

A MarketSearch Study

The South Carolina Education Lottery

*A Study of Lottery
Perception and Play Behavior*

SOUTH CAROLINA VERSION

April 1, 2005

MarketSearch Corporation
2721 Devine Street
Columbia, SC 29205
803/254-6958

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Background and Methodology

Background and Methodology

- This report presents the findings of a Lottery Perception and Play Behavior Tracking Study conducted on behalf of Chernoff Newman and the South Carolina Education Lottery.
- The study was conducted by telephone among 1,000 residents of South Carolina between March 7 and March 12, 2005. Sampling error for the total sample of 1,000 is $\pm 3.1\%$.
 - ✓ A study of 300 residents of an eight-county area along the North/South Carolina border was also conducted. Findings from the North Carolina sample are presented in a separate report.

Background and Methodology

- Respondent Distribution and Specifications:
 - ✓ Statewide, stratified sample
 - ✓ Adults 18+
 - ✓ No Lottery employees, elected/appointed officials in household
 - ✓ No one with contractual relationship with the lottery in household
 - ✓ No one in household owns a store that sells lottery tickets
 - ✓ Demographics weighted during data processing so that sample reflects South Carolina census data

Background and Methodology

- This is the fourth in a series of tracking studies.
 - ✓ The first baseline study, which was fielded from May 20 – May 29, 2002, represented Lottery play behavior and attitude about 4 months after the start of the Instant Scratch ticket sales and 2 months after the start of the Pick 3 game.
 - ✓ The second study, conducted in March, 2003 measured the change in play behavior of the Instant and Pick 3 games as it compared to the 2002 survey. In addition, it benchmarked play behavior of Carolina 5, Powerball, and Pick 4, all of which started up after the first study.
 - ✓ This third snapshot, conducted in March, 2004, measured the change in play behavior from all of the games, which were all active games, from the previous year.
 - ✓ This year's study monitors changes in play behavior, as well as provides a benchmark for Palmetto Cash 5 play and information about Lottery advertising and player lifestyle.

Background and Methodology

In conformance with prior studies, the sample was weighted to mirror the demographics of South Carolina provided in the 2000 US Census.

	2000 Census	% of Pop.	2005 Study	2004 Study	2003 Study	2002 Study
Male	1,948,929	49%	49%	49%	49%	49%
Female	2,063,083	51%	51%	51%	51%	51%
18 – 34	968,682	32%	32%	32%	32%	32%
35 – 54	1,175,445	39%	39%	39%	39%	39%
55+	858,244	29%	29%	29%	29%	29%
White	2,695,560	67%	67%	67%	67%	67%
Non- white	1,316,452	33%	33%	33%	33%	33%

Background and Methodology

In conformance with prior studies, the sample was weighted to mirror the demographics of South Carolina provided in the 2000 US Census.

	2000 Census	% of Pop.	2005 Study	2004 Study	2003 Study	2002 Study
White, 18-34, Male	315,275	11%	11%	11%	11%	11%
White, 35-54, Male	382,570	13%	13%	13%	13%	13%
White, 55+ , Male	279,331	9%	9%	9%	9%	9%
White, 18-34, Female	333,742	11%	11%	11%	11%	11%
White, 35-54, Female	404,979	13%	13%	13%	13%	13%
White, 55+ , Female	295,693	10%	10%	10%	10%	10%
Non-White, 18-34, Male	155,285	5%	5%	5%	5%	5%
Non-White, 35-54, Male	188,430	6%	6%	6%	6%	6%
Non-White, 55+ , Male	137,581	5%	5%	5%	5%	5%
Non-White, 18-34, Female	164,380	5%	5%	5%	5%	5%
Non-White, 35-54, Female	199,467	7%	7%	7%	7%	7%
Non-White, 55+ , Female	145,640	5%	5%	5%	5%	5%

Lottery Games and Introduction Dates

- ✓ Instant/Scratch Games January 7, 2002
- ✓ Pick 3 March 7, 2002
- ✓ Powerball October 5, 2002
- ✓ Pick 4 January 27, 2003
- ✓ Palmetto Cash 5 February 14, 2005

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Key Findings

Key Findings

- Overall, findings indicate that growth in the player base of the South Carolina Education Lottery has flattened out. Just under half (46%) say they have played at least one SCEL lottery game, compared to 45% last year.
- Although the lottery does not appear to be attracting new players, it is doing a good job of keeping players interested. For example, we see that more players (of each specific game) are “current.” Further, monthly expenditures per game, among those playing each respective game, have increased.

Key Findings

- With 46% of all state residents having played, SCEL game play is significantly higher:
 - ✓ For non-whites (55%) than whites (41%),
 - ✓ For men (51%) than women (41%),
 - ✓ For those under 55 years of age (48%) than those 55 years of age and over (39%),
 - ✓ For those with less than a four-year college degree (50%) than those with a four-year college/graduate degree (37%), and
 - ✓ For those with household incomes under \$50,000 (53%) than those with household incomes of \$50,000 or more (43%).

Key Findings

- Powerball and Instant Scratch Tickets are the primary games of choice among state residents. Game penetration levels for state residents are as follows:
 - ✓ Powerball (32% of South Carolina residents have “ever” purchased),
 - ✓ Instant Scratch Tickets (28%),
 - ✓ Pick 3 (16%),
 - ✓ Pick 4 (12%), and
 - ✓ Palmetto Cash 5 (11%).

Key Findings

- In previous studies, “current” players have been defined as those who play a specific game at least once per month. By game,
 - ✓ 21% of the state’s residents are “current” Powerball players,
 - ✓ 19% of residents are “current” Instant Scratch players,
 - ✓ 10% of residents are “current” Pick 3 players, and
 - ✓ 7% are “current” Pick 4 players.
- On average, monthly expenditures per game, among those playing each respective game, are:
 - ✓ \$26.60 for Instant Scratch tickets (up from \$19.35 last year);
 - ✓ \$30.70 for Pick 3 tickets (up from \$17.18 last year);
 - ✓ \$17.80 for Pick 4 tickets (up from \$11.39 last year);
 - ✓ \$24.00 for Powerball tickets (in line with \$24.52 recorded last year); and
 - ✓ \$25.60 for Palmetto Cash 5 tickets (no comparison data available).

Key Findings

- Consistent with findings from previous studies:
 - ✓ The overwhelming majority of SC Education Lottery players purchase their tickets at a convenience store that also sells gasoline;
 - ✓ Purchase is fairly evenly split between weekdays and weekends; and
 - ✓ Most buy tickets after 4:00 p.m. (before 6:00 a.m.).

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Positions on The SCEL

Positions on The Lottery

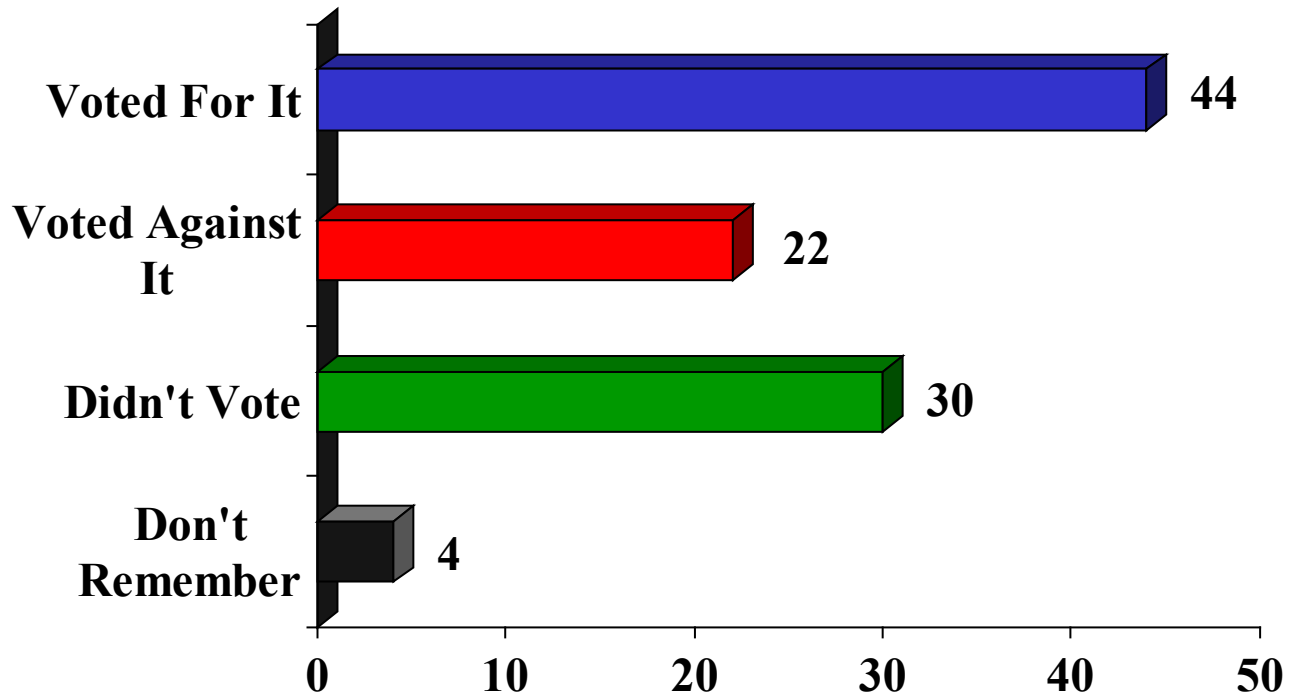
- Respondents were asked, “when the question to create a South Carolina Lottery was on the ballot, did you vote, and if so, did you vote for it or against it?”
- Consistent with previous studies, we found that 44% voted for it, 22% voted against it, 30% did not vote, and 4% don’t remember.

	2005	2004	2003	2002
Voted For It	44%	43%	46%	44%
Voted Against It	22	25	29	28
Did Not Vote	30	29	22	25
Don’t Remember	4	4	2	2

Positions on The Lottery

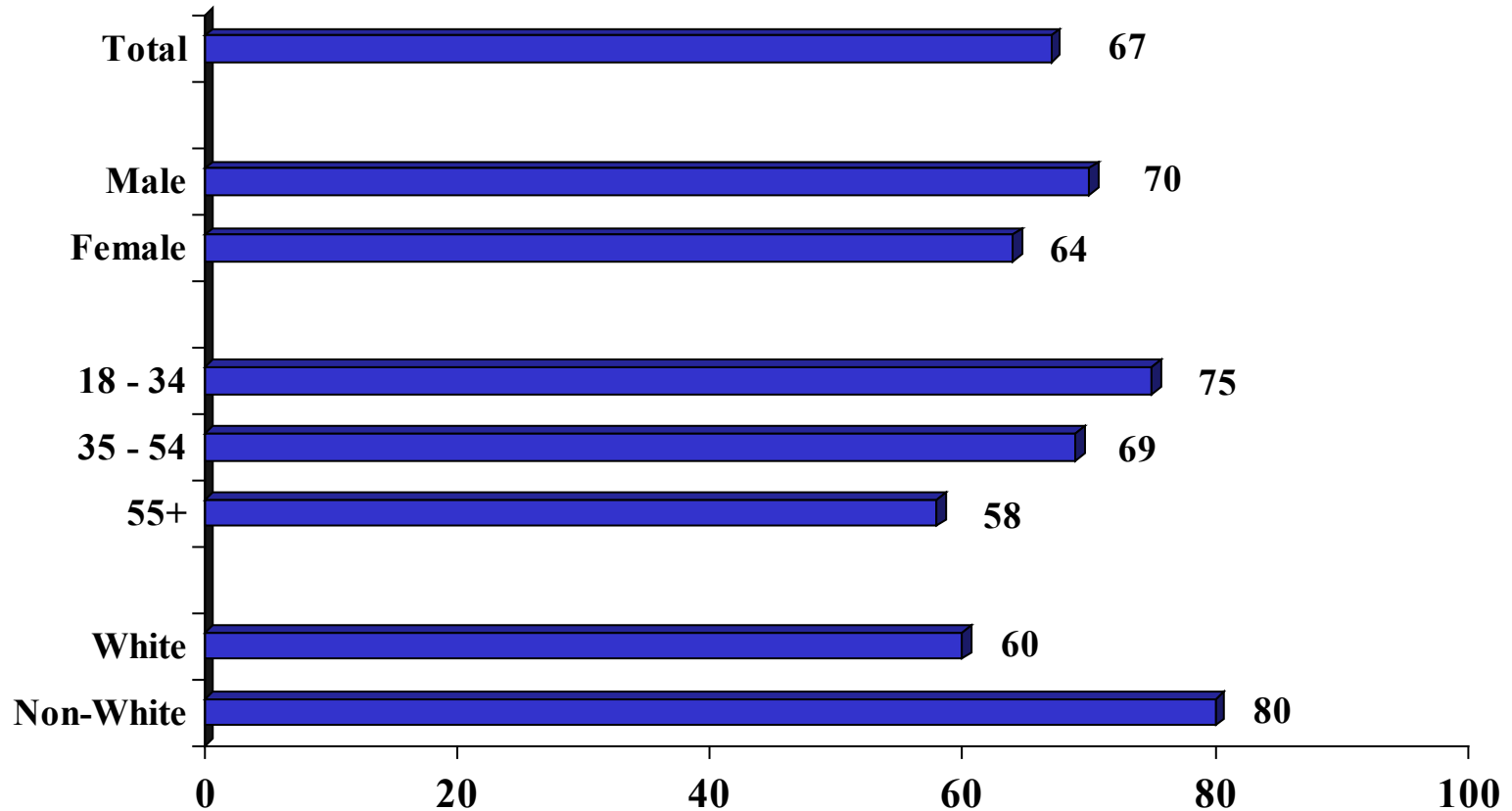
- Among those who voted either “for” or “against”, 67% voted for the lottery and 33% voted against it. Those most likely to have voted for the lottery include:
 - ✓ Men,
 - ✓ Those between the ages of 18 and 34,
 - ✓ Non-whites, and
 - ✓ Those in the 843 area code.

Did You Vote? If So, How?



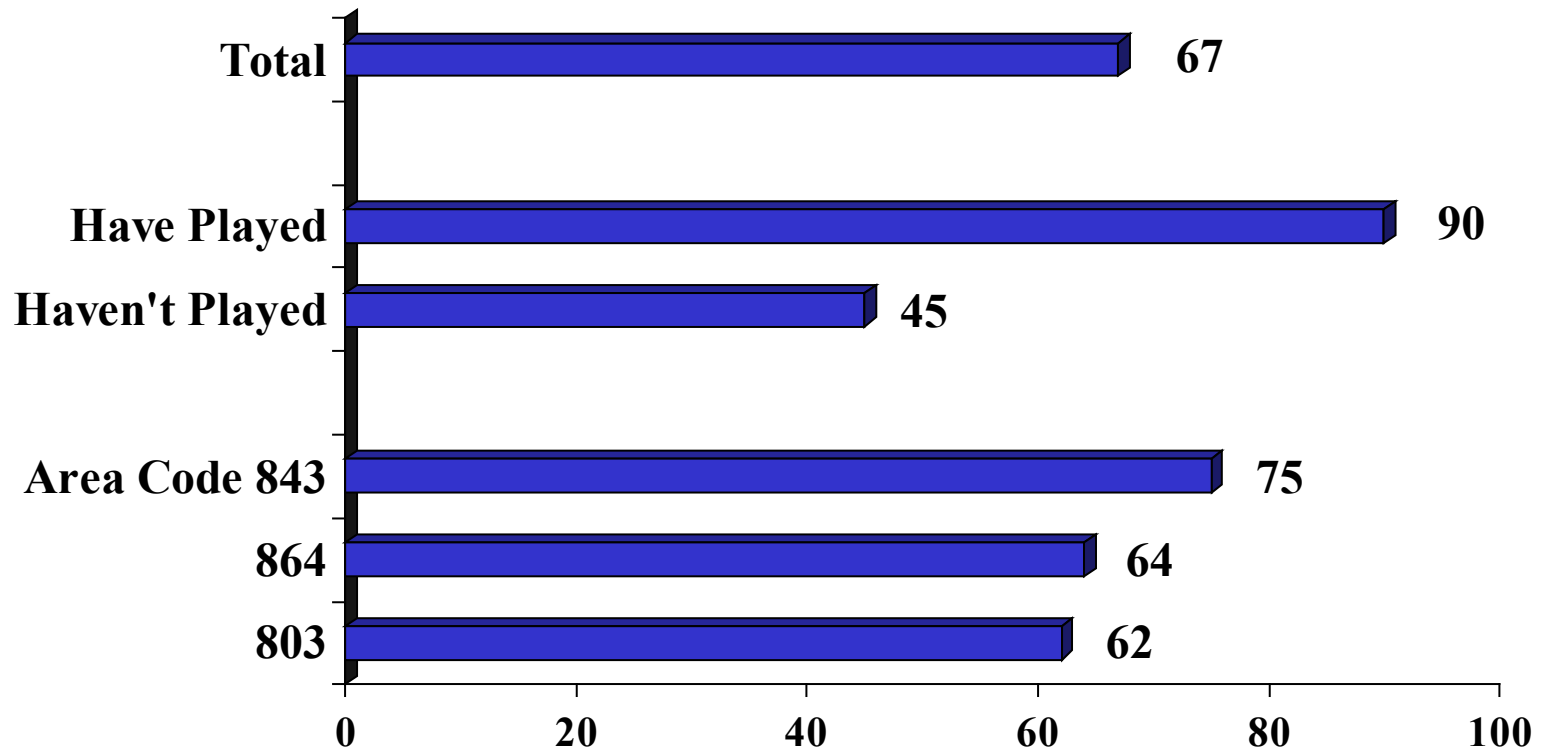
Voted for the Lottery

(among those who voted, n = 660)



Voted for the Lottery

(among those who voted, n = 660)

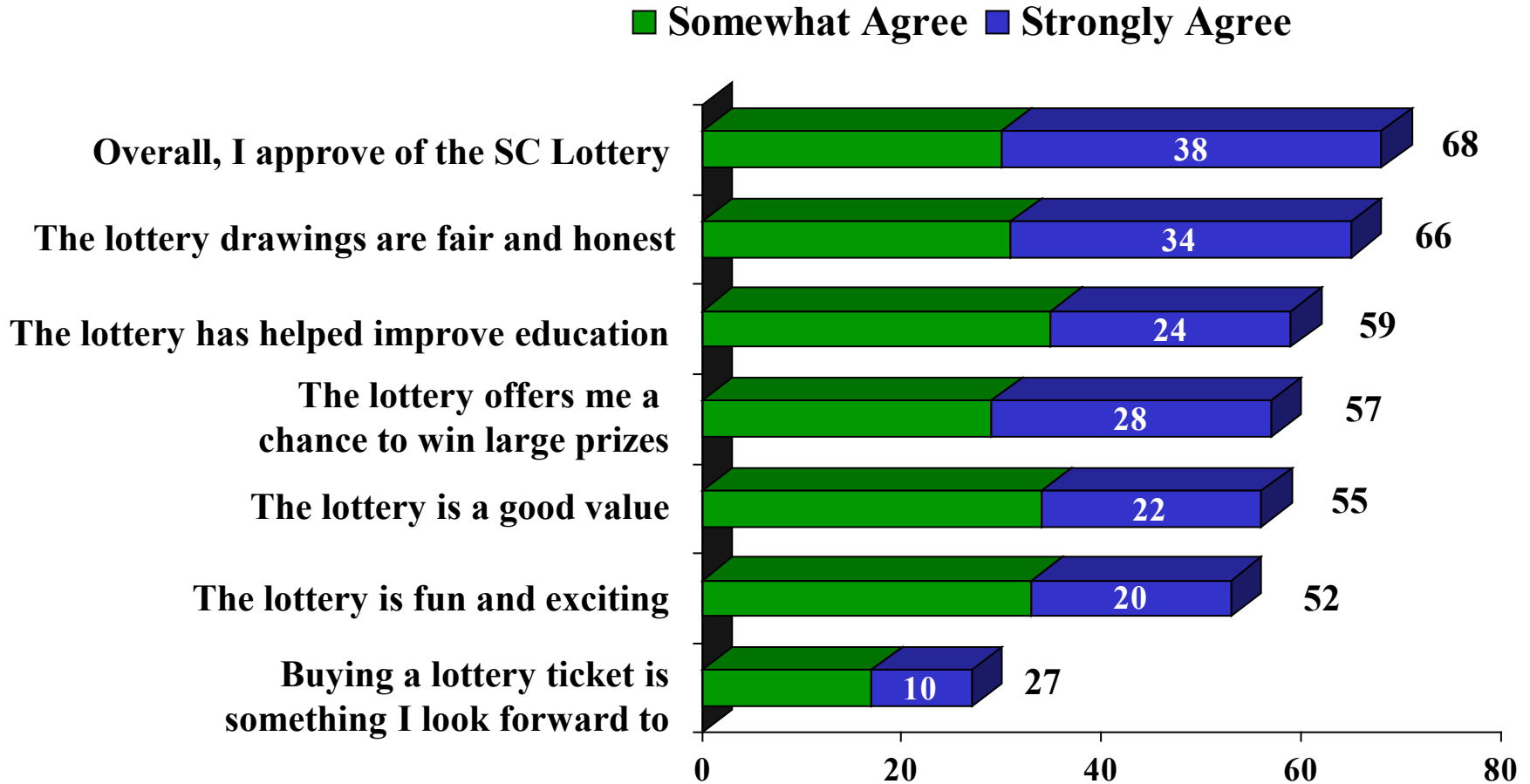


Position on The Lottery

- Agree/Disagree statements about the lottery have remained fairly consistent over the years. This year, however, respondents:
 - ✓ Are more likely to agree with the statement, “the lottery is a good value” (55% agree, compared to an average of 47% between 2002 and 2004); but
 - ✓ Are somewhat less likely to believe the lottery is helping education (59% agree, compared to an average of 64% between 2002 and 2004).

(Note: while only 27% agree with the statement, “buying a lottery ticket is something I look forward to,” it is important to note that this question was asked of all respondents. The figure among players (those who have ever played) is 48%.)

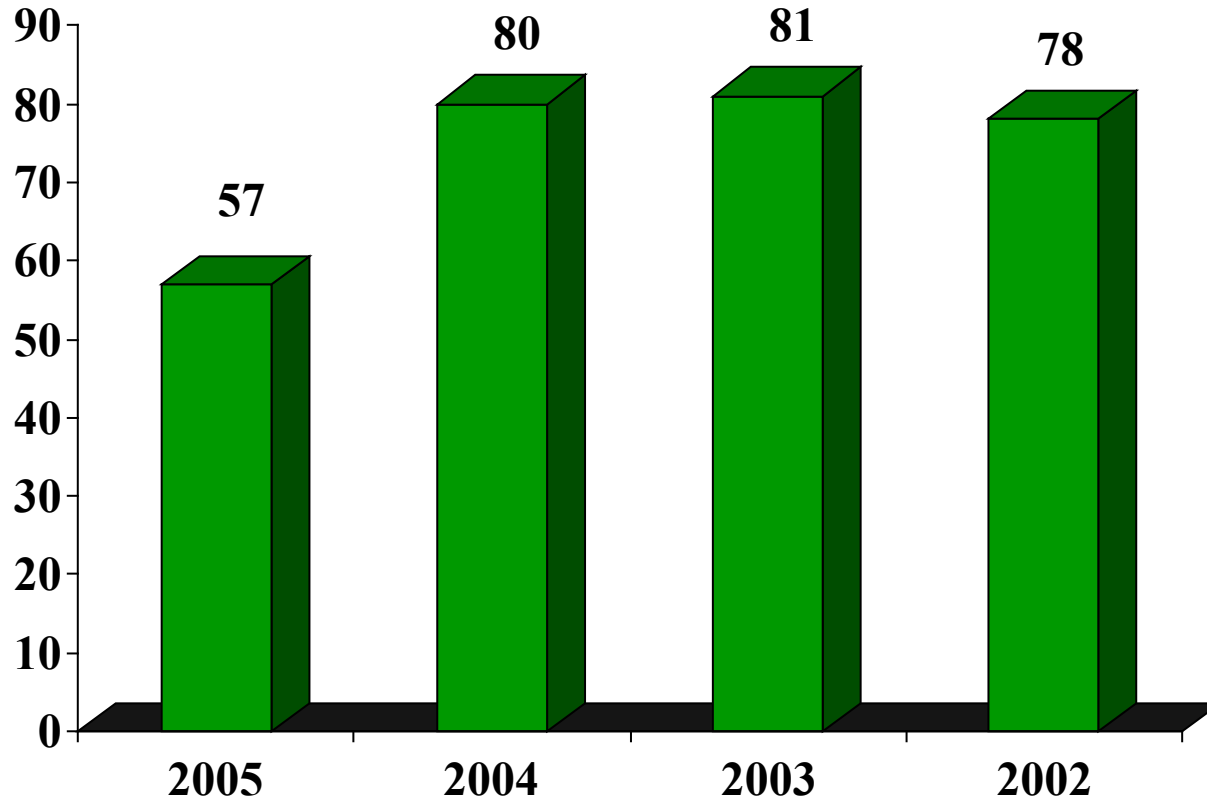
Agreement with Statements about the SCCEL



Position on The Lottery

- The majority (57%) of South Carolinians say know the money from the lottery is going to education.
 - ✓ This represents a fairly sharp decline from previous years (80% last year, 81% in 2003, and 78% in 2002). In all likelihood, this decline is better explained by question wording or interviewing technique than a real decline in consumer perception.

Know Money from the Lottery is Going to Education



Position on The Lottery

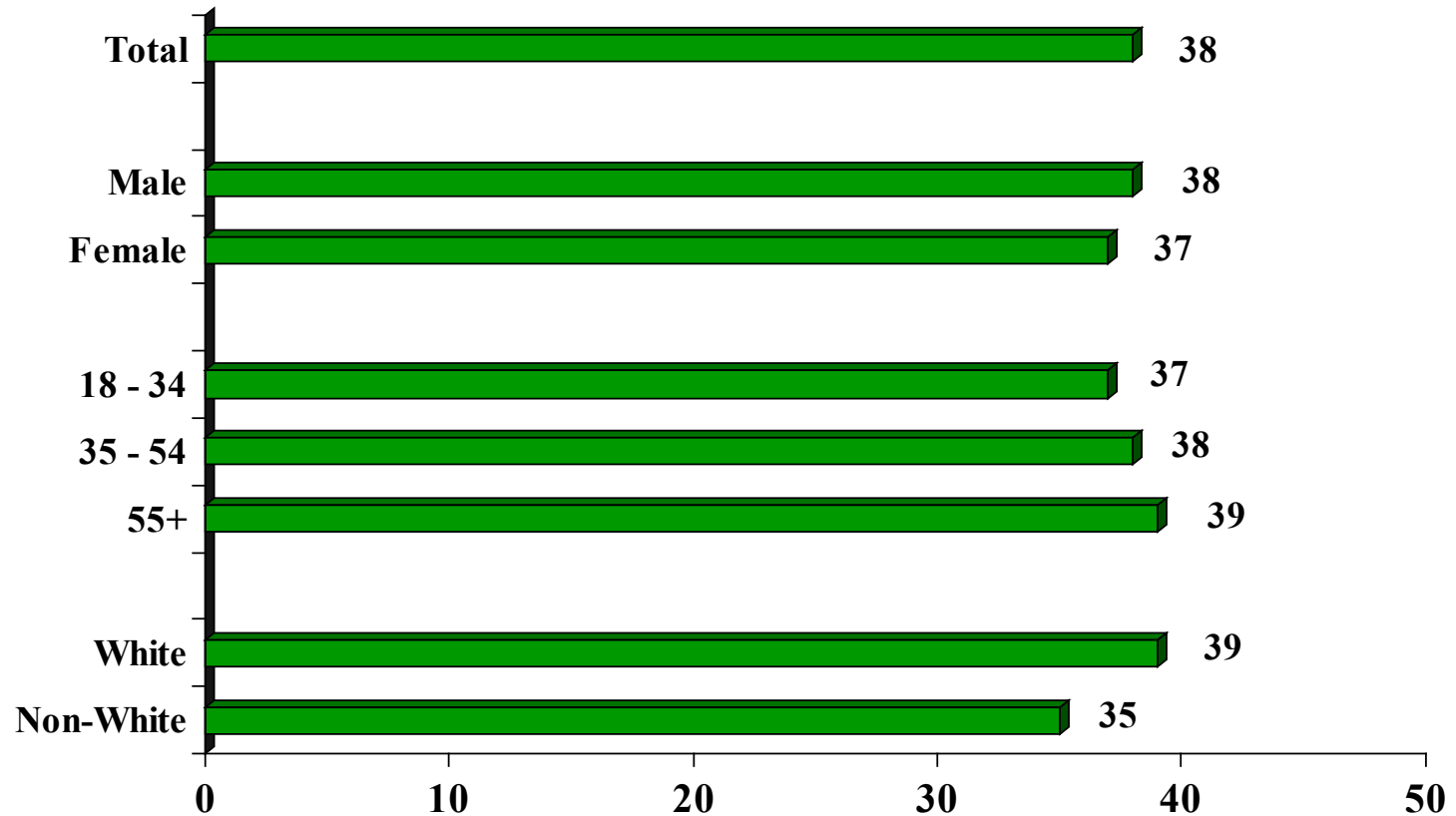
- Over a third (38%) say they have seen advertisements promoting where the money is going.
 - ✓ Among those who say they have seen these ads, only 1% (4 out of 378) can correctly cite the amount that has been allocated to education to-date.
 - ✓ Those who recall seeing these “beneficiary” ads were asked where they had seen/heard the ads.

Three-fourths (77%) say they have seen ads promoting where the money goes on TV. Still a significant minority reports seeing/hearing information about where the money is going:

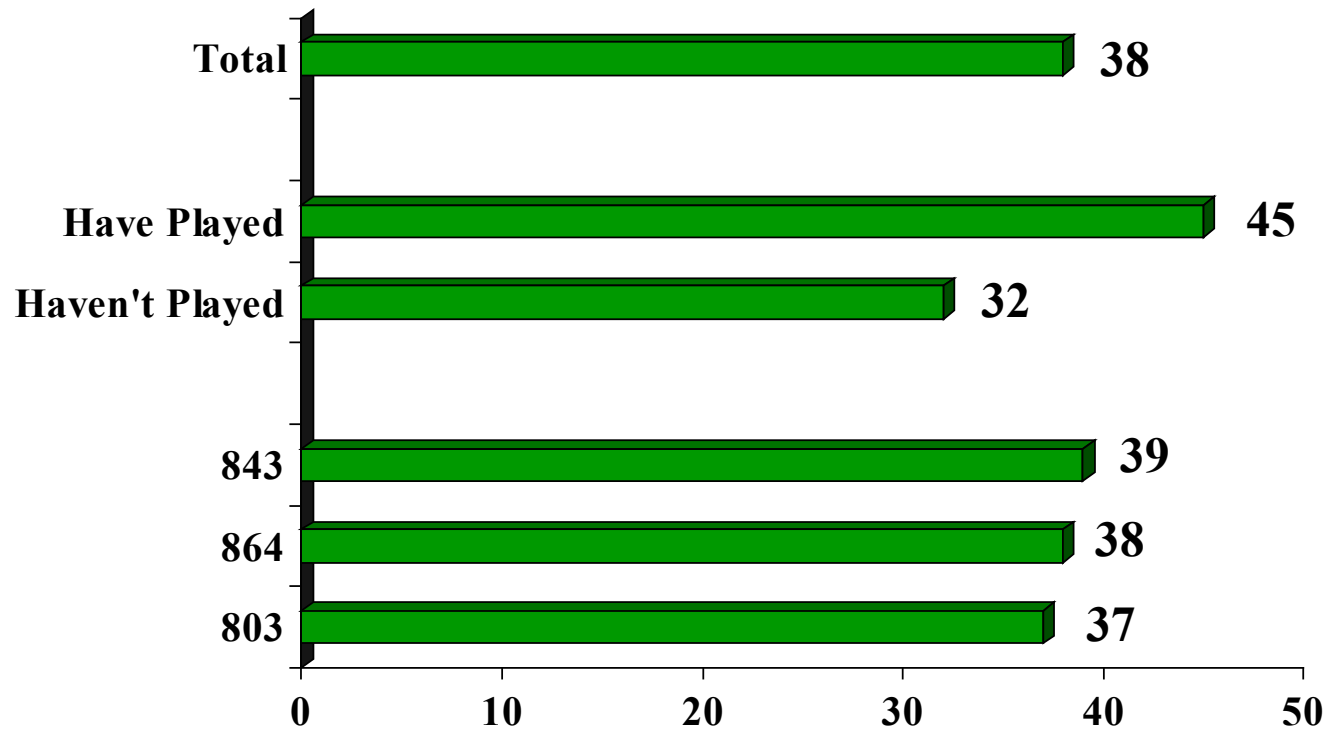
- On the radio (26%),
- In the newspaper (23%),
- During live televised drawings (21%), and
- On brochures at lottery retailers (14%).

(Others have seen the ads/information displayed at colleges/schools (9%), and the lottery website (9%).)

Have Seen Ads Promoting Where Money Is Going

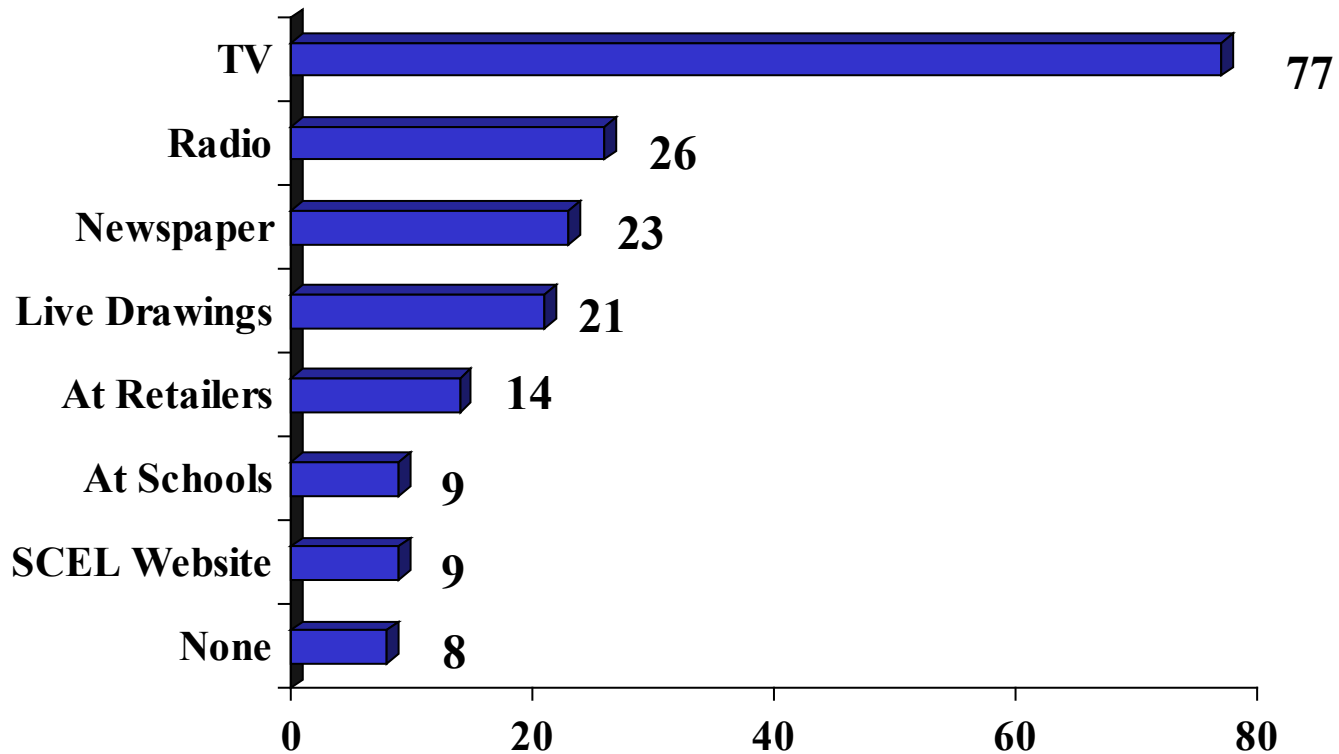


Have Seen Ads Promoting Where Money Is Going



Where Seen Ads

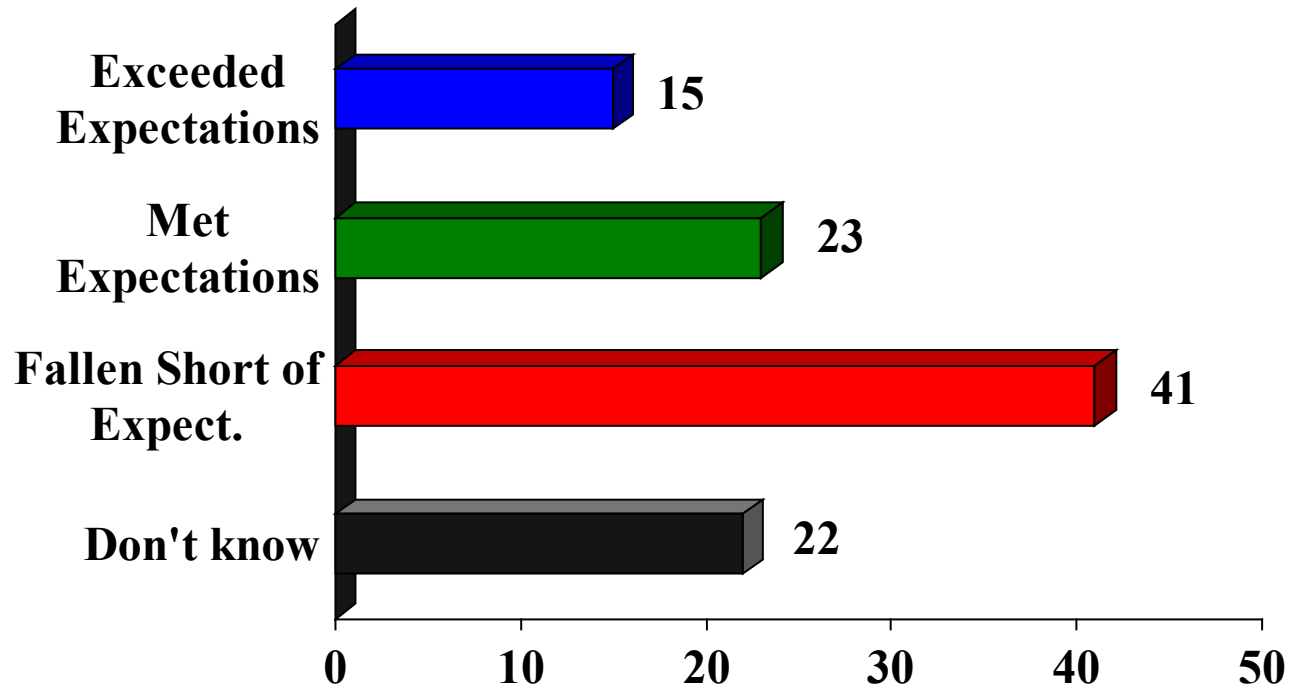
(aided, among those who report having seen ads, n = 378)



Positions on The Lottery

- Respondents were provided with the following information: The South Carolina Education lottery began in 2002. The lottery estimates that by the end of this year, \$1 billion will have been appropriated to education. Based on this information, respondents were then asked if the lottery's impact on education had met, exceeded, or fallen short of expectations.
- SC residents are more than twice as likely to say the lottery's impact on education has fallen short (41%) of expectations than they are to say it has exceeded expectations (15%).
 - ✓ NOTE: The lottery has surfaced numerous times during education-related focus groups. We have often found that consumers do not understand the lottery's role in education. Specifically, many think the lottery plays a much larger role in funding education than it actually does. For example, we have found that many consumers have been under the impression that the lottery would cure all the state's problems with education.

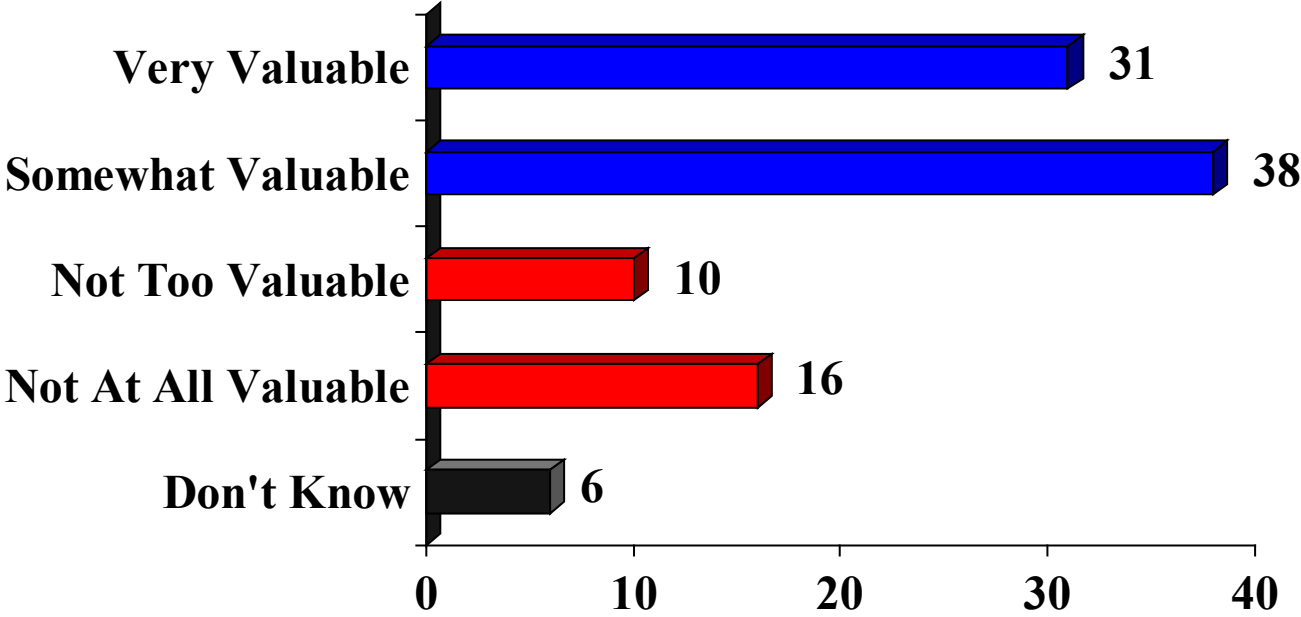
Lottery's Impact on Education Has . . .



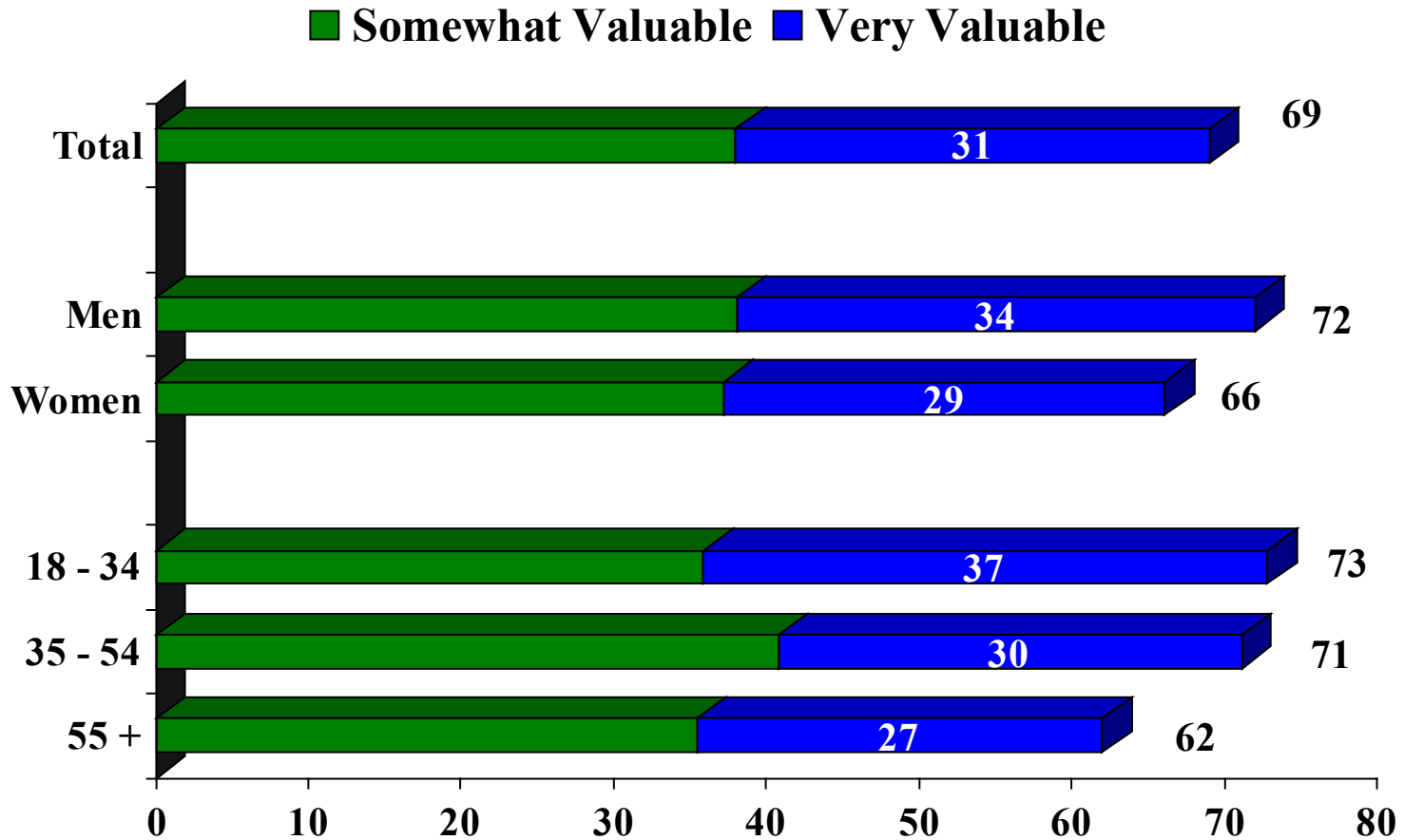
Position on The Lottery

- Regardless of findings relating to expectations, when told of the amount the lottery has allocated to education, more than two out of three (69%) South Carolina residents feel the South Carolina Education Lottery is valuable to the state; 31% feel the lottery is *very* valuable.
- Demographic findings for those who feel the lottery is valuable closely mirror those who voted for the lottery and those who play the lottery.

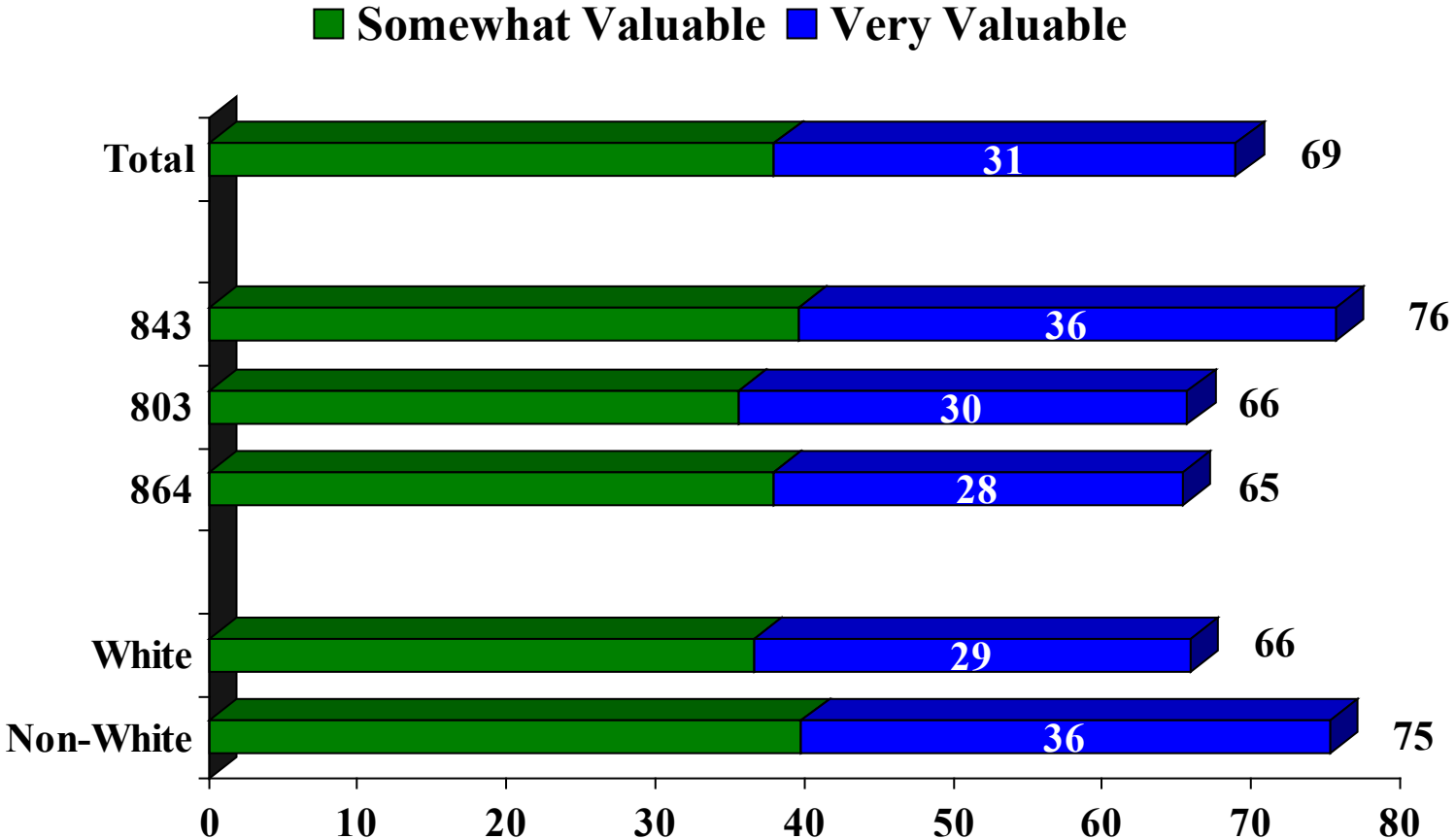
How Valuable is SCEL to South Carolina?



How Valuable is SCEL to South Carolina?



How Valuable is SCEL to South Carolina?



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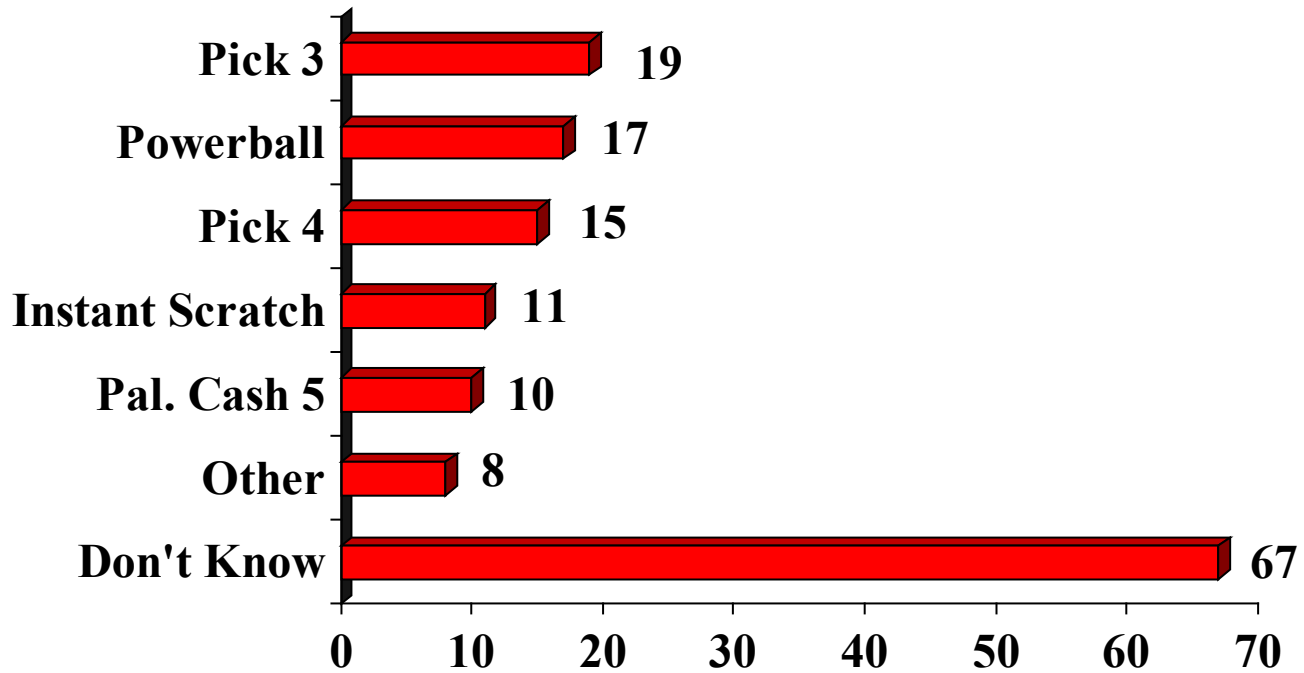
Recall of Lottery Games

Recall of Lottery Games

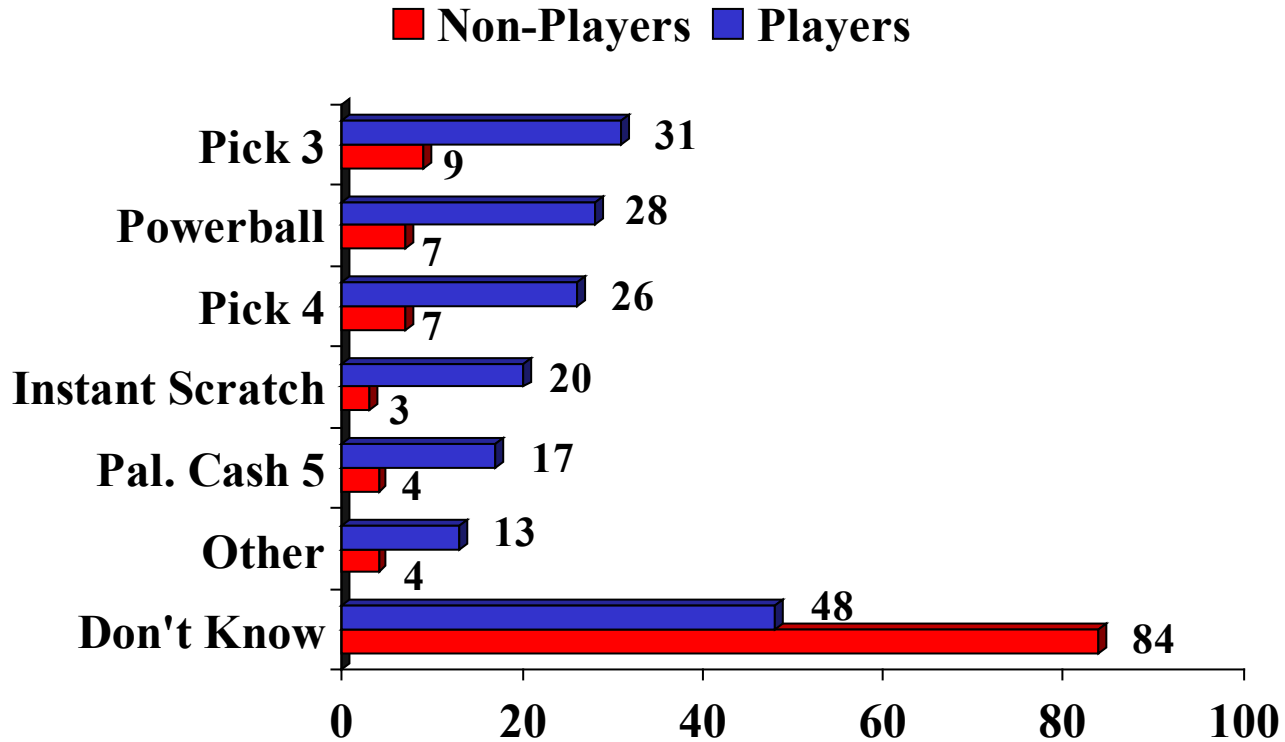
- Respondents were asked which SCEL games they could recall (unaided). In order of mention, the games are:
 - ✓ Pick 3 (19%),
 - ✓ Powerball (17%),
 - ✓ Pick 4 (15%),
 - ✓ Instant scratch (any) 11%,
 - ✓ Palmetto Cash 5 (10%).*
- Non-players (those who have never played) tend to be tuned out to the lottery. Findings identify significant differences in awareness between players (have ever played) and non-players for every one of SCEL's games. For example, 49% of players were able to mention at least one game, while only 14% of non-players could name an SCEL game on an unaided basis.
- While unaided mention of specific games is consistent with respect to age and gender demographics, findings indicate that non-whites tend to be more familiar with SCEL games, particularly "numbers" games such as Pick 3, Pick 4 and Palmetto Cash 5.

*Unaided awareness of Palmetto Cash 5 is high, given that the game was introduced February 14

Unaided Recall of SCEL Games



Unaided Recall of SCEL Games



Unaided Recall of Lottery Games

	Total	Male	Female	White	Non-White
Pick 3	19%	18%	20%	17%	24%
Powerball	17	19	14	17	15
Pick 4	15	15	16	14	19
Instant Scratch	11	10	12	10	12
Palmetto Cash 5	10	11	8	7	14
Other	8	9	8	7	10
Don't Know	67	66	68	69	65

Unaided Recall of Lottery Games

	Total	18 – 34	35 – 54	55+
Pick 3	19%	22%	19%	16%
Powerball	17	15	19	15
Pick 4	15	17	15	14
Instant Scratch	11	13	10	9
Palmetto Cash 5	10	9	10	9
Other	8	8	9	8
Don't Know	67	64	66	71

Unaided Recall of Lottery Games

	2005	2004	2003	2002
Pick 3	19%	29%	33%	31%
Powerball	17	31	28	1
Pick 4	15	20	20	-
Instant Scratch	11	18	21	34
Palmetto Cash 5	10	NA	NA	NA
Other	8	2	5	2
Don't Know	67	51	50	54

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General Incidence of Lottery Play

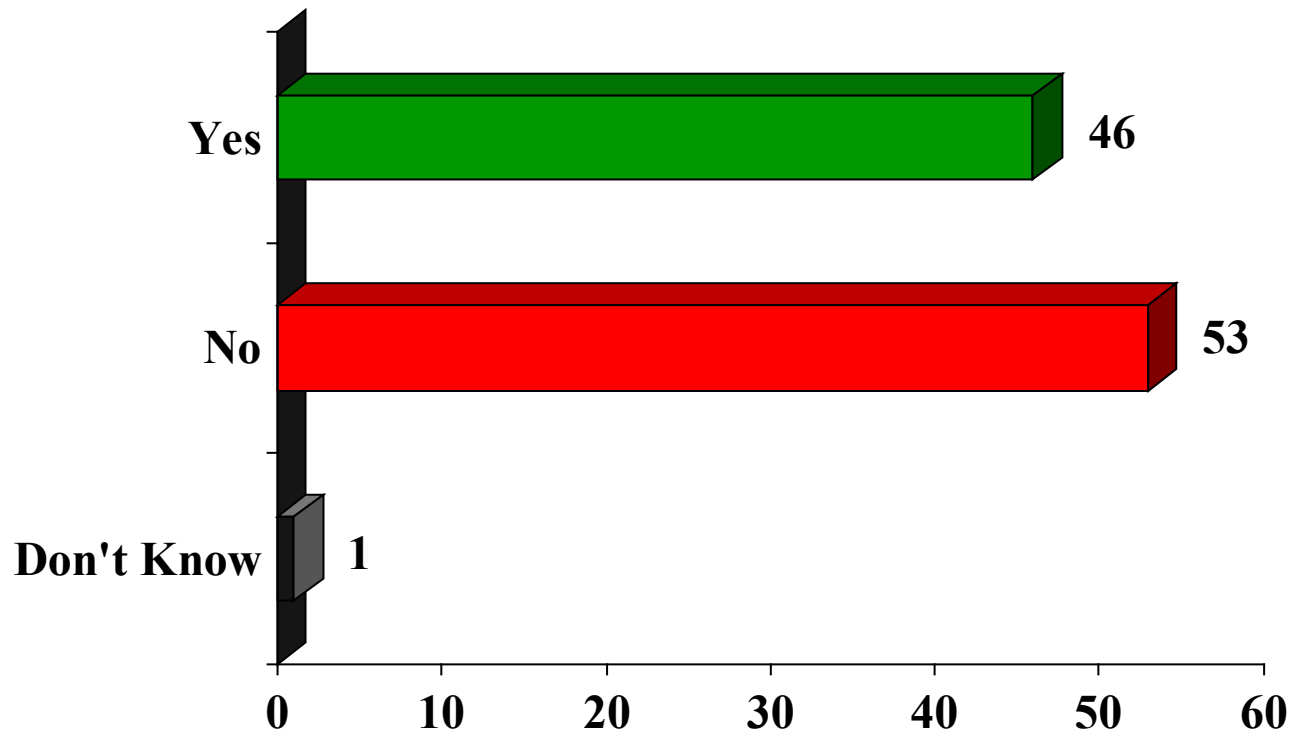
General Incidence of Lottery Play

- Nearly half (46%) of South Carolinians say they have played a South Carolina Education Lottery game at least once. This year's level is consistent with those recorded in previous studies.

The flat trend for play suggests the SCEL is not attracting new players. (It might also be the case that some have purchased so infrequently and/or long ago that they do not remember past lottery purchases.)

- In line with previous studies, Play among South Carolinians is significantly higher:
 - ✓ For non-whites (55%) than whites (41%),
 - ✓ For men (51%) than women (41%),
 - ✓ For those under 55 years of age (48%) than those 55 years of age and over (39%),
 - ✓ For those with less than a four-year college degree (50%) than those with a four-year college/graduate degree (37%), and
 - ✓ For those with household incomes under \$50,000 (53%) than those with household incomes of \$50,000 or more (43%).

Have Ever Played the SCEL



Have Ever Played the SCEL

(among total sample)

	2005	2004	2003	2002
Total	46%	45%	50%	42%
Male	51	48	53	46
Female	41	42	47	39
White	41	44	46	37
Non-White	55	48	59	53
Age 18 – 34	47	50	49	46
35 - 54	50	45	54	46
Age 55 and older	39	39	45	33

Have Ever Played the SCEL

(among total sample)

	2005	2004	2003	2002
Total	46%	45%	50%	42%
Less than 4-year degree	50	Data Not Available	Data Not Available	Data Not Available
4-year or advanced degree	37	Data Not Available	Data Not Available	Data Not Available
HHI <\$50,000	53	Data Not Available	Data Not Available	Data Not Available
HHI \$50,000 +	43	Data Not Available	Data Not Available	Data Not Available

General Incidence of Lottery Play

- Powerball (32% of state residents have “ever” purchased) and Instant Scratch Tickets (28%) have the highest penetration among the lottery games, followed by Pick 3 (16%), Pick 4 (12%), and Palmetto Cash 5 (11%).
 - ✓ NOTE: Given that Palmetto Cash 5 was introduced on February 14, the finding that 11% of respondents say they have played it suggests that some consumers are confusing Palmetto Cash 5 with Carolina 5.
- While the data for play of specific games show some fluctuations, findings from this year’s study tend to fall within ranges recorded in the past. The exception is Pick 4, which shows an increase in play over past studies.

Games Played

(among total sample)

	2005	2004	2003	2002
Any Game	46	45	50	42
Powerball	32	29	30	-
Instant Scratch Tickets	28	22	30	38
Pick 3	16	10	17	16
Pick 4	12	5	8	-
Palmetto Cash 5	11*	-	-	-

Since this game had just been launched, it might be the case that some consumers are confusing Palmetto Cash 5 with Carolina 5

Lottery Games Played

- Different games tend to attract different types of players. For example:
 - ✓ Powerball tends to have a fairly broad demographic appeal.
 - ✓ Non-whites are more likely than whites to play all games, but are especially attracted to Pick 3 and Pick 4.
 - ✓ Instant Scratch games tend to appeal to men and women equally.

Lottery Games Played

(among total sample)

	Total	Male	Female	18-34	35 - 54	55+
Any Game	46%	51	41	47	50	39
Powerball	32	37	28	29	37	28
Instant Scratch	28	27	28	29	32	20
Pick 3	16	17	15	15	16	16
Pick 4	12	14	10	11	14	9
Palmetto Cash 5	11	14	9	9	14	11

Lottery Games Played

(among total sample)

	Total	White	Non-White
Any Game	46%	41	55
Powerball	32	30	36
Instant Scratch	28	25	34
Pick 3	16	10	28
Pick 4	12	7	22
Palmetto Cash 5	11	10	15

General Incidence of Lottery Play

- In previous studies, “current” players have been defined as those who play a specific game at least once per month. By game,
 - ✓ 21% of the state’s residents are “current” Powerball players,
 - ✓ 19% of residents are “current” Instant Scratch players,
 - ✓ 10% of residents are “current” Pick 3 players, and
 - ✓ 7% are “current” Pick 4 players.

(NOTE: No data was collected on Palmetto Cash 5 play frequency, as the game had only been out a few weeks.)

- While these findings are generally consistent with those recorded in previous studies, incidence of “current” play has increased for most games since 2003. These findings suggest that, while growth in the player base has been flat, the lottery is doing a good job of keeping players “current.”

(NOTE: Data for 2002 is not available.)

“Current” Players

(among total sample)

	2005	2004	2003
Powerball	21%	16%	17%
Instant Scratch	19	12	16
Pick 3	10	6	11
Pick 4	7	3	4

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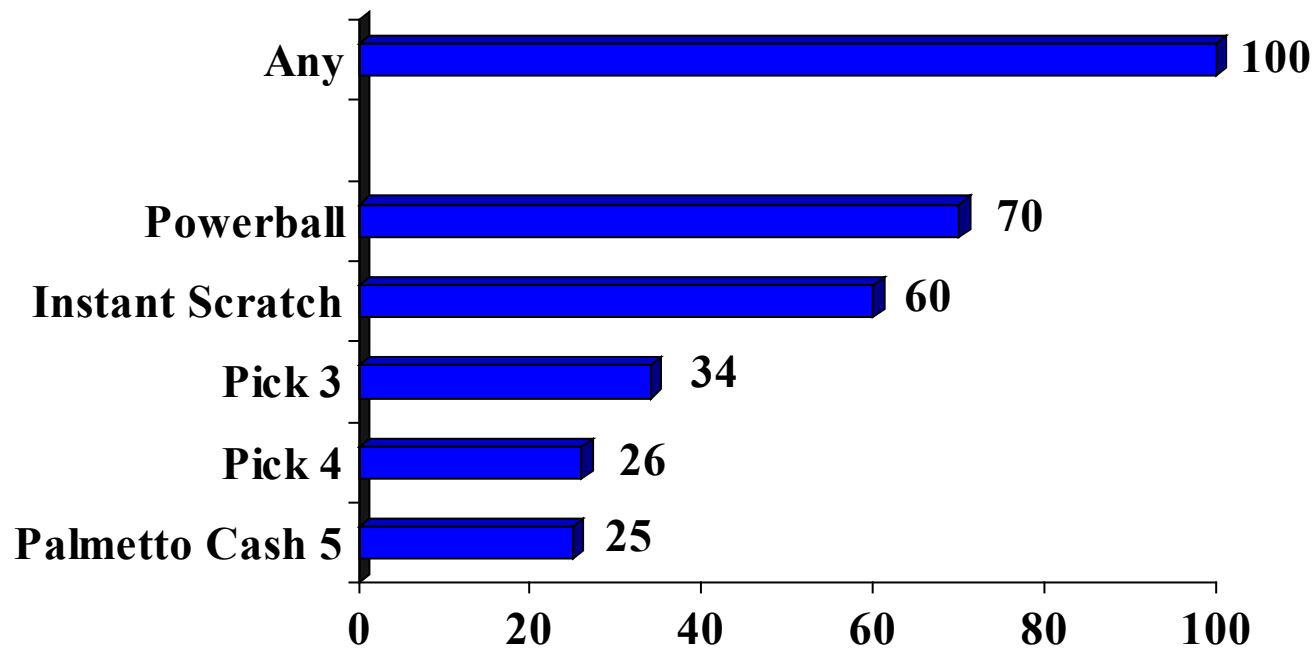
Overview of Game Play

Overview of Game Play

- The section provides an overview of SCEL game play. Each game will be addressed in detail in the following section, Dynamics of Lottery Play.
 - ✓ Powerball and Instant Scratch Tickets are the games of choice among players.
 - ✓ The majority of those who play a game continue to play it. Instant Scratch and Powerball, however, have the highest “customer retention” levels.
 - ✓ On average, Instant Scratch players spend the most per purchase and per month.
 - ✓ In terms of ever having “won anything,” Powerball players have had the best luck. (Note: this question was not asked of Instant Scratch players.)

Games Played

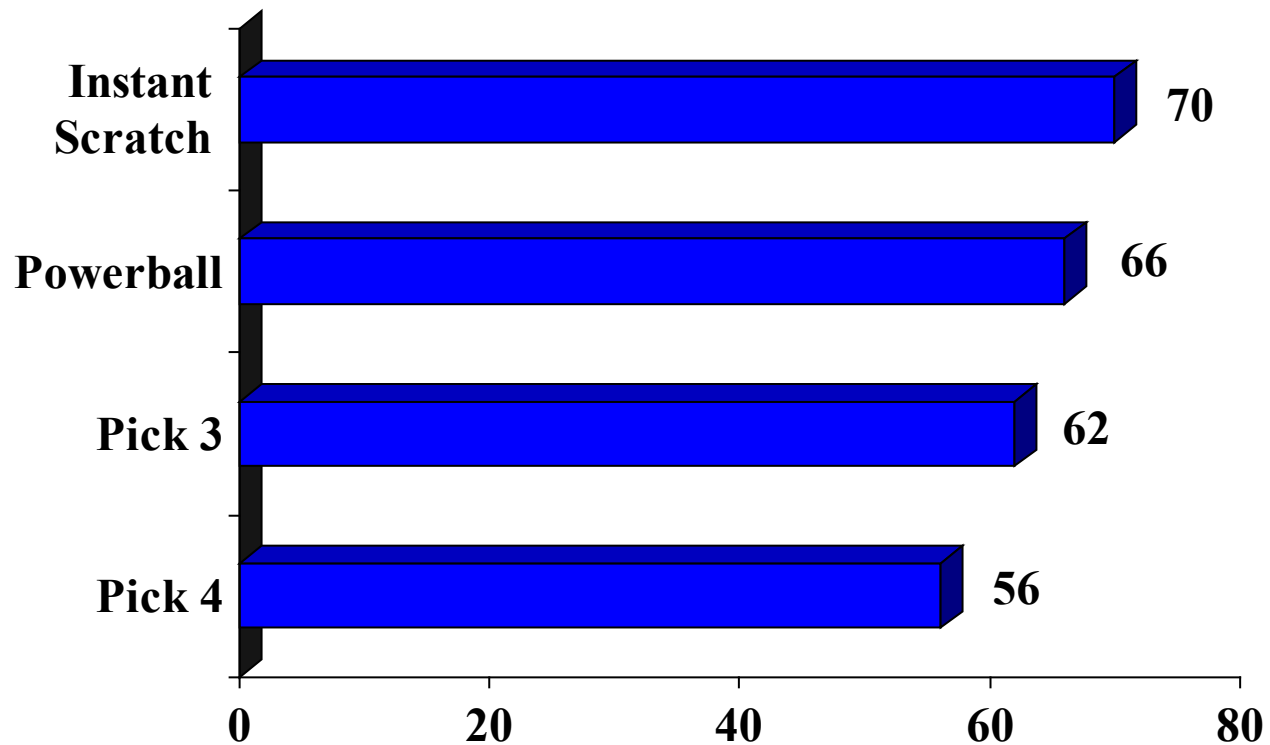
(among players, n = 457)



Q12 Since this game had just been launched, it might be the case that some consumers are confusing Palmetto Cash 5 with Carolina 5
Historical data not available.

“Current” Game Play

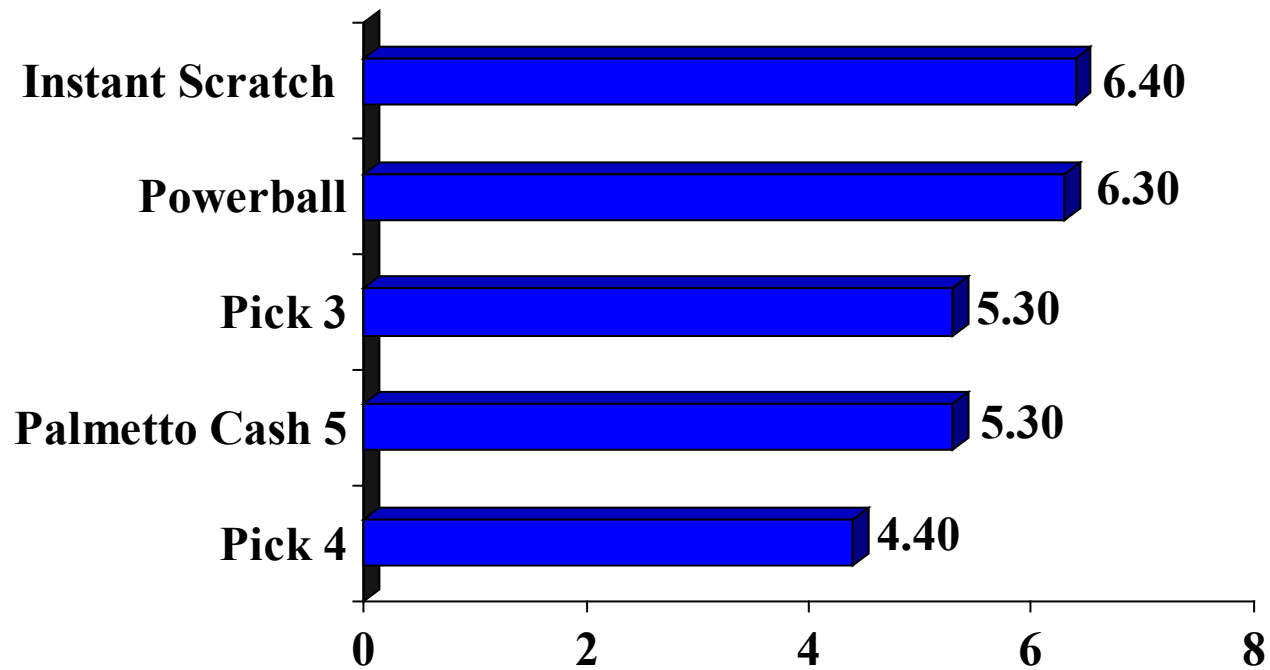
(among those who have ever played specific game)



Q17, 26, 31, 45

“Current” defined as playing at least once/month

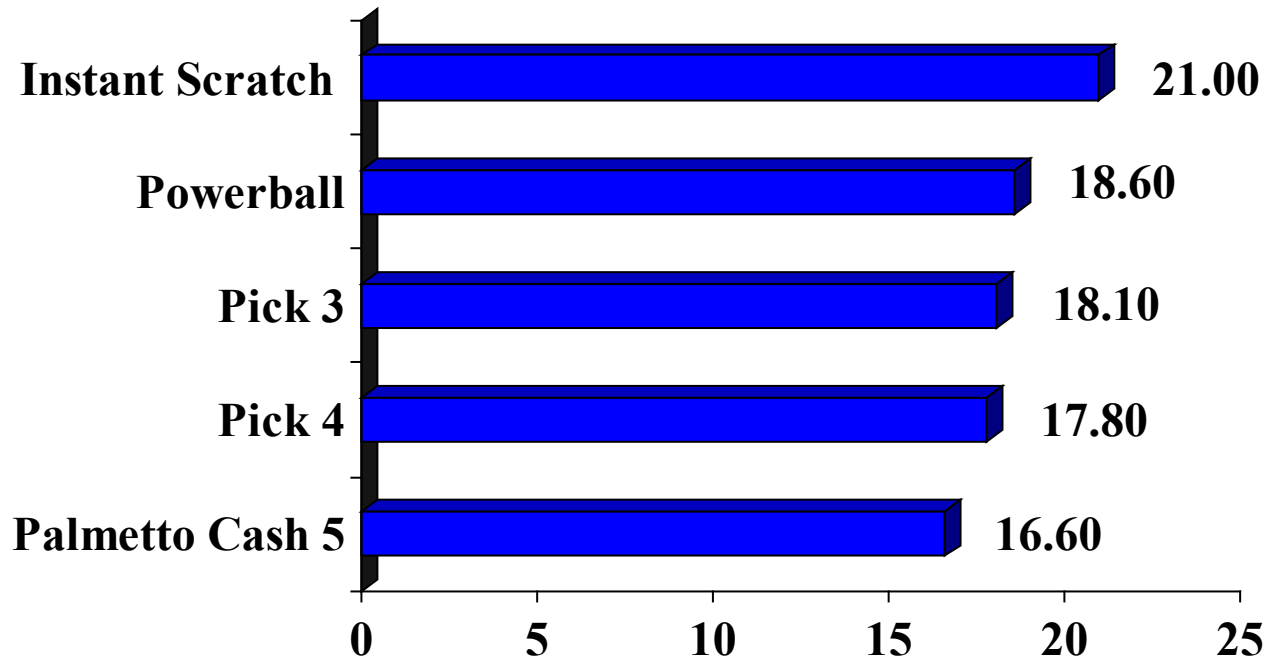
Amount Spent Per Purchase (among those who play specific game)



Q20, 28, 33, 38, 48

*In dollars

Amount Spent Per Month (among those who play specific game)

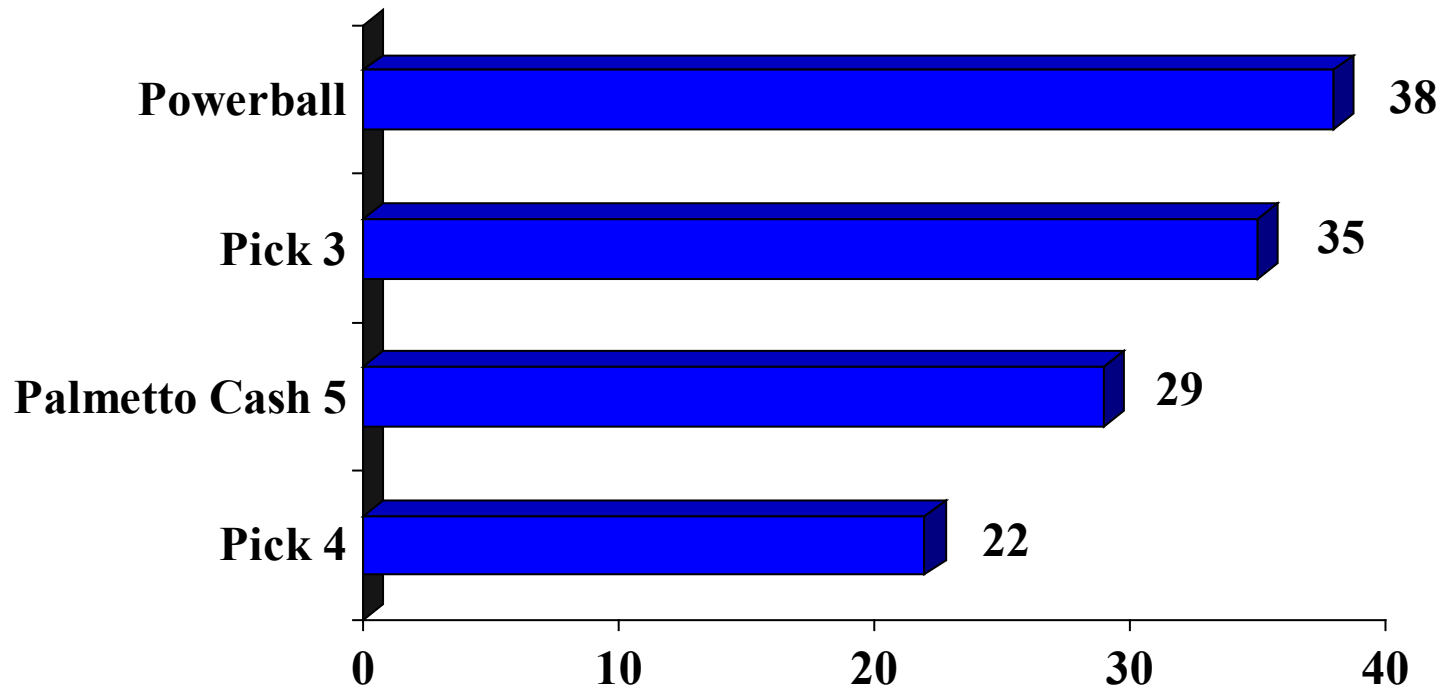


Q21, 29, 34, 39, 50

*In dollars

Have Won Anything

(among those who play specific game)



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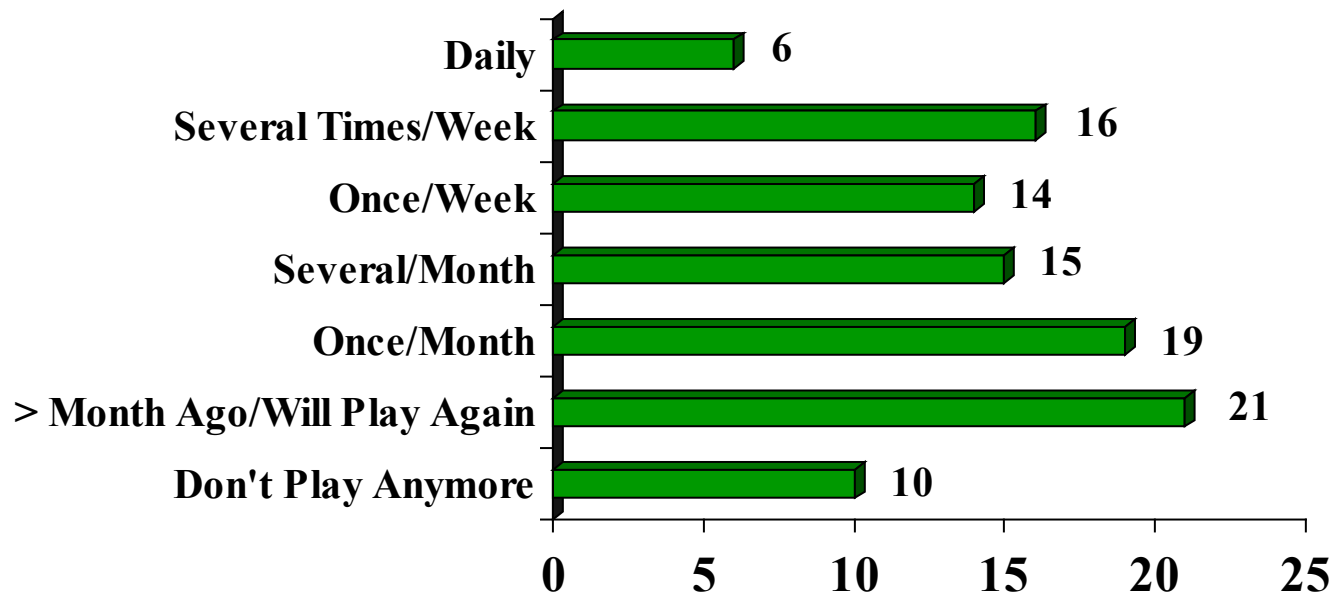
Specific SCEL Game Play

Instant Scratch Games

- As mentioned, 28% of the state's residents say they have purchased Instant Scratch Tickets.
 - ✓ Among those who have played (n = 276),
 - 69% are “current” players, a level significantly higher than has been recorded in the past two years.
 - ✓ After tapering off last year, frequency of play has increased with the introduction/growth of the new, higher-ticket games.
 - ✓ Current Instant Scratch players tend to skew heavily towards:
 - Whites, those under 55 years of age, and household income of \$50,000 and under.
 - But are fairly evenly split between men and women.

Frequency of Instant Scratch Ticket Purchase

(among those who have ever played, n = 276)

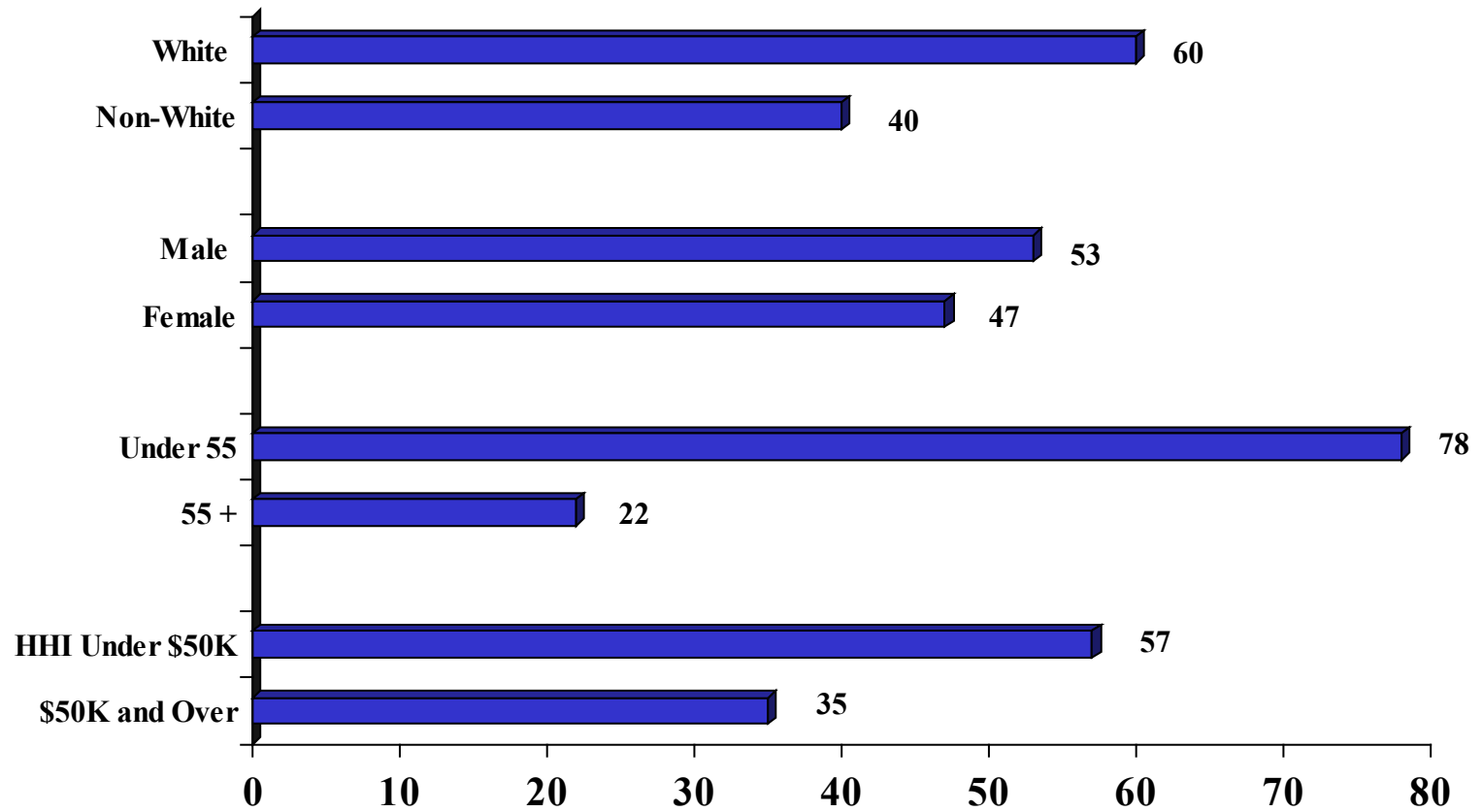


Frequency of Instant Scratch Ticket Purchase

(among those who have ever played)

	2005	2004	2003	2002
Daily	6%	2%	0%	1%
Several times/week	16	5	10	10
Once/Week	14	10	17	17
Several times/month	15	15	14	19
Once/month	19	20	12	20
CURRENT PLAYERS	69	52	53	67
No play in past month	21	31	28	24
Don't play anymore	10	17	19	10

Profile of “Current” Instant Scratch Players



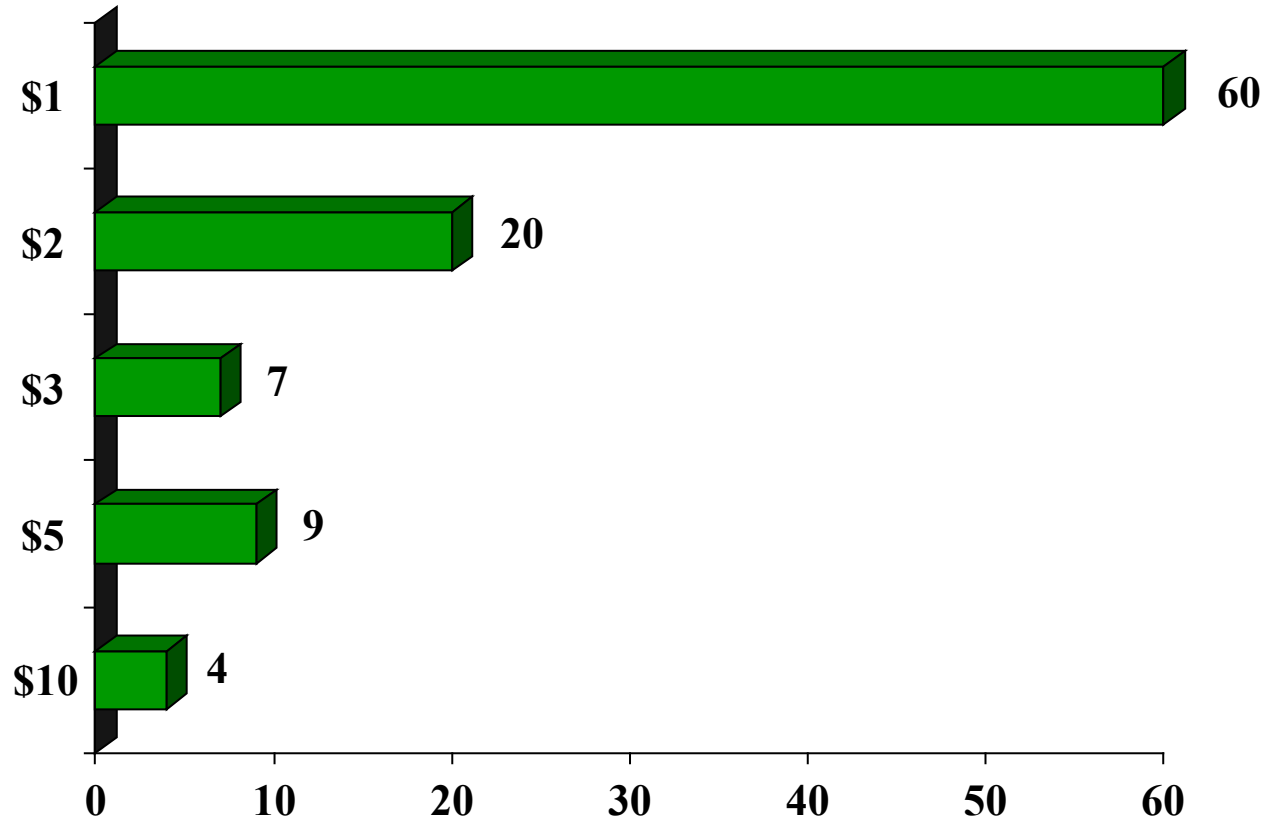
Instant Scratch Tickets

- Most Instant Scratch players are buying \$1 (82%) and \$2 (58%) tickets. Growth of these tickets, however, has remained fairly flat over the past year. The higher-dollar tickets, however, are showing significant growth.
- Three in five (60%) Instant Scratch players say they purchase \$1 tickets most often. Still, the higher-ticket games are becoming “games of choice” for many, with 13% who report playing the \$5 ticket (9%) or \$10 ticket (4%) most often.
- Further, with the addition of the higher-ticket games, the data show an increase in average amounts spent per purchase and per month.

Instant Scratch Tickets Played

	2005	2004	2003	2002
\$1	82%	88%	88%	26%
\$2	58	61	58	6
\$3	26	23	16	-
\$5	39	23	14	-
\$10	21	14	-	-

Instant Scratch Ticket Played Most Often



Amount Spent Per Purchase

	2005	2004	2003	2002
\$1	3%	12%	19%	12%
\$2	14	23	16	22
\$3	9	9	7	11
\$4	6	8	8	9
\$5	33	23	27	26
\$6 - \$9	6	3	5	4
\$10 - \$19	20	16	11	12
\$20 - \$49	8	6	6	5
\$50+	1	1	1	0
Average	\$10.70	\$7.00	\$5.71	\$5.07
Average (with cap of \$25 on purchase)	\$6.40	\$5.03	\$4.64	\$5.07

Amount Spent Per Month

	2005	2004	2003	2002
\$1	6%	12%	14%	10%
\$2	6	13	8	11
\$3	2	6	3	5
\$4	3	5	4	6
\$5	12	15	10	12
\$6 - \$9	6	7	6	8
\$10 - \$19	20	16	22	23
\$20 - \$49	32	17	25	20
\$50+	14	8	8	4
Average	\$26.60	\$19.35	\$20.21	\$12.99
Average (with cap of \$200 on purchase)	\$21.00	\$14.04	\$13.52	\$12.59

Instant Scratch Tickets

- “Fun to play” and “immediately knowing if I’ve won” continue to be mentioned as the primary reasons for liking Instant Scratch Tickets.
- Nearly one in five Instant Scratch players do not mention anything they dislike about playing Instant Scratch games. Those who do mention a negative tend to focus on the perception that they “cannot win much” (29%) and the difficulty of winning the top prize (15%).

Like Most About Instant Scratch Games

Fun to play	25%
Immediately know if I won	21
Good chance to win something	12
Ease of play	10
Like the odds	10
Opportunity to win a lot of money	9
Enjoy scratching off	8
Have won it	6
Other	15
Don't know	10

Like Least About Instant Scratch Games

Cannot win much	29%
Too hard to win top prize	15
Too hard to win lower prizes	10
Don't like scratching	6
Other	23
Nothing	22
Don't know	8

Instant Scratch Tickets

- Instant Scratch players were asked, “what would be the smallest winning amount that would make you feel like you won something?”
 - ✓ The median figure cited by Instant Scratch players is \$10. Many have even lower expectations: 41% gave a figure of \$5 or less. In fact, fully 15% would feel like they had won something if they won \$1. Still, many are attracted to the higher prizes. Over a third (35%) cite prizes of \$50 and higher as the smallest amount they could win and feel like they won something.
- Instant Scratch players have higher standards when it comes to the “chatter prize” (the smallest winning amount they would tell a friend about). The median figure for “chatter prize” is \$25.00

Smallest Winning Amount . . .

	2005	2004	2003	2002
<i>That would make you feel like you won something</i>				
Median	\$10	\$10	\$10	\$20
<i>That you would encourage you to tell a friend you'd won</i>				
Median	\$25	\$25	\$20	\$20

Instant Scratch Games

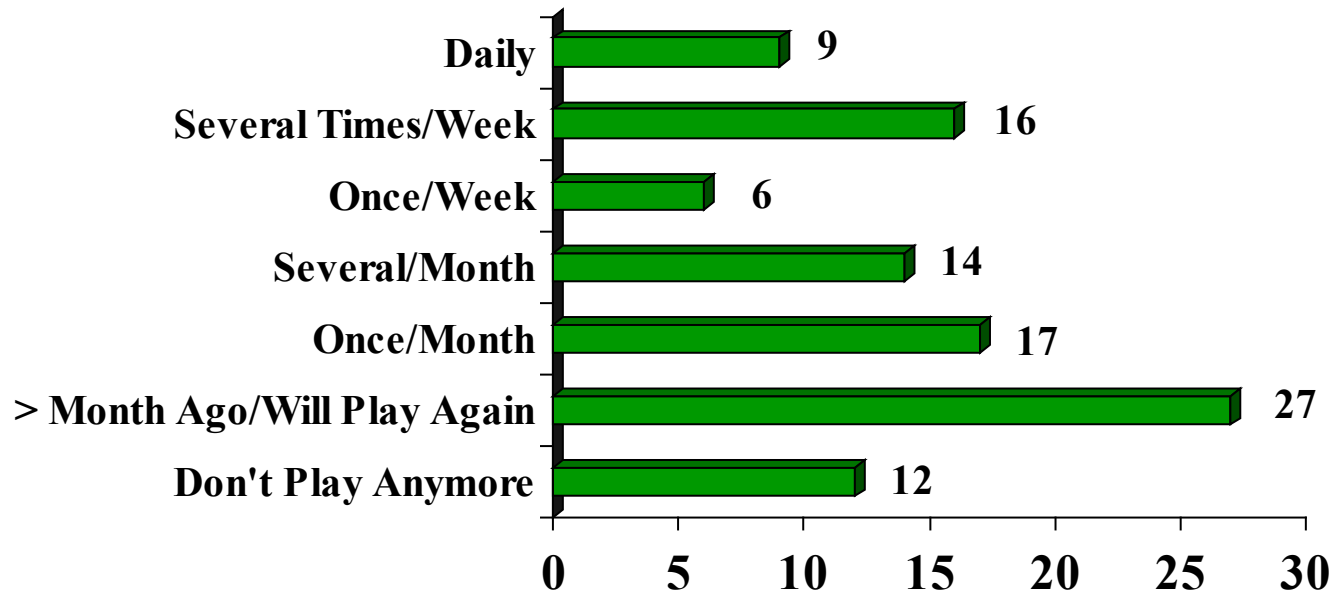
- Those who have purchased Instant Scratch Tickets but do not purchase them anymore (n = 27) were asked why they no longer play. Reasons for no longer playing Instant Scratch games include:
 - ✓ Don't have extra money/Budget (24%),
 - ✓ Waste of money (16%),
 - ✓ Never win/Poor odds (15%),
 - ✓ Not doing enough for education (14%),
 - ✓ Lost interest (10%),
 - ✓ Don't support/believe in it (5%),
 - ✓ Forgot about it (5%),
 - ✓ "Other" (18%), and
 - ✓ Don't know (9%).

Pick 3

- Approximately one in six (16%) of the state's residents say they have purchased Pick 3 tickets.
 - ✓ Among those who have played (n = 157),
 - 62% are “current” players.
 - “Current” play dipped last year, but has returned levels recorded in 2003 and 2002.
 - ✓ Current Pick 3 players tend to skew heavily towards:
 - Non-whites,
 - Men,
 - Those under 55 years of age, and
 - Household income of \$50,000 or less.

Frequency of Pick 3 Purchase

(among those who have ever played, n = 157)

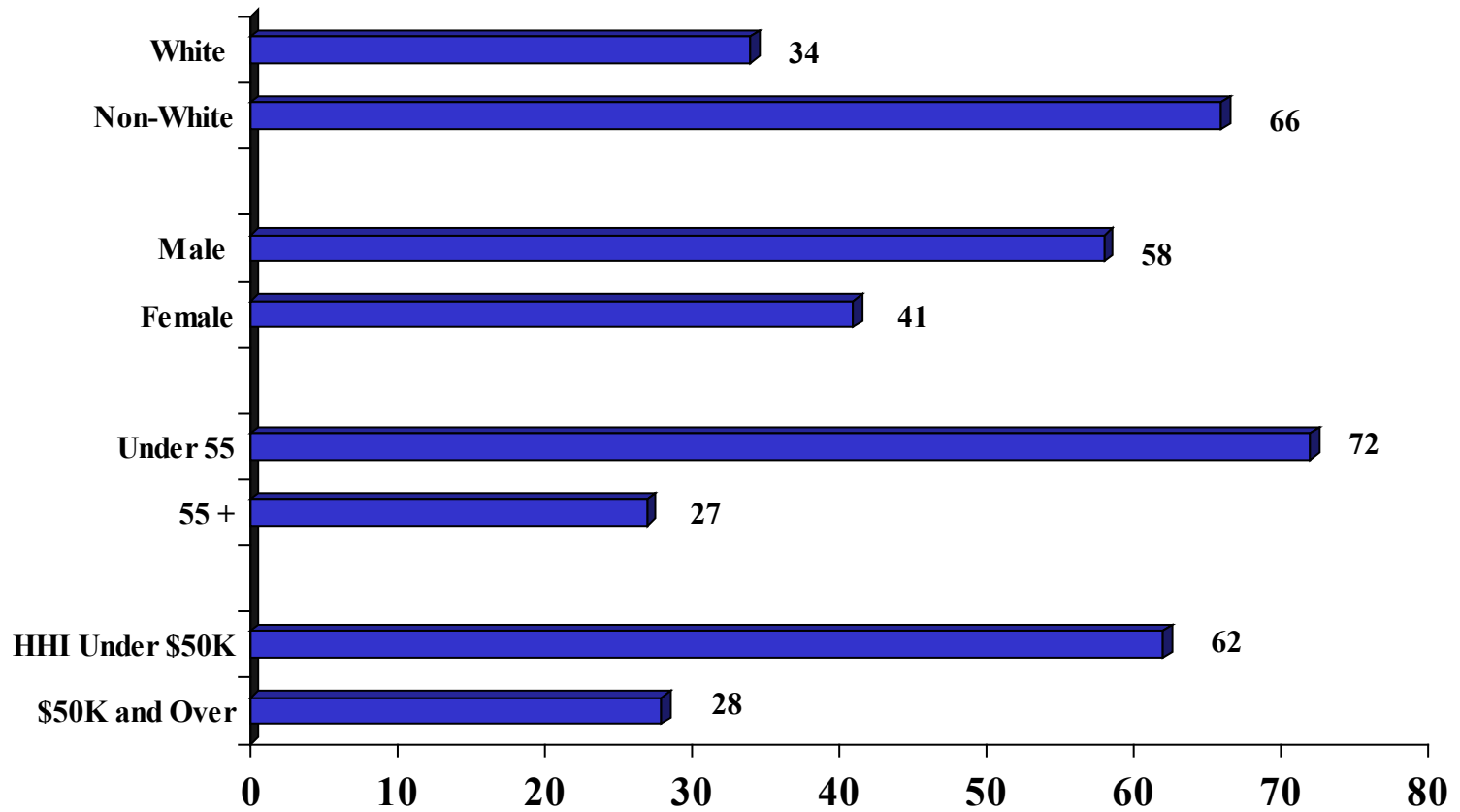


Frequency of Pick 3 Purchase

(among those who have ever played)

	2005	2004	2003	2002
Daily	9%	3%	7%	3%
Several times/week	16	14	11	13
Once/Week	6	11	12	20
Several times/month	14	7	13	15
Once/month	17	20	20	11
CURRENT	62	55	63	62
No play in past month	27	24	18	20
Don't play anymore	12	21	19	19

Profile of “Current” Pick 3 Players



Pick 3

- On average, Pick 3 players spend \$6.50 each time they purchase tickets. The majority of players (55%) say they spend \$5 or more each time they purchase Pick 3 tickets.
- Pick 3 players spend an average of \$30.70 dollars per month on the game.
- Consistent with last year's study, 35% of Pick 3 players say they have won on Pick 3.

Amount Spent Per Purchase

	2005	2004	2003	2002
\$1	12%	34%	26%	20%
\$2	19	15	10	15
\$3	8	8	15	15
\$4	5	7	2	4
\$5	27	21	29	22
\$6 - \$9	5	5	5	9
\$10 - \$19	17	3	9	10
\$20 - \$49	6	8	4	5
\$50+	1	-	-	-
Average	\$6.50	\$4.20	\$4.47	\$8.62
Average (with cap of \$25 on purchase)	\$5.30	\$3.93	\$4.17	\$4.68

Amount Spent Per Month

	2005	2004	2003	2002
\$1	6%	16%	11%	9%
\$2	6	11	5	8
\$3	8	3	4	2
\$4	4	9	4	6
\$5	12	12	18	10
\$6 - \$9	7	7	8	9
\$10 - \$19	25	17	17	33
\$20 - \$49	21	18	24	23
\$50+	13	8	8	-
Average	\$30.70	\$17.18	\$15.36	\$14.66
Average (with cap of \$200 on purchase)	\$18.10	\$11.64	\$15.36	\$13.71

Have Won Anything on Pick 3

	2005	2004	2003	2002
Yes	35%	35%	30%	26%
No	64	61	70	74
Don't know	1	4	-	-

Pick 3

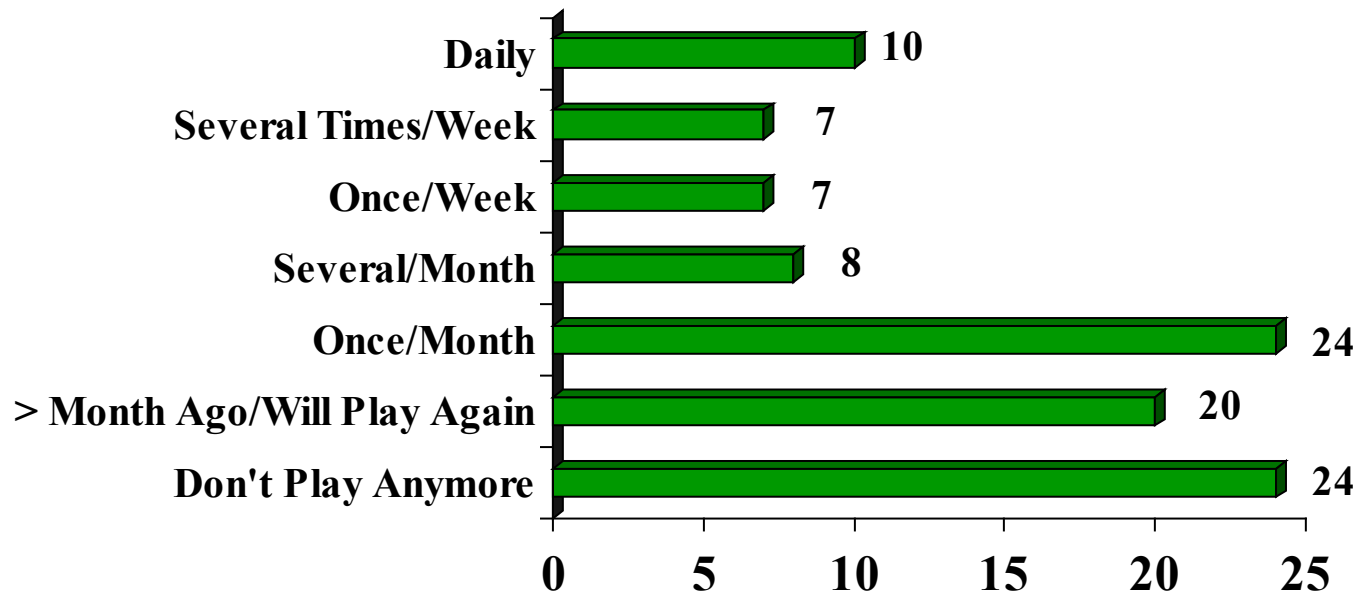
- Those who have purchased Pick 3 tickets but do not purchase them anymore (n = 18) were asked why they no longer play. Reasons for no longer playing Pick 3 include:
 - ✓ Lost interest (24%),
 - ✓ Never win/Poor odds (20%),
 - ✓ Don't have extra money/Budget (14%),
 - ✓ Prefer other games (10%),
 - ✓ Forgot about it (9%),
 - ✓ Waste of money (7%),
 - ✓ "Other" (8%), and
 - ✓ Don't know (17%).

Pick 4

- Just over one in ten (12%) of South Carolina residents say they have purchased a Pick 4 ticket.
 - ✓ Among those who have played (n = 117),
 - 56% are “current” players, up seven (7) percentage points over last year.
 - ✓ Current Pick 4 players tend to skew heavily towards:
 - Non-whites,
 - Men,
 - Those under 55 years of age, and
 - Those with household incomes of \$50,000 or less.

Frequency of Pick 4 Purchase

(among those who have ever played, n = 117)

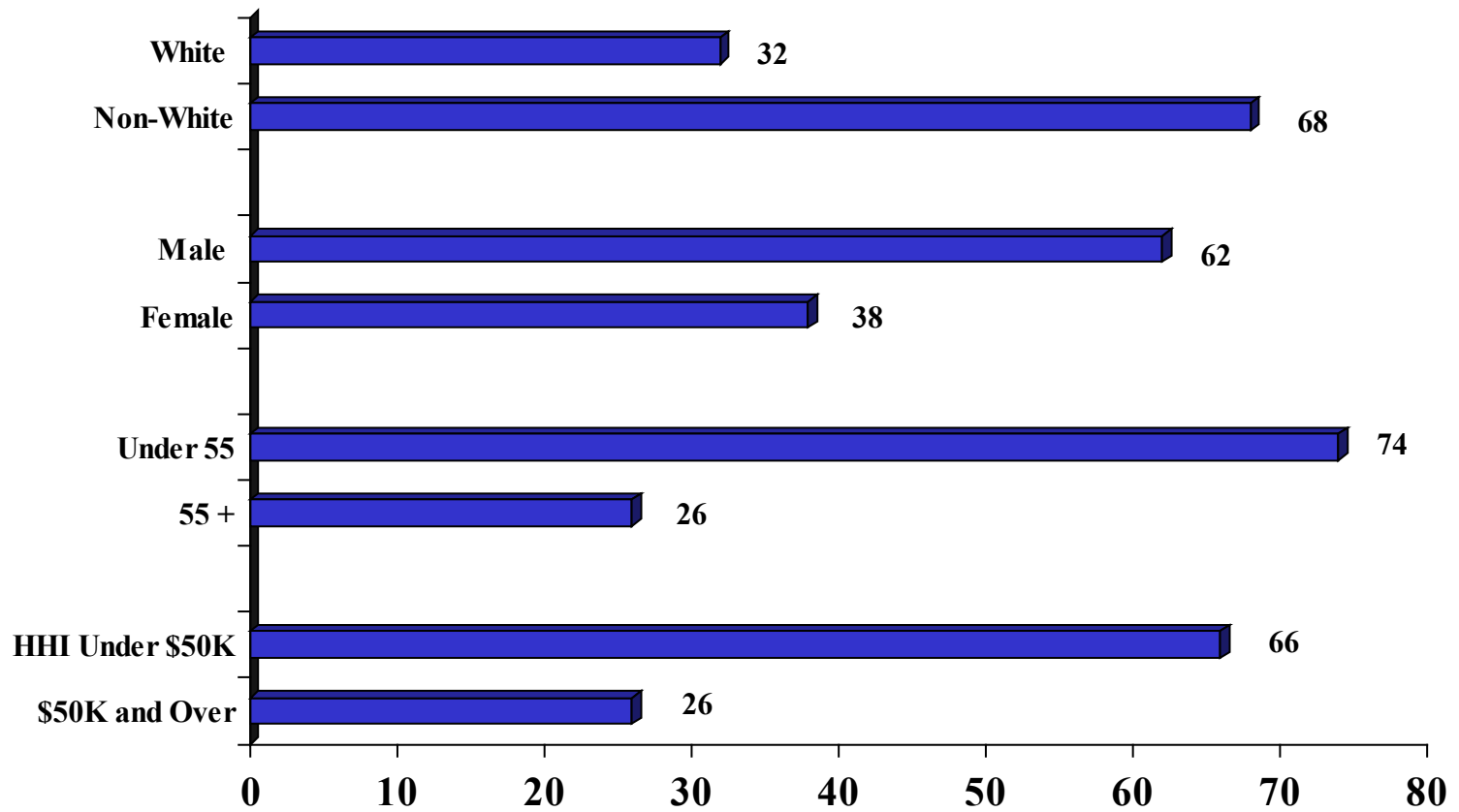


Frequency of Pick 4 Purchase

(among those who have ever played)

	2005	2004	2003
Daily	10%	0%	4%
Several times/week	7	12	7
Once/Week	7	6	9
Several times/month	8	13	9
Once/month	24	18	20
CURRENT	56	49	49
No play in past month	20	25	26
Don't play anymore	24	25	25

Profile of “Current” Pick 4 Players



Pick 4

- On average, Pick 4 players spend \$7.40 each time they purchase tickets. Just under half of Pick 4 players (43%) say they spend \$5 or more each time they purchase Pick 4 tickets.
- Pick 4 players spend an average of \$17.80 dollars per month on the game.
- Findings identify a sharp increase in the percentage of players who say they have won anything playing Pick 4.
 - ✓ 22% this year, compared to 9% in 2004 and 7% in 2003.

Amount Spent Per Purchase

	2005	2004	2003
\$1	16%	36%	25%
\$2	22	28	19
\$3	8	2	11
\$4	5	3	7
\$5	25	24	21
\$6 - \$9	6	-	1
\$10 - \$19	6	6	6
\$20 - \$49	9	2	10
\$50+	4	-	-
Average	\$7.40	\$3.21	\$4.92
Average (with cap of \$25 on purchase)	\$4.40	\$3.21	\$4.01

Amount Spent Per Month

	2005	2004	2003
\$1	11%	16%	8%
\$2	8	15	10
\$3	7	-	9
\$4	1	13	3
\$5	9	18	14
\$6 - \$9	5	7	8
\$10 - \$19	31	20	20
\$20 - \$49	16	6	21
\$50+	11	5	7
Average	\$17.80	\$11.39	\$12.04
Average (with cap of \$200 on purchase)	\$17.80	\$11.39	\$12.04

Have Won Anything on Pick 4

	2005	2004	2003
Yes	22%	9%	7%
No	79	91	93
Don't know	-	-	-

Pick 4

- Those who have purchased Pick 4 tickets but do not purchase them anymore (n = 29) were asked why they no longer play. Reasons for no longer playing Pick 4 include:
 - ✓ Prefer other games (24%),
 - ✓ Never win/Poor odds (22%),
 - ✓ Lost interest (21%),
 - ✓ Don't have extra money/Budget (6%),
 - ✓ "Other" (23%), and
 - ✓ Don't know (5%).

Palmetto Cash 5

- Just over one in ten (11%) of South Carolina residents say they have purchased a Palmetto Cash 5 ticket. Given the newness of the game and the relatively high incidence of play, it might be the case that some are confusing Palmetto Cash 5 with Carolina 5.
 - ✓ Findings identify high awareness of the PowerUp option on Palmetto Cash 5. Over two-thirds (70%) of those who have played Palmetto Cash 5 are familiar with the PowerUp option. Further, 48% of those who have played took advantage of the PowerUp option.

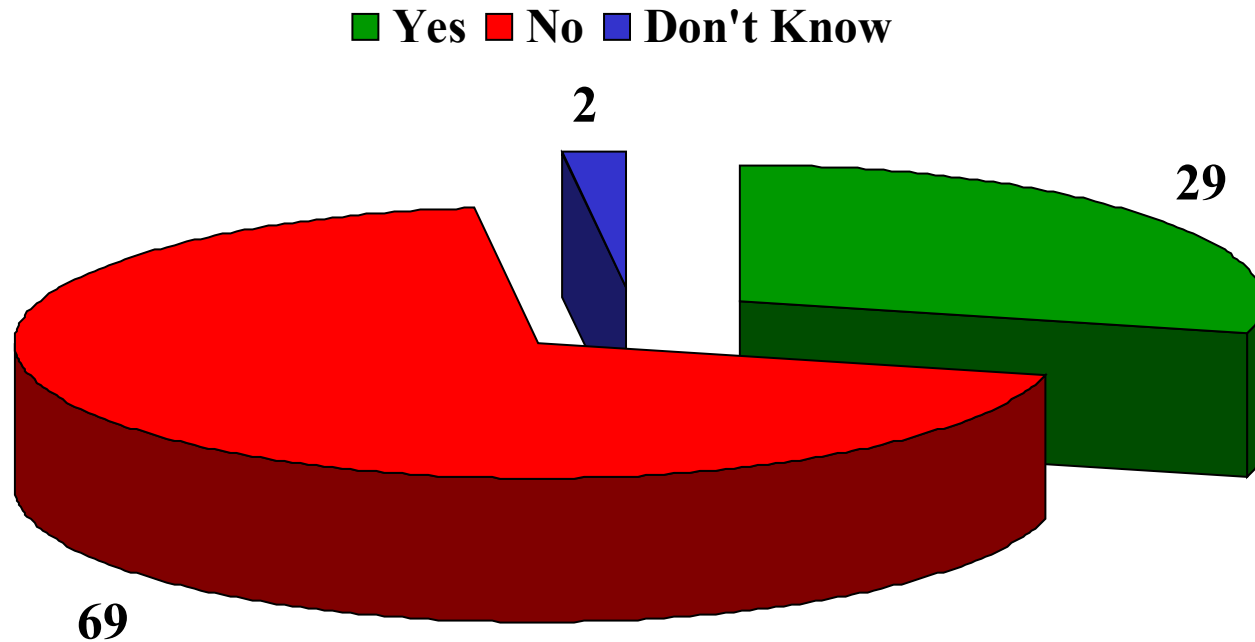
Palmetto Cash 5

- On average, Palmetto Cash 5 players have spent \$6.50 each time they purchased tickets.
- Palmetto Cash 5 players have spent an average of \$25.60 dollars per month on the game. (NOTE: the Palmetto Cash 5 game had only been out a few weeks when interviewing was conducted.)
- Over one in four (29%) of those who have played Palmetto Cash 5 say they have won something.
- Those who have played are most likely to say they like the opportunity to win a lot of money (18%), chance to multiply winnings (11%), the odds (9%), and size of the top prize (9%).
- When asked what they like least, 22% of Palmetto Cash 5 players say “nothing.” Those who cite a specific negative are most likely to say “too hard to win top prize” (14%) and “cannot win much” (12%).

Amount Spent Per . . .

	Purchase	Month
\$1	13%	6%
\$2	24	3
\$3	5	1
\$4	4	6
\$5	20	15
\$6 - \$9	5	11
\$10 - \$19	15	17
\$20 - \$49	14	30
\$50+	0	12
Average	\$6.50	\$25.60
Average (with cap on purchase)	\$5.30	\$16.60

Have Won Anything on Palmetto Cash 5 (among those who have played, n = 113)



What Like Most/Least About Palmetto Cash 5 (among those who have played, n = 113)

LIKE MOST:

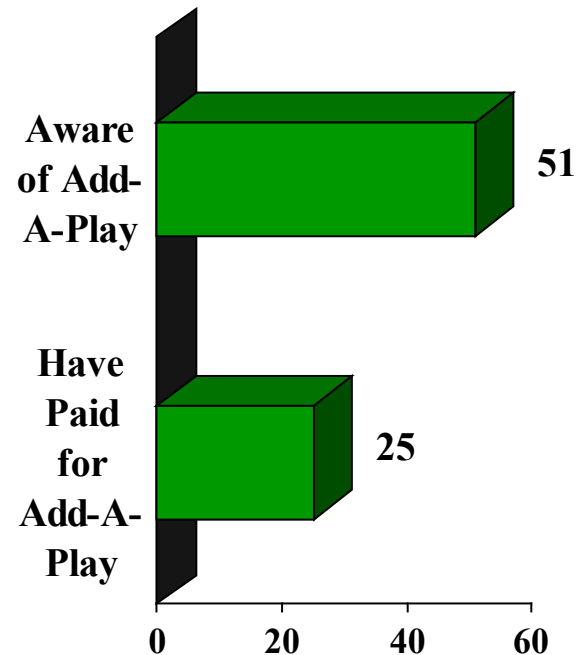
- Opportunity to win a lot of money (18%),
- Chance to multiply winnings (11%),
- Like the odds (9%),
- Size of top prize (9%),
- Fun to play (8%),
- Good chance to win something (5%),
- “Other” (28%), and
- Don’t know (23%).

LIKE LEAST:

- Nothing (22%),
- Too hard to win top prize (14%),
- Cannot win much (12%),
- Too hard to win lower level prizes (6%),
- “Other” (22%), and
- Don’t know (32%)

Awareness of Add-A-Play

- Among those who have played Pick 3, Pick 4, or Palmetto Cash 5 (n = 228), 51% say they are aware of the Add-A-Play option.
- One in four of those who have played one of the games that offers Add-A-Play say they have paid the extra dollar to take advantage of Add-A-Play.

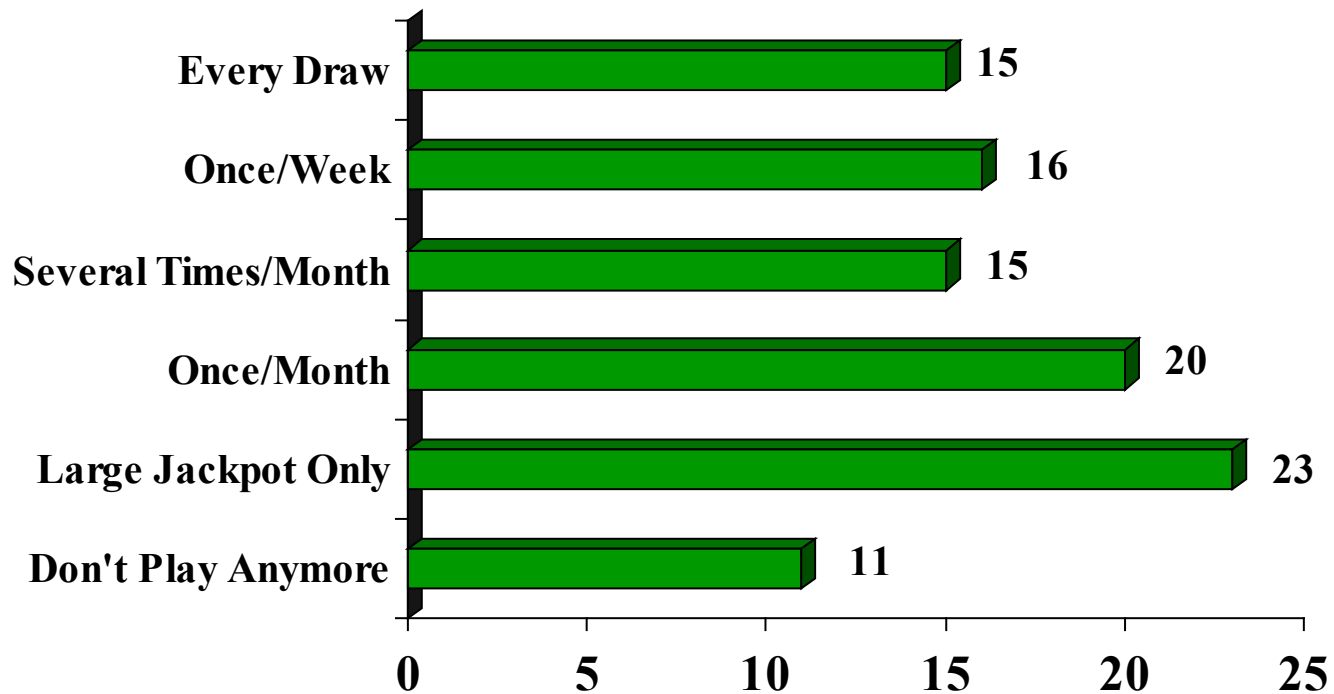


Powerball

- A third (32%) of South Carolina residents have played Powerball at least once.
 - ✓ Among those who have played (n = 321),
 - 66% are “current” players, up significantly over last year.
 - ✓ Current Powerball players tend to:
 - Skew heavily towards whites and those under 55 years of age, but
 - Are more evenly represented with respect to gender and ethnicity.

Frequency of Powerball

(among those who have ever played, n = 321)

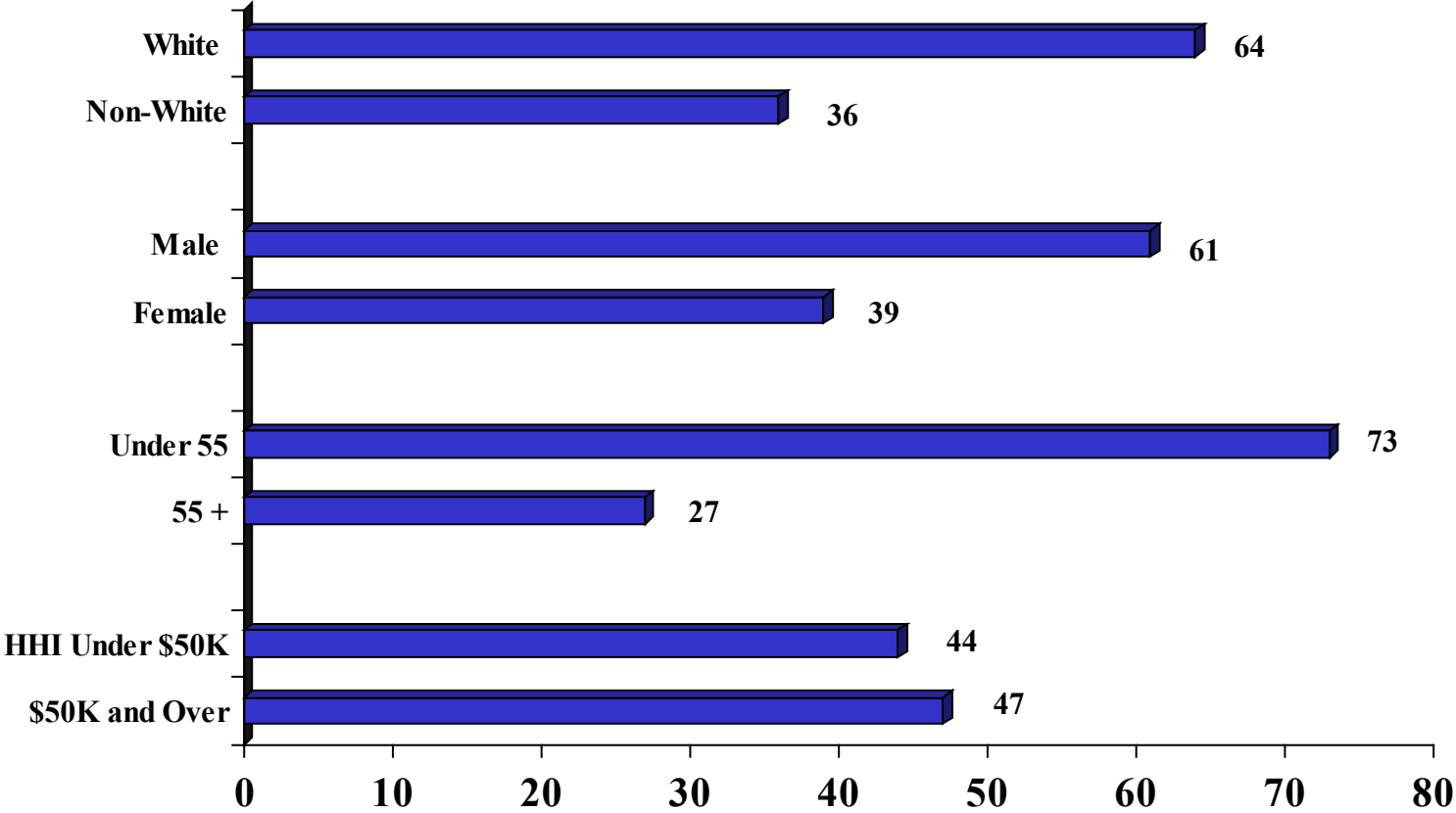


Frequency of Powerball Purchase

(among those who have ever played)

	2005	2004	2003
Every Draw	15%	15%	11%
Once/Week	16	20	23
Several times/month	15	11	11
Once/month	20	10	11
CURRENT	66	56	56
Only when jackpot is large	23	35	31
Don't play anymore	11	10	12

Profile of “Current” Powerball Players



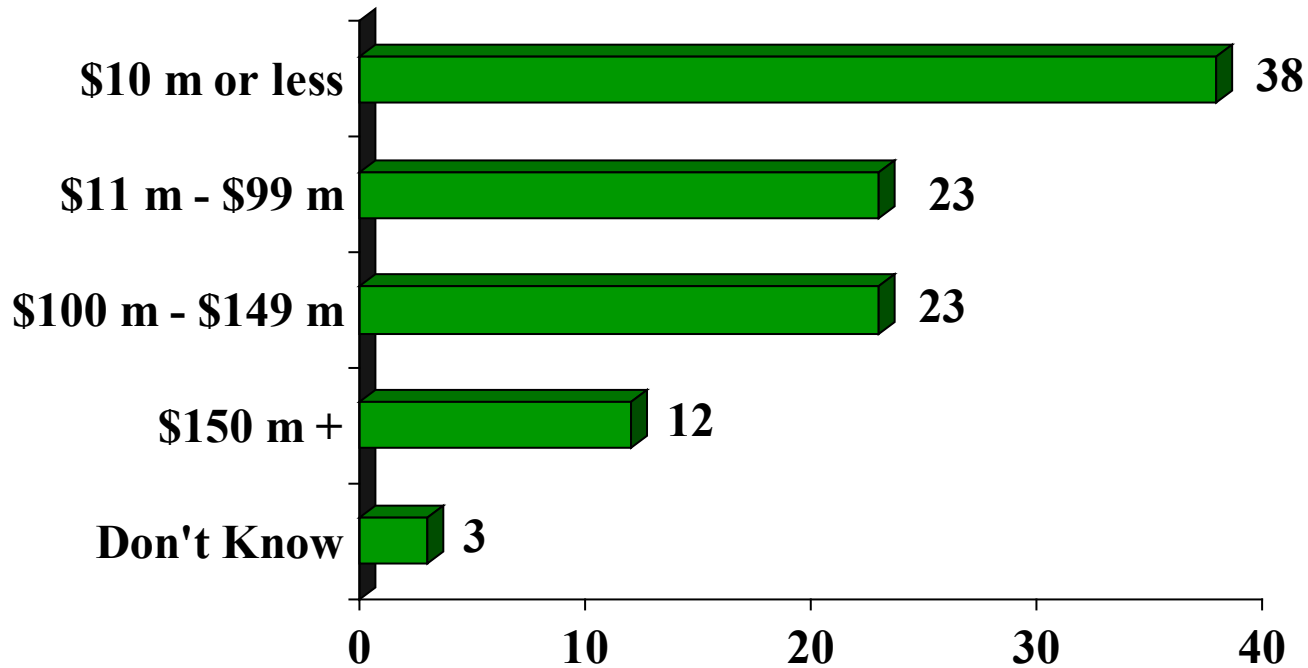
*Income does not add up to 100% due to refusal to identify income

Powerball

- ✓ Those who say they only play when the jackpot is very large were asked what they consider to be a very large jackpot. Interestingly, more than a third (38%) cite a figure in the “\$10,000,000 or less” category, indicating that many are unfamiliar with the Powerball minimum prize. The next “prize point” occurs between \$100,000,000 and \$150,000,000. This category was mentioned by 23%.

What Is a Very Large Jackpot?

(among those who buy when jackpot is very large, n = 73)



Powerball

- On average, Powerball players spend \$12.40 each time they purchase tickets. Most Powerball players (66%) say they spend \$5 or more each time they purchase Powerball tickets.
- Powerball players spend an average of \$24.00 dollars per month on the game.
- Findings identify a sharp increase in the percentage of players who say they have won anything playing Powerball.
 - ✓ 38% this year, compared to 45% in 2004 and 36% in 2003.

Amount Spent Per Purchase

	2005	2004	2003
\$1	9%	19%	14%
\$2	11	15	19
\$3	6	6	8
\$4	7	7	6
\$5	33	22	26
\$6 - \$9	6	5	5
\$10 - \$19	16	17	15
\$20 - \$49	9	7	7
\$50+	3	1	0
Average	\$12.40	\$7.88	\$7.15
Average (with cap of \$25 on purchase)	\$6.30	\$5.43	\$5.39

Amount Spent Per Month

	2005	2004	2003
\$1	6%	12%	8%
\$2	4	5	9
\$3	1	3	4
\$4	4	6	5
\$5	17	13	13
\$6 - \$9	9	11	13
\$10 - \$19	22	19	18
\$20 - \$49	24	23	23
\$50+	12	7	8
Average	\$24.00	\$24.52	\$16.24
Average (with cap of \$200 on purchase)	\$18.60	\$13.76	\$16.24

Powerball

- “Current” players and those who play only when the jackpot is very large were asked, “at what jackpot level do you buy more tickets than you normally would?”
 - ✓ The data in last year’s study suggested that players were showing signs of “jackpot fatigue,” as players were indicating that it would take higher jackpot amounts to make them buy more tickets than they normally would.
 - ✓ That trend did not continue this year and, in fact, reversed somewhat. However, we will want to keep an eye on “jackpot fatigue” in future studies.

Jackpot Level At Which You Purchase More Tickets Than You Normally Would

	No Min./ \$10 Mill.	\$11 - \$19 Million	\$20 - \$49 Million	\$50 - \$74 Million	\$75 - \$99 Million	\$100 - \$149 M.	\$150 - \$199 M.	\$200 Million +
2005	48%	52%	67%	76%	78%	96%	975	100%
2004	44	46	52	69	76	93	95	100
2003	55	59	68	77	79	95	96	100

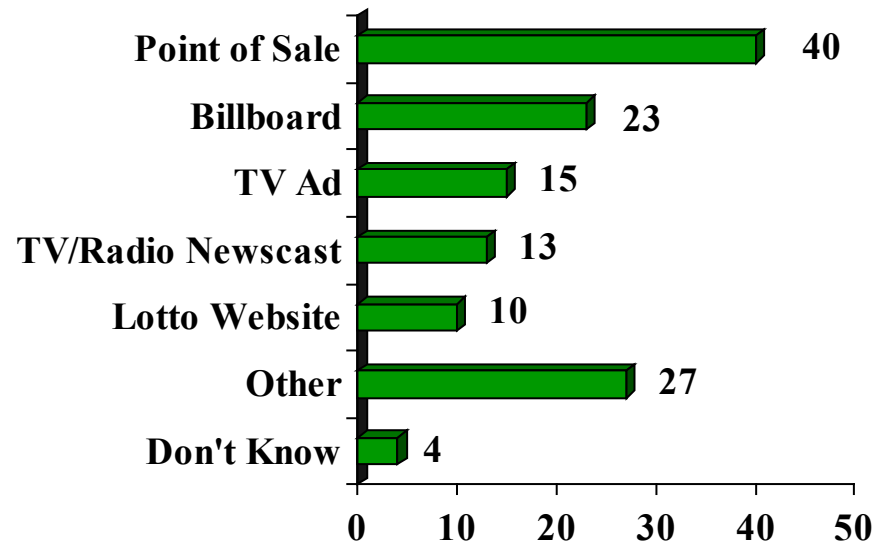
Have Won Anything on Powerball

Last year's study identified a significant increase in the percentage of players who have won something on Powerball. This year's data reflect a proportion similar to that recorded in 2003.

	2005	2004	2003
Yes	38%	45%	36%
No	63	55	64
Don't know	-	-	-

How Get Updated About Powerball Jackpot Amount

- Many Powerball players get jackpot amount updates from multiple sources.
- Point of sale (40%) and Billboard (23%) are the most commonly used sources for jackpot amount updates.
- “Other” sources include:
 - ✓ Newspaper ad (8%),
 - ✓ Word of mouth (6%),
 - ✓ Newspaper article (4%),
 - ✓ Radio ad (2%),
 - ✓ Powerball e-mail subscriber (1%), and
 - ✓ “Other” sources mentioned by one person (4%).



What Like Most/Least About Powerball (among those who have played, n = 285)

LIKE MOST:

- Opportunity to win a lot of money (30%),
- Size of top prize (20%),
- Fun to play (13%),
- Like the odds (12%),
- Good chance to win something (9%),
- Good chance to win top prize (8%),
- “Other” (23%), and
- Don’t know (10%).

LIKE LEAST:

- Cannot win much (26%),
- Too hard to win top prize (14%),
- Too hard to win lower level prizes (6%),
- Winners can come from other states (4%),
- Nothing (20%),
- “Other” (26%), and
- Don’t know (16%)

Powerball

- Those who have purchased Powerball tickets but do not purchase them anymore (n = 36) were asked why they no longer play. Reasons for no longer playing Powerball include:
 - ✓ Never win/Poor odds (31%),
 - ✓ Don't have extra money/Budget (22%),
 - ✓ No time/Too busy (8%),
 - ✓ Lost interest (6%),
 - ✓ Prefer other games (6%),
 - ✓ Waste of money (5%),
 - ✓ "Other" (22%), and
 - ✓ Don't know (9%).

A MarketSearch Study

Non-Cash Game Play

Non-Cash Game Play

- Only 14% of players (ever played) say they have played any games where a non-cash prize such as a trip or vehicle was offered.
 - ✓ Those who have played one of the non-cash games say they have played:
 - Caribbean Cash (36%),
 - Harley-Davidson (25%),
 - Vegas Jackpot (12%),
 - Some other game (15%), or
 - They don't recall which non-cash game they played (33%).

Non-Cash Game Play

- ✓ About a third (34%) of those who have played a non-cash game say they participated in the second prize drawing.
- ✓ Similarly, about a third (35%) of those who have played a non-cash game say they were aware of the million-dollar give-away game called Carolina Millionaire.
 - Only nine (9) of the 23 people who are aware of the Carolina Millionaire game say they played it.

A MarketSearch Study

Reactions to Proposed SCEL Game

New SCEL Game

- Confirming players' uncertainty about minimum Powerball amounts, the majority (58%) of players cite jackpots of \$10,000,000 or less when asked the jackpot amount they would expect for a Powerball-type game that cost \$5 per ticket. Findings do not identify any other significant "prize points." Instead, the data suggest most are simply "throwing out a guess."
- SCEL players (ever played) were provided with the following description of a potential new game: The South Carolina Education Lottery is considering offering a new game. The game would be similar to Powerball, but with two key differences: the cost of a ticket and the jackpot. Jackpots in the new game would begin at a higher dollar amount - \$20 to 50 million instead of \$10 million for Powerball. And, the cost of a ticket for the new game would be \$5 instead of \$1 for Powerball.

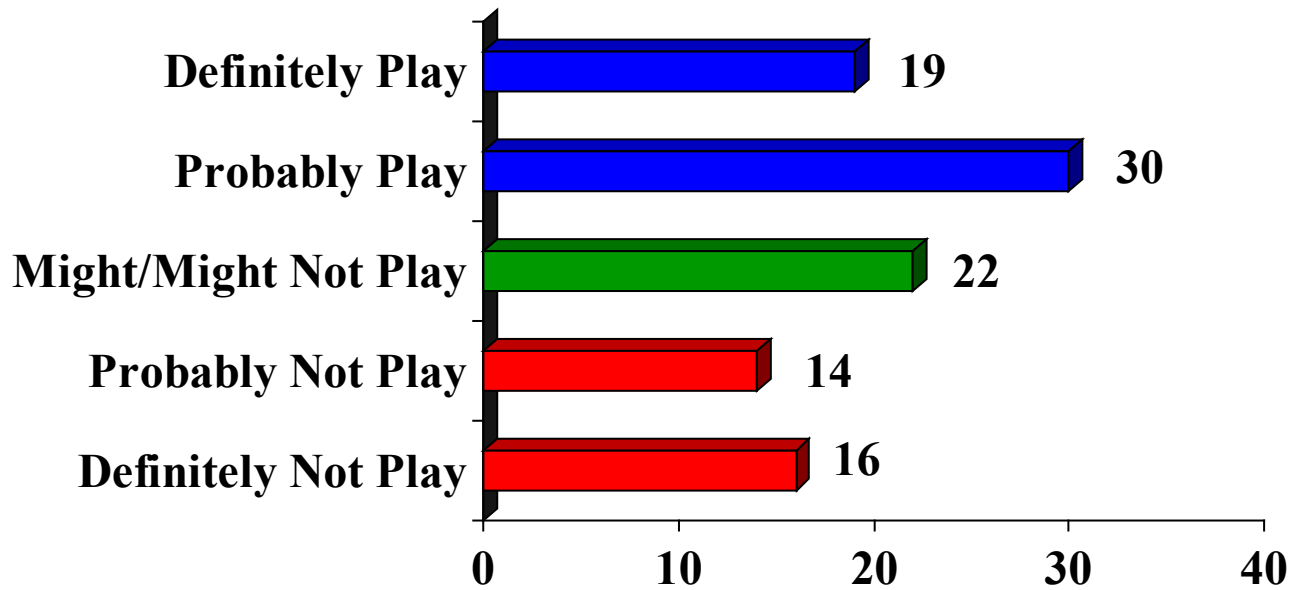
New SCEL Game

- Lottery players react to the proposed new game with moderate interest. Nearly half (48%) say they would definitely or probably play the new game, while 29% who say they would not.
 - ✓ Fitting with historic lottery player profiles, interest in the new game is higher among:
 - Non-whites (57%),
 - Men (53%),
 - Those between the ages of 18 and 34 (55%), and
 - Those with a high school diploma or less than a high school education (57%).

New SCEL Game

- The new game is likely to have an impact on Powerball play. Those who are Powerball players (have ever played) and said they would definitely play, probably play, or might or might not play the proposed new game were asked how the new game would impact their Powerball play.
 - ✓ 53% said they would still play Powerball,
 - ✓ 20% said they would play the new game only,
 - ✓ 16% said they would play whichever game had the higher jackpot, and
 - ✓ 11% said they were unsure how the new game would affect their Powerball play.

New SCEL Game



A MarketSearch Study

Purchase Behavior

Purchase Behavior

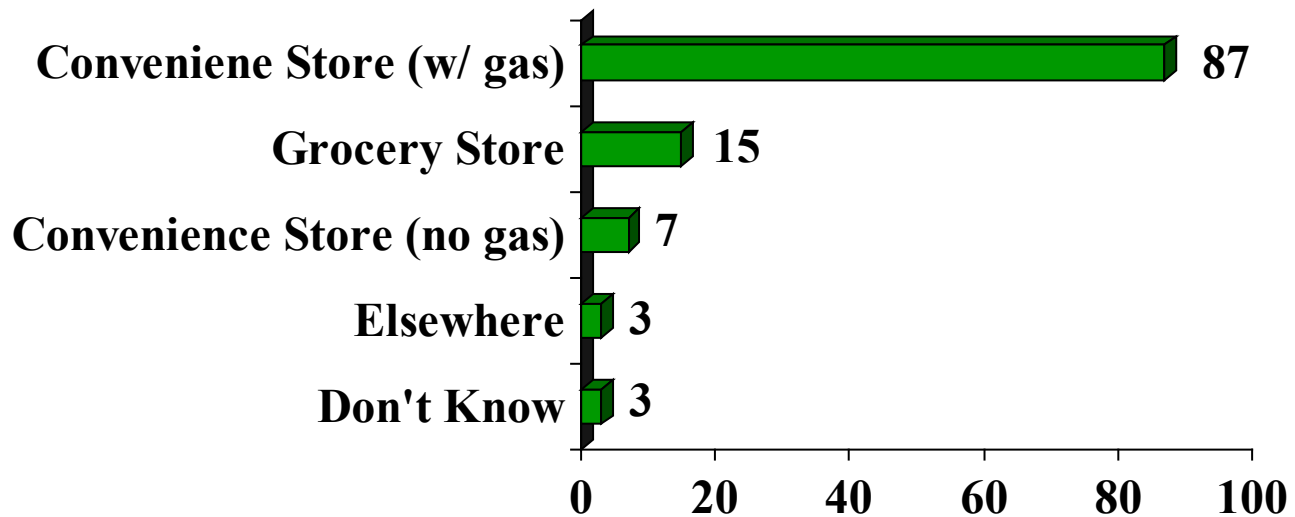
- The overwhelming majority (87%) of SC Education Lottery players indicate they purchase their tickets at a convenience store that also sells gasoline.
 - ✓ More than three out of four (76%) of those who buy tickets at a convenience store (with or without gas) say they typically also purchase other goods while there.
 - Items most likely to be purchased with lottery tickets include gas (63%) and soft drinks/snacks (53%). Although to a somewhat lesser extent, players also purchase tobacco (17%), beer (7%) and coffee (4%).

Purchase Behavior

- Days of purchase are fairly evenly split between weekdays (39%) and weekends (33%). An additional 19% say they buy on both weekdays and weekends, while 10% say they don't know when they typically buy tickets.
- Most lottery game purchases take place late in the day. Half (50%) buy tickets after 4:00 p.m. (before 6:00 a.m.).

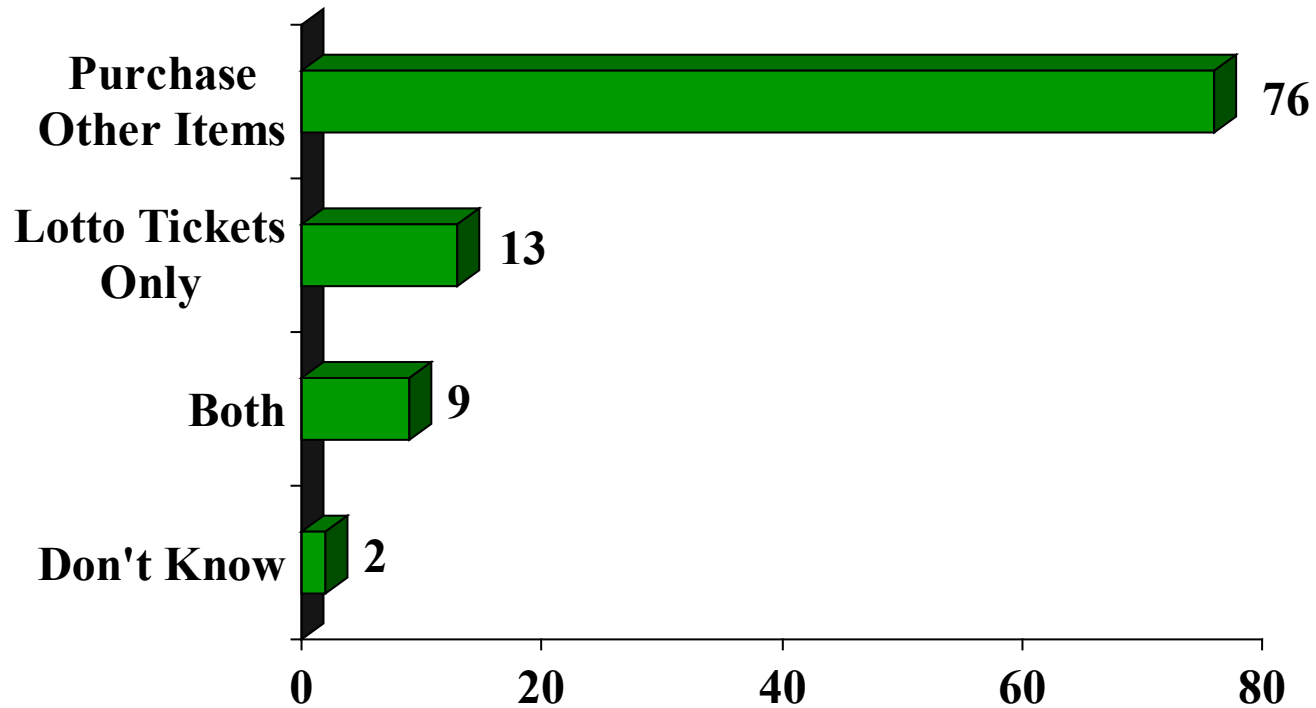
Typical Purchase Location

(among those who have ever played, n = 457)



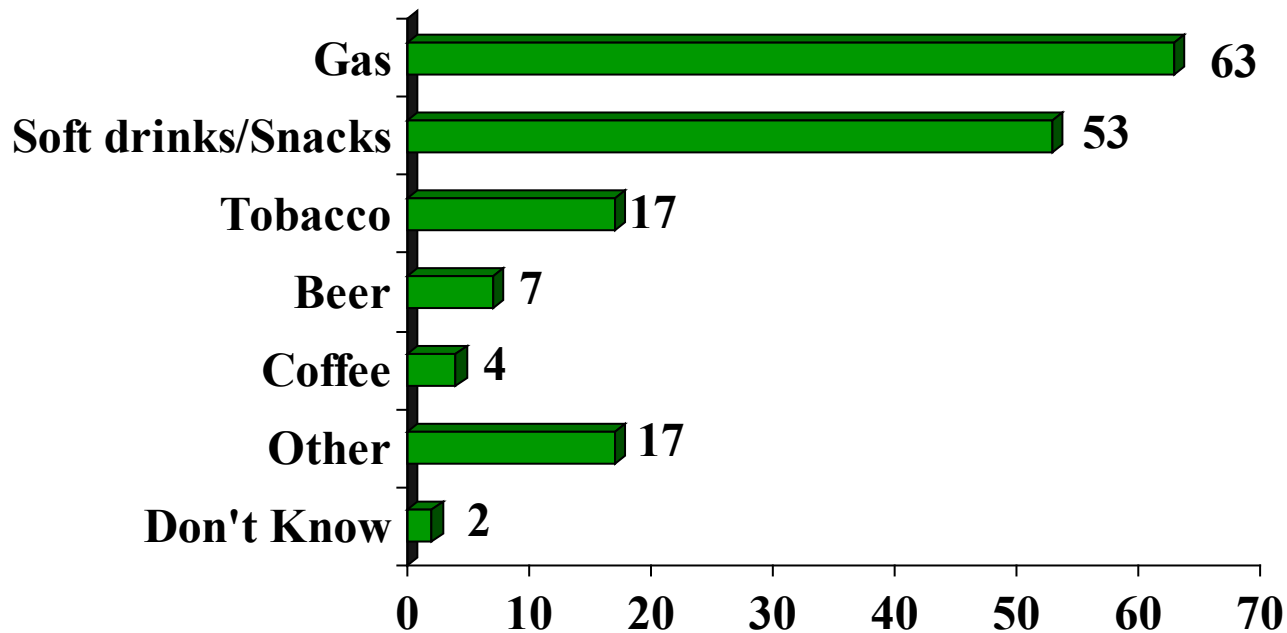
Purchase of Additional Items

(among those who purchase at convenience stores, n = 411)

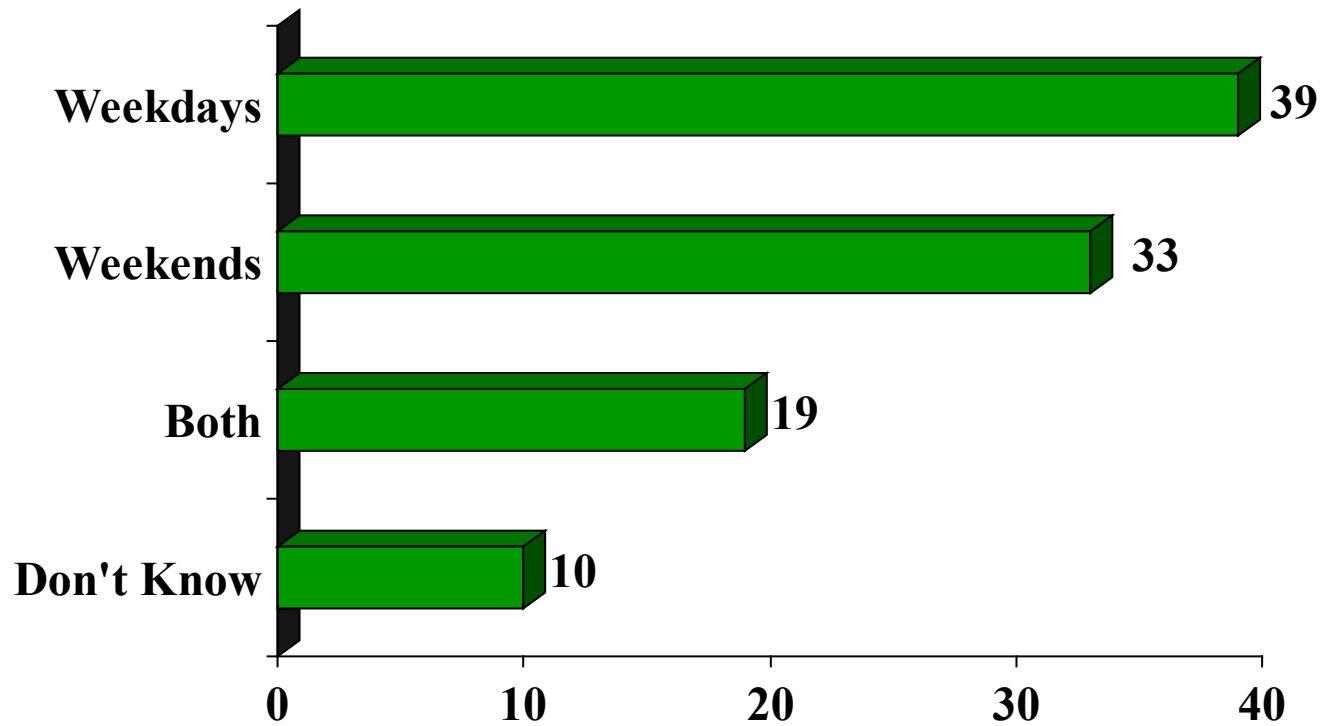


Items Purchased with Lottery Tickets

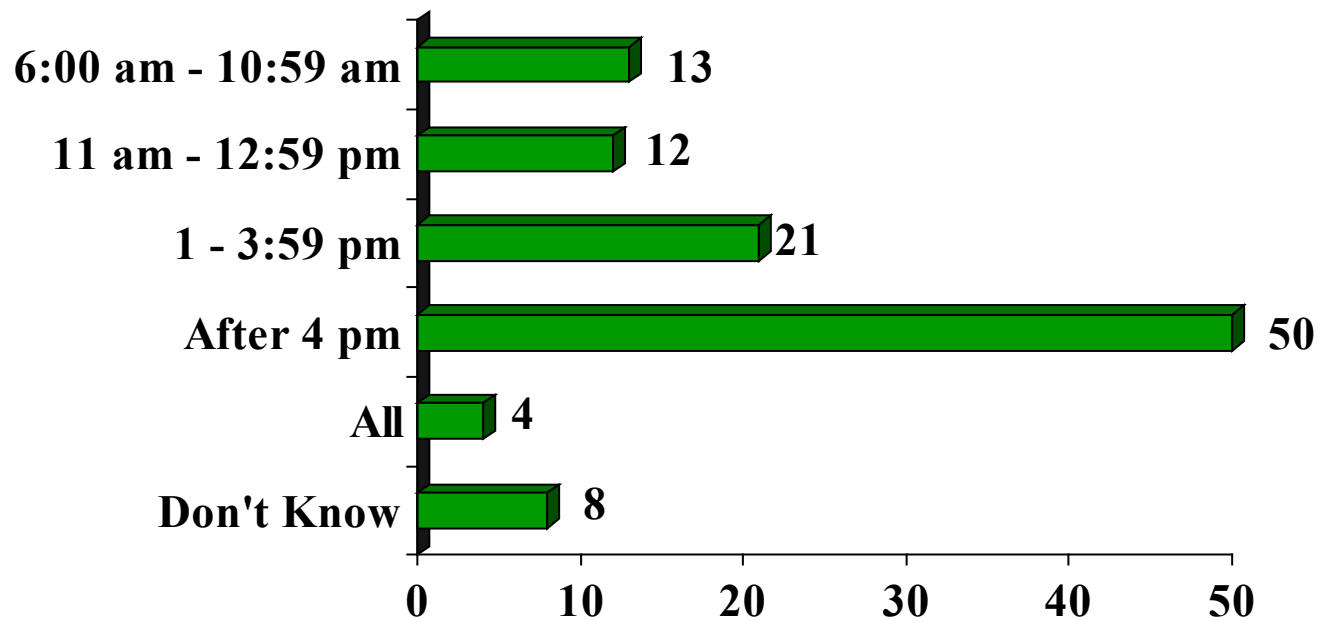
(among those who purchase lotto tickets at convenience stores and typically buy “other” items with tickets, n = 349)



When Buy Most of Your Lottery Tickets



Time of Day Usually Buy Lottery Tickets



A MarketSearch Study

Megamillions Play

Megamillions

- The majority (58%) of SCEL players (those who have ever played, n = 457) say they have heard of Megamillions.
 - ✓ Awareness of megamillions tends to:
 - Be higher among men (64%) than women (51%);
 - Increase with age (47% among those 18 to 34, 60% among those 35 to 54, and 70% among those 55 and older);
 - Increase with income (51% among those with HHI < \$50,000, 62% among those with HHI between \$50,000 and \$74,000, and 72% among those with HHI of \$75,000 and over;
 - Be consistent with respect to player ethnicity and region of the state.

Megamillions

- Nearly one in five (24%) SCEL players say they have played Megamillions.
 - ✓ Among those who have played (n = 108), most bought tickets in Georgia (79%), and Virginia (16%). Each of the other states where tickets have been purchased was mentioned by one or two people only.
 - ✓ Fewer than one in five (19%) of those who have played say they are “current” players. The majority (51%) of those who play say they do so only when the jackpot is very large, while nearly a third (31%) say they don’t play it anymore.
 - ✓ Most (82%) Powerball players who also play Megamillions say they do not compare jackpots to determine which games to play.

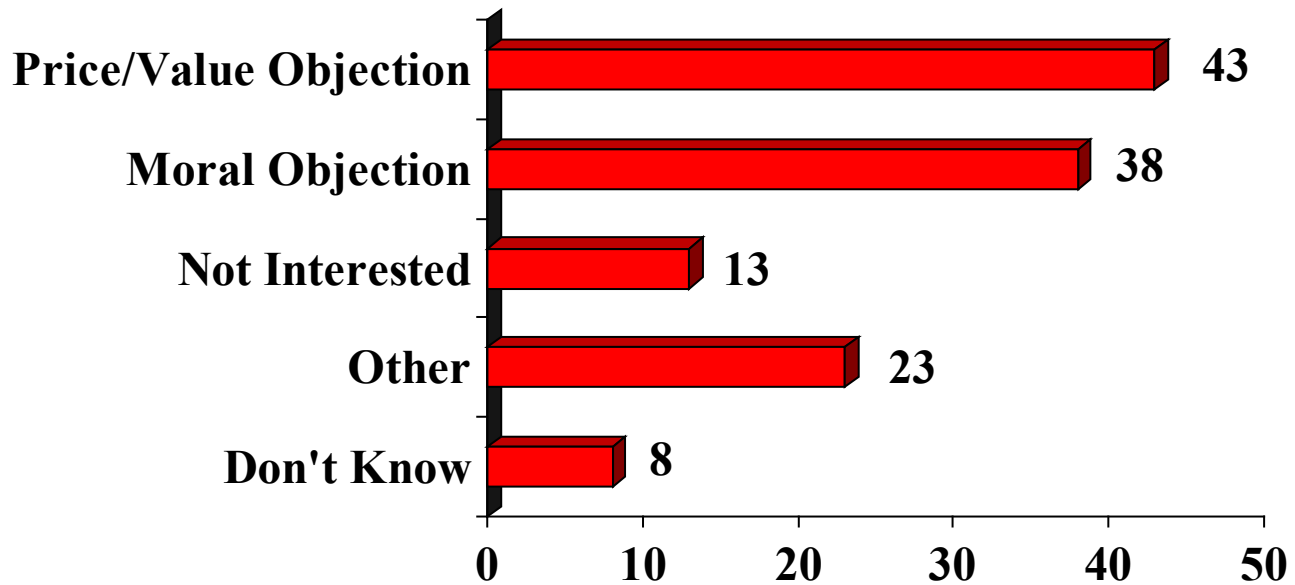
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Reasons for Not Playing the SCEL

Reasons for Not Playing the SCEL

- Non-players were asked, “can you tell me the major reasons why you have not played the South Carolina Lottery?” Most reasons for not playing involve some type of moral objection or a price/value objection. For example:
 - ✓ Many non-players say they don’t think it’s a good use of discretionary income. Major reasons cited along these lines include:
 - Waste of money/don’t like the odds/won’t win (34%), and
 - No money to spend (9%).
 - ✓ Many non-players say they object to gambling for one reason or another.
 - 27% say they don’t gamble, and
 - 11% say gambling is against their religion.

Major Reasons for Not Playing



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Lottery Advertising

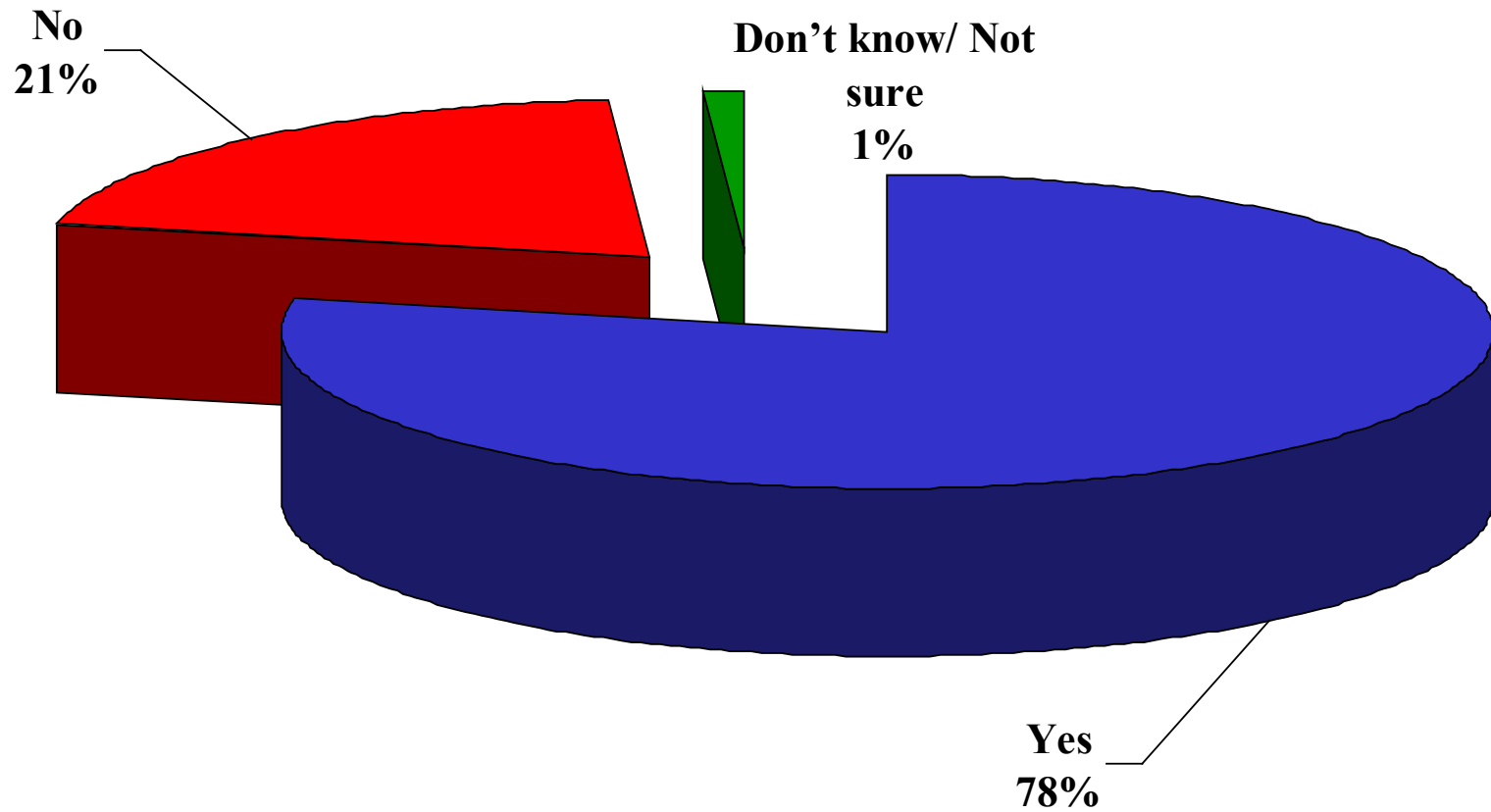
Lottery Advertising

- Over three out of four (78%) players say they have seen or heard advertisements for the South Carolina Education Lottery. While this figure is inline with that recorded last year, it is down from levels recorded in 2003 and 2002.

Have seen or heard SCEL Advertising	2005	2004	2003	2002
Yes	78	81	87	89
No	21	18	11	9
Don't know	1	1	2	2

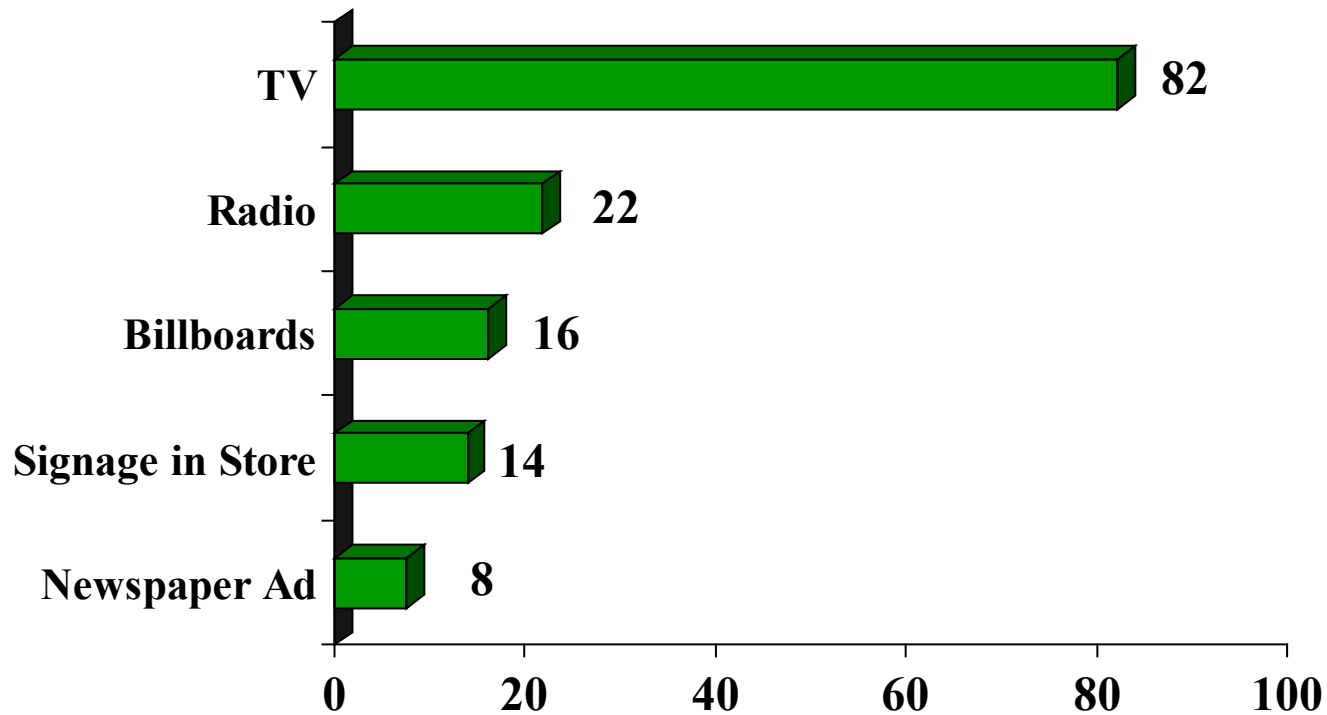
- Consistent with previous studies, TV (82%) is the primary media recalled. Many also notice radio ads (22%) and billboards (16%).

Seen or Heard Advertising



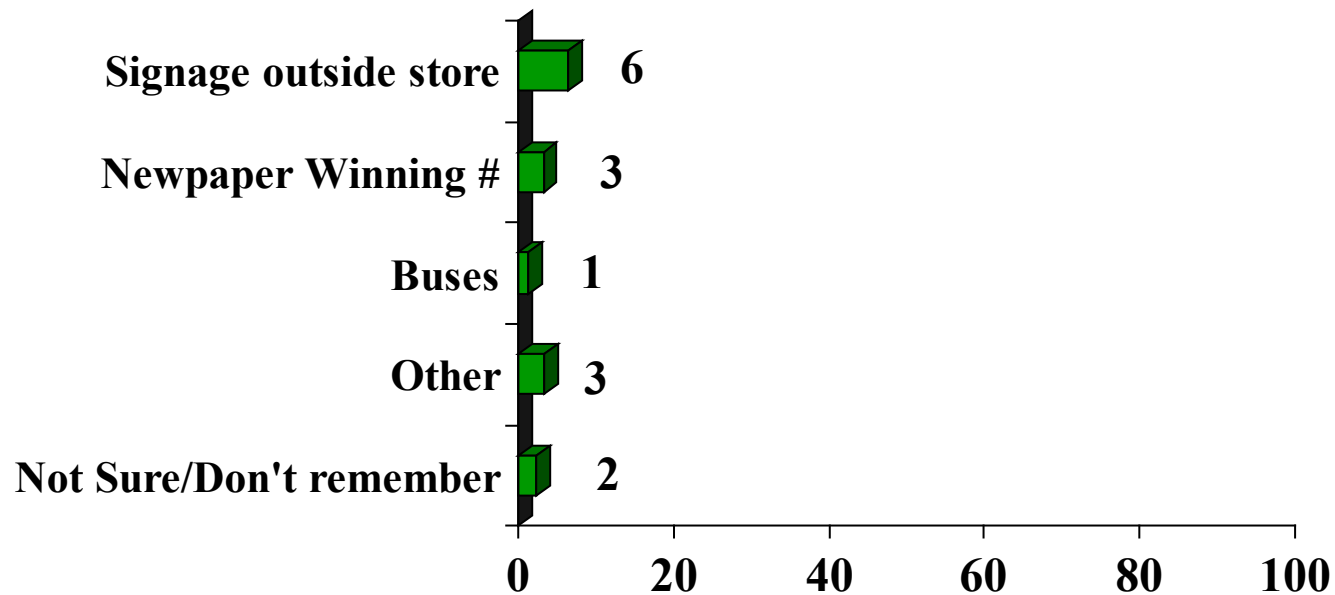
Where Saw or Heard Advertising (1 of 2)

(among those who have seen/heard ads, n = 358)



Where Saw or Heard Advertising (2 of 2)

(among those who have seen/heard ads, n = 358)

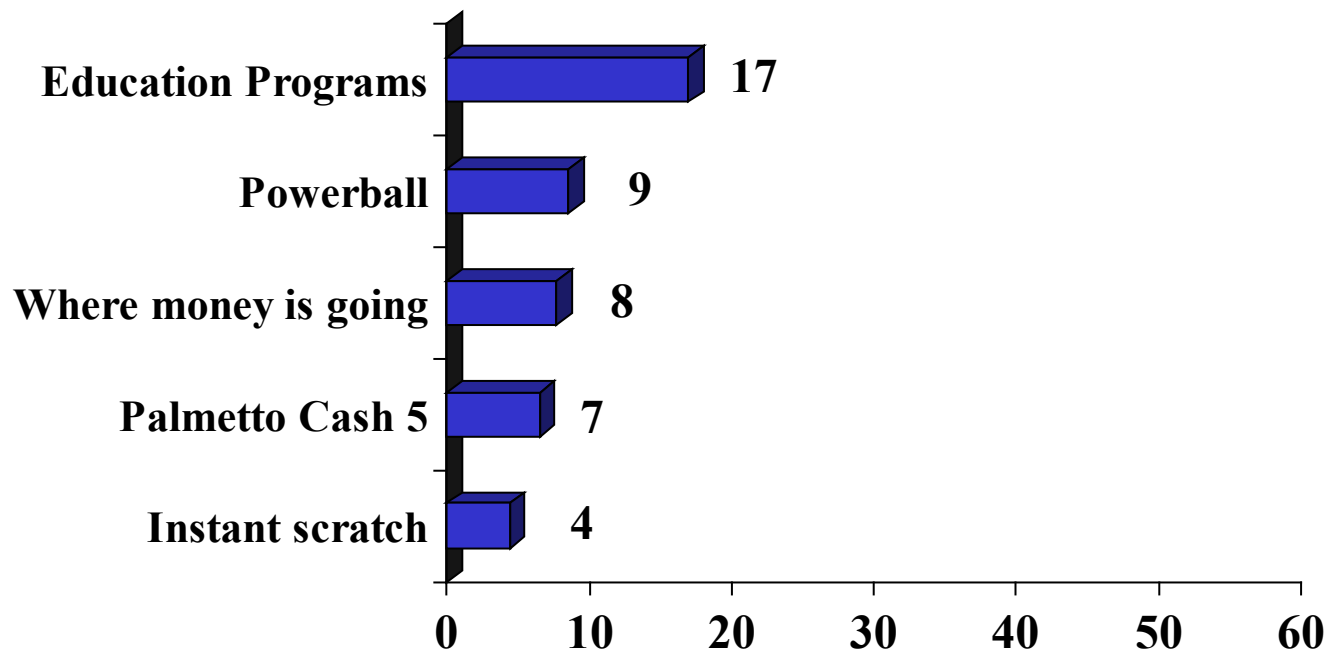


Lottery Advertising

- Those who recall having seen/heard lottery advertising were asked what they recalled about the ad(s). Findings identify a fairly even split between lottery funding (25%) and specific game play (30%).
- Only 18% of SCEL players say that there is information about the lottery they want, but are not getting.
 - ✓ Most of those who would like additional information say they would like beneficiary information/where the money goes (66%).

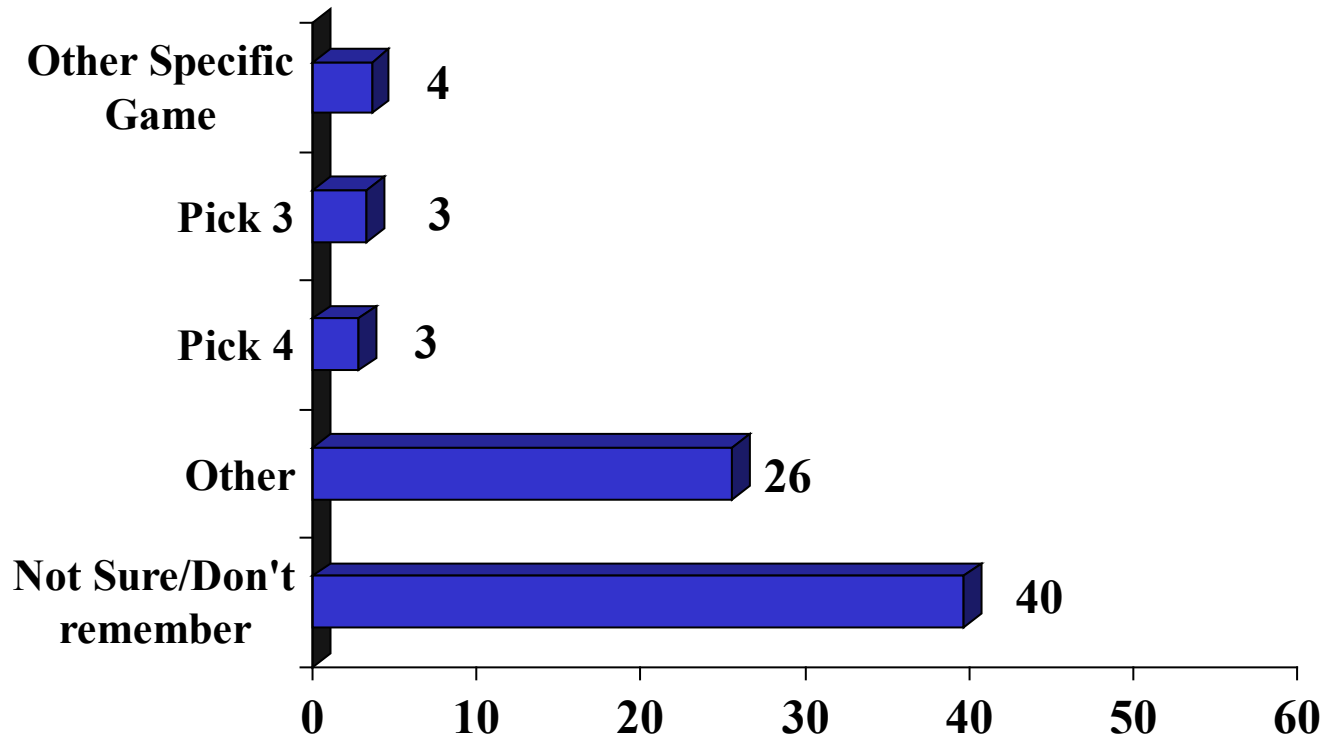
Recollection of Ads (1 of 2)

(among those who have seen/heard ads, n = 358)

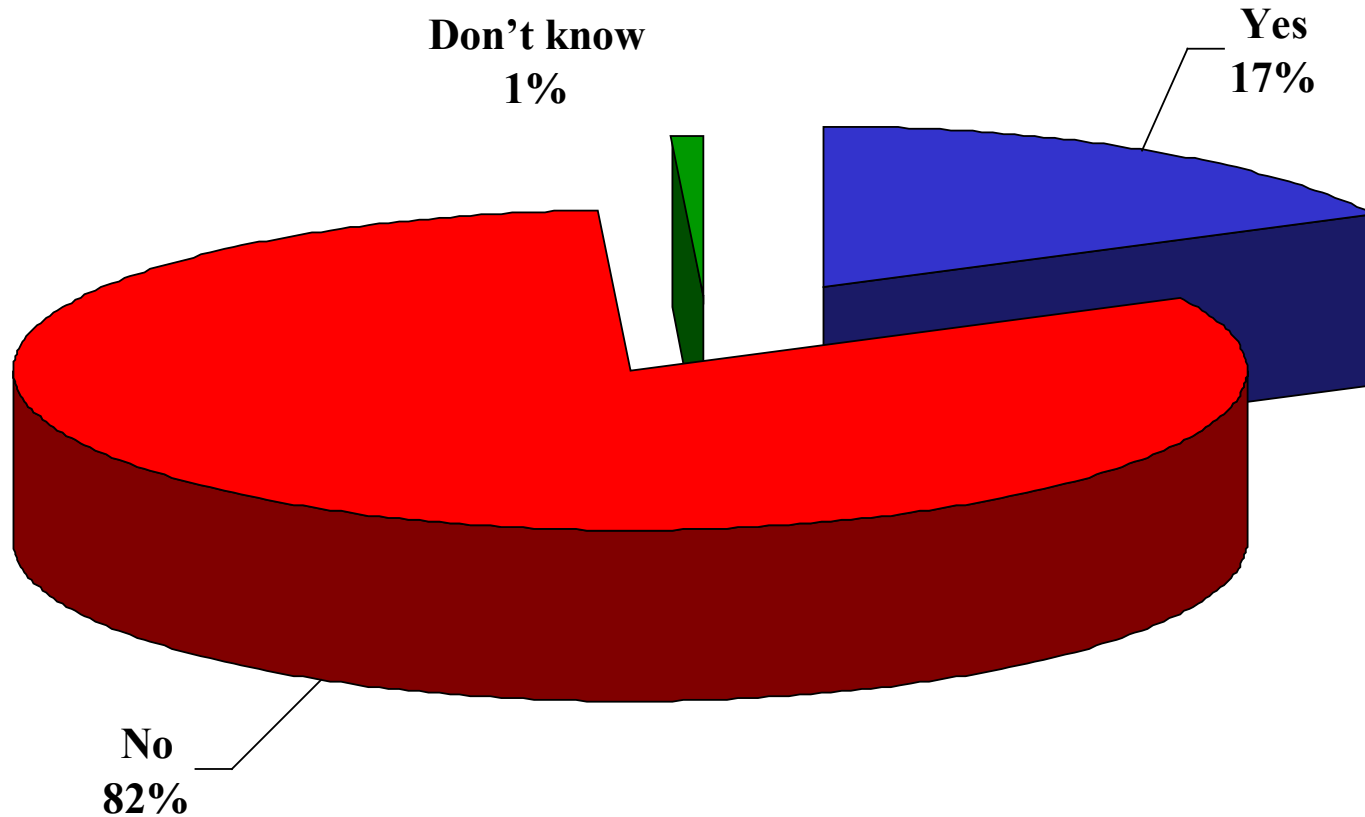


Recollection of Ads (2 of 2)

(among those who have seen/heard ads, n = 358)

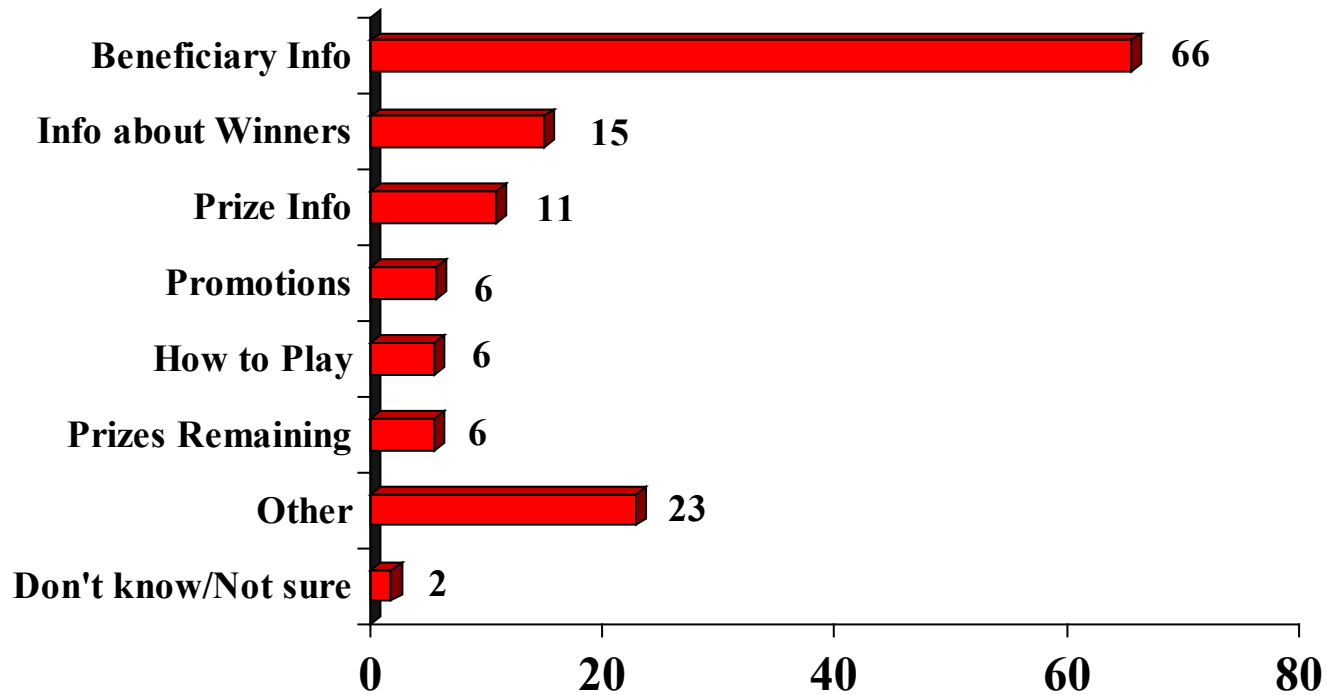


Information They Want But Not Getting About Lottery



Desired Information

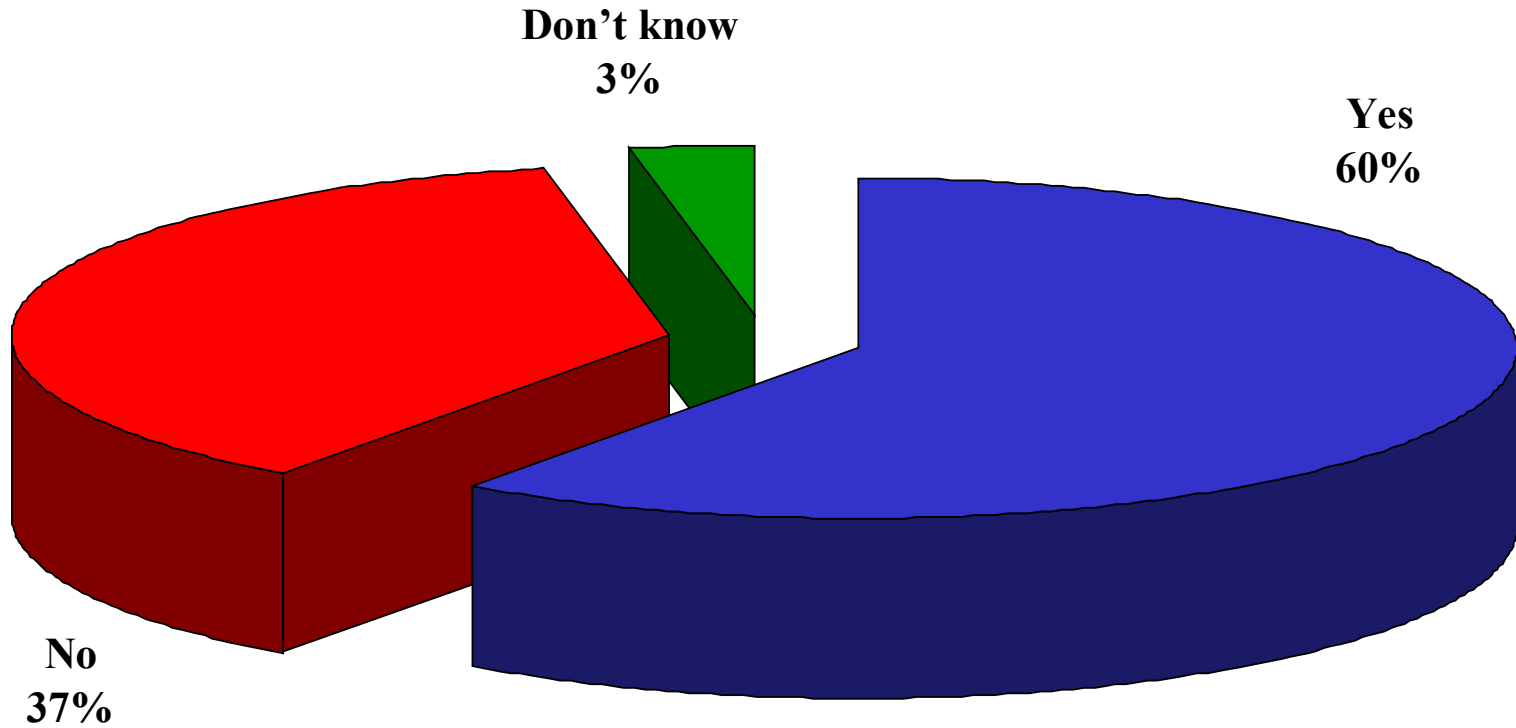
(among those who want more information, n=80)



Lottery Advertising

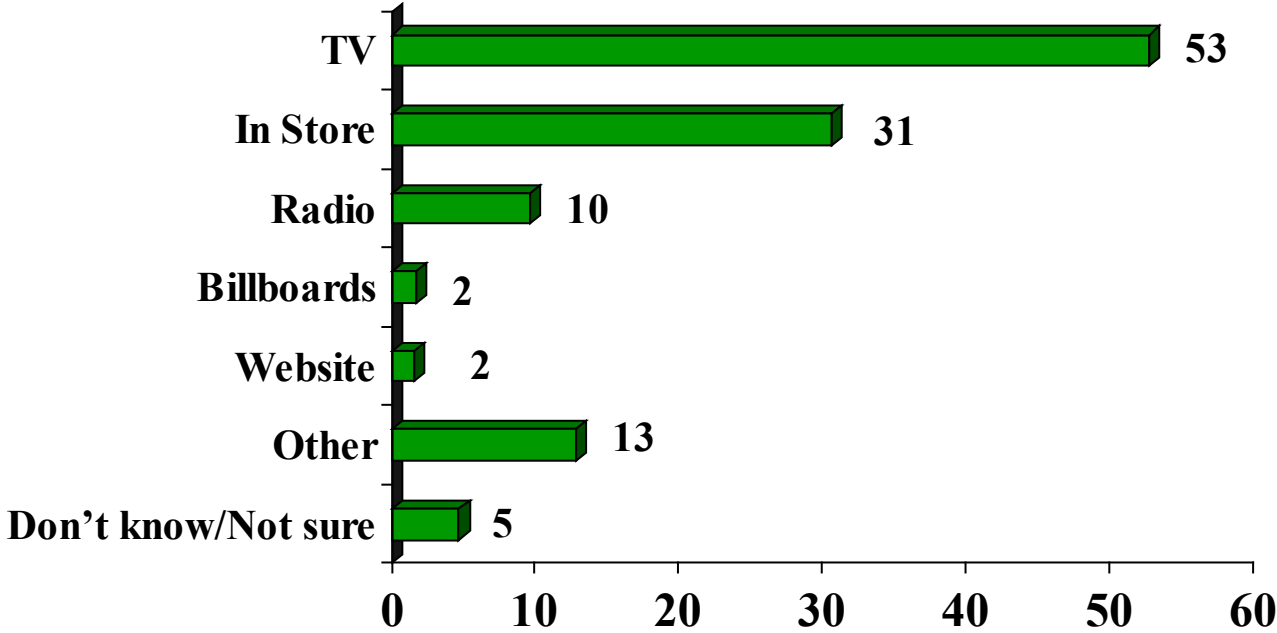
- Word of the new Palmetto Cash 5 game has spread pretty quickly. Findings indicate that 60% of players are aware of the game.
 - ✓ (Note: Palmetto Cash 5 was launched on February 14, 2005. Interviewing was conducted between March 7 and 12, 2005.)
- Most of those aware of Palmetto Cash 5 say they heard about it on TV (53%). In-store/Point of sale promotions (31%) and radio ads (10%) also represent significant sources of ad recall.

Awareness of Palmetto Cash 5 (among SCEL players)



Where Heard About Palmetto Cash 5

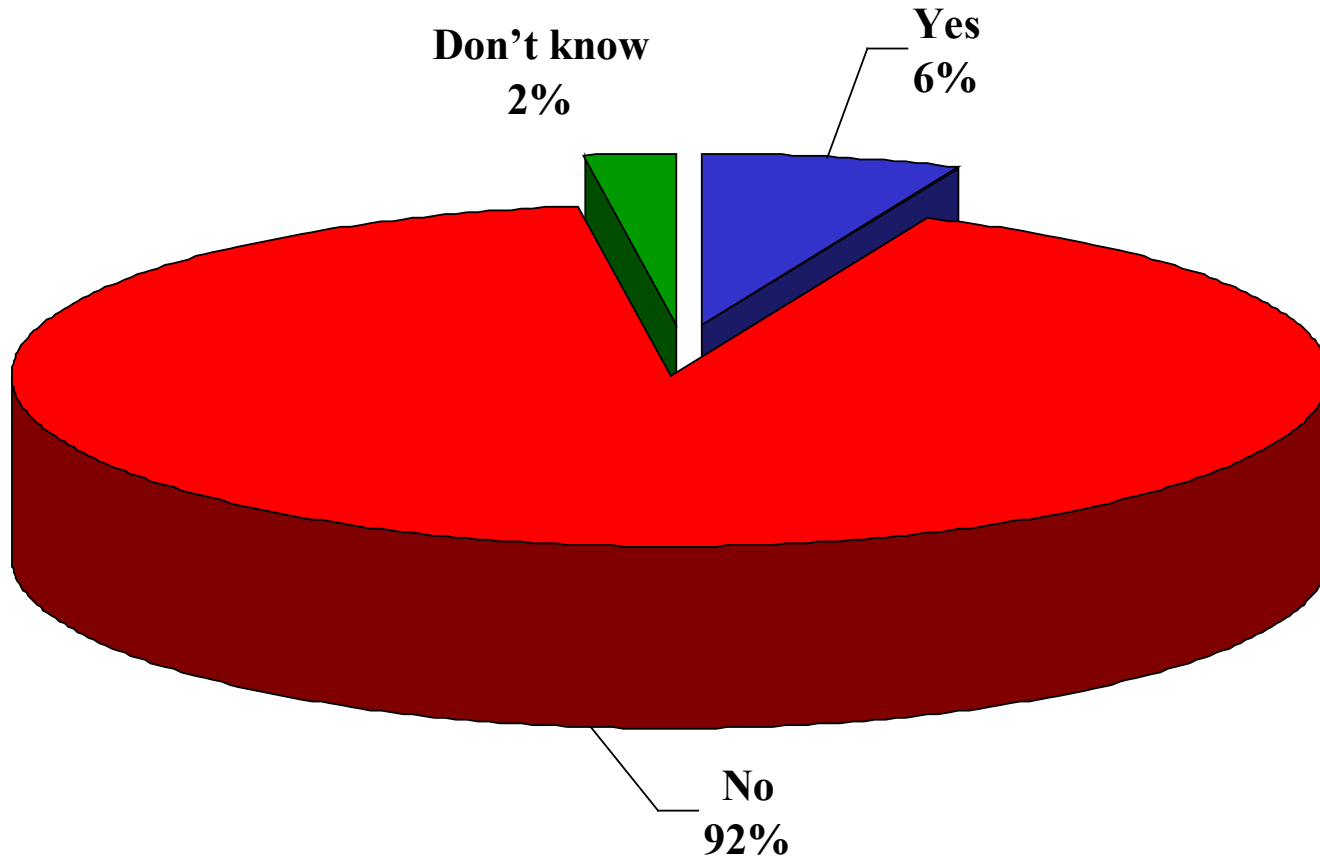
(among those aware of Palmetto Cash 5, n=276)



Lottery Advertising

- Recall of SCEL ads at sporting events is fairly limited. Only 6% say they recall having seen lottery advertising at a college or professional sports event. Awareness is highest among:
 - ✓ Men (8%) and
 - ✓ Those between the ages of 18 and 34 (10%).

Seen Lottery Advertising at College/Professional Sports Events

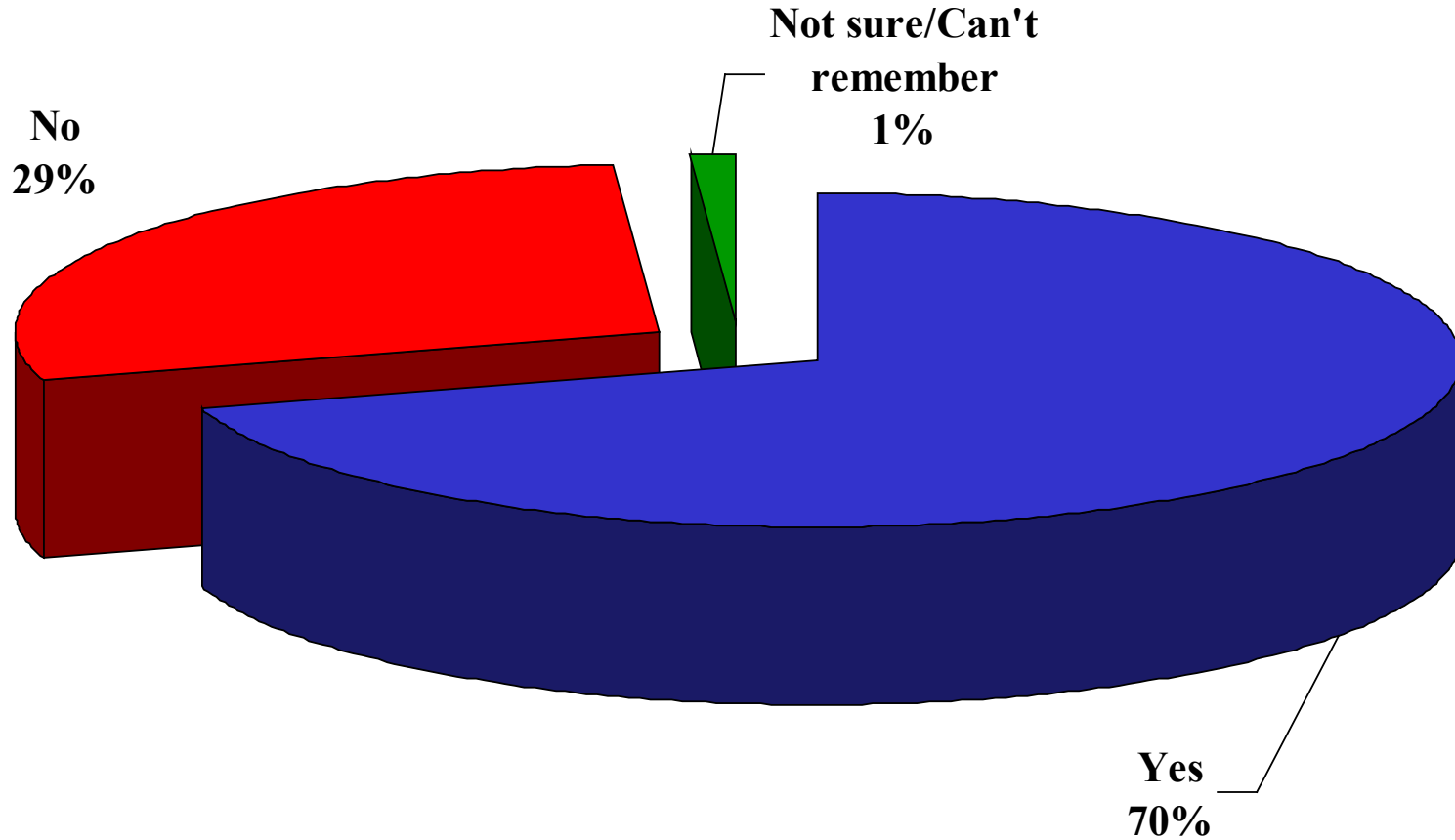


Lottery Advertising

- Fully 70% of those who play games with a televised drawing (Pick 3, Pick 4, Palmetto Cash 5, and/or Powerball) watch the televised drawing. Among those who watch live drawings,
 - ✓ 72% watch Powerball drawings and
 - ✓ 63% watch Pick 3, Pick 4 and/or Palmetto Cash 5 drawings.
- Most those who watch drawings do so frequently:
 - ✓ 57% of those who watch Pick 3, Pick 4 and/or Palmetto Cash 5 drawings do so at least once per week.
 - ✓ 39% of those who watch Powerball drawings say they do so at least once a week.

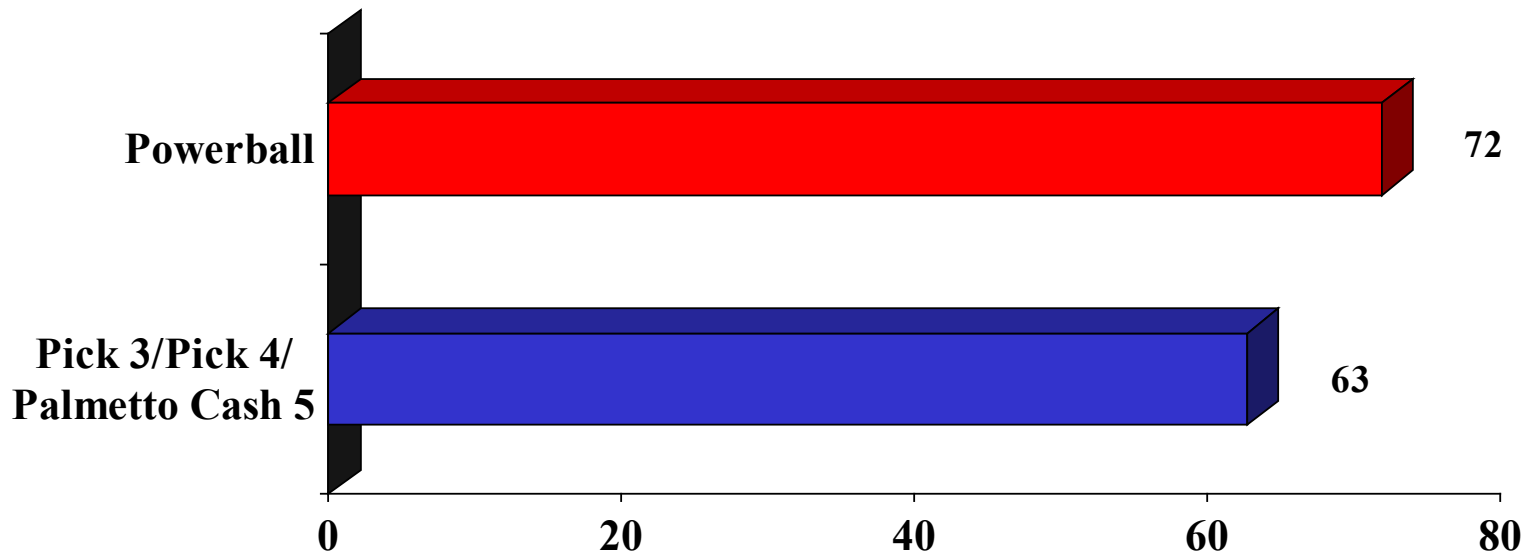
Watched Lottery Drawings on TV

(among those who play Pick 3, Pick 4, Palmetto Cash 5 or Powerball, n=387)

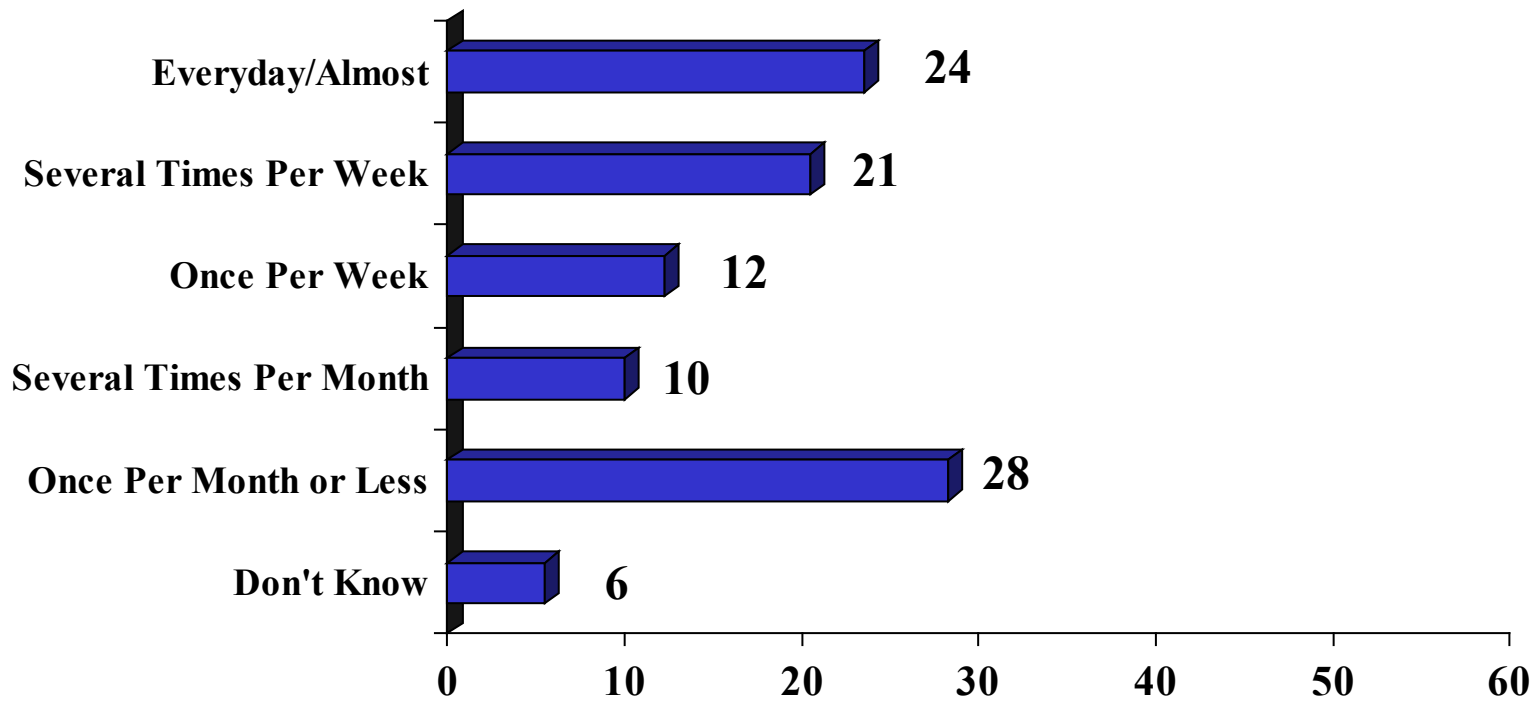


Which Lottery Drawings Do You Watch

(among those who watch lottery drawings on TV, n=273)

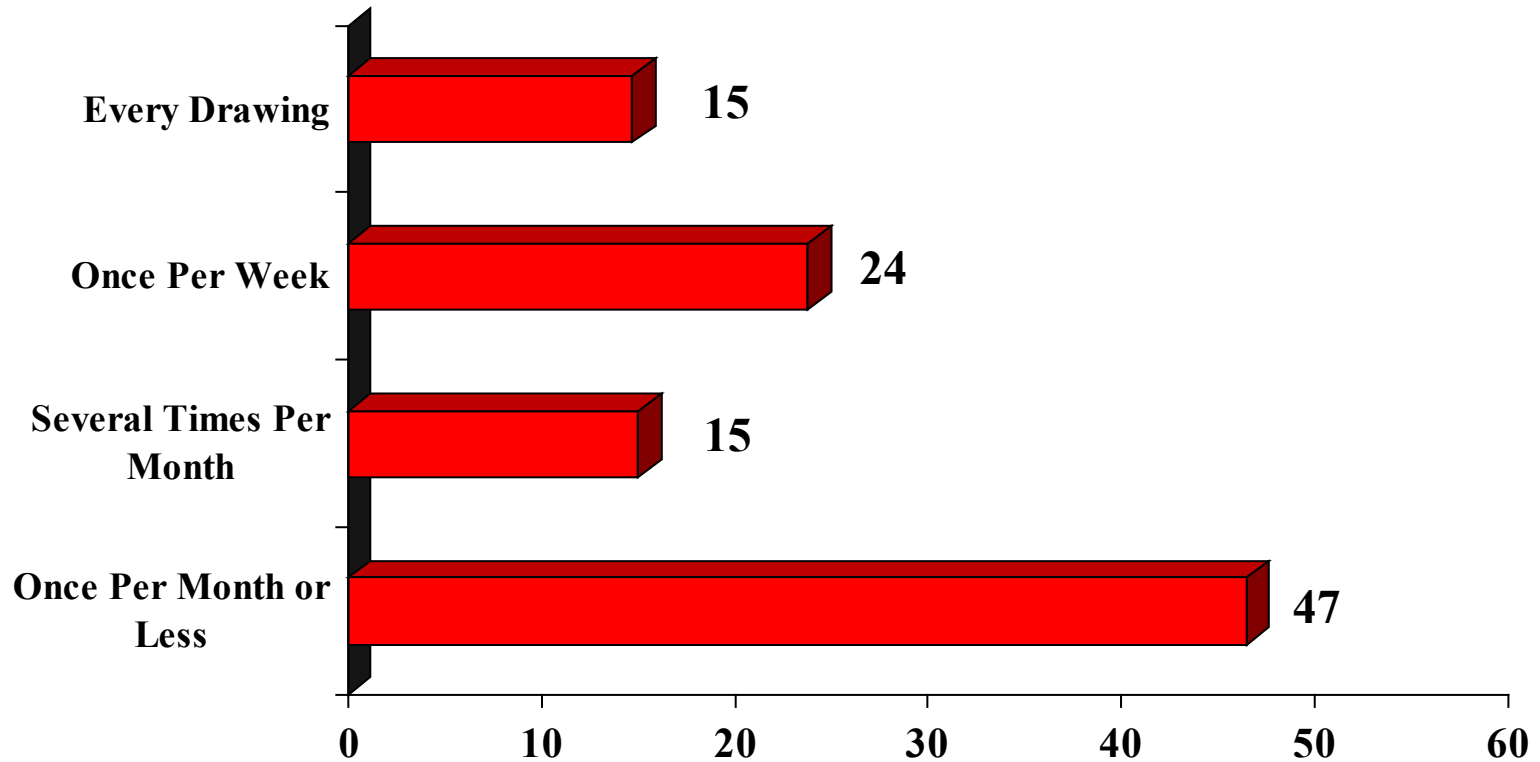


How Often do you Watch Pick 3 or 4, or Palmetto Cash 5 (among those who watch Pick 3 or 4, or Palmetto Cash 5 drawings on TV, n=171)



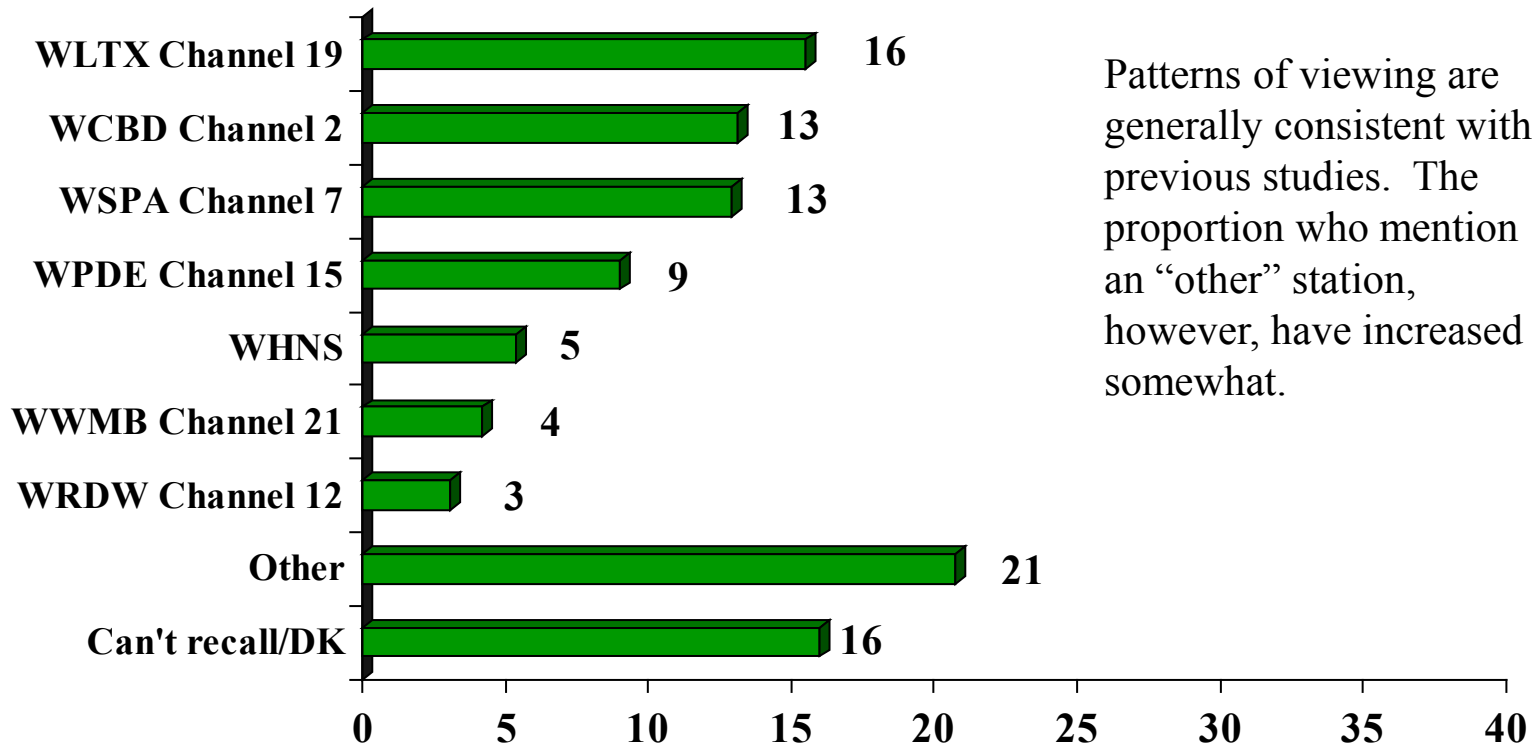
How Often do you Watch Powerball Drawings

(among those who watch Powerball drawings on TV, n=196)



TV Stations

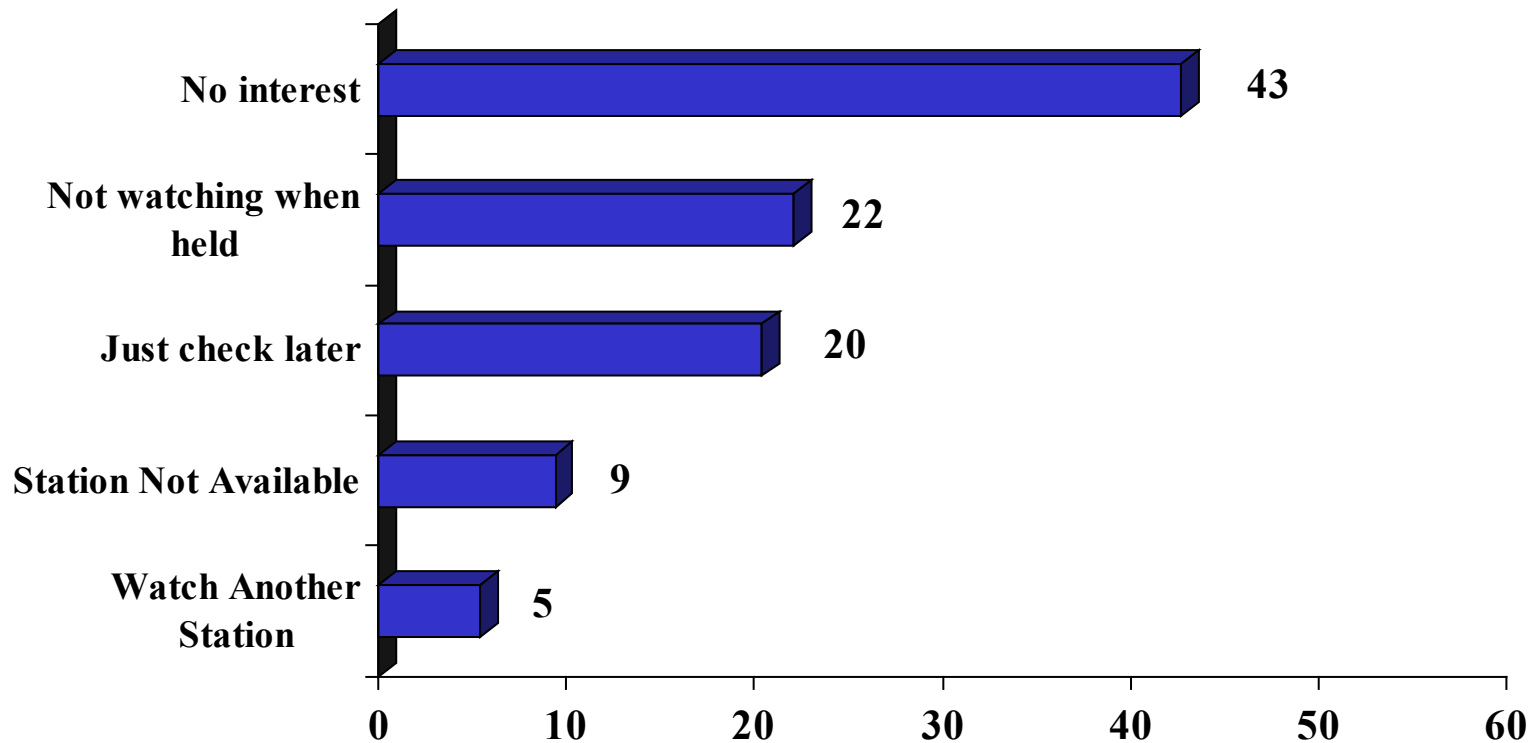
(among those who watch drawings on TV, n=273)



Patterns of viewing are generally consistent with previous studies. The proportion who mention an “other” station, however, have increased somewhat.

Reasons for Not Watching Drawings on TV

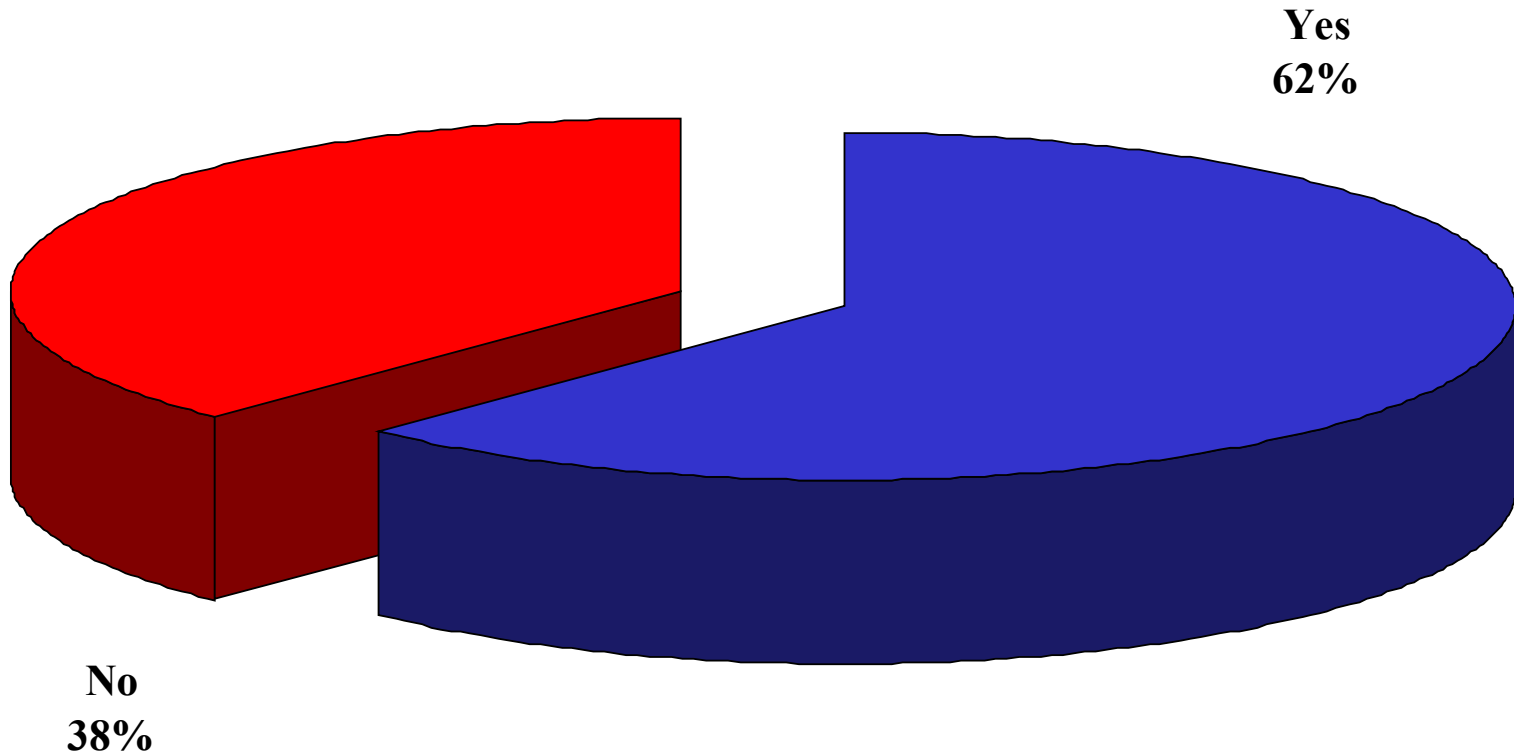
(among those who do not watch drawings on TV, n=115)



Lottery Advertising

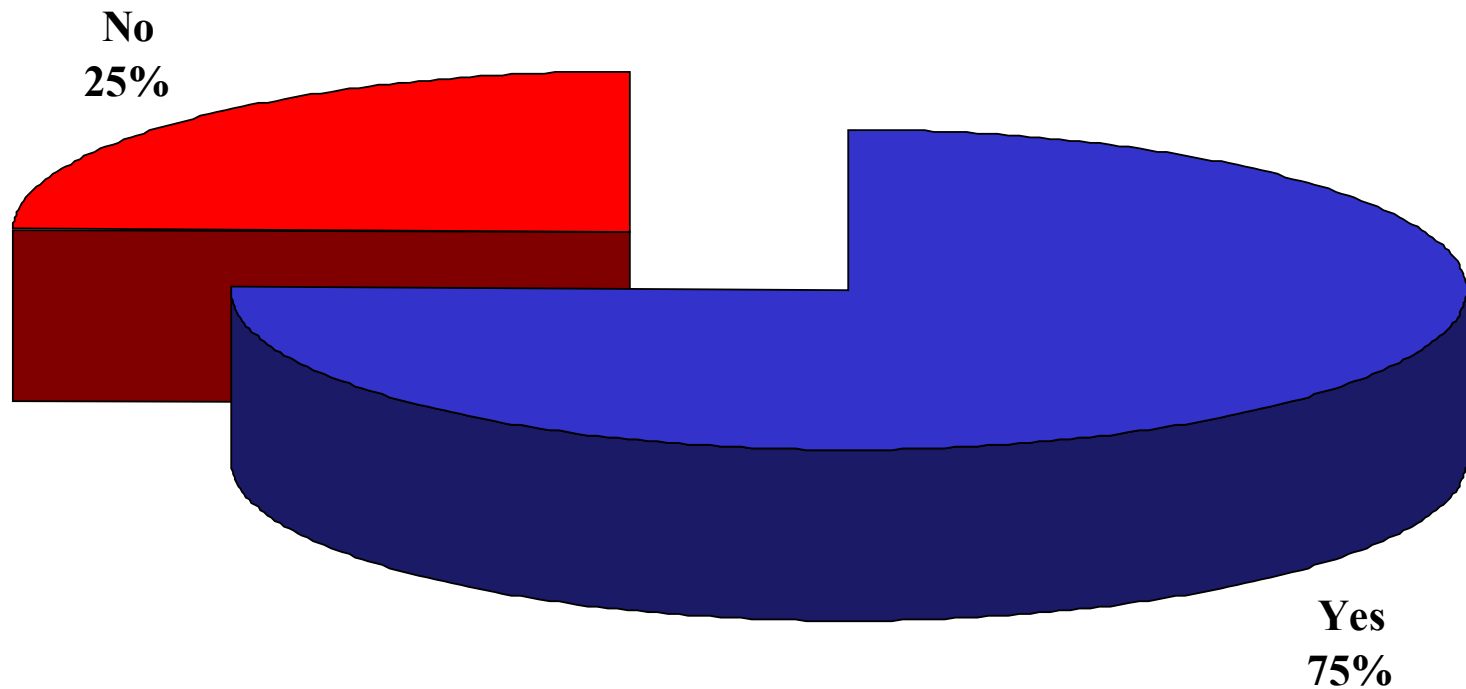
- Roughly two-thirds (62%) of SCEL players have Internet access.
- Among SCEL players with Internet access (n = 284):
 - ✓ 75% are aware of the SCEL's website, and
 - ✓ 48% have visited the website.
- Among those who have visited the SCEL website (n = 136):
 - ✓ 27% have seen the "Lottery Insider," and
 - ✓ 4% have joined it.

Internet Access



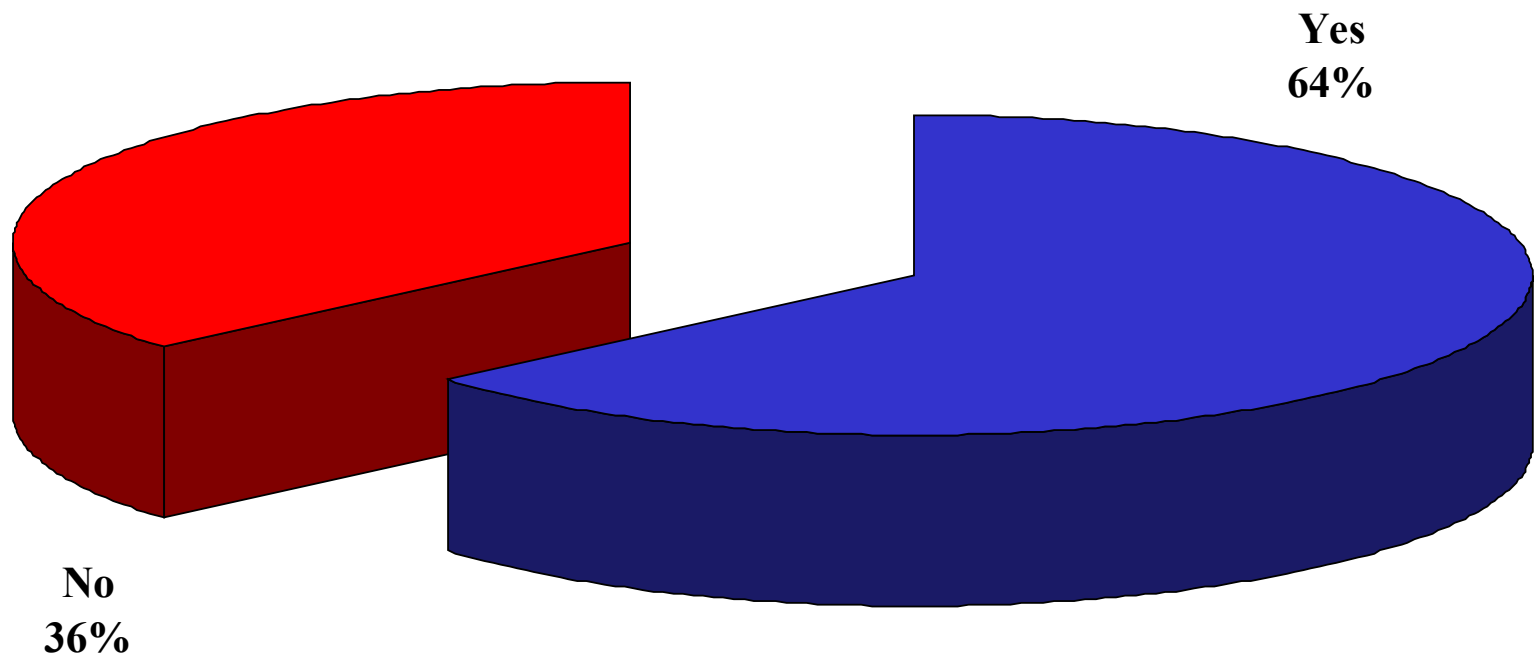
Knowledge of SC Lottery Website

(Among those who have internet access, n=284)



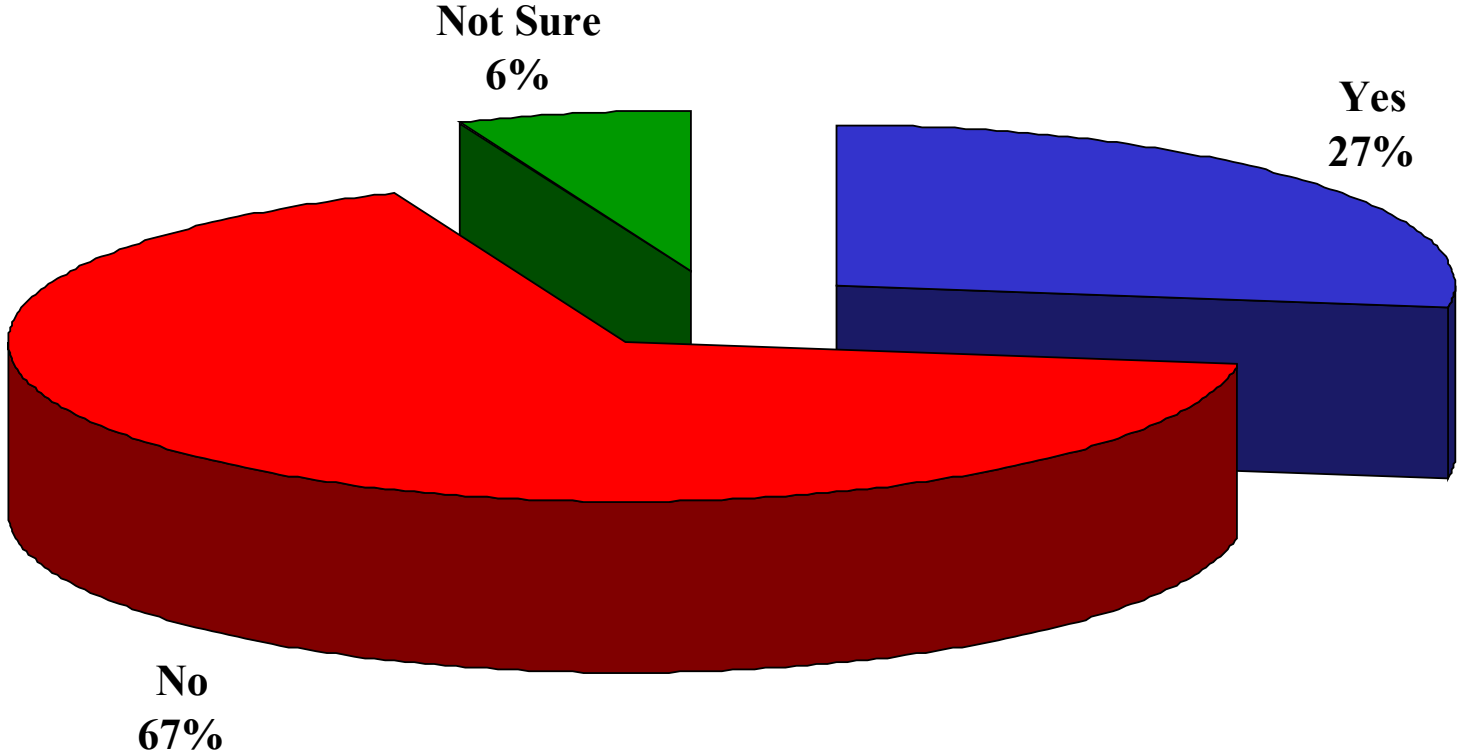
Visited the SC Lottery Website

(Among those who know about Website, n=214)



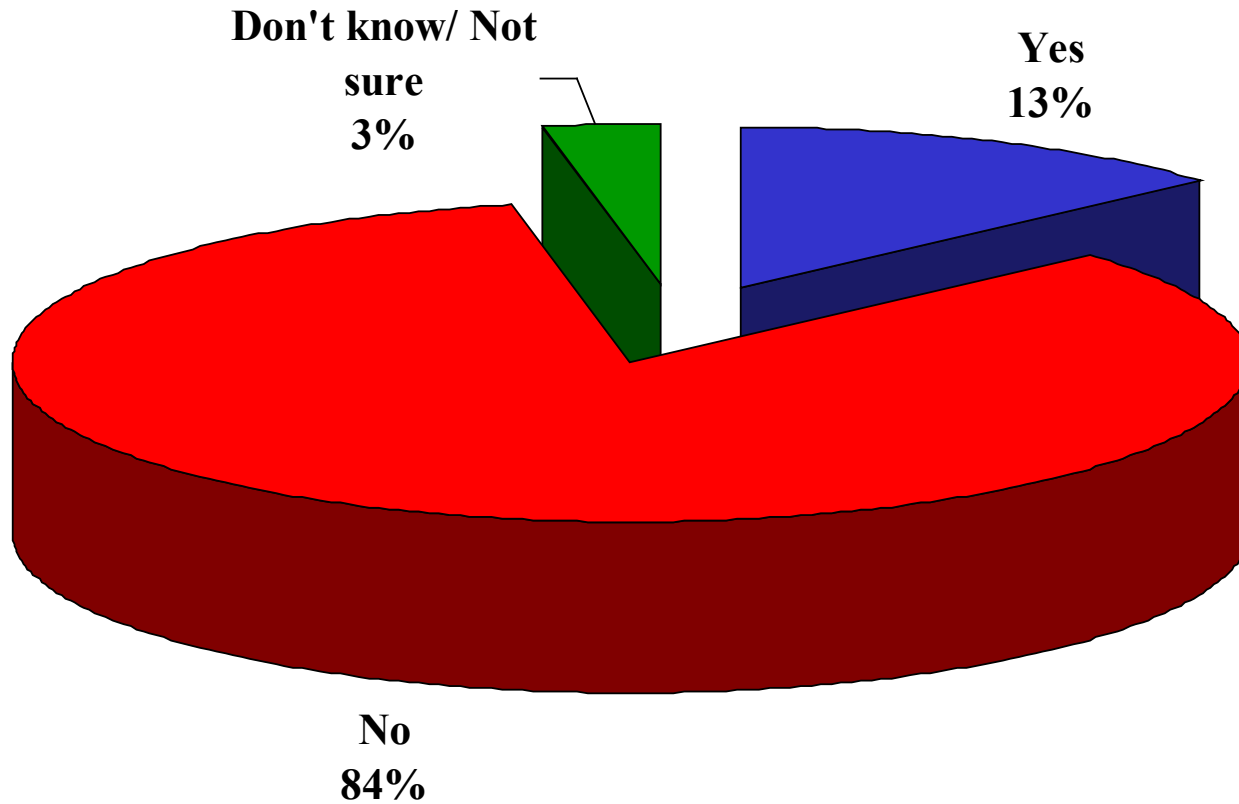
Seen “Lottery Insider” on Website

(Among those who have visited the Website, n=136)



Joined “Lottery Insider”

(Among those who have seen “Lottery Insider”: on Website, n=37)



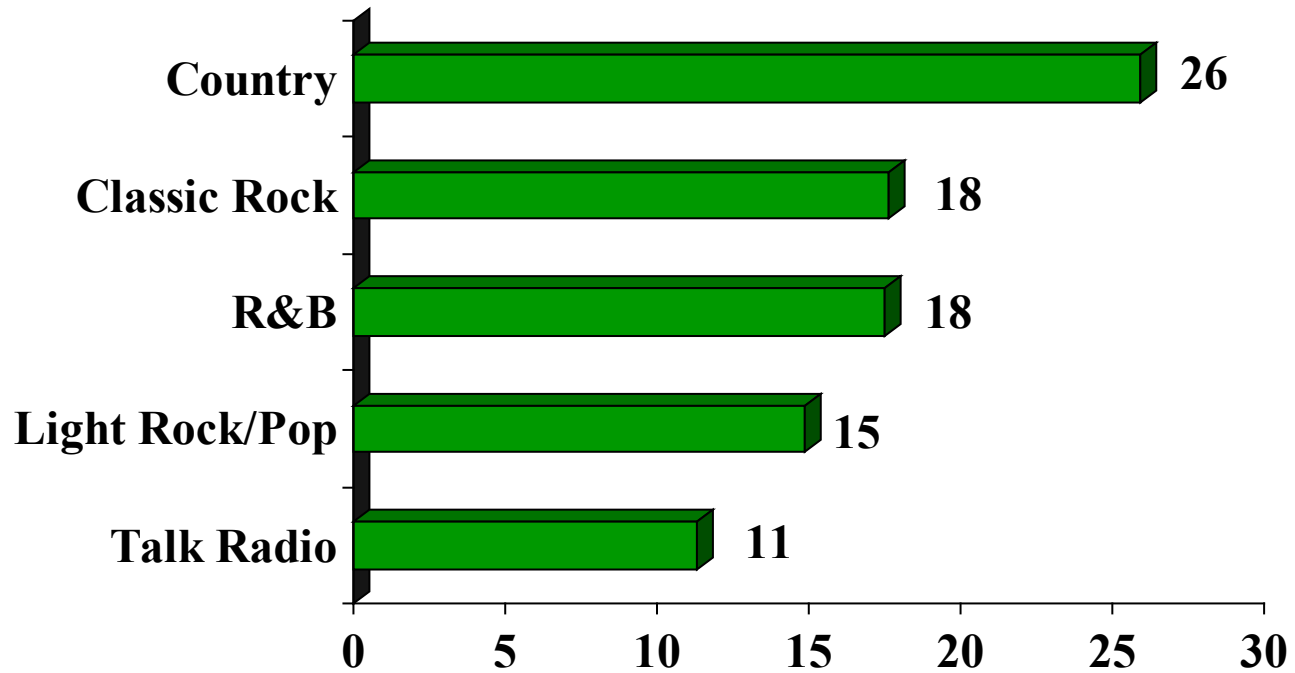
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Player Media Habits

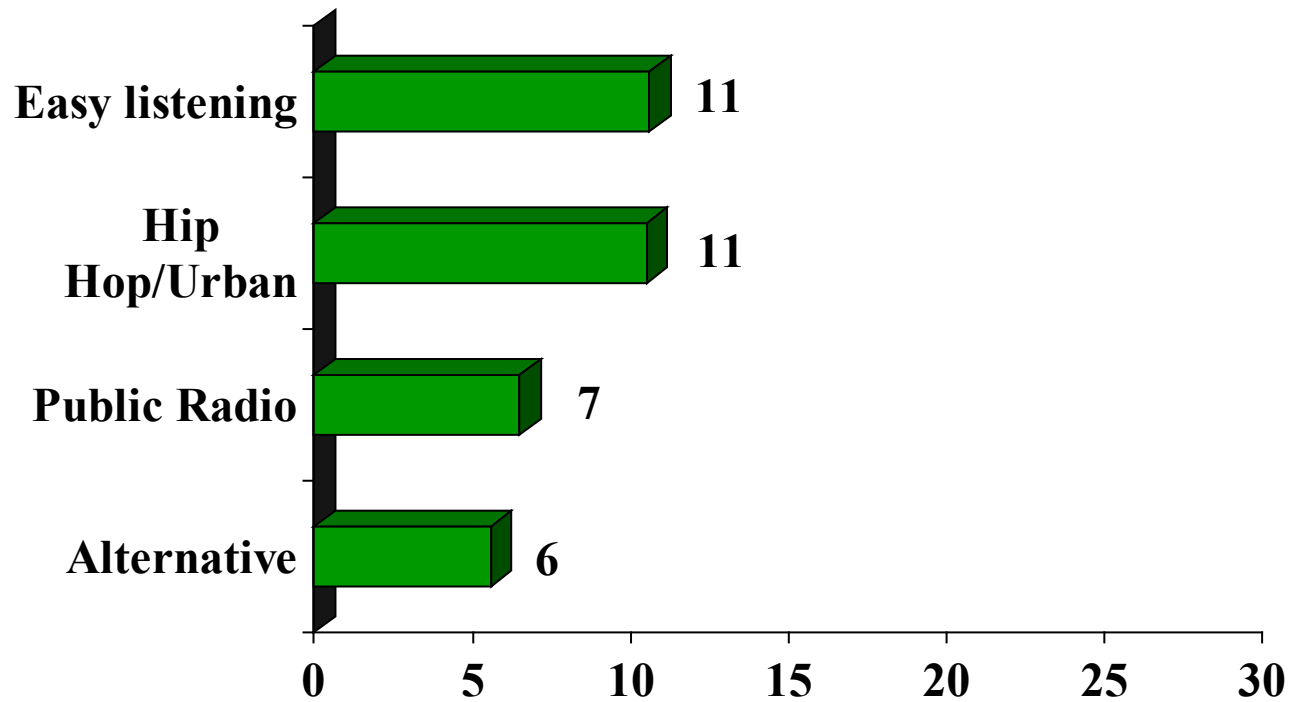
Player Media Habits

- Country music (26%) is the most commonly listened to radio programming by players, followed by Classic Rock (18%) and R&B (18%).
- Nearly half (47%) say they listen to the radio most often in the mornings (between 5 a.m. and 9:59 a.m.).
- Four out of five (81%) SCEL players have cable or satellite TV programming.
 - ✓ Even so, cable/satellite subscribers say they spend 50% of their time watching network stations such as NBC, ABC, or CBS.
 - ✓ Only 7% of cable/satellite subscribers owns a TiVo.

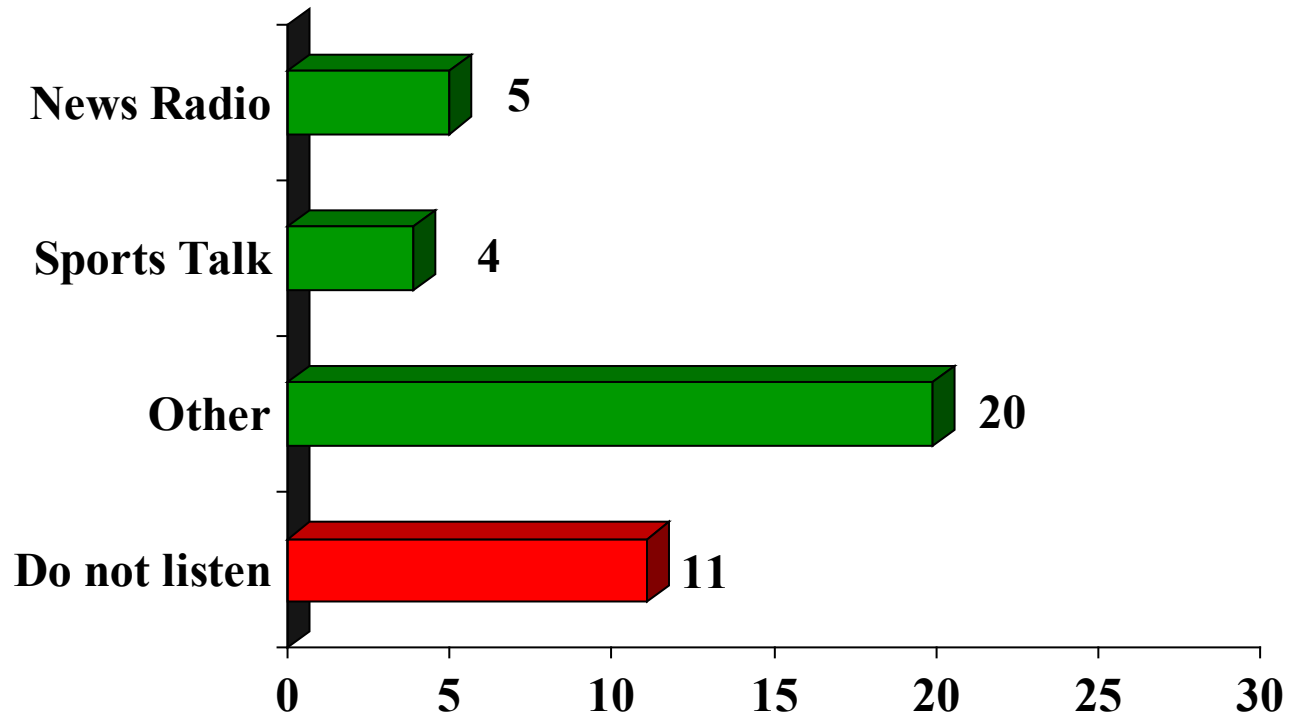
Radio Programming (1 of 3)



Radio Programming (2 of 3)

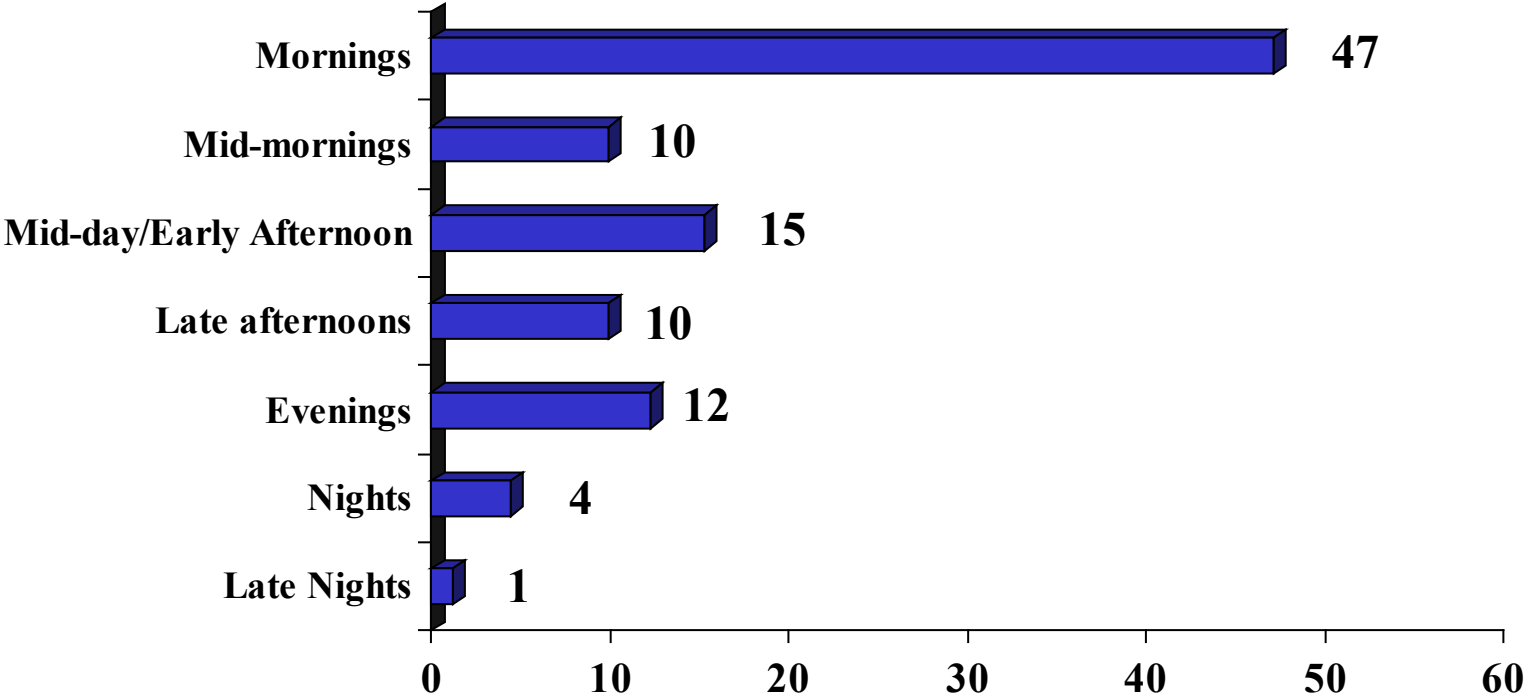


Radio Programming (3 of 3)

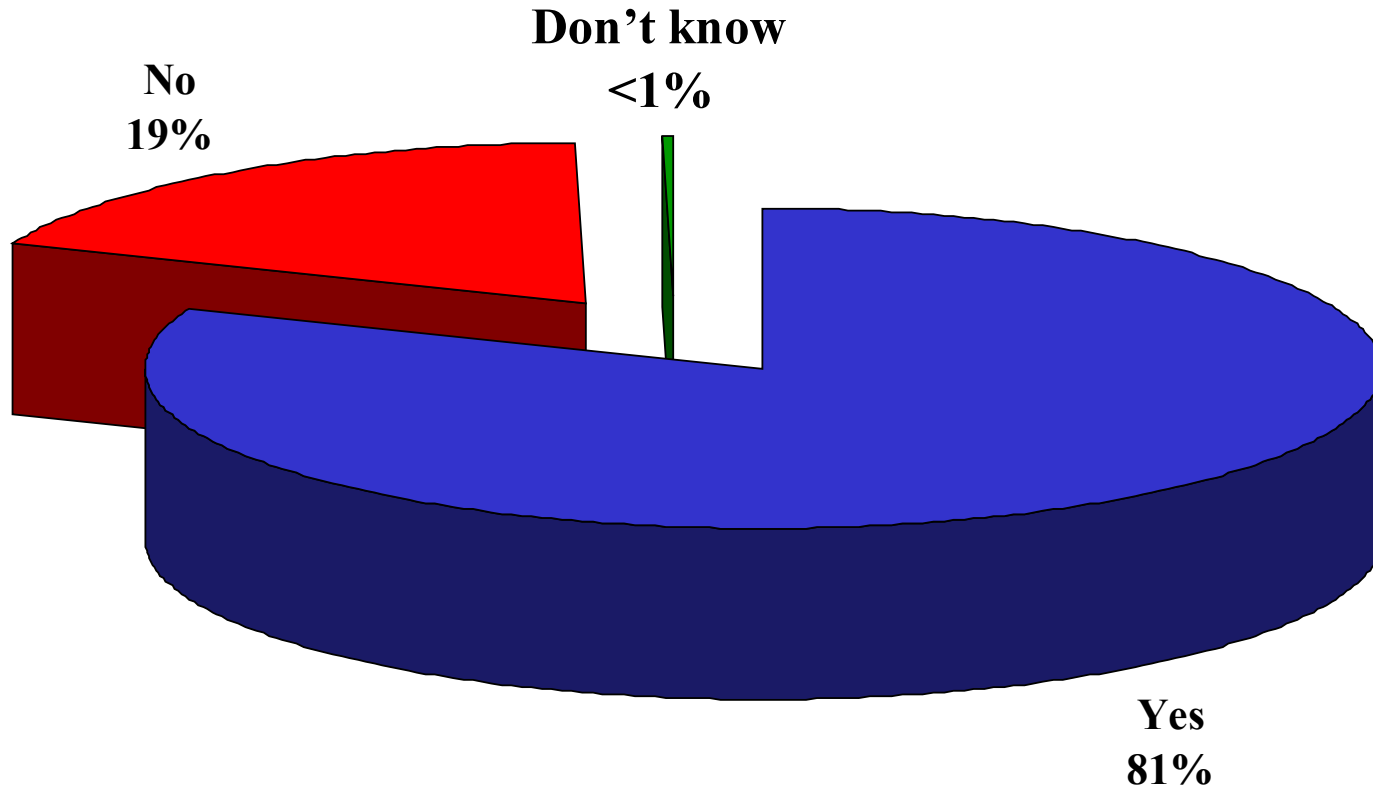


Time of Day You Listen to Radio

(among those who listen to radio, n = 407)

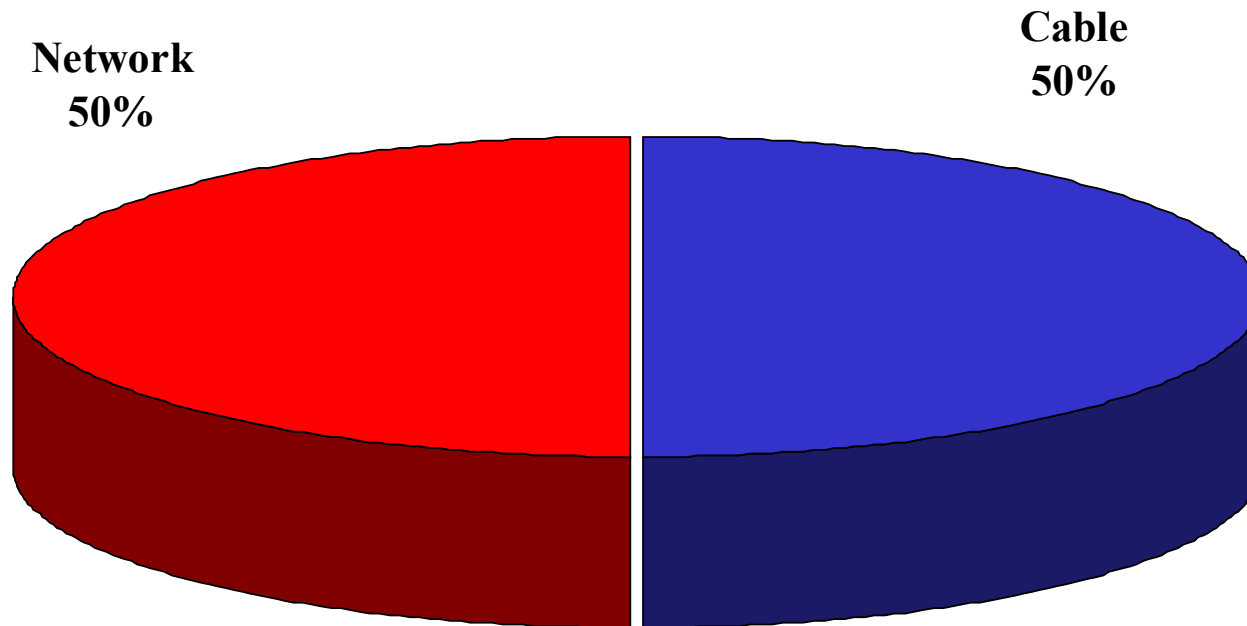


Subscribe to Cable or Satellite TV



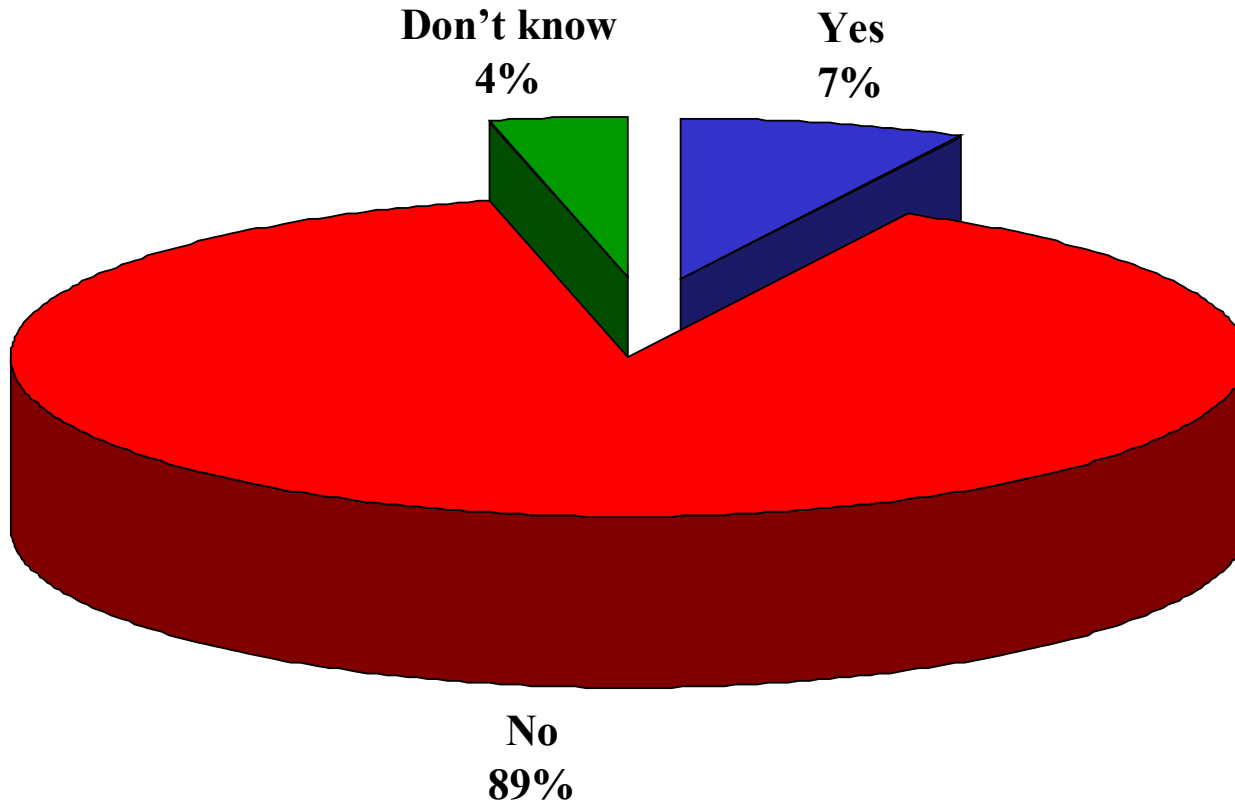
Percentage of TV Viewing

(among those who subscribe to Cable or Satellite, n = 371)



Own a TiVo

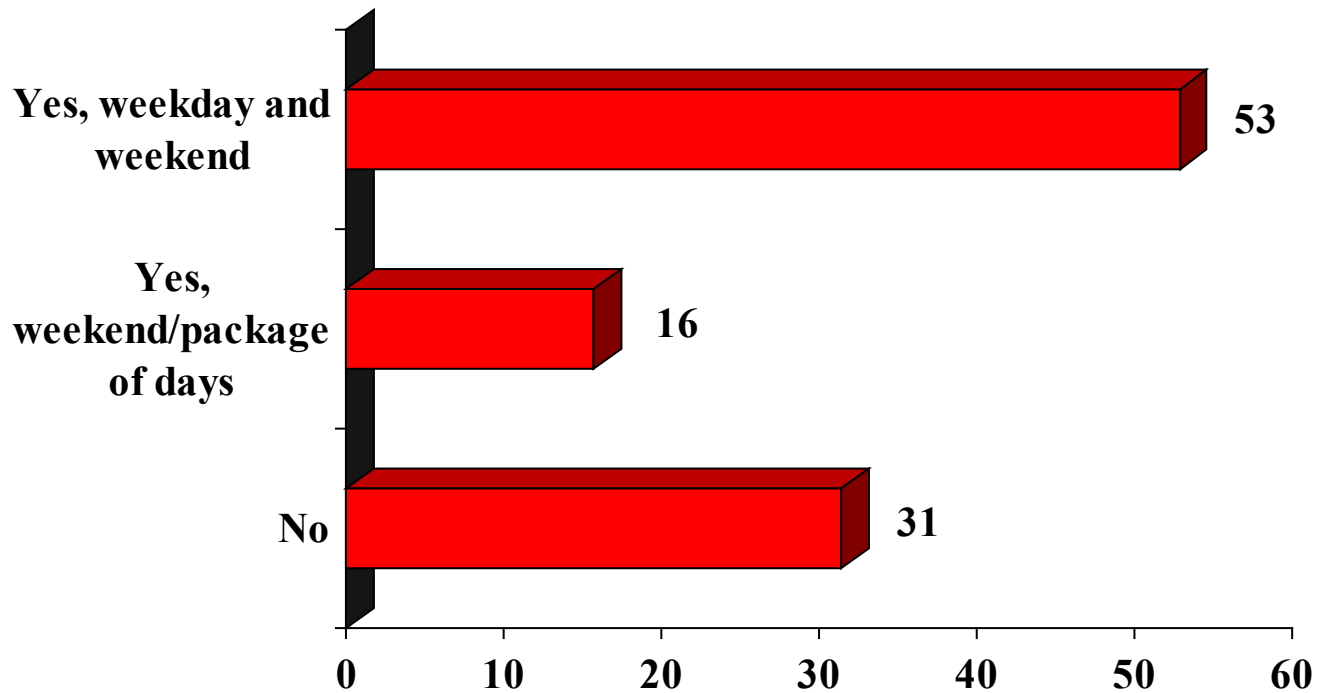
(among those who subscribe to Cable or Satellite, n = 371)



Player Media Habits

- Seven in ten (69%) of SCEL players say they regularly read their local newspaper.
 - ✓ 53% report regularly reading all editions, while
 - ✓ 16% regularly read on the weekend/package of days.

Regularly Read Local Newspaper



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Player Lifestyle

Player Lifestyle

- While, as a group, players are not particularly active in any of the activities tested, a significant minority participates in each.

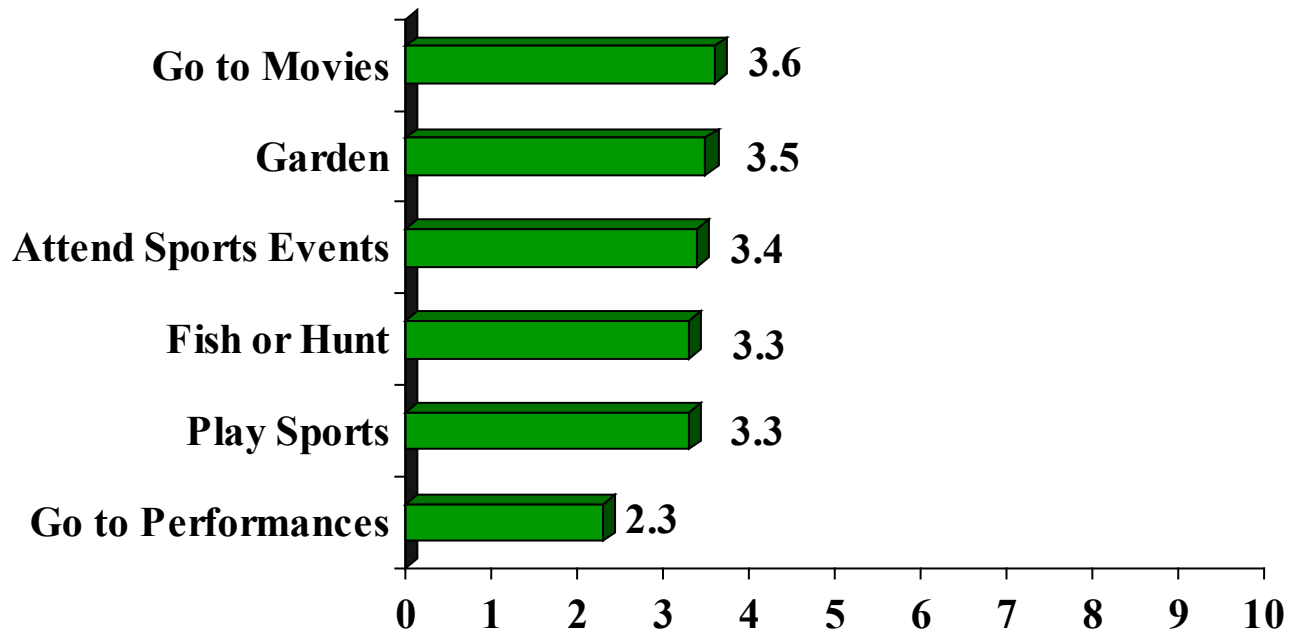
Player Lifestyle (1 of 2)

(Mean Score on scale from 1 to 10, where 10 = participate very often)



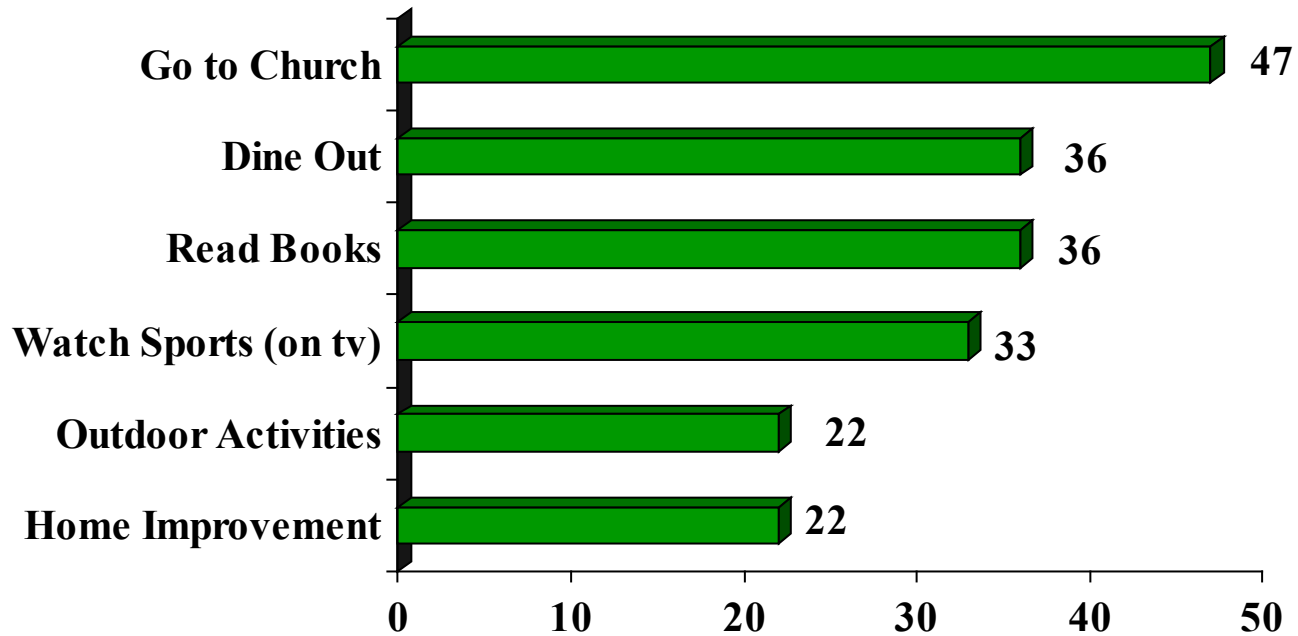
Player Lifestyle (2 of 2)

(Mean Score on scale from 1 to 10, where 10 = participate very often)



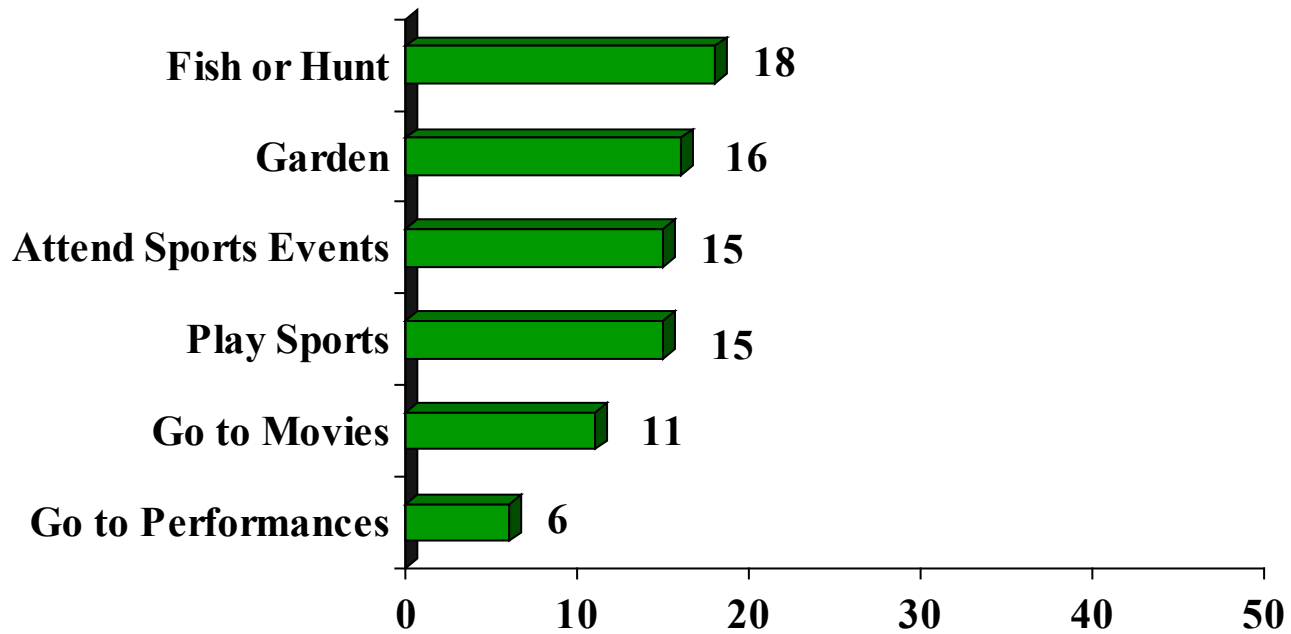
Player Lifestyle (1 of 2)

(% choosing 8, 9, or 10, where 10 means participate very often)



Player Lifestyle (2 of 2)

(% choosing 8, 9, or 10, where 10 means participate very often)



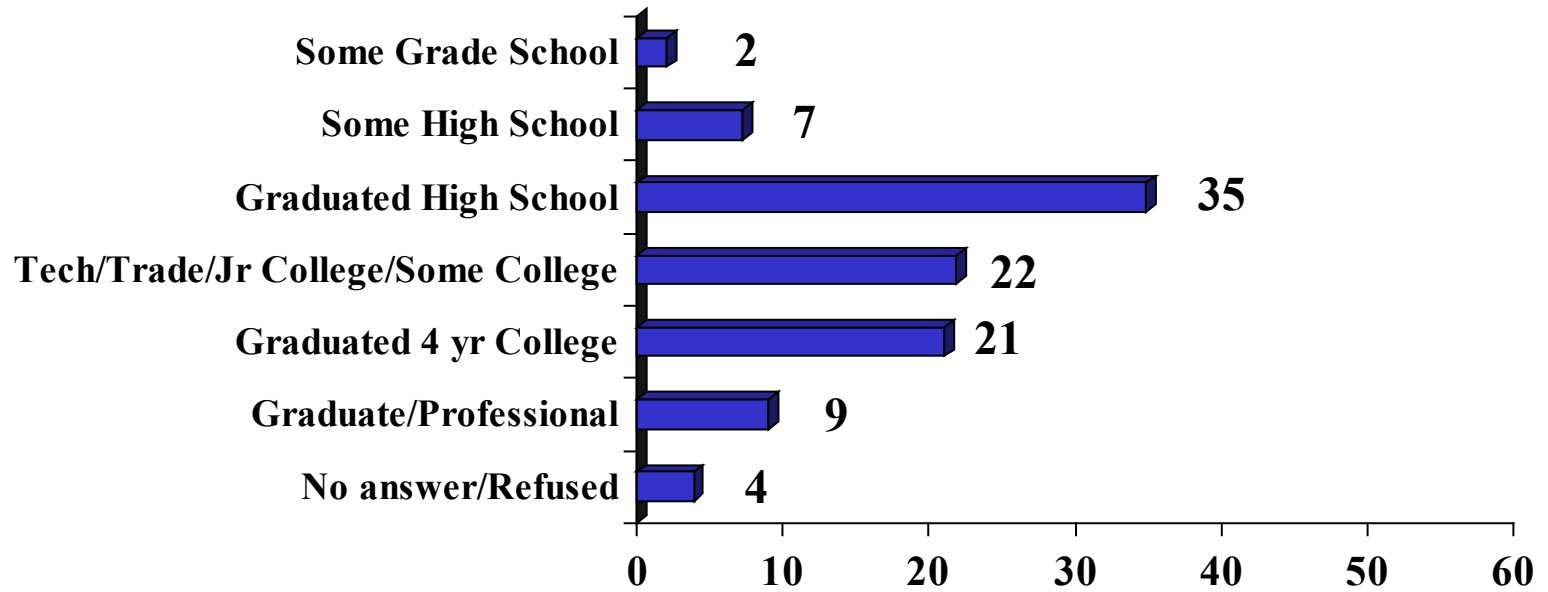
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Appendix A: Study Demographics

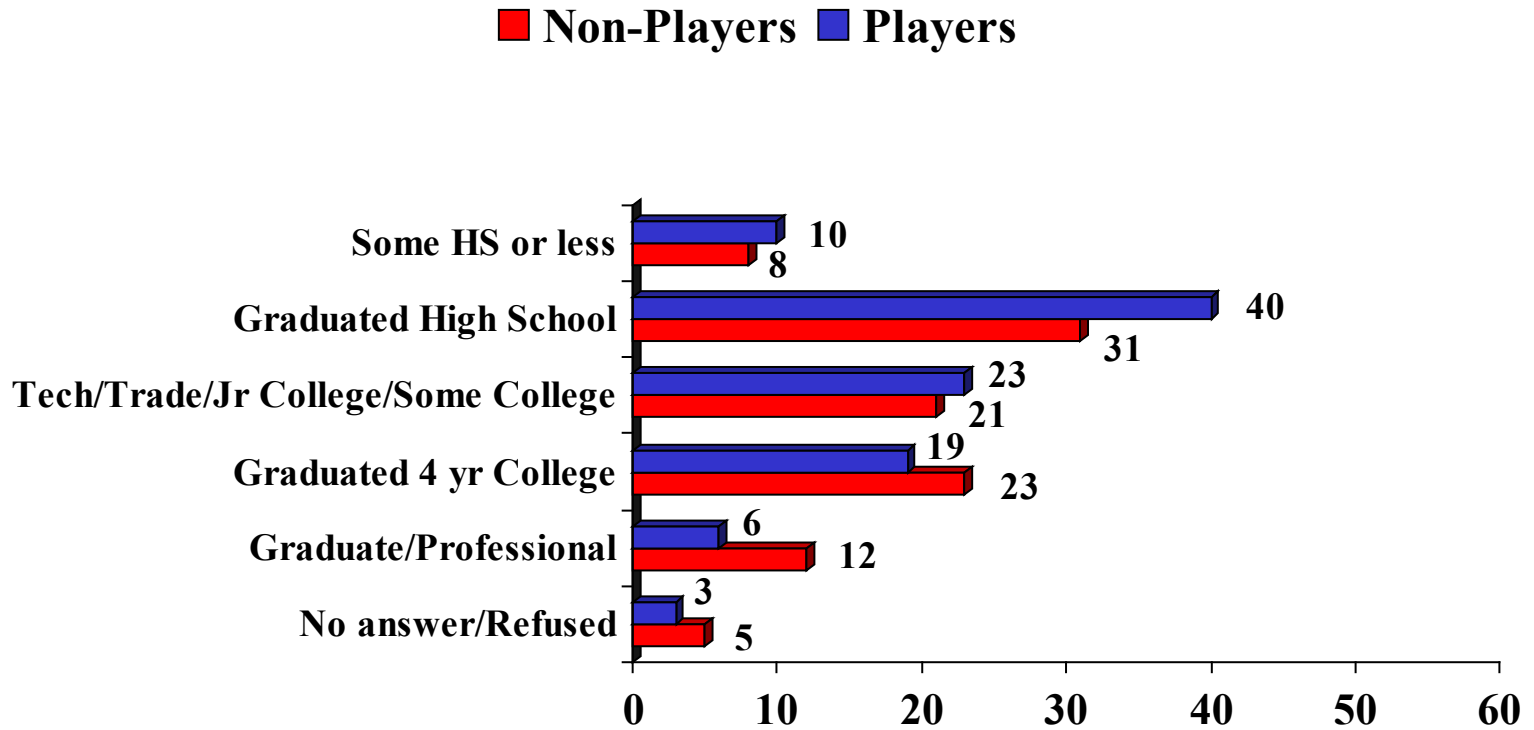
County

<u>County</u>		<u>County</u>	
Greenville	8%	Florence	3%
Lexington	7	Greenwood	3
Charleston	7	Dorchester	3
Spartanburg	6	Pickens	2
Richland	5	Beaufort	2
Anderson	5	Darlington	2
Berkeley	4	Laurens	2
York	4	Kershaw	2
Horry	4	Lancaster	2
Aiken	4	Cherokee	2
Sumter	3	Other	22

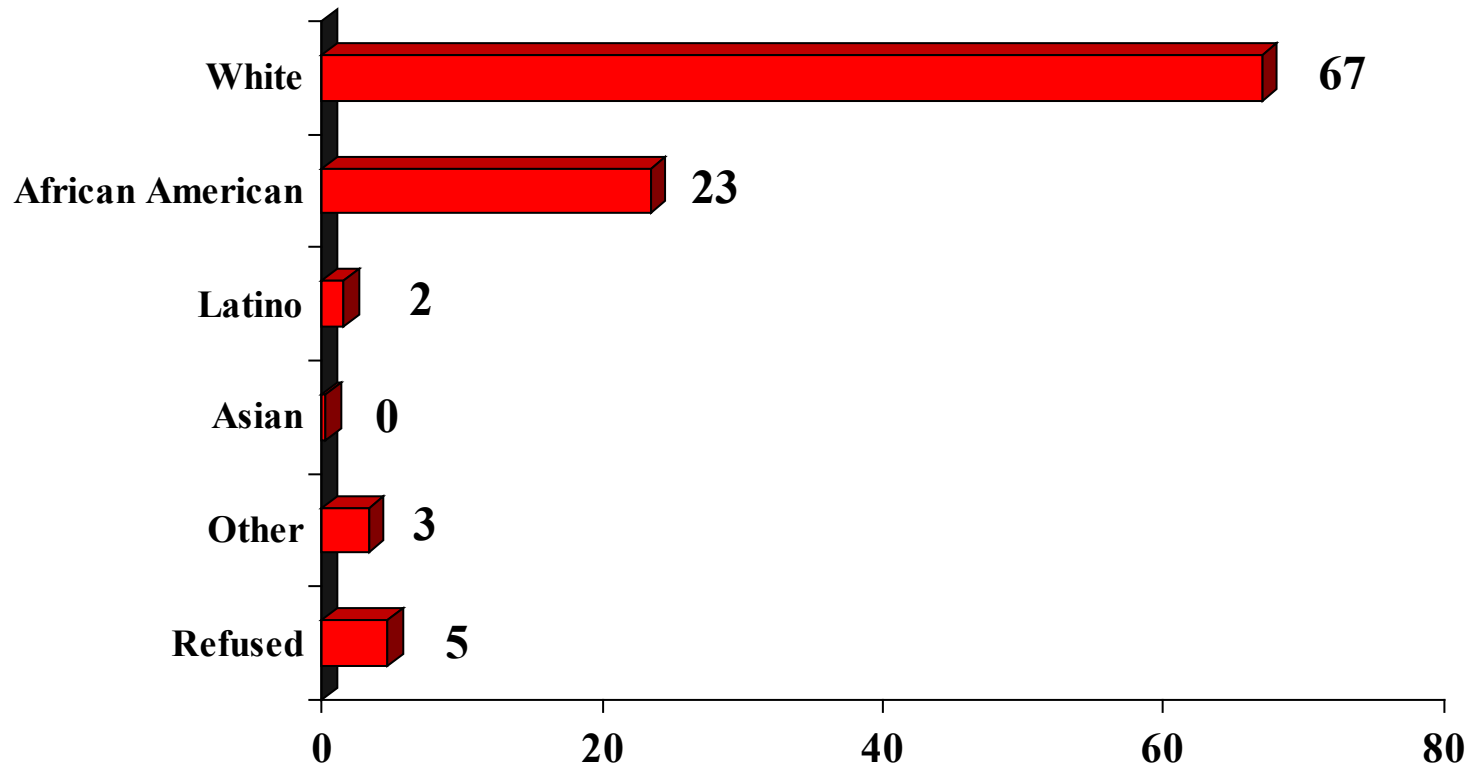
Education



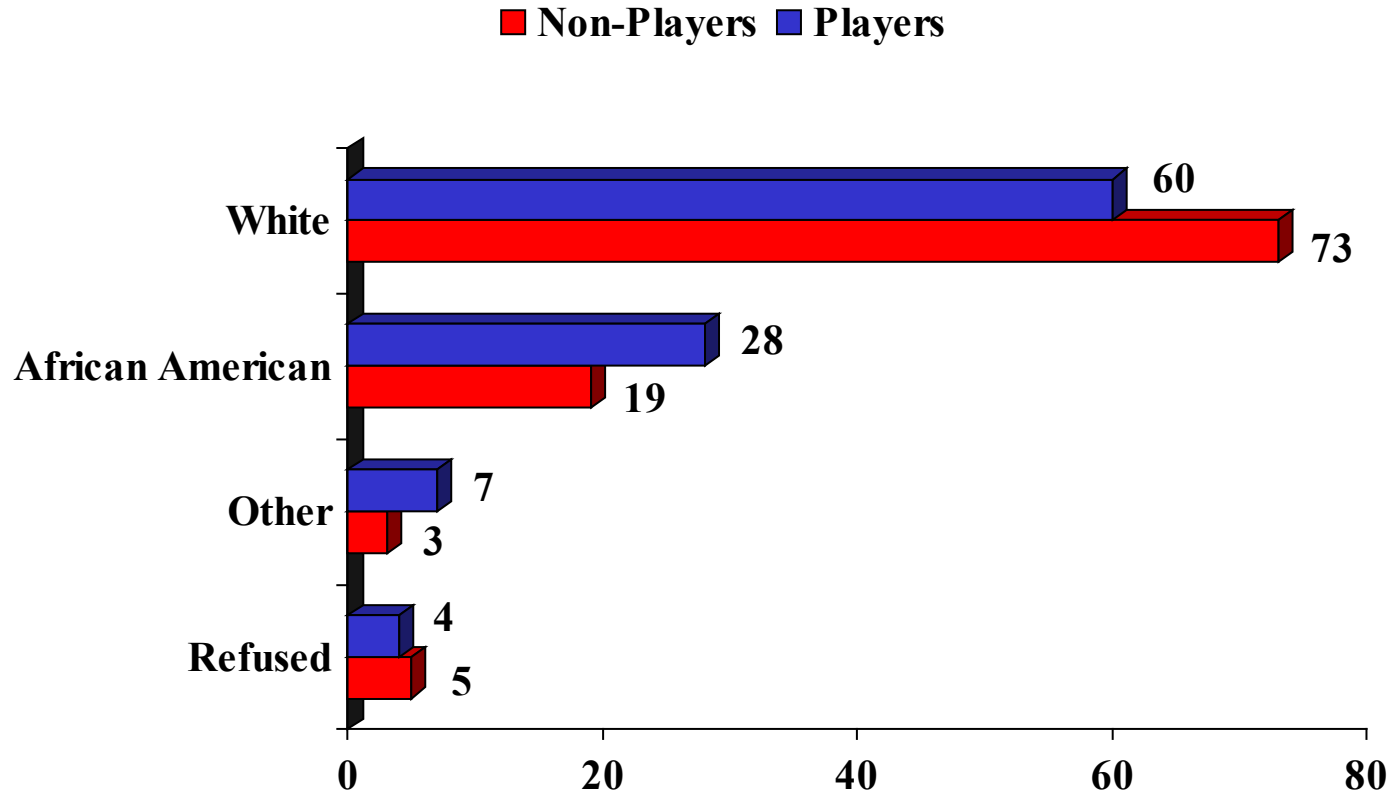
Education



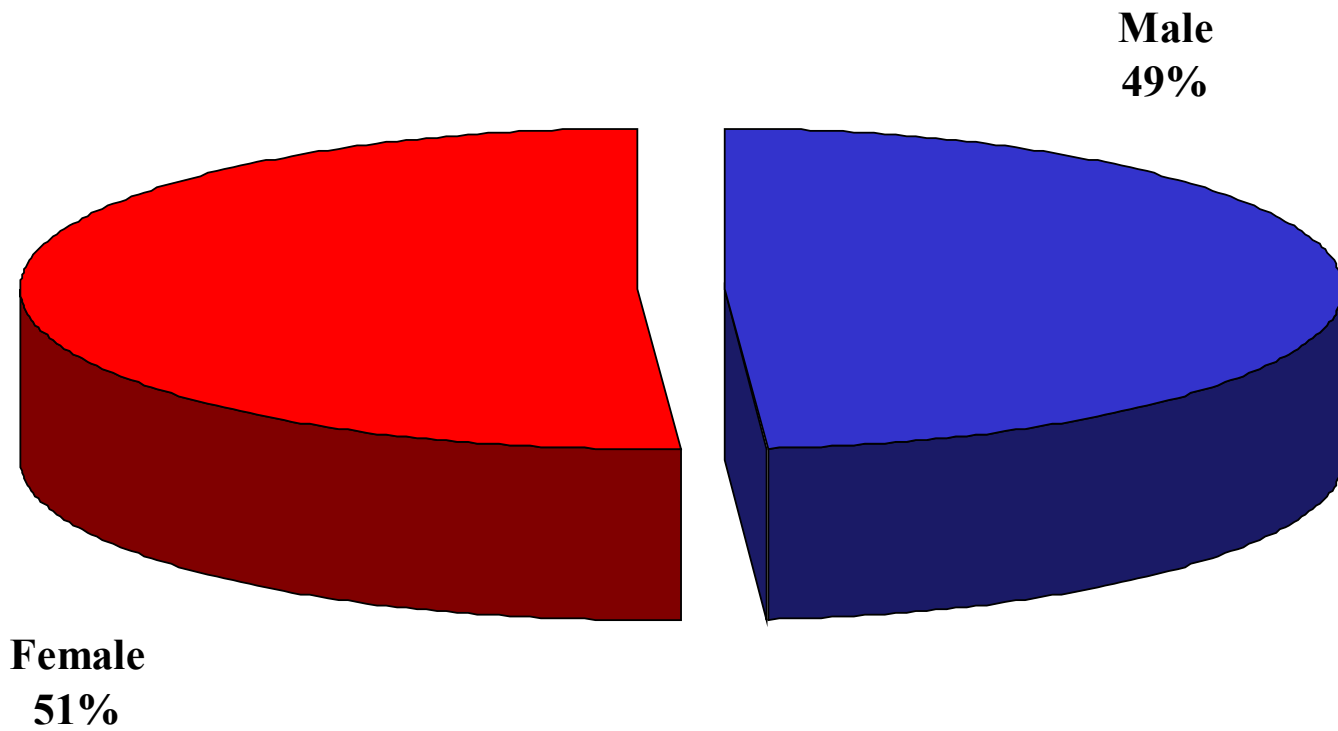
Ethnicity



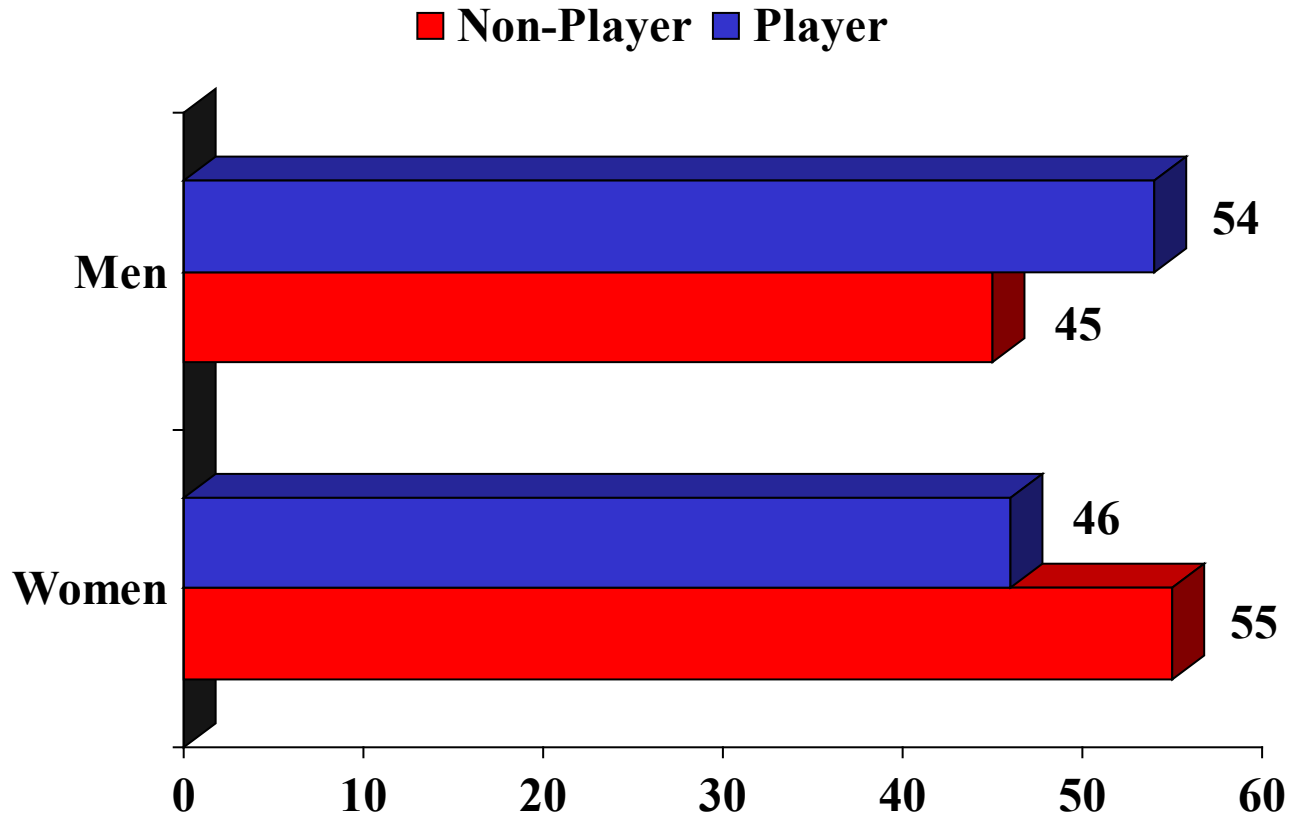
Ethnicity



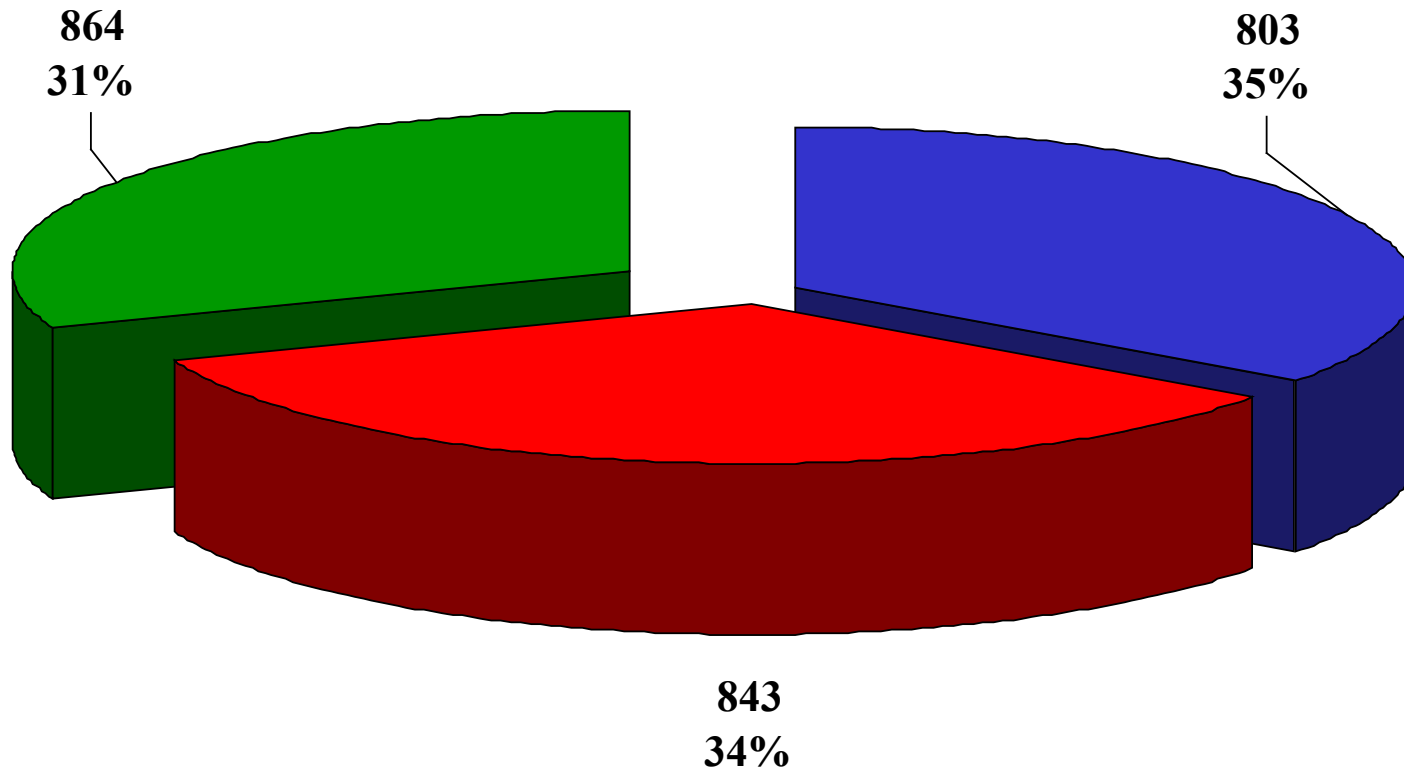
Gender



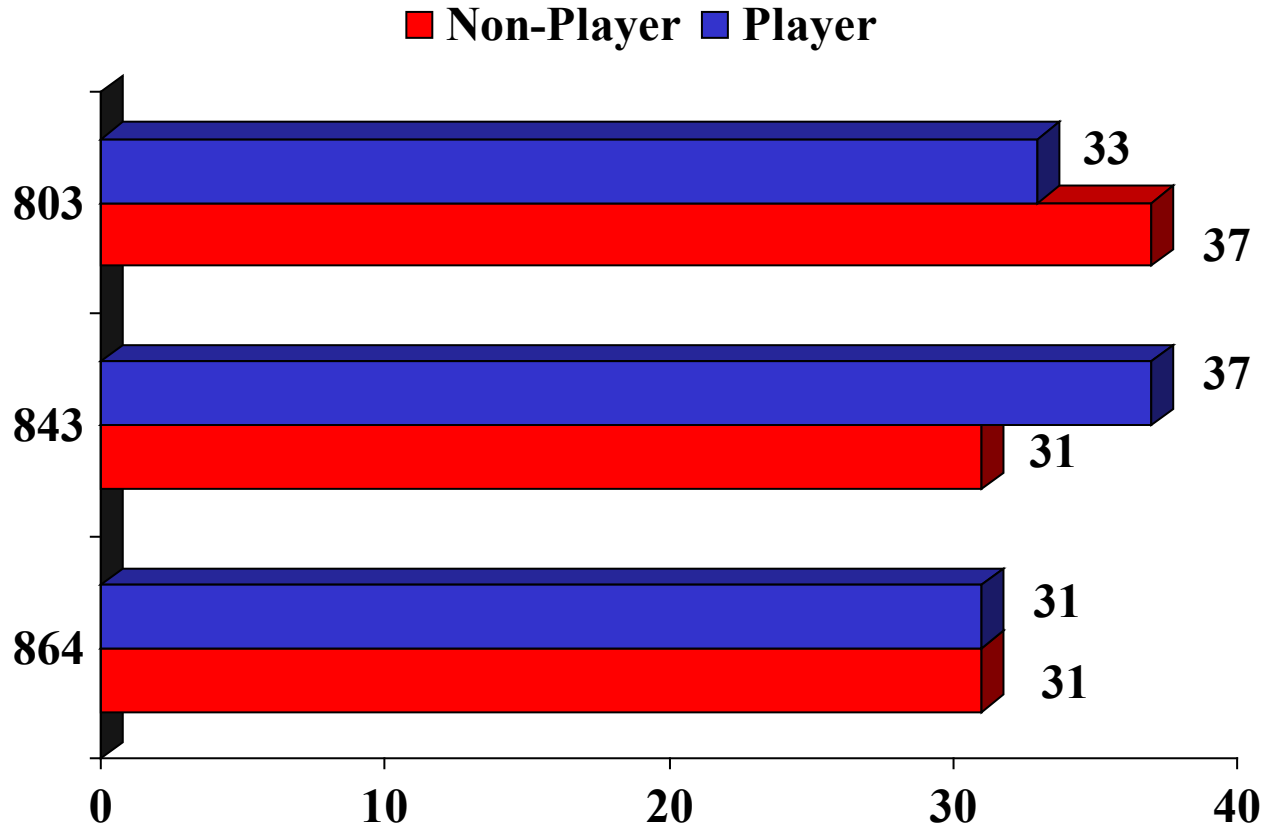
Gender



Area Code



Area Code



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Appendix B: Questionnaire
