

**Summary Findings from
Montana Cash Focus Groups and
Retailer Interviews
June 18 – 20, 2013**

Final Topline Report

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Overview:

Four focus groups took place; two in Billings, Montana on June 19, 2013 and two in Helena, Montana on June 20, 2013. One group in each location was comprised of regular Montana Cash players, the other group was infrequent or non-Montana Cash players.

- A total of 40 people took part in the groups, there was good representation across all criteria requested by the client.
- All those participating had at least basic knowledge of the Montana Lottery and the games it offered and considered themselves “regular” lottery players.
- Key goals for the consumer focus groups included:
 - Reasons for playing or not playing the Montana Cash game;
 - Perceptions and knowledge of the game;
 - Likes/dislikes of the game;
 - Ideas for making the game more attractive;
 - Key message exploration.

Ten Montana Lottery retailers across the state were interviewed by telephone.

- Key goals for the retailer interviews included:
 - Perception of the Montana Cash game;
 - Game pros and cons;
 - Ideas for making the game more attractive
 - Key message hypothesis
- Discussion for the focus groups was based upon the two key topic areas; the general Montana Lottery and more specifically, the Montana Cash game and the discussion was designed to prompt and allow flexible comments and feedback.

Key Findings from All Groups:

- Among both the general Montana Lottery and Montana Cash focus groups the primary reasons for playing any of the games was to win; the entertainment value; the “escape” value of dreaming of what they might do with their winnings; and the camaraderie of playing with friends and family.
- All participants imagined that they could potentially be a lottery winner someday and that expectation contributed to their continual play.
- Among all participants, most of them play where the jackpots are the largest. When asked if they could only play one game what it would be, most said Powerball.
- When deciding what game to play, influencing factors for participants from all groups included; jackpot size, games that were least confusing or easiest to play, routine of playing the same game; or hearing of someone they knew winning a particular game.
- When asked to name attributes for a good lottery game, comments included:
 - Knowing the game has produced winners;
 - Cost of the ticket;
 - Instant gratification from the scratch tickets;
 - The amount of the payout.
- Virtually all participants knew and liked the idea that Montana Cash was a Montana-only game.
- Almost none of the participants in the groups had any awareness of who the current or past Montana Cash winners were; how much they won or where they lived. Several participants felt it would be create more interest in the game if those elements were more highly publicized. When asked how they would redesign the Montana Cash game, answers included:
 - More promotion of the game including; special events, more advertising about the games and the winners;
 - More prize levels;
 - Communicate where the winnings go other than to the prizes;
 - Increase the jackpot size;
- When asked what one thing they would never change about the Montana Lottery the participants in all groups were adamant they wouldn’t want to lose the availability of the games and the various outlets where they could be played. When asked the same question

- about the Montana Cash game, they felt it needed to stay a Montana-only game and that the name should never change.
- When asked how they checked their winning numbers, methods mentioned among all groups were; phone, internet, scanner at lottery outlets, or checking in the local newspaper.
 - About half of all participants had visited the Montana Lottery website.
 - Among the comments directed to the Montana Lottery official:
 - Educate people about what they are planning for new games, new prizes;
 - Do a series of ads to explain how all games are played and where the money goes.

Key Findings from General Montana Lottery focus groups:

- Among the groups who did not play the Montana Cash game, there was little to no awareness of the game’s components and many of the regular Montana Cash game players had limited awareness of some aspects of the game.
- Many participants mentioned the Montana Millionaire game as the one which best represents “a good lottery game”. This was based on the limited number of tickets available, its well-publicized, the fact it’s only sold in Montana, and that it “builds excitement” with the early bird and instant win drawings.
- The primary reason listed for not playing Montana Cash by non- players was that the jackpot wasn’t large enough and didn’t grow as quickly as some of the other games.
- General Montana Lottery players knew almost nothing about the Montana Cash game or any of its components although they had a sense that the odds were better than other games and they knew that it was a Montana-only game.
- Most participants in these groups were surprised to hear how often the jackpot for Montana Cash was won and how much had been paid out to winners over the years.

Key Findings for Montana Cash focus groups:

- Many of the Montana Cash players mentioned they liked the low price for the tickets.
- Several of the participants in these groups liked the fact that the jackpot for Montana Cash seems to get won more often.
- Even among these groups, the prize levels weren’t well known.

- All the Montana Cash players liked the idea that the Montana Cash tickets were only sold in Montana and that the winners were usually Montanans, although they didn't know who they were or where they lived.
- Most of these participants didn't like either the idea of increasing the drawing days or increasing the cost to three tickets for two dollars.
- The most popular improvement idea among the Montana Cash players was to increase the levels and variety of prizes.
- Many of the participants thought it wouldn't be detrimental to raise the cost to \$1 per ticket, while others mentioned that the Wild Card game had a higher jackpot for the same ticket price as the current Montana Cash game.

Key Findings for the Montana Lottery Retailers:

- Eight of the retailers said that Montana Cash tickets sell well to very well in their location.
- Most attributed it to the lower ticket price.
- Most retailers couldn't remember any dislikes that were mentioned by their customers.
- Customers commented to the retailers they liked Montana Cash because:
 - The odds were better than other games;
 - Money stays in Montana;
 - Montanans win;
 - Customers like to buy it as part of a "bundle".
- When asked what they might change about Montana Cash, only five had suggestions, the rest said not to change anything. Those changes were:
 - Have more winners;
 - More chances to win and higher jackpots;
 - More opportunities to win at more prize levels, so matching 5 numbers, 4 numbers, 3 numbers, 2 numbers and 1 number would have some kind of win;
 - Bigger jackpots, more prizes;
 - More daily drawings.
- All of the retailers said that most of their customers realized that Montana Cash was a Montana-only game.
- When asked what their customers needed to hear about the game, comments included:

- Need to “hear about the game”. There isn’t enough advertising done;
- Need to try to encourage younger people to play;
- Increase awareness of the game;
- Need to hear more about winners in their area.

Conclusions and Recommendations:

- Conclusion – The level of perception and awareness for the Montana Cash game is generally low. Non-playing participants resoundingly indicated they had either little or no knowledge of any aspect of the game. Playing participants had a surface knowledge of the game; the method of play, the cost of a ticket and that the winners were Montanans. Retailers almost unanimously echoed similar sentiments.
 - Recommendation: In order to increase the perception and awareness for this game, there needs to be more advertising, promotion and visibility of Montana Cash to the general public. Many ideas and suggestions surfaced during the “let’s pretend” portion of the focus groups when participants were asked specifically what could be done to redesign the game. Viable suggestions that incorporate participant comments include:
 - More advertising, with a larger portion going to radio and print;
 - Promote Montana Cash winners through signs and notices at retailers, preferably located close to the ticket outlet;
 - Use of reader boards at retail locations to raise overall awareness of the game;
 - Reminder signs/posters at the retailer check-out.
 - Communicate that the monies received are used within Montana;
 - Add different prize levels and then be sure to communicate them to the public;
 - Recommendation: Consider non-traditional promotional avenues to promote the game. Suggestions include:
 - Signs held by people on street corners, car signs and the like to promote the game.
 - Appeal to younger players with a Facebook contest asking them to submit a photo of what they would do if they won the jackpot.
 - Research the ability to have a mobile app to promote the games and list winning numbers.

- Conclusion: Most participants felt the game could benefit from having more than the current three prize levels of jackpot, \$200 or \$5.
 - Recommendation: Although there was significant discussion in the groups about what the additional prize levels might be, several suggested adding trips which seems to be a viable option. Our suggestion is to partner with Montana resorts and retailers, then the Montana Lottery could both raise their level of awareness of the Montana Cash game as well as promoting goodwill with Montana businesses and residents.
 - Recommendation: Consider the possibility of adding a system where non-winning tickets could be cashed in for an additional ticket.
 - Offer random “instant” prize winning tickets that would generate increased sales across the state.

- Conclusion: Montana Cash has a basically positive, even if relatively unknown image in the marketplace.
 - Recommendation: All promotion and program education done by the Montana Lottery will only further enhance this positive image among Montanans. Further education is needed and could be achieved through flyers at the retail locations and an educational program of some kind.

- Conclusion: There is great customer loyalty to the Montana Cash game among those participants who play it.
 - Recommendation: Consider the possibility of using customer /winner testimonials as part of an advertising or promotional campaign. Specific areas of mention could be the length of time that Montana Cash has been available, the great price of the tickets, how money stays within the state, and/or how the money is spent within the state.

Most group participants left feeling that they would be much more likely to play Montana Cash given what they had learned during the evening.

Summary of responses to group handout.

I like Montana Cash because.....

- It's a Montana only game. (5)*
- I didn't know much about it before, but I'm not interested. The odds really drew me in.
- Odds, hitability
- The lower jackpots mean more lower payouts mean maybe not a lot of money at once, but more frequent payouts.
- It's easy to grab when playing a bundle.
- It keeps cash in Montana by only allowing it to be sold here.
- There are less numbers so the odds are better.
- I didn't know about it till now but it sounds fun and like I may have good chances.
- It's in Montana so odds are better.
- It's a Montana game and it has better odds of winning the jackpot.
- It's cheap and simple to play. Stays in Montana.
- It's local, designed on for Montana residents. Fewer numbers = better odds.
- If I don't win at least another Montana resident will and money stays in Montana. I feel like I'm getting real "Montana Deal" with 2 draws for \$1.
- Win more. It's just in Montana. Add profits to the state in Montana.
- There are more chances to win over other lotto games.
- It stays in Montana and the odds are better than other games.
- Best odds of all games for drawing.
- Better odds, money mostly stays in Montana.
- It's local.
- You get two tickets for \$1. Odds of winning are better even though smaller amounts. Montana based game, revenues more likely to stay in state.
- The money stays in Montana and the odds of winning are better than other lottos.
- Stays in Montana. Benefits Montana.
- It is ours! Better odds of winning at least something! Winning is king.
- The chances of winning or knowing a winner are greater even if the prize is smaller.
- My odds of winning are greater than Powerball. I still play Powerball though.
- It's easy and convenient and local.
- Someone from Montana is winning.
- Because it's more local and sounds like odds are better.
- Odds of winning are better than most others.
- The winnings are paid locally, odds are better for winning.

**Indicates number of times mentioned as a stand along comment.*

- Ticket prices are very reasonable and it is here in Montana. A local winner!
- It's in Montana and tickets are 2 for \$1.
- Easy to purchase. Local lottery. Cheap.
- They offer 2 chances for a buck.

I don't like Montana Cash because.....

- I don't know much about it. (2)
- I haven't won yet. (3)
- I just don't know enough about it, not necessarily "don't like".
- Haven't played enough to say why I wouldn't like it.
- Jackpot isn't huge.
- It doesn't have any other prizes.
- The jackpots are smaller. (4)
- It wasn't advertised well and low pay out.
- It does not pay a high jackpot. (2)
- Cheap winnings.
- People win too often and the jackpot doesn't get high enough.
- I really have not won too much but enough to keep playing.
- I think it needs more money in jackpot, it never gets too big.
- You didn't need to hit more than half the numbers drawn to win the smallest prize.
- The prizes are too low.
- No information on where all the money from this state owned and ran is all going. If the excess money is being used properly it should be shown where to since the public is funding all of it.
- There is really nothing I don't like about it that stops me from playing it. However, I think there could be improvements.
- Not enough prizes. Not big enough prizes.
- "Smallish" win amounts! Bigger pots pull more attraction of people with disposable income!
- The jackpot is smaller so you don't win as much money.
- The jackpot is not as high and there aren't enough winners each week.
- Doesn't pay out enough.
- I don't hear about it.
- You don't hear much about the game and who's winning or where the money is going.
- Honestly, you don't ever hear about it. When you do, it doesn't catch your attention.
- I don't like to give away my hard earned money for a slight chance of winning.
- I don't like that the jackpot is lower than the bigger games like Powerball.
- You have to wait to see if you are a winner.

Montana Cash would be a better game if.....

- It was advertised more with promotional offers.
- There were more prize levels. (7)
- The jackpot was higher. More people knew about it.
- The jackpot was larger. (4)
- The levels of payout increased. (2)
- Advertising better.
- Was drawn more often, 3X a week or more.
- Paid more with more chances.
- It had higher jackpots and higher payouts for 4 of 5 and 3 of 5.
- It had better odds and larger winnings.
- It's okay as is. Fun and cheap.
- Maybe if it had an extra joker/or wild card winner.
- They had more prizes available. I would like to see more than five dollars.
- The starting jackpot was higher. (7)
- You didn't need to hit more than half the numbers drawn to win the smallest prize.
- The state put more money into prizes.
- Maybe some new and exciting prizes. Was more unique, something to set it apart from other games.
- There was a Montana Lottery app for my iPhone.
- More payouts, more winners.
- It attracted more players to grow the "pots" bigger.
- There were more prize levels such as \$1,000 and \$500.
- Offered more of a variety of levels to win. I'd love to win a trip, for example, if not the jackpot.
- If I knew where the money went.
- Different colored tickets, winner's location was advertised.
- They had daily drawings.
- We knew who won.
- It had some kind of reward program.
- Jackpots were higher even if the ticket price was higher.
- We heard more about it. Marketing seems to have gone "dark" for a rare state that allows gambling.
- It was better advertised via radio.
- I could find out where the money went to in Montana. Who profits from it?
- If I could hear about winners and jackpots.
- It was advertised more, different prizes.
- Advertised more using social media. Mobile friendly app and website for smartphone.

I'd play Montana Cash more often if.....

- I made more money. (2)
- I don't think I would cuz I play other games so I only play once a week.
- Jackpot was higher. (12)
- More prize levels. (3)
- If they advertised more and different prizes.
- I knew more about it.
- If I had had it in my face while at the checkout.
- Advertised more, billboards, ads, ads. Would have a special 12 chances for say \$5.00, 2 chances free.
- I'd see it at the store. It doesn't jump out and get noticed as much.
- Advertised better.
- I'm going to try out and see how good it is. So maybe play it more often.
- It had higher payouts.
- There were more drawings and extra bonus number to win.
- There were more prize increments; another prize between \$5 - \$200 would be great!
- If there were bigger starting prizes.
- Two times a week is ok.
- More ways to win.
- Jackpots were bigger (3)
- Better odds, winner every time.
- I won more often and if it offered tax breaks because of what it funded, i.e. schools or healthcare.
- More prizes.
- We knew where the money went beside the winning ticket holders, and if there were more winners.
- More advertising.
- There was a weekly "vacation" winner and a MT driver's license was needed in order to play.
- Daily drawings.
- I knew where the money was going locally, if I heard about it more.
- I heard more about it and something reminded me to play.
- You could win more money and I heard more about it.
- I saw and heard that people won, or if I won.
- Only people from Montana could win!
- I heard about it more I would remember to play.
- If I knew more about Montana Cash.
- Advertising again.
- It was on my mind more.