at 95% confidence level between segments

*Caution: small base size

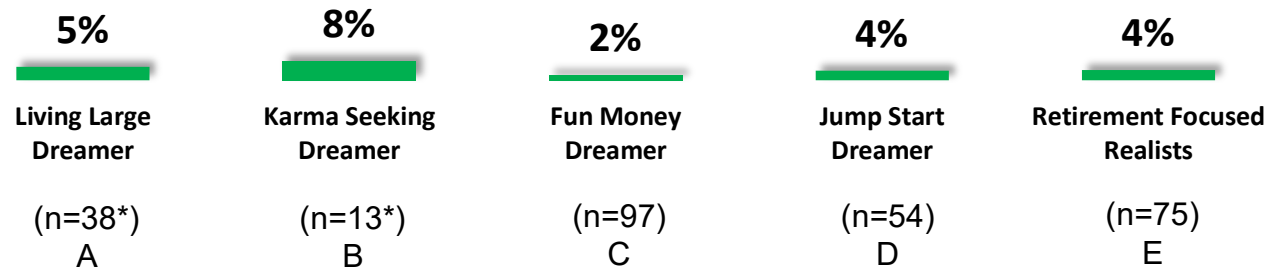
Pick 3 Playership by Segment

- **Living Large Dreamers*** (11%) report the highest past year **Pick 3** play, while **Karma Seeking Dreamers*** (8%) lead for past month play in W35.

Past Year



Past Month



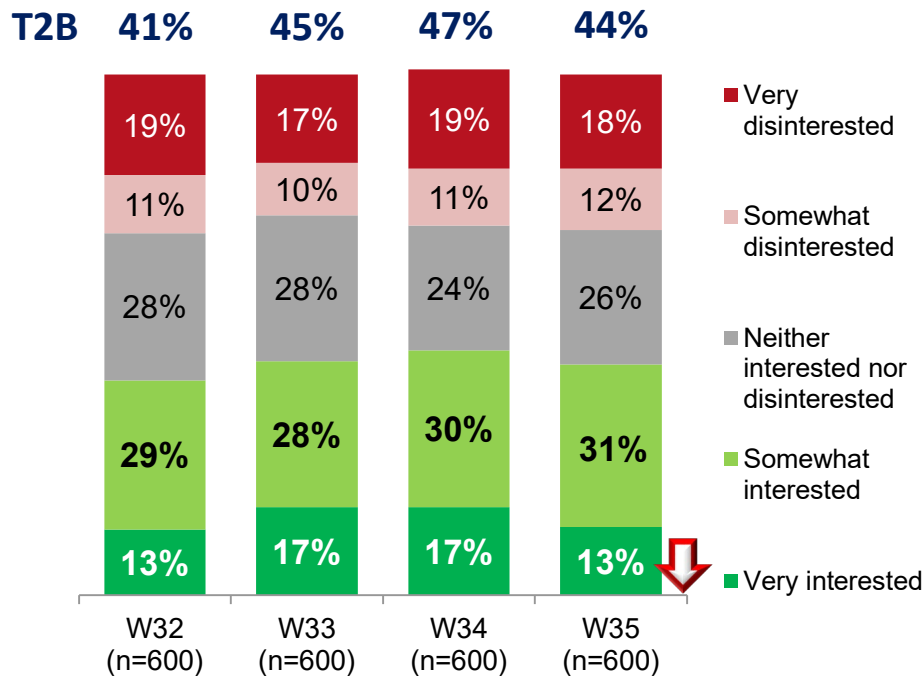
Note: Capital letter indicates significantly higher/lower at 95% confidence level between segments

*Caution: small base size

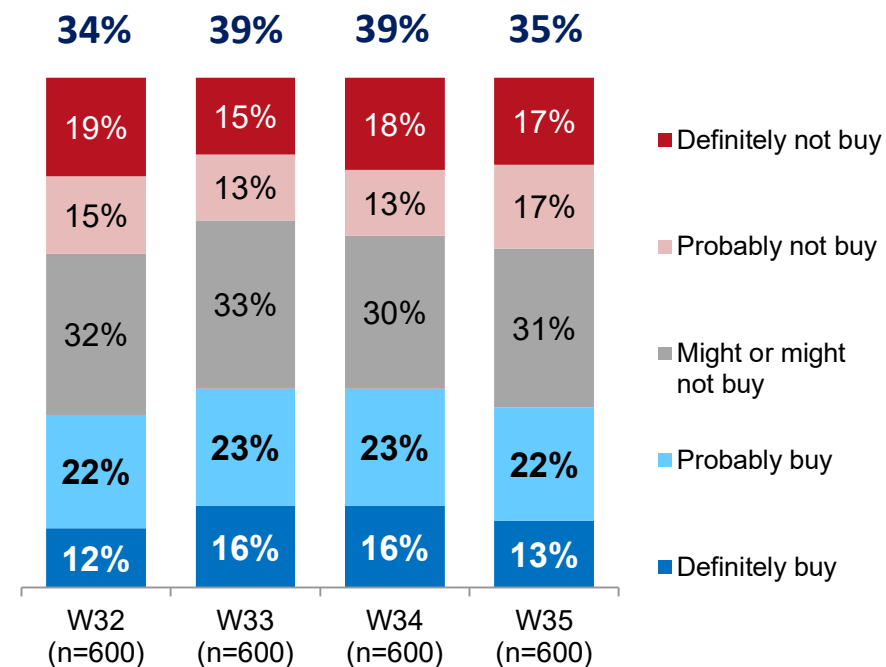
Lucky for Life Interest and Likelihood to Buy

- In W35, slightly fewer Coloradoans (44%, -3%) state they are **very or somewhat interested** in the Lucky for Life game, stopping an upward trend from W32 to W34, due in part to a **significant decrease** in the portion saying, “**very interested**” (13%).
- Also, 35% state they **would probably or definitely purchase** a LfL ticket in the future, a 4% decline.

Lucky for Life Interest



Lucky for Life Future Purchase



W4L5. How would you rate your level of interest in the Lucky For Life game from the Colorado Lottery?

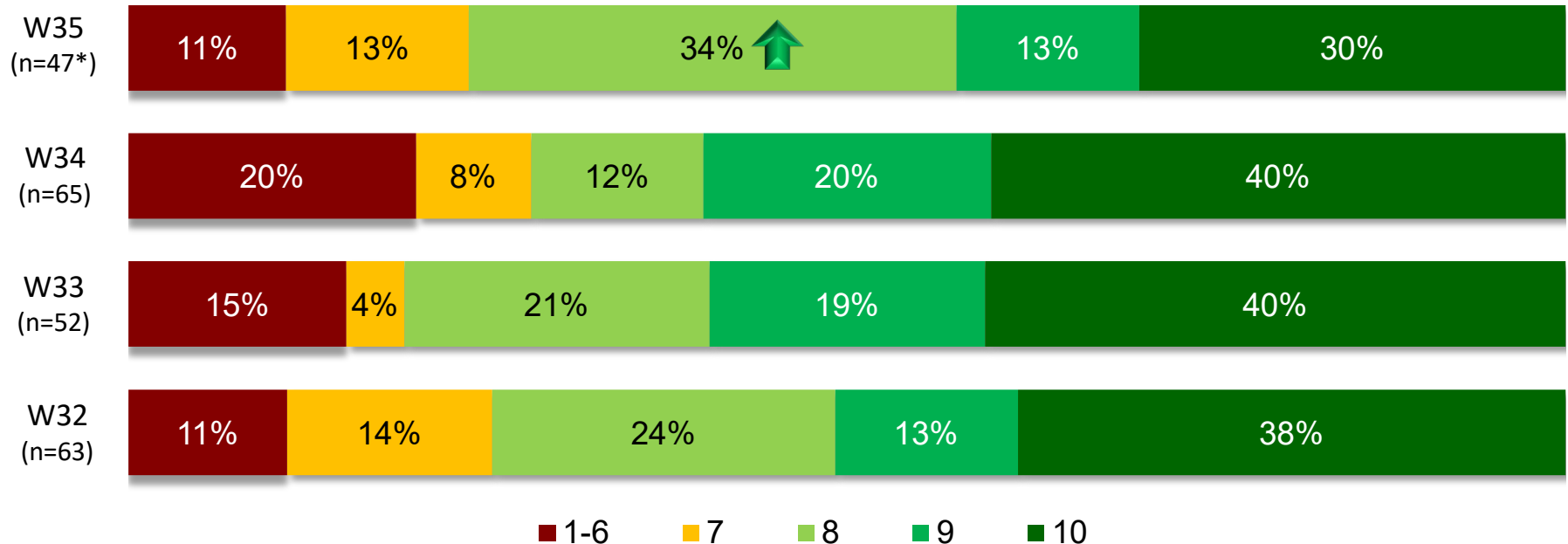
W4L6. How would you rate your likelihood to purchase a ticket in the future for the Lucky For Life game from the Colorado Lottery?

Lucky for Life Ease of Play and Understanding

- 30% of 'Lucky for Life' players rate the game a '10' for being **easy to understand & play**, a 10% decline from last wave.
- Further, 11% of players gave the game low rankings '1-6', a dip from W34, returning to the W32 level.



Ease of Play and Understanding Ratings [On a scale from 1 to 10]



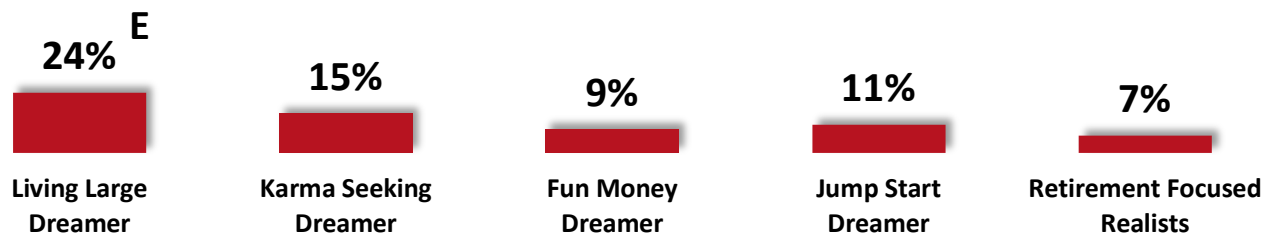
W4L7. On a scale from 1 to 10, where 10 is very easy and 1 is very difficult, how easy is the Lucky For Life game to understand and play?

*BASE=Lucky for Life players.

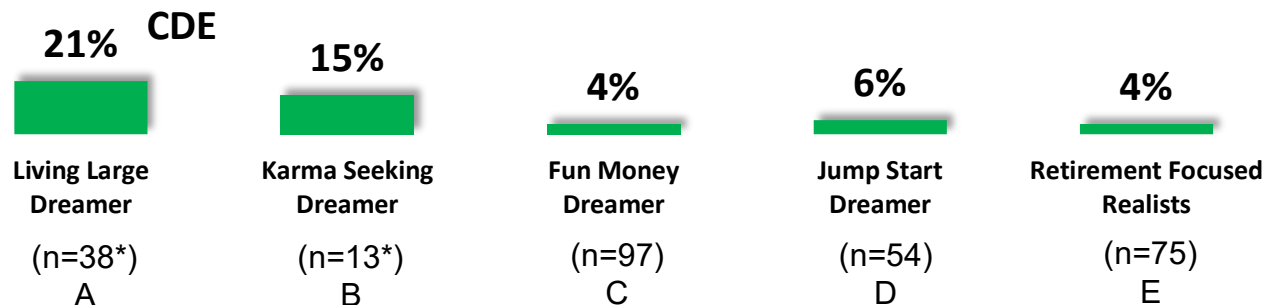
Lucky for Life Playership by Segment

- **Living Large Dreamers*** (24%) top the reported segments in both past year (24%) and past month (21%) **Lucky for Life** play.
- In addition, 15% of **Karma Seeking Dreamers*** cite past month and past year playership, trailing only the leader.

Past Year



Past Month



Note: Capital letter indicates significantly higher/lower at 95% confidence level between segments

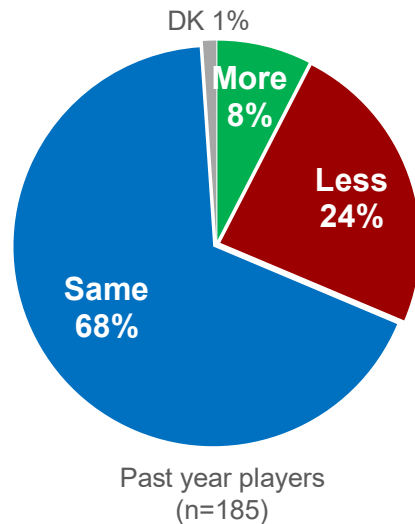
*Caution: small base size

Scratch



Change in Scratch Game Spend

- 8% of Scratch game players indicate they are spending more on the game compared to a year ago in W35, mostly stable since W32. Furthermore, fewer players (24%, -7%) state they are spending less.
- The main reason for spending less in W35 is “**COVID-19**,” at nearly a third (32%), rising directionally by 7% from last wave. “**Don’t have the money**” has **dipped significantly** this wave, a positive indication.



	More	Less	Same
Wave 32	9%	34%	55%
Wave 33	6%	31%	61%
Wave 34	8%	31%	60%

Reasons for Spending Less



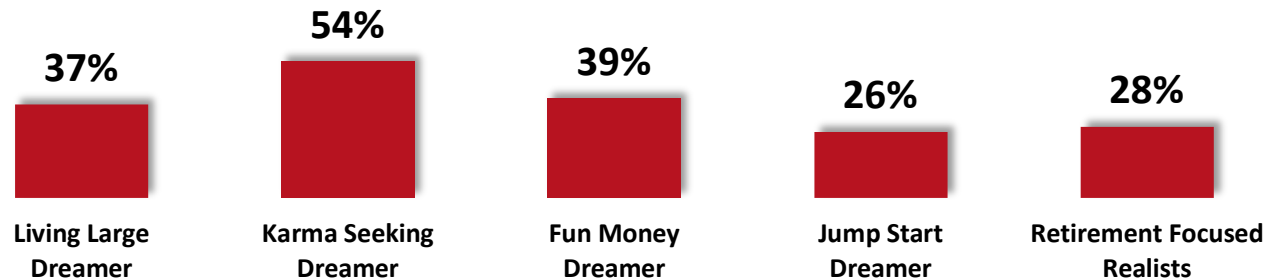
Q28. Would you say you are spending more, less, or about the same on Scratch-off games, as you were a year ago?
Q29AW19. Please tell us why you are spending less on Scratch games from a year ago.

^ Caution small sample size

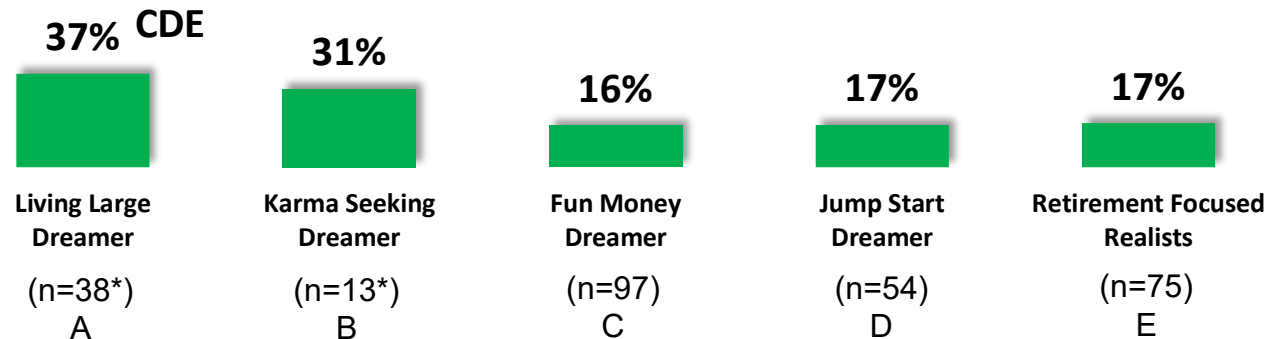
Scratch Playership by Segment

- More than half of **Karma Seeking Dreamers*** (54%) indicate they have played Scratch games in the past year, topping the key segments in W35.
- For past month play, nearly two in five **Living Large Dreamers*** (37%) cite playership, at a **significantly higher** rate than 3 key segments.

Past Year



Past Month

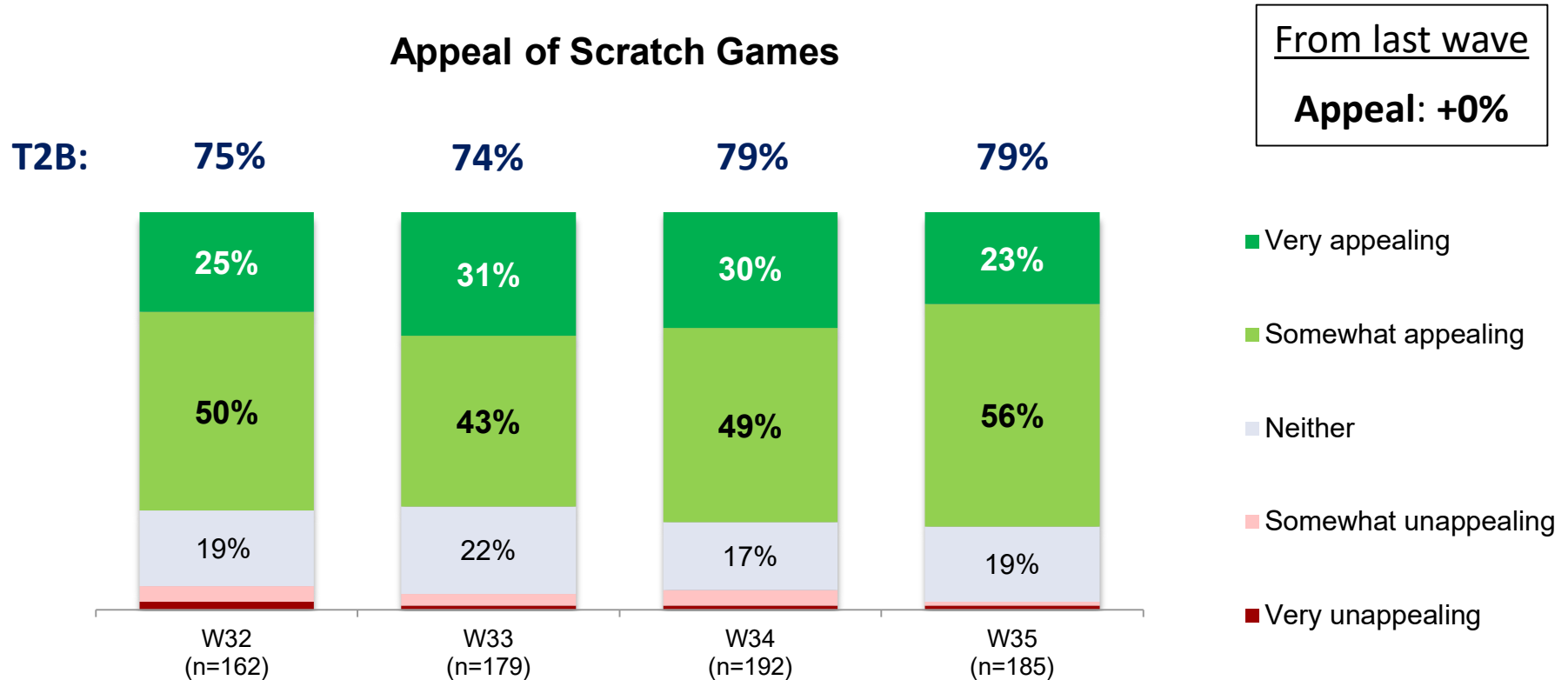


Note: Capital letter indicates significantly higher/lower at 95% confidence level between segments

*Caution: small base size

Scratch Game Appeal

- Similar to the prior wave, four in five Scratch game past year players (79%) indicate the games currently offered by the CO Lottery are **very** or **somewhat appealing**. While the portion who stating 'very appealing' declined, the portion who said 'somewhat appealing' increased.



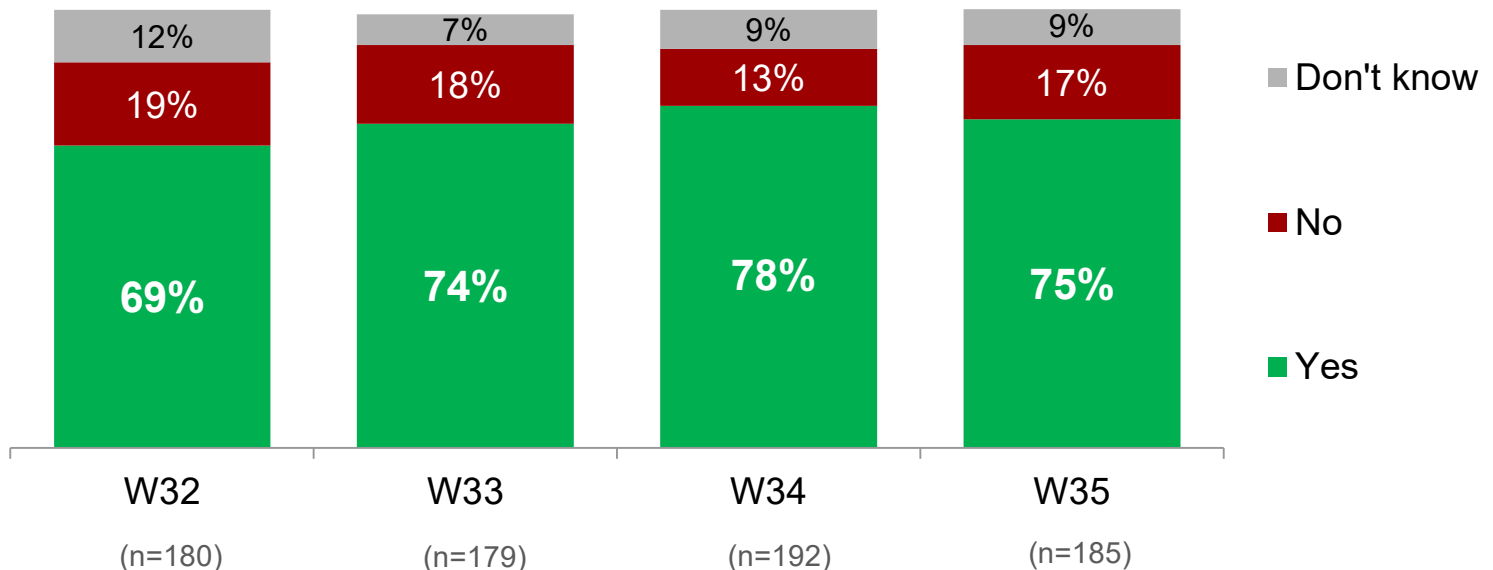
Q32AW7. How would you rate the appeal of Scratch games currently offered by the Colorado Lottery?

Past year players

Scratch Game Information Within Retail Store

- Three-quarters of Scratch players feel they get enough information about Scratch games at retail, a marginal decrease (-3%) in W35.
- Further, approximately one in six (17%) do not think they are getting enough in-store information, a 4% boost from last wave.

Feel In-store Information Materials Provide Enough Info?

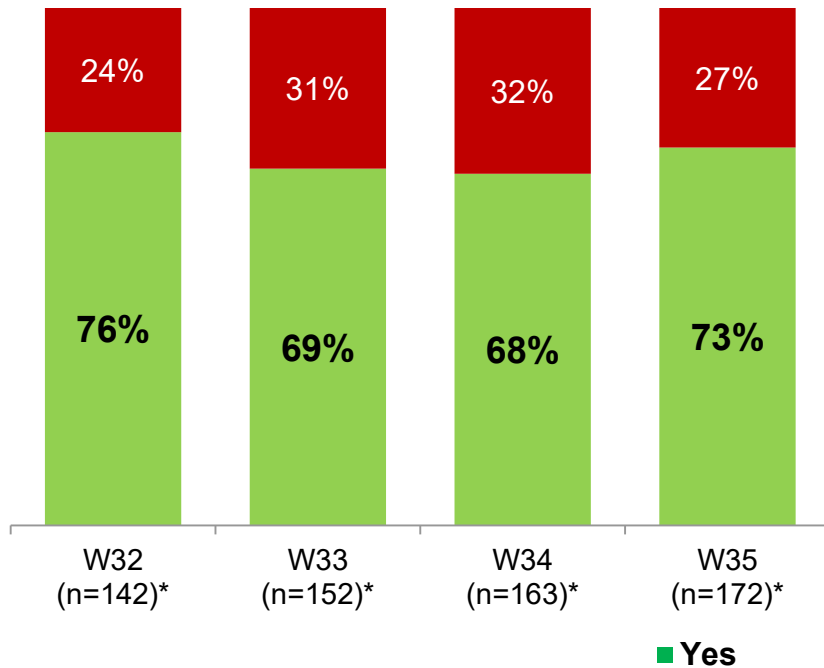


Base=Respondents who played Scratch games in the past year
Q32KW7. Do you feel you get enough information about Colorado Lottery Scratch games at the retail store that you purchase tickets from?

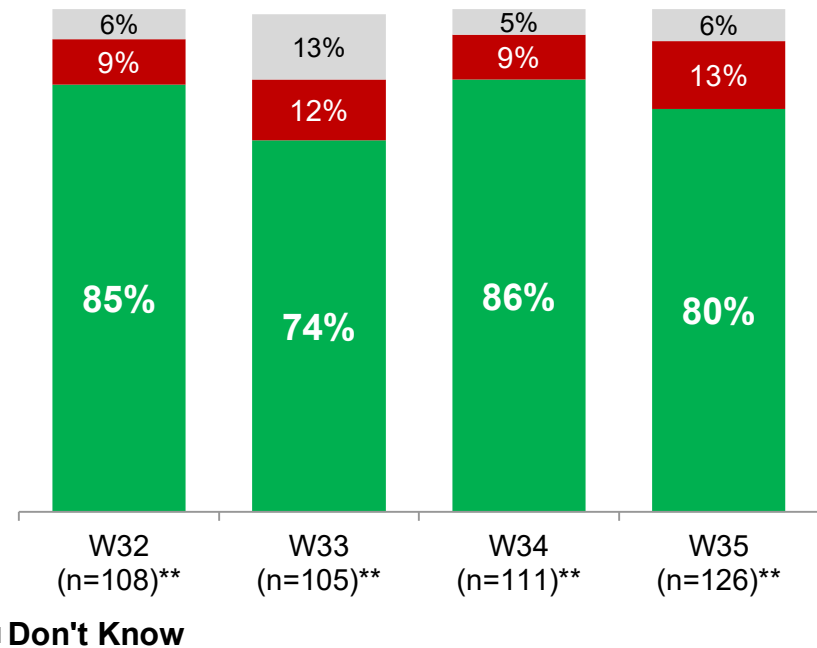
Lottery Game Vending Machine Purchase

- 73% of Scratch players aware of vending machines have purchased tickets from VMs in W35, a 5% increase this wave.
- Additionally, fewer players using the machines (80%, -6%) state they receive enough information on the displays this wave.

Purchase from Lottery Game Vending Machines?



Get Enough Info from Lottery Game Vending Machine Display?



Q32MW7 .Do you purchase Colorado Lottery Tickets from Lottery Game Vending Machines?

Q32NW7. Do you feel you get enough information about Colorado Lottery games on the display of the vending machines that you purchase tickets from?

*BASE=Respondents who are aware of the Colorado Lottery Game Vending Machines

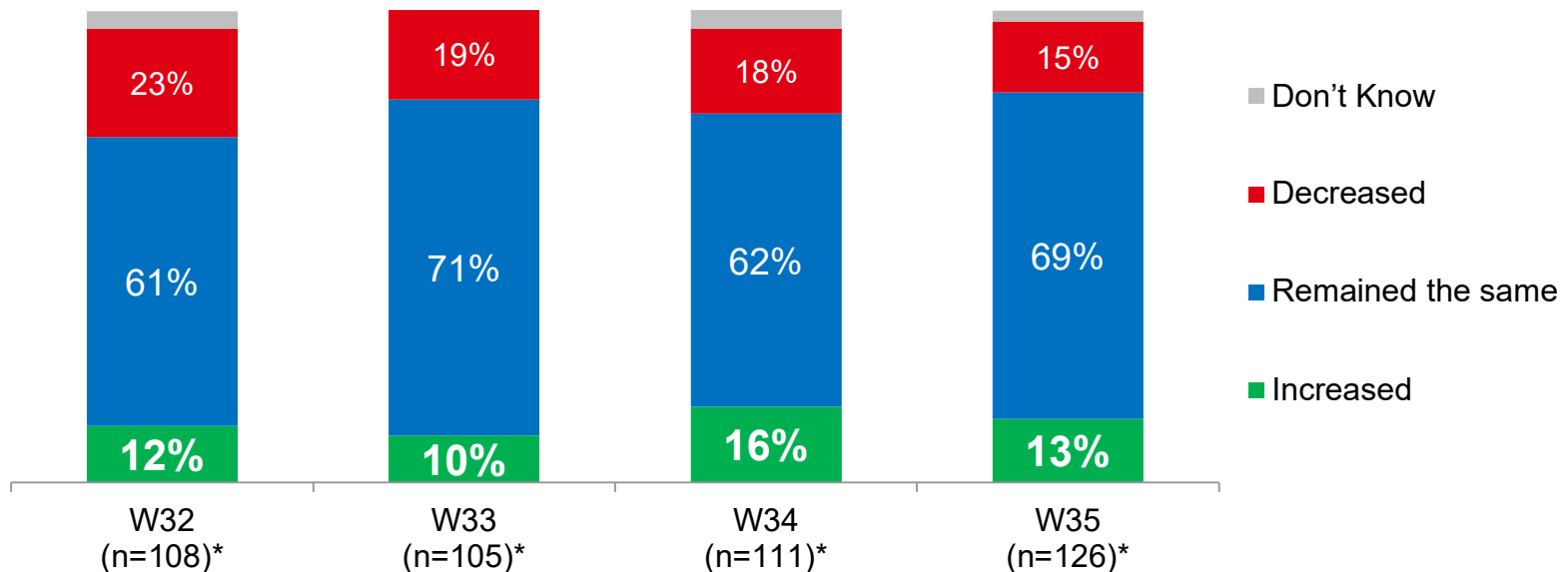
**BASE=Respondents who purchase Scratch tickets from STVMs

Lottery Game Vending Machines – Spend Change

- In W35, 13% of Scratch players who purchased Lottery tickets from vending machines say their spend has increased compared to 6-month ago, a 3% decrease from last wave.
- A similar portion mention their spend has decreased this wave (15%, -3%).

Lottery Spend Change Using Lottery Game Vending Machine

NET GAIN: -2%

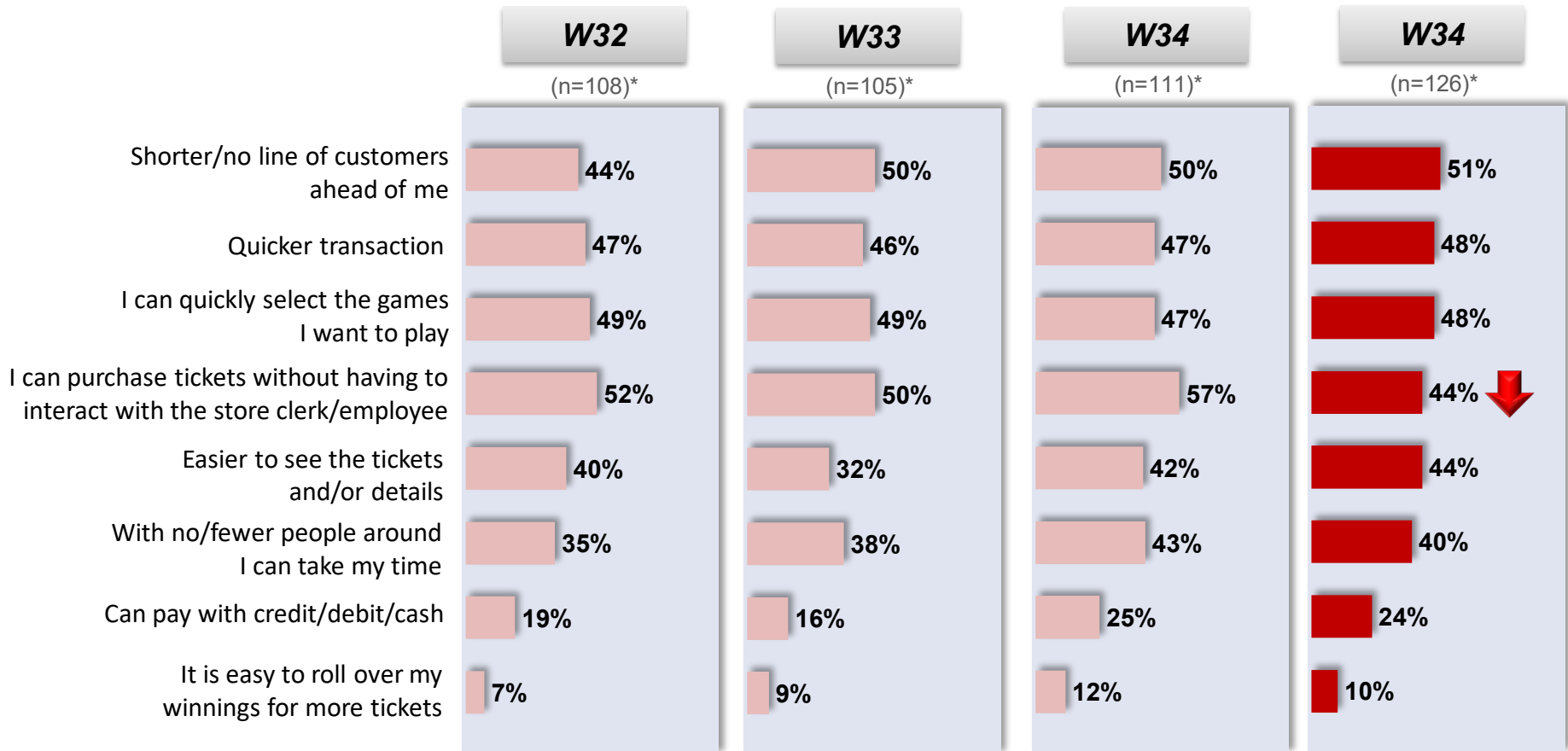


Q32NW11. Would you say your Lottery spend has increased, decreased or remained the same using Lottery Game Vending Machines, as compared to 6 months ago?

*BASE= Respondents who have played scratch games in the past year

Appeal of Buying Scratch Tickets from STVMs

- **Shorter/no lines** (51%) is the top reason to purchase tickets from VMs in W35.
- **Significantly fewer** say 'I can purchase tickets w/o having to interact with employees' (44%) as an appealing reason this wave, possibly due to customers becoming more comfortable with human contact.



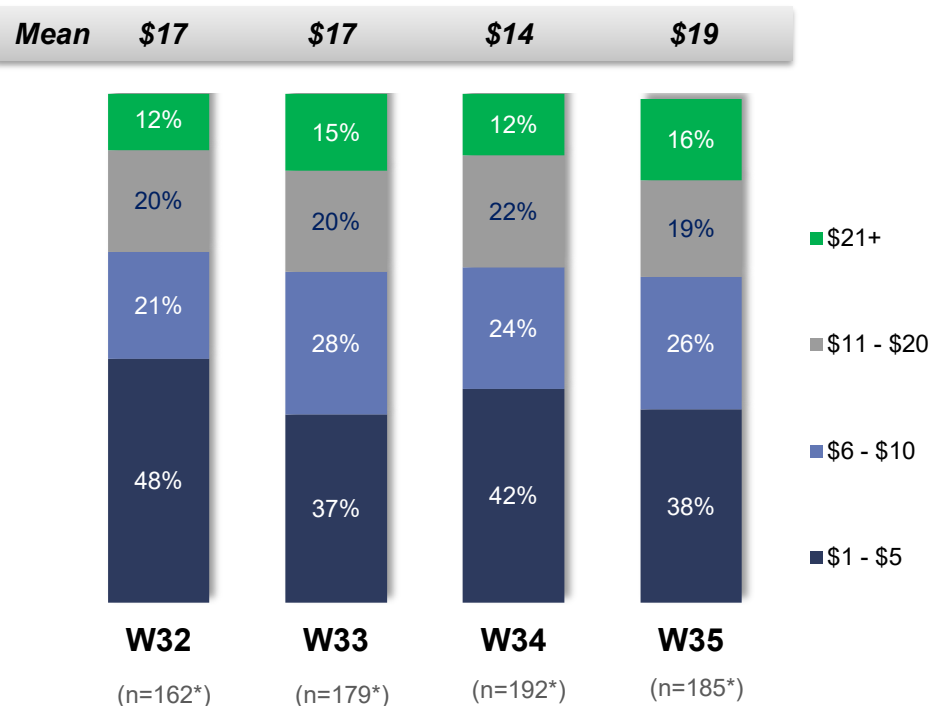
* Base= Respondents who have purchased Scratch tickets from STVM

Q32MW10. What do you find appealing about purchasing Colorado Lottery Tickets from Scratch Ticket Vending Machines?

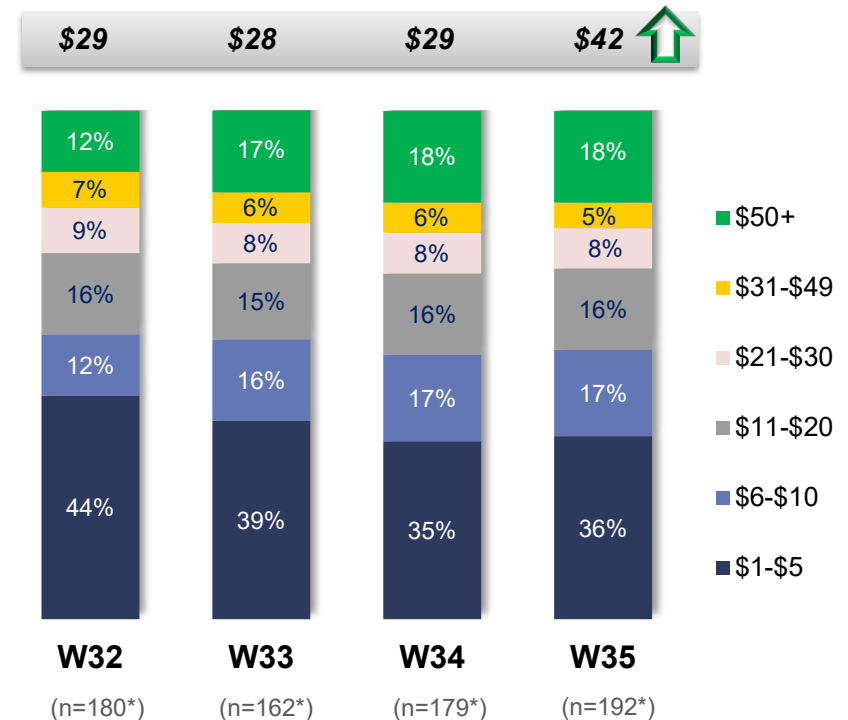
Amount Spent on Scratch Games

- Average Scratch spend **per play** (\$19) and **per month** (\$43, a **significant lift**) both grew this wave.
- Those spending \$21+ per play increased directionally (16%, +4%).

... Last Time Played



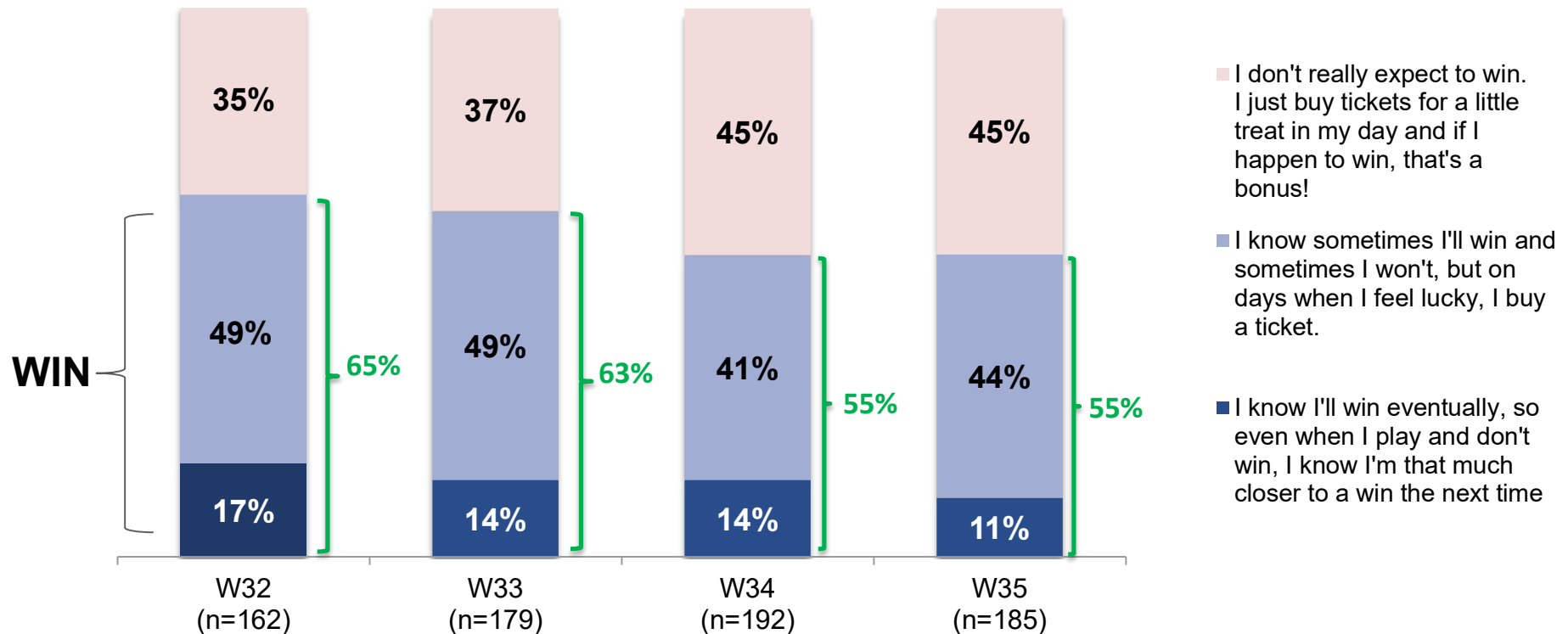
... In Typical Month



^Spend each time tickets are bought (mean): W32 = \$15, W33 = \$14, W34 = \$12, W35 = \$16

Expectations of Instant Scratch-Off Games

- The level to which Scratch players cite that they **expect to win** (55%) remains steady in W35.
- In addition, nearly half (45%) continue to say they *don't really expect to win*.



Q32DW6. If you had to choose one of the following statements to describe your expectations of playing instant scratch-off games, which would you choose?

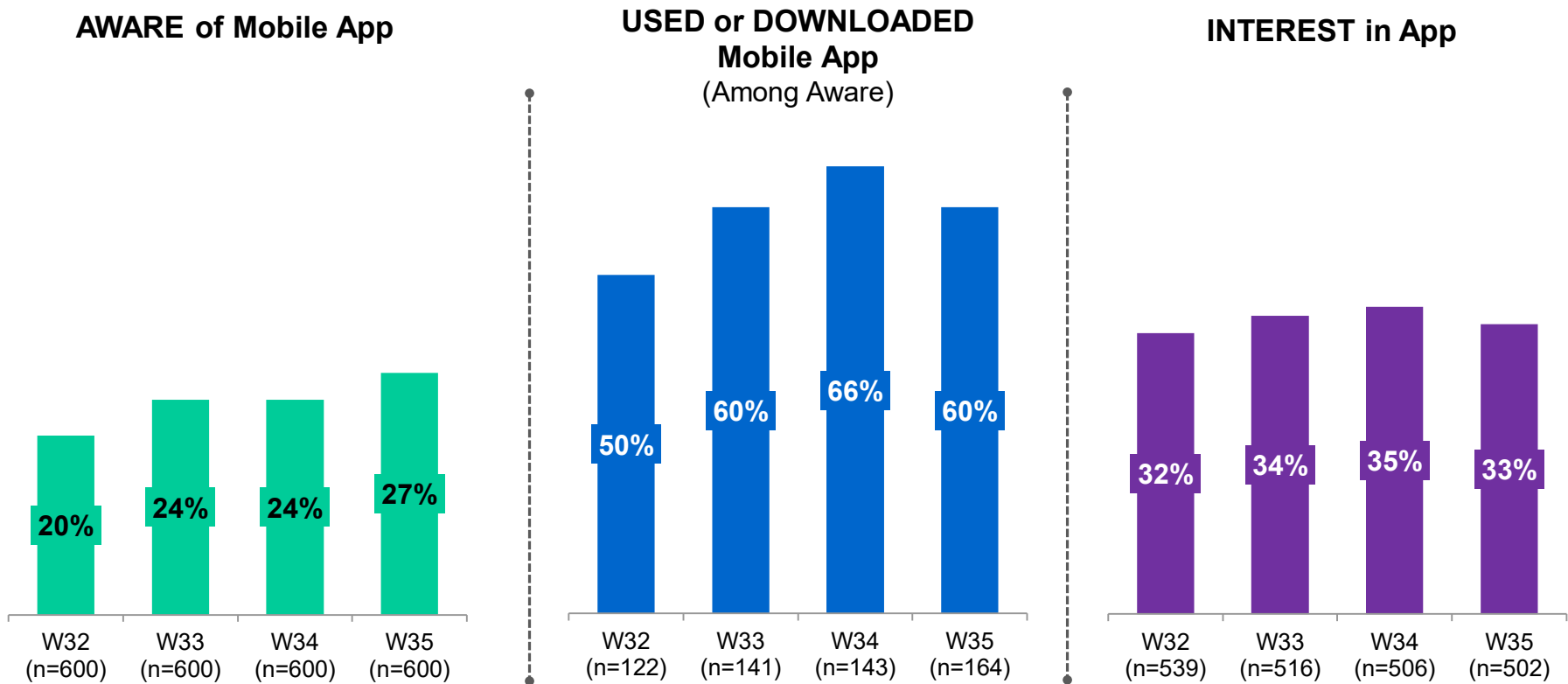
BASE: Respondents who have played scratch games in the past year



Mobile App, Website and Funding

Mobile App: Awareness, Use and Interest

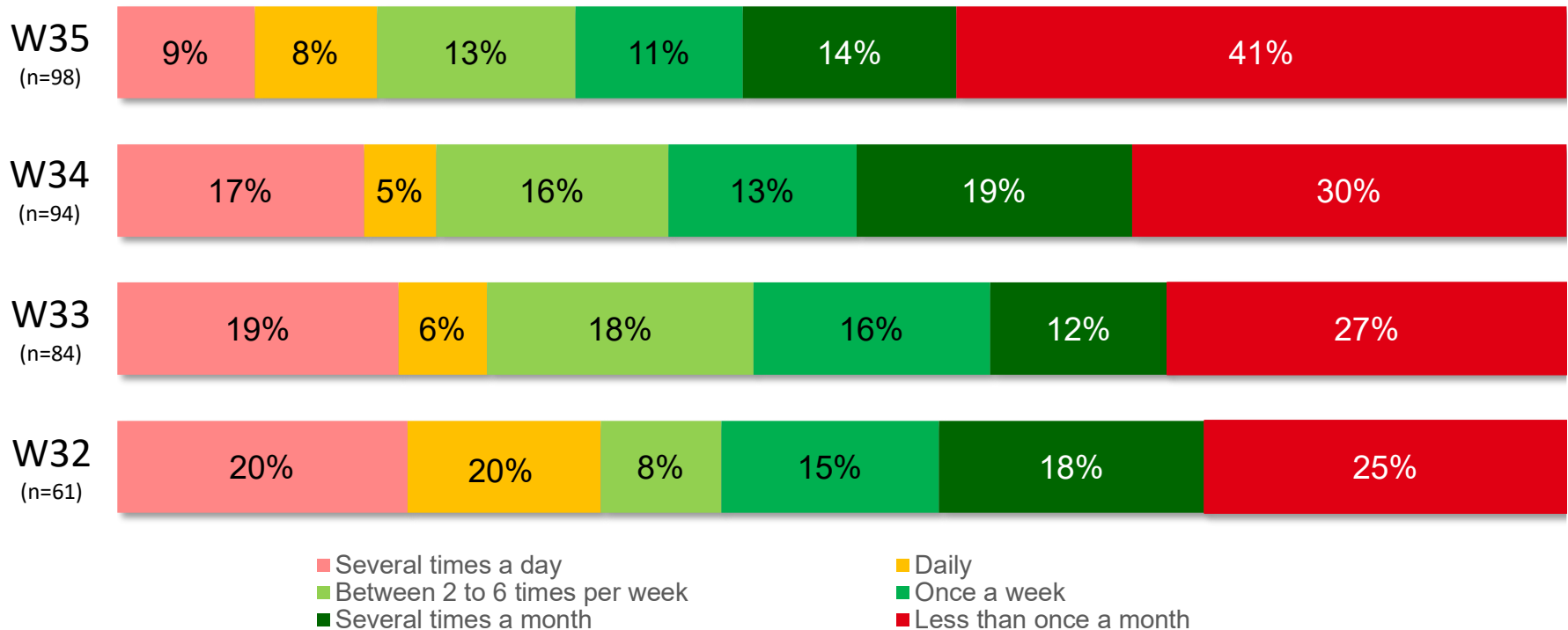
- 27% of residents say they are aware of the mobile app this wave, generally trending up since W32.
- Three in five of those aware of the app say they have used or downloaded it, down 6%, returning to the level seen in W33.
- Additionally, a third are interested in a mobile app, mostly stable since W32.



Mobile Game App: Frequency of Use

- In W35, about one in six (17%) of those who have used or downloaded the app, mention using the mobile game app **several times a day** (9%) or **daily** (8%), down directionally for the THIRD straight wave.
- Two in five (41%) say they use the app **less than once a month**, up from 30% since W34.

Frequency of Use of Mobile Game App*

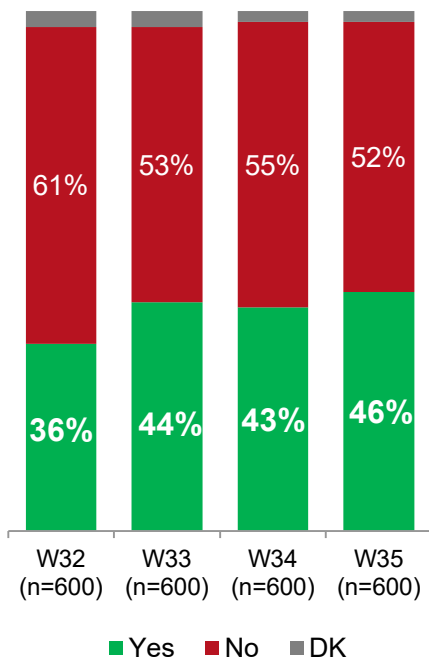


Q72A. How often do you use the Colorado Lottery app?

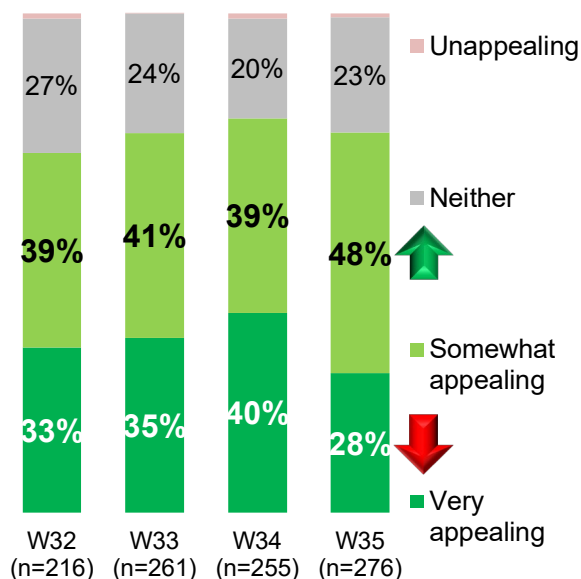
Colorado Lottery Website

- 46% mention they have **ever visited** the CO Lottery website in W35, generally trending up since W32.
- Three-quarters (76%) of those visiting the website cite it as **appealing**, a directional dip (-3%) from last wave, with 'very appealing' decreasing significantly and 'somewhat appealing' increasing significantly.
- Most website visitors continue to **check winning jackpot numbers**.

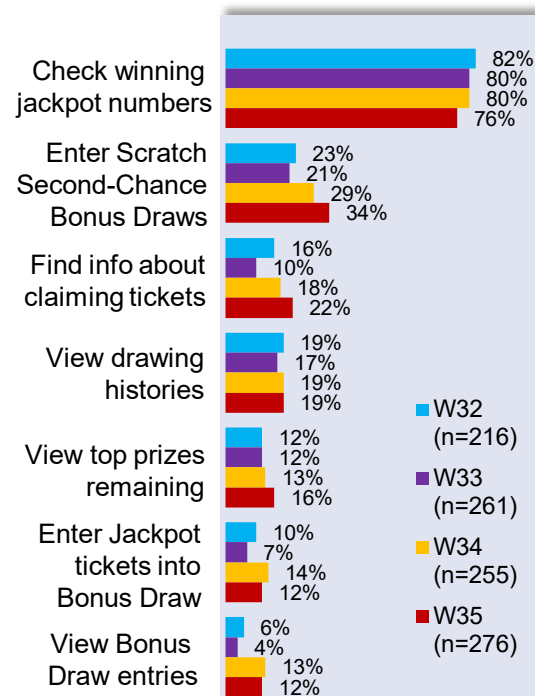
CO Lottery Website Visitation
(Total)



Appeal of Website
(Visited Website)



Website Use
(Visited Website)



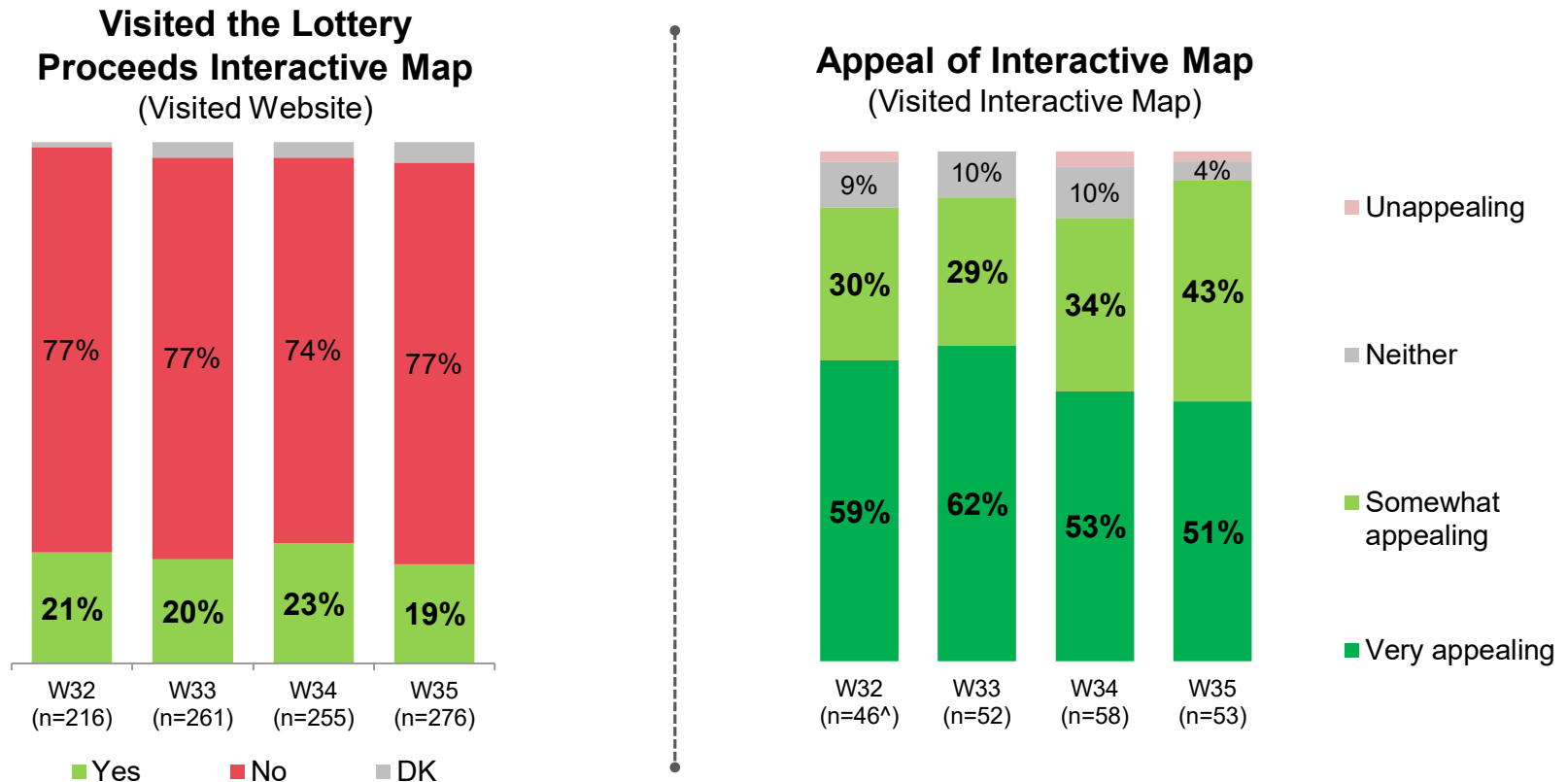
Q83A. Have you ever visited the Colorado Lottery website?

Q83B. What do you use the Colorado Lottery website for?

Q83CX1. How do you rate the Lottery's website overall?

Lottery Proceeds Interactive Map

- Nearly one in five (19%) of those who visited the CO website have visited the **Lottery proceeds interactive map** this wave, down 4% since last wave.
- **Appeal** of the map remains strong, as a vast majority (94%, +7%) who visited the map gave it a rating of **very** or **somewhat appealing**, with ratings for 'very appealing' remaining steady at more than half.

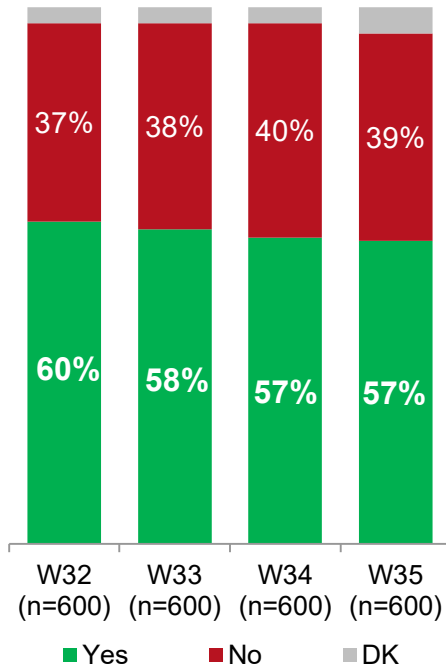


Q83D. Have you visited the Lottery proceeds interactive map on the Lottery's website that showcases some locations where Lottery funds have been used?
 Q83DX1. How do you rate the Lottery proceeds interactive map on the Lottery's website that showcases some locations where Lottery funds have been used?

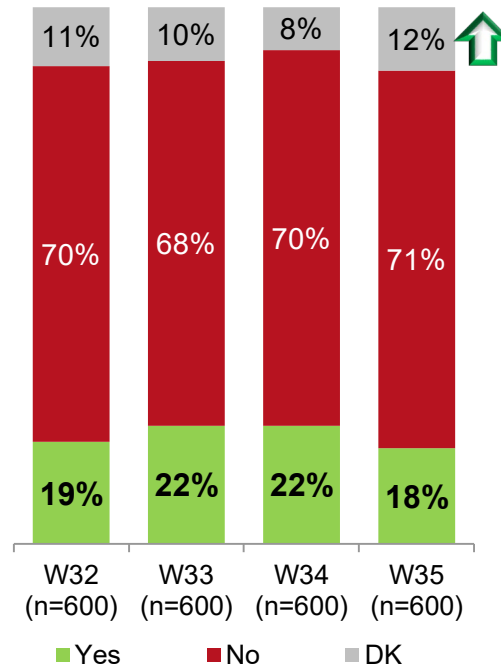
Colorado Lottery Funding

- Once again, 57% of residents state that they are aware that the Colorado Lottery funds go to Colorado communities for outdoor, recreation and conservation efforts in W35.
- Nearly one in five (18%) residents recall any Lottery funded projects near their communities, down 4% this wave.
- Satisfaction with Lottery funded projects remains strong, with more than half (56%, +3%) saying '**very satisfied**'.

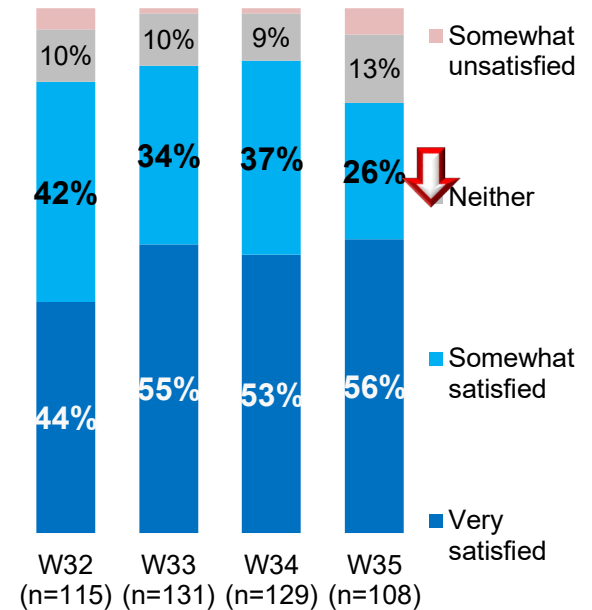
Awareness that CO Lottery funds go to CO communities



Awareness of any Lottery funded projects



Satisfaction with Lottery Funded Projects (Aware)



Q83F. Are you aware that Colorado Lottery funds go to Colorado communities for protecting Colorado's wilderness and creating trails, parks, pools, and recreation?

Q83H. Are you aware of any Lottery funded projects (parks, playgrounds, trails, etc.) near you?

Q83HX1. How do you rate your satisfaction with the Lottery funded projects (parks, playgrounds, trails, etc.) near you?

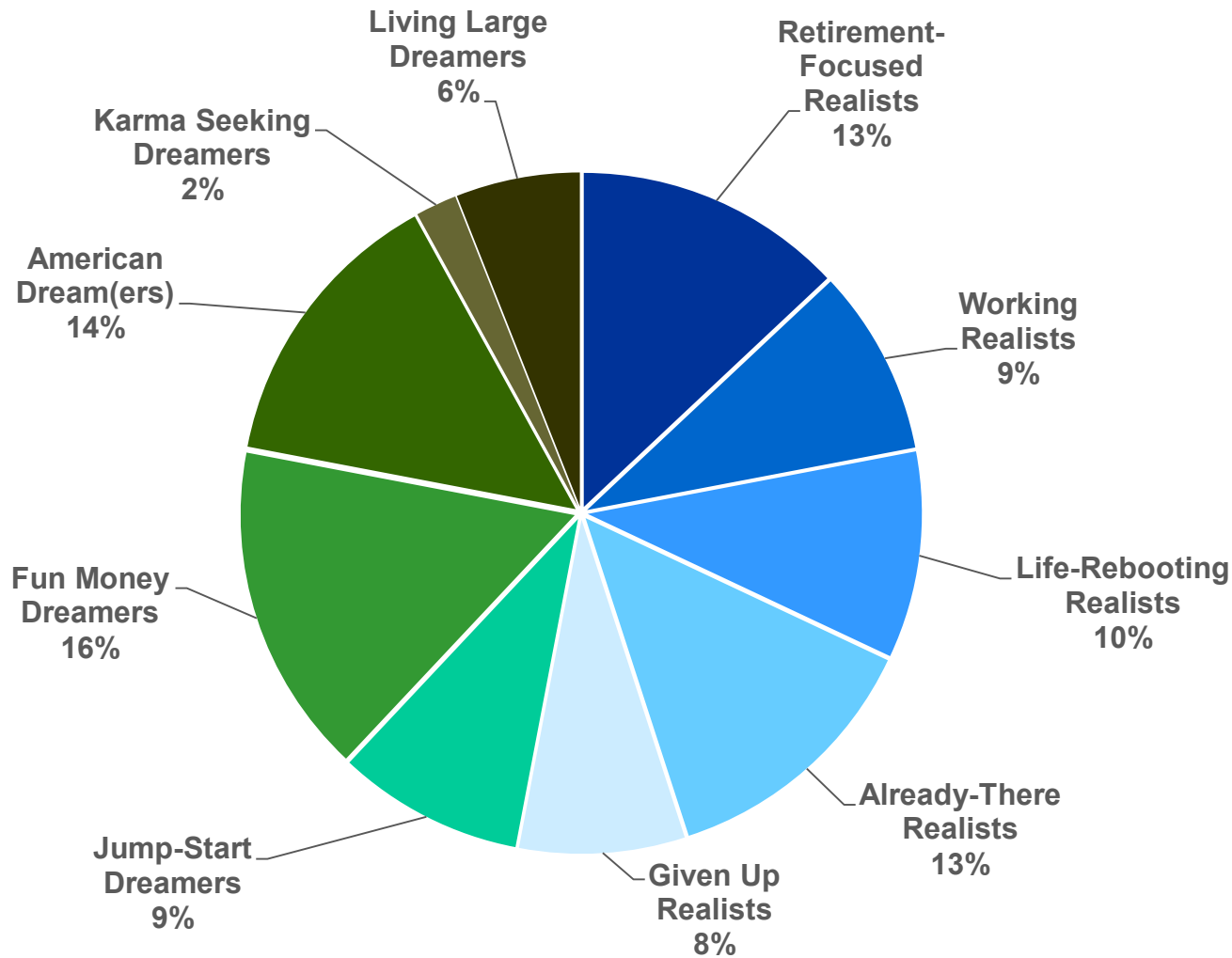


Segmentation

W35 Motivational Segments

DREAMERS

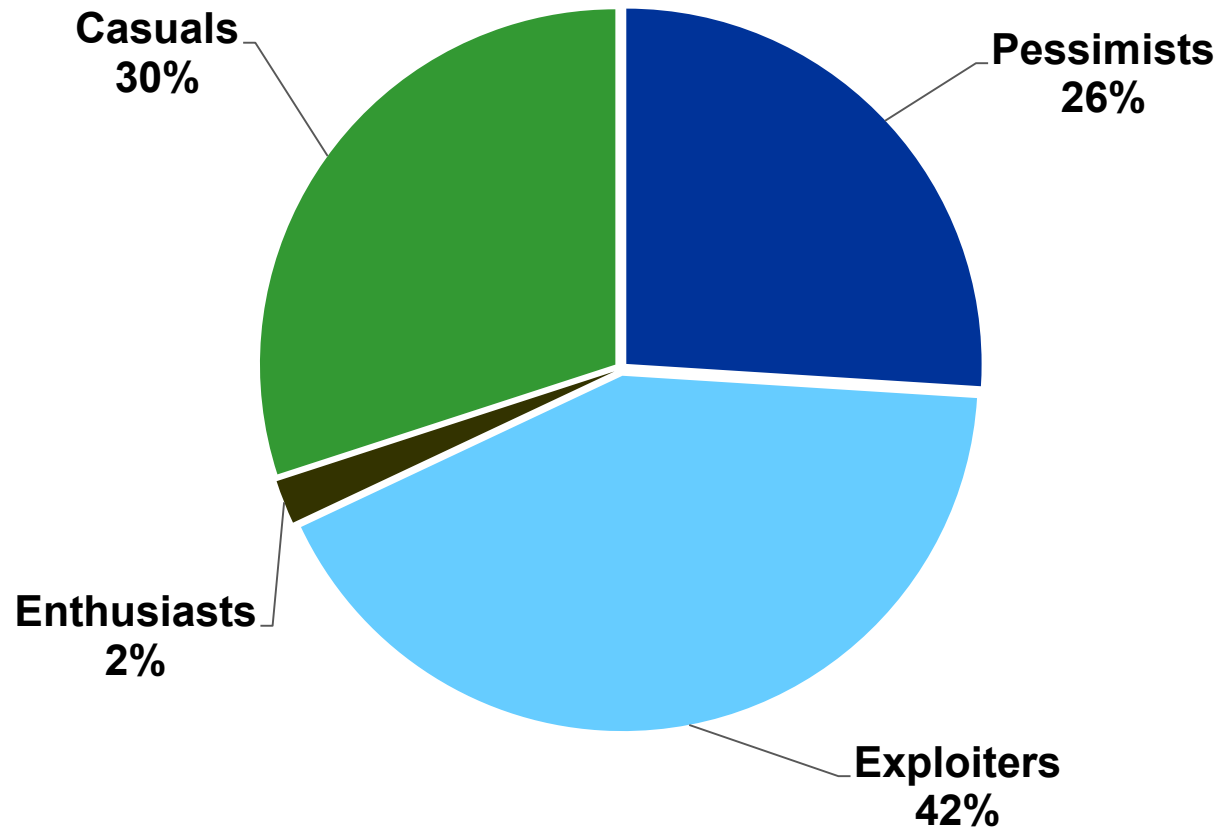
REALISTS



Total respondents (n=600)

W35 Scratch Segments

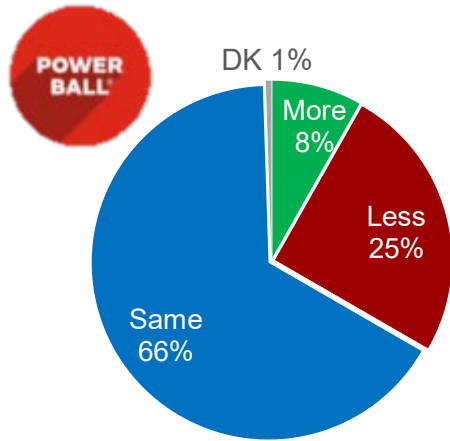
Among past year Scratch players (n=185)



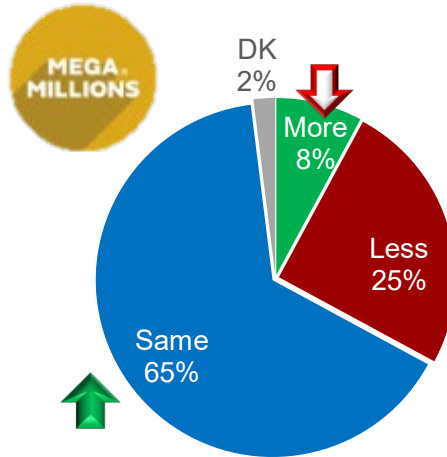


Appendix

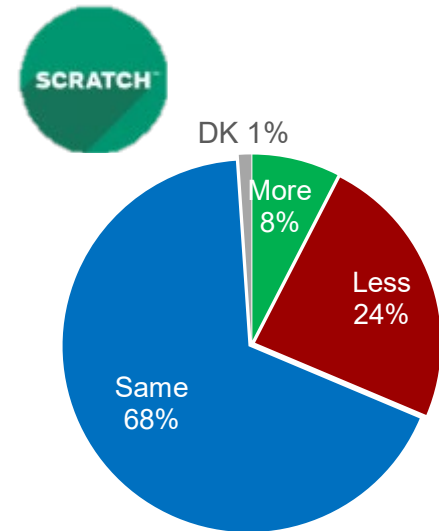
W35 Change in Spend per Game



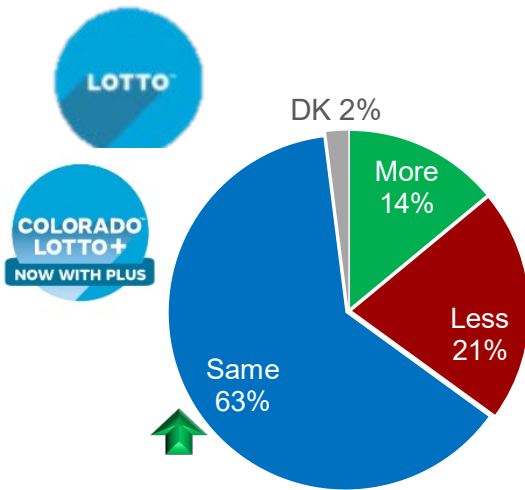
Past year players
(n=195)



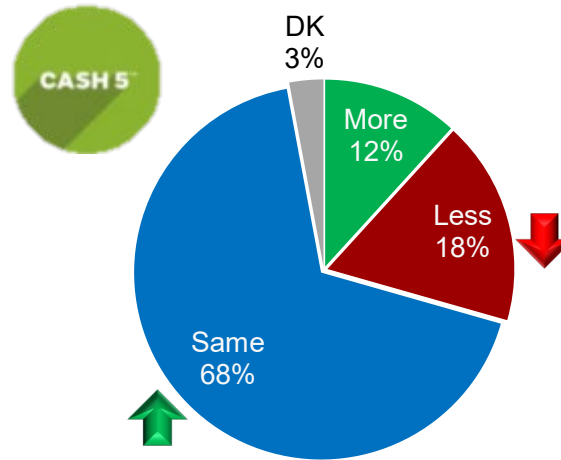
Past year players
(n=152)



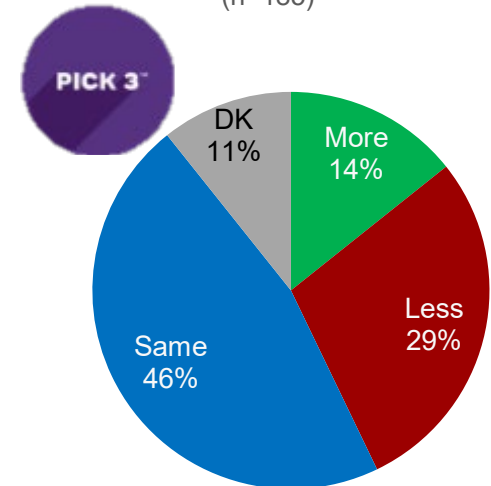
Past year players
(n=185)



Past year players
(n=86)



Past year players
(n=34[^])



Past year players
(n=28[^])