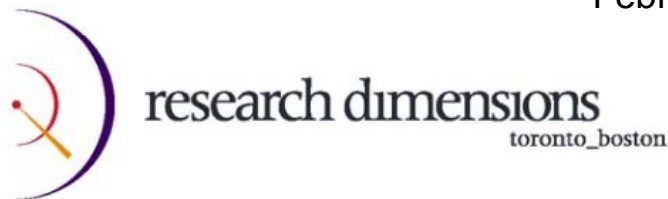




BREAK OPEN PRICE INCREASE STUDY Qualitative Findings

Prepared for: Break Open Ticket Development Fund
Management Committee

February 2011



Better
information,
Smarter decisions,
Inspired
solutions.

TABLE OF CONTENTS

Background and Objectives	3
Study Method	4
Limitations	5
Executive Summary	6
Recommendations	10
Detailed Findings	16
1. Appeal of Break Opens	17
2. Play Behaviour	18
3. Information Needs	22
4. Awareness of \$1 Break Opens	25
5. Perception of \$1 Break Opens	26
6. Prizes	27
7. The Ideal \$1 Ticket	29
8. Price Increase	31
9. Reactions to Potential Ticket Enhancements	33
10. Additional Findings	44

BACKGROUND AND OBJECTIVES

Break open tickets (BOTs) in Ontario have traditionally been priced at 50 cents a ticket, although a limited selection of \$1 tickets is also available.

The 50 cent ticket continues to be very popular with players, but there are financial challenges. The proceeds from each 50 cent ticket are distributed to several stakeholders. Over time, industry costs and fees have risen while commercial sector commissions have remained fixed.

The Break Open Ticket Development Fund Management Committee (BOTDFMC) was therefore interested in exploring the viability and implications of a more general industry move to a \$1 ticket, effectively doubling the price of the product. While there would be possible benefits (e.g. room for top prizes to increase and be more appealing to consumers), there would also be risks if consumers reject the price increase.

Research Dimensions was therefore commissioned to conduct qualitative consumer research with the broad objective of gauging consumer reaction to a potential price change, as well as investigating players' reaction to current \$1 BOTs, reaction to potential \$1 BOT enhancements, expectations of prize structure, and other expectations given the higher price point.

Following the qualitative research, a quantitative research phase will provide an estimate of the likely impact on sales of a move to a \$1 price point.

STUDY METHOD

Method	<ul style="list-style-type: none"> 11 Focus groups with break open players (2 hours each) 			
Group breakdown by location		Heavy/Medium players	Medium/Light players	
	Sudbury	2	1	
	Ottawa	1	1	
	Kingston	1	1	
	Hamilton	1	1	
	Toronto	1	1	
Recruiting Specifications	<p>Break Open Players</p> <ul style="list-style-type: none"> Mix of ages 25-64 in each group Mix of men and women in each group Comfortable speaking in English Some ethnic respondents in the Toronto and Hamilton groups Primarily play break open tickets at convenience stores or lottery kiosks (i.e. not Bingo halls) Screened for security to ensure no occupational conflicts. <p>Heavy Players: Play break opens at least twice a week on average, and plan to continue to play. Spend over \$30 a month on break opens.</p> <p>Medium Players: Play at least once a month on average, but less than twice a week, and plan to continue to play. Spend between \$10-\$30 a month on break opens.</p> <p>Light Players: Played at least 3 times in the past six months, but play less than once a month on average, and plan to continue to play. Spend less than \$10 per month on break opens.</p>			

LIMITATIONS

The normal limitations of qualitative research discussions must be kept in mind.

Respondents were selected on a non-random basis and their views cannot be regarded as quantifiably projectable to any specific population, cohort or universe.

The information obtained may be viewed as an indication of what attitudes exist but not of the extent to which these attitudes are represented in any defined population. The results from the quantitative phase of research are more definitive.

Finally, group discussions are not “unreliable surveys”. They are essentially idea generating vehicles where any avenue of information which appears to evoke useful ideas or problem solving suggestions is pursued and reported.

EXECUTIVE SUMMARY

Executive Summary

CURRENT LANDSCAPE

Lack of product understanding

Overall, there is little knowledge about the specifics of BOTs, including: specifics about the prize board, awareness of the number of winners at each prize level, the number of tickets in a deal, that all the prizes are in each deal and awarded at that location, the odds of winning, the payout percentage, that BOTs are not an OLG product, and that they are for charity.

Barriers to playing more

The main barriers to playing more BOTs include:

- Lack of availability. BOTs are becoming increasingly hard to find in some regions
- Perceived bad odds of winning
- The inconvenience of having to play and redeem in the same retail location
- Lack of awareness of the charity connection.

Awareness of \$1 BOTs

Awareness of \$1 BOTs varies greatly among players and regions. Overall, there are many players who were unaware of \$1 BOTs prior to the focus groups. Much of the lack of awareness of \$1 BOTs is due to their lack of availability at many retail locations.

POTENTIAL FOR \$1 BOTs

Perception of \$1 BOTs

Though players do not initially express much enthusiasm about \$1 BOTs, after looking at a variety of \$1 BOTs (provided in the groups), many players become more interested in \$1 BOTs because they feature higher top prizes and more winners at many of the prize levels.

This interest indicates that the main barriers to \$1 BOTs is the lack of product knowledge and availability.

Reaction to 50 cent ➔ \$1 change

Overall, the reaction to the possibility of a BOT price increase is mildly positive.

The potential price increase is not received negatively by most players, because of the interest generated during the discussion regarding the \$1 BOTs. Additionally, the possible ticket enhancements are seen to add value and increase positive perceptions.

- However, some players do express disappointment and concern about the price increase. Mainly these concerns focus on the perception that \$1 is no longer “spare change.”

Reaction to potential ticket enhancements

\$1 BOTs that feature enhancements that differentiate them from 50 cent BOTs generate positive reactions from participants.

Desired enhancements that are frequently mentioned spontaneously by players are: higher prizes, more winners, and better odds. When presented with other possible enhancements, players react most positively to the idea that the \$1 BOT should be larger in size than 50 cent BOTs. The larger sized ticket, however, should still fit comfortably in the player's hand. Given the larger size, the idea of having additional windows is also very well received. More windows signify more chances to win and more fun.

Effect of a price increase on dollars spent

Respondents indicated the amount they would spend if \$1 BOTs were available, but 50 cent BOTs were no longer available.

- If \$1 BOTs were to remain as they currently are, the majority of players say they would spend the same dollar amount as they currently spend. Several would spend less, and a few would spend more than they currently spend.
- If \$1 BOTs were to be enhanced with some of the ideas tested during the groups (e.g. larger size, more windows, etc.) then the vast majority of players say they would spend the same amount as they currently spend, and several would spend more. Very few would spend less.

Recommendations

Recommendations

\$1 BOTs

50 cent ➔ \$1 BOT price increase

One of the main goals of this research was to explore the viability and implications of a price increase due to the increasing financial challenges related to the 50 cent BOT. If the BOT industry would like to move toward only offering a \$1 BOT, this phase of the research indicates that a price increase to \$1 would likely be accepted by a majority of BOT players. There would be a segment of players that would be upset by the loss of the 50 cent BOT, but it is likely that many would still play the \$1 ticket, especially if it features new ticket enhancements.

- If 50 cent BOTs are phased out, it is important that some traditional style \$1 BOTs (in terms of visual design and game mechanics) remain available. Such BOTs would appease those players who have an attachment to the traditional style game.
- However, if the decision is made not to phase out 50 cent BOTs, strong consideration should be given to differentiating \$1 BOTs to indicate they are worth more than the 50 cent tickets.

\$1 BOT enhancements

As noted earlier, acceptance and purchase of \$1 BOTs would likely be heightened through enhancements. Qualitative findings indicate that the enhancements that would be most positively received include:

- Larger sized \$1 BOTs that contain an additional tab/window or two
- BOTs that clearly indicate higher prizes and more winners
- BOTs that clearly indicate that they are for charity.

Availability of \$1 BOTs

Findings from the qualitative phase of the research indicate that the main barriers to the success of \$1 BOTs is lack of awareness and knowledge of the games, primarily due to lack of availability in many retail locations.

Regardless of whether or not 50 cent BOTs are phased out, for \$1 BOTs to be successful, it is imperative that awareness, knowledge, and availability be increased.

Increasing churn

Given that most players “re-invest” small winnings under \$10, consideration should be given to increasing the number of small prizes on BOT prize boards. The positive effect of increased churn could be two-fold:

- Increasing the number of tickets purchased (re-investment)
- Increasing positive impressions of BOTs because the increased churn would likely lead to the perception of better odds of winning (currently many players have a negative perception of the odds).

ADDITIONAL RECOMMENDATIONS

BOT promotions

Since many BOT purchases are made spontaneously, especially by light players, increasing promotions for BOTs would likely have a positive effect on purchase frequency. It is recommended that:

- Retailers be encouraged to promote BOTs (e.g. retailer incentive programs)
 - » Retailers should also be encouraged to position BOT containers very visibly in stores
- All retail locations should feature signs indicating that BOTs are sold at that retail outlet
- POS material should be used to highlight the main appeals of BOTs such as: quick, easy, fun, use spare/pocket change, and for charity.

Charity awareness

Awareness of the connection to a charity has a positive effect on the amount spent by many BOT players. Furthermore, if a price increase were to occur, the charitable connection could assist in encouraging players to have a more positive reaction to the extra money spent. Therefore, it is recommended that awareness of the BOT charity connection be significantly improved. Some suggestions for increasing awareness include:

- » Clearly noting on all tickets that BOTs are for charity
- » Posting the specific charity the BOT is for on the container (as is done in Sudbury)
- » Where feasible, encourage more custom charity tickets (e.g. the CNIBBOTs increase awareness)
- » Increase charity-related POS material in all retail locations.

Additional considerations:

- BOT Availability
 - » Many players noted throughout the groups that BOTs are becoming increasingly difficult to find. Often the lack of availability leads to a missed purchase opportunity. It is important to minimize the number of retail locations that stop selling BOTs. Additionally, efforts should be made to increase the number of BOT retail locations.
- Ticket Design
 - » Consideration should be given to better utilizing the pull tab side of the ticket to communicate pertinent information about BOTs.
 - » Designing the ticket to be less cluttered may improve awareness of game features such as the prize board, the number of winners at each prize level, and any other information printed.
- Prize Structure
 - » It appears that in designing new \$1 BOTs, there would be room for different prize structures. For example, some respondents were interested in prize boards with a very large top prize (\$1000 or more), while others were interested in a relatively small top prize with several winners at that prize level. These prize boards should be communicated to players, as they create interest in BOTs.
- Non-winning ticket disposal
 - » Given that several players complain about the negative perceptions created by overflowing garbage cans of non-winning BOTs, it is recommended that larger, or covered, garbage bins be provided in retail outlets, and/or retailers be encouraged to empty disposal containers frequently to reduce the impression that there are so many non-winning tickets. .

DETAILED FINDINGS

1. Appeal Of Break Opens

BOTs are described by players as a fun gaming product that provides a quick and easy thrill with the potential to win exciting monetary prizes. Throughout the groups, players are easily able to identify many appealing and exciting features of break opens that set them apart from other gaming products.

The most frequently mentioned appealing features include:

- The “cheap” price (pocket/leftover change can be used for purchase)
- The proceeds go to charity (not known by all participants, but mentioned in all groups)
- Instant: the ticket can be played instantly and winnings are paid out instantly
- They are easy to play (simple play mechanics and straightforward game) and fun (“breaking open” and anticipation/suspense).

This word cloud was created from a compilation of the words and phrases identified by respondents to **describe what makes break opens appealing and exciting**. The bigger the word is, the more times it is mentioned by respondents.



2. Play Behaviour

Play occasions

Most players describe the BOT purchase occasion as being spontaneous. They do not go to the retail location with the planned objective of purchasing BOTs. Often, the purchase is made with leftover change from the purchase of another product (e.g. other lottery tickets, a snack, groceries).

“I go to the store to buy pop and always use my leftover change for break opens.”

“Occasionally I buy scratch tickets and when I do I will get a couple break opens.”

Some heavy players, however, do have consistent purchase occasions – even daily. For these players, purchasing BOTs is habitual.

“I am retired now, so I see break opens as part of my regular entertainment.”

Retail location

Often, players consistently purchase their BOTs at a retail location that is conveniently located either: close to home, where they grocery shop, or at another location they visit regularly. This is especially the case for heavy players, where the purchase is more routine.

- In Toronto and Ottawa some players note that they used to purchase regularly at the same location, but that retailer no longer carries BOTs – among these players purchase frequency has decreased.

“Break opens are becoming increasingly hard to find – I have to search them out...sometimes I give up and buy something else.” (Toronto)

- In Hamilton many players purchase tickets at the hospital. In Sudbury there were the most mentions of playing in Bingo Halls.

Variety of BOTs played

The majority of players (both heavy and light) do not have a preference for the variety of ticket played (theme, prize board, etc.). In most instances, they split the money spent evenly among the variety of tickets available in their retail location. Most that do have a preference choose based on which ticket has the highest top prize, which container of tickets has their preferred level of tickets in it (e.g. very full or half full), or which ticket is most attractive looking (bright colours). Few choose based on theme.

“I play whatever ones are available, it doesn’t matter to me.”

“If there are not many tickets left in the bin, I assume all the winners are gone.”

“If you are paying the same price, and one ticket has a \$100 top prize and one has a \$400 top prize I’m going to go for \$400.”

Amount of BOTs in the container

Regarding the amount of BOTs left in the container, there are mixed perceptions as to what level of tickets is ideal. Some believe a very full container indicates all the winners are left, while others believe that fewer tickets left in the container means they have a better chance of getting a winner, and yet others believe that a middle amount presents the best odds.

However, most players do not pay too much attention to the amount of tickets in the container, but are wary if the container is very low on BOTs.

Winnings

The vast majority of players use “small” winnings (below \$10) to purchase more BOTs. Many note that a \$10 win is significant enough to keep the money. A few players are strict about keeping all winnings.

When discussing the odds of winning, many players express disappointment that they rarely win any significant prizes, if they win at all. Most that won on their first time playing BOTs note that the excitement of that first win is why they continue to play.

Barriers to playing more

Overall, players are generally satisfied with BOTs. However, when asked, they are able to provide areas of dissatisfaction:

- The lack of availability. Some players note that BOTs are no longer available at their retail location and many are not willing to go out of their way to find them.
“A lot of convenience stores don’t have them. And if they’re not in that store, I’ll buy something else.”
- Perceived “bad” odds of winning. In every group, players note (early in the discussion) that it is very hard to win on BOTs. Several note that they do not win as often as they used to.
 - » For some, the overflowing garbage containers in the retail locations that are often full of non-winners add to the perception that BOTs do not offer good odds.
- The need to play and redeem in the same retail location. Almost all players are told/aware they must play BOTs in store. However, several note that they would purchase more tickets if they could bring them home to play, and give them as gifts.
- Lack of awareness that BOTs are a charity product. Some players, previously unaware of the charity connection, note that they will play more often knowing that BOTs are charity products.

3. Information Needs

Lack of product understanding

Overall, there is little knowledge about the specifics of BOTs (somewhat more pronounced among light players), including: specifics about the prize board, awareness of the number of winners at each prize level, the number of tickets in a deal, that all the prizes are in each deal and awarded at that location, the odds of winning, the payout percentage, that BOTs are not an OLG product, and that they are for charity. This lack of understanding stems from the following:

- Many players do not have an interest in these details, and simply want a quick chance to win money
- Many players do not have the opportunity to closely examine the tickets prior to purchase (container is far from the cash or the ticket is not clearly displayed on the container)
 - » Some look at the prize information after the purchase. For example, if the player has matched three symbols and needs to see what they won.
- The information on the ticket is so small they do not notice it (e.g. number of winners)
- The information is not readily available (e.g. odds of winning, number of tickets in a deal)
- The information is not noted/advertised consistently (e.g. for charity, not an OLG product).
 - » Many assume BOTs are an OLG product because they are often sold along side other OLG products in convenience stores and kiosks.

Lack of promotion

There is very little promotion/advertising noticed by players for BOTs. Few retailers are considered to make an effort to “push” BOTs. The little promotion that is noticed includes:

- In some locations, a sign on the door that indicates BOTs are sold at that location
- Mac’s Convenience Stores featuring coloured containers that are considered eye-catching
- The containers being positioned at the cash so they are more noticeable
- A minority of retailers asking customers if they would like to purchase BOTs

There is considered to be more promotion when BOTs are sold in hospitals and legions.

Information wanted

During the discussion, players note that they would like to have the...

- Odds of winning noted on the ticket, or on the container
- Number of tickets in a deal noted on the ticket
- Top prize and number of winners at each prize level more visible on the ticket
- Specific charity clearly noted on the container and ticket
- Information regarding the number of winners left in the container (though many note they would not purchase BOTs if the big winners were not left)
 - » Many note that their retailer regularly tells them that the big winners are left in the container—but players tend to be skeptical of this information, believing that the retailer would tell them this simply to make the sale, regardless of the truthfulness of the claim
 - » Some have experienced retailers who note they are not allowed to provide this information.

Charity

As noted earlier, many players are unaware that BOTs are for charity. Furthermore, there is a lack of awareness that each container represents a single charity.

- However, awareness of the charity connection is higher in Sudbury and Ottawa than in the other cities. In Sudbury, many note that the charity is advertised on the container, and in Ottawa, the prominence of the CNIB custom tickets increases awareness.
- In Hamilton, some players have the perception that only BOTs sold in hospitals, or sold directly by a charitable association, are for charity and that those sold in convenience stores/lottery kiosks are not.

Most players mention that they would like to know the specific charity that the BOT is for and the percentage of profits that go directly to the charity, because this makes the charity claim more “real” and believable.

“I need to know that it is a recognized charity, not some no-name charity – this makes the claim that it is going to charity more believable.”

When the charity connection is discussed, the reaction is very positive – players like knowing that the money is going to a good cause. However, there are mixed reactions regarding whether the charity connection effects purchase frequency. For some players, it increases purchase frequency, and for others it does not have an effect – they are simply playing to win.

- Nonetheless, many players note that the charity connection alleviates some of the disappointment of not winning.

“It means that the money you lose is not wasted... it makes losing easier.”

4. Awareness Of \$1 Break Opens

Awareness of \$1 BOTs

Some players are aware of \$1 tickets and play them regularly, some are aware of them but choose not to play them, and others are unaware of \$1 tickets. Awareness ranged greatly from groups where hardly any players were aware of \$1 tickets (e.g. Kingston- light players), to groups where almost all were aware of them (e.g. Sudbury – heavy players).

“I didn’t even know dollar ones existed. I just play the 50 cent ones.”

“Both \$1 and 50 cent tickets are available at my retailer, I just split my money between them.”

In most cases, heavy players are more aware of \$1 BOTs than light players.

Availability of \$1 BOTs

Respondents were asked to complete a homework assignment that required them to purchase all varieties of BOTs available at their retail location and bring them to the group. Through this assignment, and the discussion, it is clear that much of the lack of awareness of \$1 BOTs is due to their unavailability at many retail locations.

- Availability of \$1 BOTs varies by city.
 - » For example, awareness of \$1 BOTs is highest in Sudbury (where many retailers carry them), and quite low in Toronto and Hamilton where many players noted they had never seen \$1 tickets available.
- For some, who do have \$1 BOTs available at their retail location, the homework assignment was the first time they played the \$1 tickets.

5. Perception Of \$1 Break Opens

Perception of \$1 BOTs

Initially several players do not express enthusiasm when discussing \$1 tickets. This is likely due to their lack of awareness, and their initial reluctance about the higher price. However, after looking at a variety of \$1 BOTs (provided in the groups), many players become more interested in \$1 tickets because of the higher top prizes and more winners at many of the prize levels. Many note that the odds of winning seem better on a \$1 BOT than a 50 cent BOT.

“The \$1 tickets are the exact same as the 50 cent except they have higher prizes and more winners.”

“I would go for the \$2,000 prize.”

“I have never seen prizes this big before on break opens.”

The interest expressed by many players after seeing the selection of \$1 tickets shows that the main barriers to \$1 BOTs is the lack of product knowledge and availability. Once aware of the \$1 tickets many express a desire to play them.

“WOW! I am going to talk to my retailer and tell him to get these.”



6. Prizes

Prize Board

Initially, most participants note that the prize board is not an important factor in the purchase decision for BOTs – for the most part, they do not take the time to examine the prize board in store. However, after being asked to examine various prize boards (during the groups), many change their mind, noticing that some prize boards are more appealing than others.

“If I had time to look, and could see the tickets clearly before purchase, then yes, I would look at the prize structure.”

Players' preference for prize boards is varied. Of the prize boards tested...

- The most participants prefer prize boards that have a lower top prize, but many winners at that prize level (e.g. 100s Gone Wild).
 - » Some players feel that they have a better chance of winning a lower prize amount, and thus avoid the games with the really high top prizes.
 - ❖ Some players expressed concern because they believed they could not redeem a very high prize such as \$2,000 in store, and thus noted they would avoid a ticket with such a high prize because of the inconvenience.
- Many players, however, are drawn to games with the highest jackpot (e.g. Mega Rich).
 - » The top prize, for many players, is the only information they initially look at on the ticket.
- Still others, choose prize boards that give a balanced prize distribution (a couple winners at the top prize level and several winners at the mid level prizes).
 - » These players feel it is unlikely they will win a top prize, and thus look for more chances to win a mid level prize.

The odds

- Players are not aware of the odds for winning on a BOT. Expectations of what the odds are vary greatly (e.g. 1 in 5 to 1 in 1,000).
- When examples of the odds are given for the \$1 BOT prize boards tested, most participants react positively, because the odds are better than expected.
- When the odds are displayed most players would choose to play \$1 BOTs over 50 cent BOTs because they provide “better” odds to win a higher prize.
 - » Some players who were initially opposed to the \$1 BOT would choose to purchase it over the 50 cent BOT, once being shown the odds.

7. The Ideal \$1 Ticket

Respondents were asked to describe the **ideal \$1 break open ticket design** that communicates extra value over the 50 cent ticket. This exercise was completed both before and after the potential \$1 ticket enhancements were discussed. The ideas/enhancements that players commonly note as being appealing include a ticket that...

- Displays the odds of winning
- Has a much higher top prize (than the 50 cent tickets)
- Has more winners at the top prize level (than the 50 cent tickets)
- Has more prizes overall (than the 50 cent tickets)
- Is larger in size (than the 50 cent tickets) and still fits in the player's hand
- Indicates that the money goes to charity (and the specific charity it goes to)
- Has more windows/pull tabs (than the 50 cent tickets)
- Is less cluttered/busy looking than the current tickets
- Is recyclable
- Has the ability to be taken out of the store and cashed at any break open retail location (eliminating the need to play quickly and accommodating gifting).

Other ideas/enhancements that were mentioned by *some* players as ideal include a ticket that...

- Is a different shape
- Has the ability to win in multiple directions (vertically, horizontally, diagonally)
- Has a bonus/wild symbol
- Has the ability to win more than once on each ticket
- Has a variety of themes (e.g. holidays/occasions)
- Has prizes beyond cash, such as electronics, trips, etc.

8. Price Increase

Reaction to the price increase (50 cents ➔ \$1)

Overall, the reaction to the possibility of a BOT price increase is mildly positive.

After players are familiarized with the \$1 ticket, interest is generated (bigger prizes, more winners, etc.), and thus the potential price increase is not received negatively by most players. Furthermore, the prospect of ticket enhancements that differentiate the \$1 BOTs and add value, increase positive perceptions.

- Nonetheless, some players do express disappointment at the possibility that the 50 cent BOT could no longer be available. The main areas that lead to this disappointment are the “cheapness” of the 50 cent BOT, and the realization that with the \$1 BOT, players may not have/purchase as many tickets to “pop open.”

“It would break my heart! I like 50 cent tickets.”

- Some express concern that \$1 is no longer simply “spare change” – it is more of an investment.

“I would think a little more about spending \$1 than 50 cents.”

Effect of a price increase on dollars spent

Respondents were asked to indicate the amount of money they would spend if 50 cent BOTs were no longer available.

- If \$1 BOTs were to remain as they currently are, the majority of players say they would spend the same dollar amount as they currently spend. Several would spend less, and a few would spend more than they currently spend.
- If \$1 BOTs were to be enhanced with some of the ideas tested during the groups (e.g. larger size, more windows, etc.) then the vast majority of players say they would spend the same amount as they currently spend, and several would spend more. Very few would spend less.
 - » Light players are more likely than heavy players to spend more if new enhanced versions of \$1 BOTs were available.

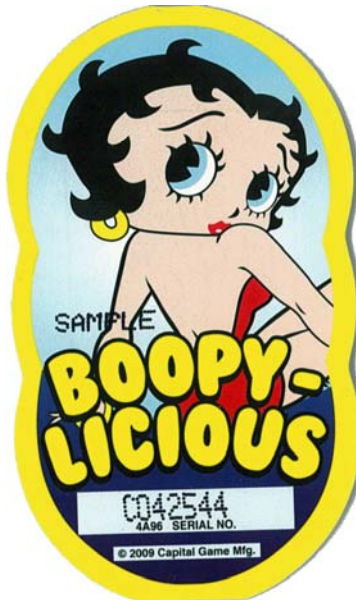
9. Reactions to Potential Ticket Enhancements

Overall reaction to the potential ticket enhancements

Most players react positively to the idea of the \$1 BOT being enhanced to differentiate it from the 50 cent ticket and to add more value for the higher price point.

The most obvious, and frequently mentioned enhancements, are higher prizes, more winners and better odds. Moving beyond these enhancements players react most positively to the idea that the \$1 BOT should be larger in size than the 50 cent ticket. Given the larger size, the idea of having additional windows is also very well received. More windows signify more chances to win, and more fun.

Several other potential enhancements are well received, but do not garner as consistently positive feedback as those listed above.



Different shapes

The idea of having different shaped \$1 BOTs garners mixed reactions from players.

- Some – especially light players – react positively to the shapes, noting that they are eye catching and fun. Others – especially heavy players – express concerns centered around the non-traditional shape (they express nostalgia about the traditional size and shape), and how it would sit in the hand.

The shapes that are most well received include the “peanut/bee” shape, and the “racecar/slot machine” shape as they fit easily in the hand, are unique, and are not too large.

Reaction to the “Kaboom/Tilt” shape is mixed. Some really like that it is very unique, while others find it too large and awkward to hold.

Other ideas mentioned for shapes include: holiday themes (e.g. Christmas stocking, Christmas tree, heart, etc.), a Maple Leaf, and luxury symbols (e.g. gold bar, diamond, etc.).



Different shapes (cont'd)

Advantages of different shapes

- Featuring different shapes would differentiate \$1 BOTs
- Having a single picture on one side of the ticket is considered eye catching and “clean” looking (less cluttered)
 - » Another advantage of featuring a single picture on the front is that it emphasizes the theme of the ticket
- The style of the BOT looks “new and improved” – as if “more effort” has been put into the graphics and design.

Disadvantages of different shapes

- Some players express concern that some of the shapes and graphics (e.g. Bee, Betty Boop) are too juvenile for a gambling product – that they would attract children and make the product seem child friendly.

“I really like them. The only thing is that I’m thinking about kids going into stores with their parents and these tickets looking too fun and appealing for them.”

- The current design has one window, whereas most players prefer the ability to pop open several windows.
- Some shapes do not fit as comfortably in the palm of the player’s hand as the traditional rectangular shape. This is especially a concern expressed about the Kaboom/Tilt shape.
 - » If the ticket does not fit comfortably in the hand, it makes it more difficult to quickly pop open the pull tabs all at once – as many players do.

Themes

Having various BOT themes is not a “new” idea, and therefore, the idea of having specific \$1 BOT themes does not create excitement. Beyond holiday themes, players struggle to generate ideas for new themes that would add value to the \$1 ticket.

- In many groups the idea of having BOTs for various holidays, including Christmas, Valentine's Day, Halloween, St. Patrick's Day and birthdays is well received. However, this idea loses some appeal when consideration is given to the fact that the tickets do not lend themselves to gifting (cannot be taken out of store).

In Hamilton, the idea of having charity specific themes was well regarded and generates interest. The players note that symbols that relate directly to the charity (logo, children, etc.) would be appealing because it helps drive awareness of the charity and reminds the player that they are donating to a good cause. The appeal of this idea is likely heightened because of the prominence of hospital BOTs in this region.



Bonus/wild symbol

The idea of \$1 BOTs featuring a bonus symbol (if the symbol is found in a pop open window, the associated prize amount is won) is well received by most players. Players note that it is an extra chance to win, and this extra chance adds value to the \$1 BOT. Those that are familiar with bonus symbols on scratch tickets tend to be particularly positive about this potential enhancement.

“It offers extended play because it is an extra chance to win, you hold out for that one last shot at winning.”

The minority of players that express concerns about the bonus symbol note that they worry that the bonus symbol may go unnoticed, given that many players do not closely look at the prize structure.

- A few believe that the bonus symbol would unnecessarily complicate the game – they prefer the ease of simply matching symbols.

A few mention that a bonus *window* that offers an additional chance to win would also be of interest.

Larger size ticket

The idea of having the \$1 BOT be larger in size than the 50 cent BOT is the most well received of all the potential enhancements tested. Players consistently note, across all cities, that the larger ticket size indicates that the player is getting more for their money.

Additional benefits of the larger size include that it:

- Differentiates the \$1 BOT from the 50 cent

“It distinguishes it from the 50 cent...it just stands out.”

- Provides room to make key information more visible on the ticket

“For the older population this would make it much easier to read the ticket and see the symbols... I find it hard to see the fine print.”

- Will allow the ticket design to be less cluttered.



Despite the interest in a larger sized ticket, it is important that the \$1 BOT remain small enough that it fit comfortably in the palm of the player's hand. A few note that the size of a playing card is ideal.

One concern expressed with the larger ticket is that it will create more waste. Players are already sensitive to the overflowing garbage bins full of non-winning BOTs, and the larger size ticket would add to this issue.

Win in multiple directions

Respondents were shown a concept that allows players to match 3 symbols in multiple directions (horizontally, vertically, and diagonally). Overall reaction to this concept is mixed.

- Some players like this potential enhancement because it provides added play value (takes longer to evaluate if the ticket is a winner) and it is perceived to add more “chances” to win.
- Those that like this idea note that it adds value to the \$1 BOT.

“It makes it more fun, because you have to look at the game more, and it gives you more chances.”



Win in multiple directions (cont'd)

Concept concerns

- Some respondents express concern (based on the concept print-out) that there would only be 1 or 3 pull tabs per ticket. Most players feel that getting fewer than 5 pull tabs diminishes the value offered. However, it is recognized that with the current design, it may not be possible to offer more than 3 pull-tabs for this game.
- Some players note that the ability to win in multiple directions is unnecessarily overcomplicating the game. Part of the appeal of BOTs is their simplicity, and they do not want that to be lost.

“I’m used to the traditional way of winning horizontally – it is just easier to read.”

- Some players require a red line to indicate a winner – as is shown in the concept – as this ensures that they would not overlook a winning ticket.
 - » However, with 3 pull tabs, some express concern that the player could tell on the first pull whether they had won (vertically or diagonally), because they could see the beginning of the red line – eliminating some of the anticipation.

More windows (strip ticket and 4 x 25 cent)

The ticket examples shown during the groups that feature many windows (15-20) are seen as providing excellent play value. The prospect of being able to pop open many windows is seen as fun, unique, and providing many more chances to win. However, there are also disadvantages to this idea:

- Again, some view the very large ticket size as being a “waste” of paper, especially since BOTs are not recycled
- The current ticket examples feature lower prizes than are expected for a \$1 ticket, minimizing the perceived value
- These tickets (especially the 4 x 25 cent ticket) may take too long to play in store, and thus would be more viable if tickets could be brought home, given as gifts, etc.

“Most of the time you can’t take them out of a store so it would be more of a pain to open them at the store counter.”



More windows (cont'd)

- The 4 x 25 cent ticket is somewhat awkward to play when left as a large sheet, because the windows cannot be quickly popped open using one hand.
 - » The strip ticket does not have the same play mechanics drawback – as it only has a single row of windows.

“The big one seems awkward to hold and open so I think the strip would be more comfortable and easier.”

Overall, the ticket examples shown during the groups are well received upon first viewing, but lose ground when upon close examination the above drawbacks are realized. Nonetheless, the overall idea of having more windows on a \$1 BOT is very well received, and thought to add additional value to the ticket. Many players note that they would be pleased with one or two additional windows on the traditional style ticket.



Ability to win multiple times on a single BOT

The ability to win multiple times on a ticket, is currently featured on some \$1 BOTs. However, very few players are aware of this feature, and in the group few notice this feature when the ticket samples are distributed. This is likely due to the very small font size that indicates that the ticket may contain multiple winners.

Most players like this potential ticket enhancement as they feel it gives them more chances to win. A few players, however are skeptical, noting that in terms of the odds, the fact that one ticket can have two winners decreases their overall odds on other tickets.



10. Additional Findings

Regional similarities and differences

Overall, product perceptions and reaction to the potential price increase are very consistent across the regions visited. Reactions to the potential ticket enhancements are also similar, as is the lack of understanding of the product. However there are some regional differences, the most pronounced of which are as follows:

- There is more mention of gambling in Sudbury where participants discuss visiting the casino and bingo halls, and some players mention playing gaming products daily. This may help explain the popularity of BOTs in this region.
- There is more awareness of the charity connection in Sudbury and Ottawa
- There is less awareness of \$1 BOTs in Toronto and Hamilton
- There is more prominence of BOTs sold in hospitals in Hamilton
- Hamilton is the only city where BOTs sold in bars were mentioned (note that respondents were recruited to purchase BOTs primarily in convenience stores and lottery kiosks).

The pull tab side of the ticket

Through discussion it was suggested that the pull tab side of BOTs could be utilized more. Many players do not examine the front of the ticket, but do spend time looking at the pull tab side of the ticket (while popping open the windows). Therefore, this side of the ticket could contain pertinent information that players have expressed a desire to know. Information could include:

- Charity name (like CNIBs custom ticket), or to avoid a custom ticket it could just generally indicate that the ticket is for charity
- The number of tickets in a deal or the odds of winning
- If the game has a special feature (e.g. bonus symbol) this could be noted.



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