



**New Hampshire Lottery
KENO 603 Business Survey**

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The University of New Hampshire
Survey Center

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Executive Summary

The University of New Hampshire Survey Center conducted a survey for the New Hampshire Lottery Commission to better understand how well Keno has integrated with New Hampshire businesses. An email invitation was sent to all one hundred fifty-eight (158) KENO 603 retailers on September 26th, 2018. Paper surveys were mailed to those who did not complete the survey online, and phone calls were placed to those who did not respond to the mailed paper version of the survey. Responses were collected through October 28, 2018. Overall, 105 KENO 603 retailers completed the survey, yielding a response rate of 66%.

The following figures display survey results including any demographic differences, Appendix A contains detailed tabular results, Appendix B contains open-ended responses, and Appendix C contains the survey instrument.

Key Findings

Nearly two-thirds of responding KENO 603 retailers say the main reason they decided to offer it was to increase revenue or the number of customers at their business. Fewer say they decided to offer it because customers requested it, to improve the customer experience, or to compete with similar gambling options elsewhere.

About three-quarters of responding KENO 603 retailers agree that KENO 603 has brought in new customers and increased their total number of customers, as well as encouraging their customers to spend more time and money at their business.

The vast majority of responding KENO 603 retailers say that offering KENO 603 has had a very or somewhat positive effect on their customers' overall experience and nearly half say that offering KENO 603 has increased their business's food and beverage revenues. Just over half of those who say their food and beverage revenues has increased estimate that they have increased 1% to 10% as result of KENO 603.

Four in five responding KENO 603 retailers report no negative impact on their business as a result of offering KENO 603 and one-third say there is nothing the NH Lottery Commission could do to improve their experience with it. Those who do have suggestions of what could improve their experience most frequently mention more marketing or promotions, an increased share of revenue, or changes to the structure of the game.

Nearly two-thirds of responding KENO 603 retailers believe the 8% sales commission they receive is fair while a quarter don't think it is fair.

One in five KENO 603 retailers say their experience with KENO 603 has fallen short of their expectations.

Four in five responding KENO 603 retailers say they are very likely to renew their license and continue offering KENO 603 while nearly all of the rest say they are somewhat likely to do so.

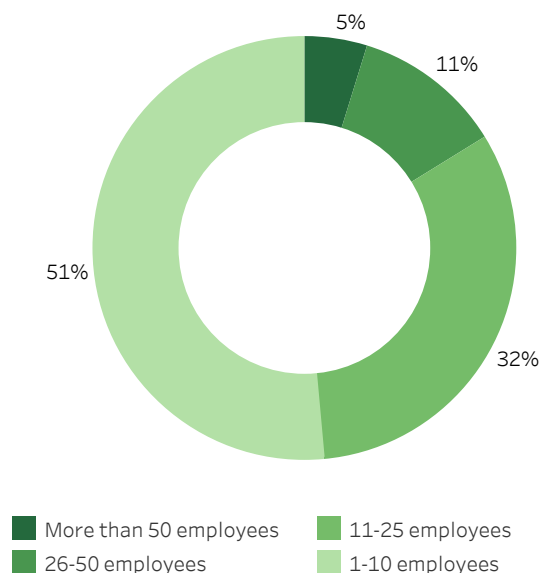
When asked how likely they are to recommend offering KENO 603 to another bar or restaurant in New Hampshire, just over half of responding KENO 603 retailers are promoters (gave a score of 10 or 9 on a 0-10 scale) while one in five are detractors (gave a score of 6 or lower). When asked why they would be likely to recommend it, promoters most often say it is because KENO 603 provides additional revenue, while others say it improves their customers' experience or is easy to offer.

Just over half of responding KENO 603 retailers say that knowing that the profits from KENO 603 help fund full-day kindergarten in New Hampshire makes them more likely to continue offering KENO 603.

Demographics

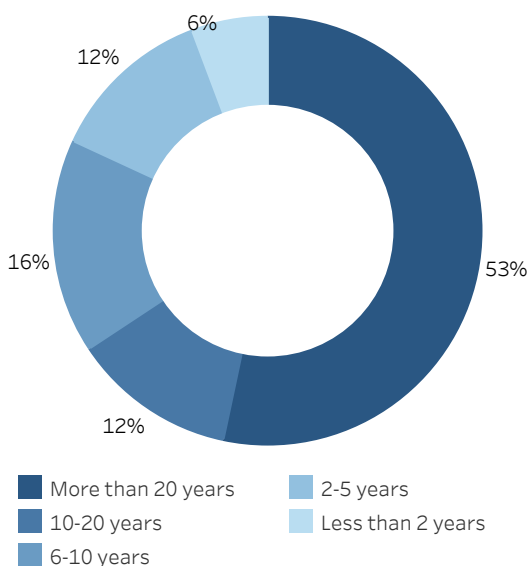
Half of responding KENO 603 retailers say that their business has 1 to 10 employees, one-third (32%) say they have 11 to 25 employees, 11% have 26 to 50 employees, and 5% have more than 50 employees (Figure 1).

Figure 1: Number of Employees



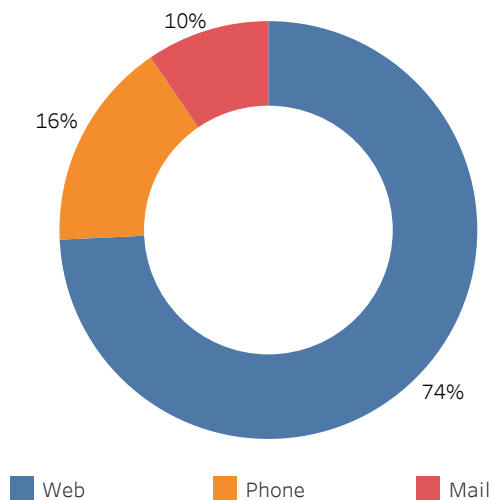
Six percent of responding KENO 603 retailers say that their business has been operating in New Hampshire for less than 2 years, 12% have been operating for 2 to 5 years, 16% have been operating for 6 to 10 years, 12% have been operating for 10 to 20 years, and just over half (53%) say their business has been operating in the state for more than 20 years (Figure 2).

Figure 2: Number of Years Operating in New Hampshire



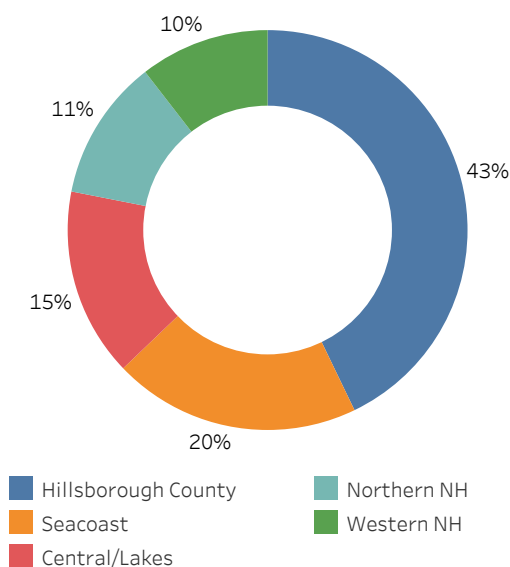
Three-quarters (74%) of responding KENO 603 retailers completed the survey on the web, 16% completed it by phone, and 10% completed it through the mail (Figure 3).

Figure 3: Method of Completing Survey



Forty-three percent of responding KENO 603 retailers say their business is located in Hillsborough County, 20% are located on the Seacoast, 15% are located in the Central/Lakes Region, 11% are located in Northern NH, and 10% are located in Western NH (Figure 4).

Figure 4: Region of Business



Why Offer KENO 603

Nearly two-thirds of responding KENO 603 retailers (63%) say the main reason they decided to offer KENO 603 was to increase revenue or the number of customers. Seventeen percent decided to offer it because of customer demand or suggestion, 7% did it to improve the customer experience, 6% did so to compete with similar options elsewhere, 2% say they have always offered gambling options, and 5% mention another reason (Figure 5a).

Figure 5a: What is the main reason you decided to offer KENO 603? (coded)

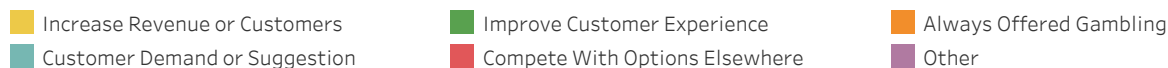
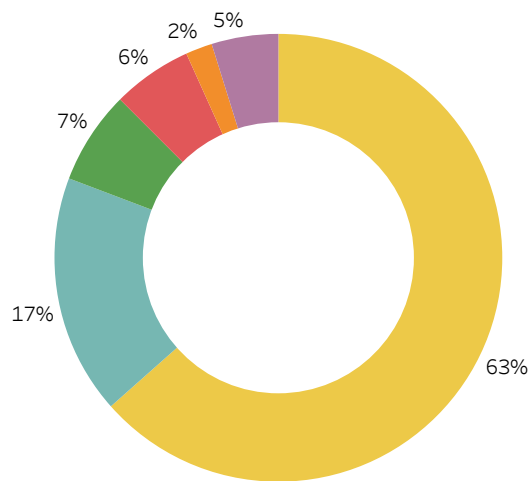
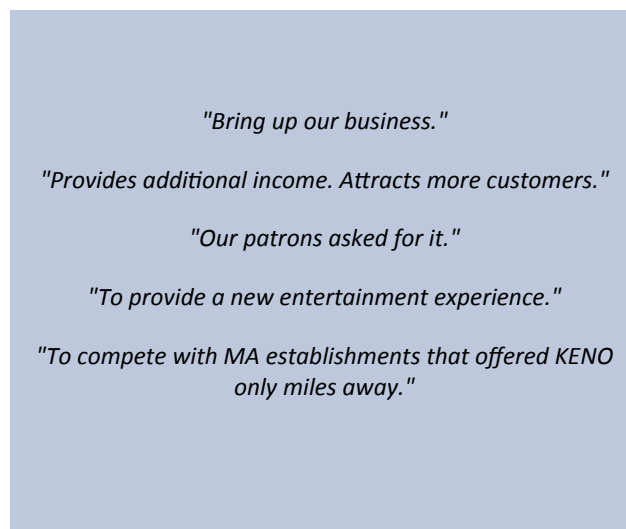
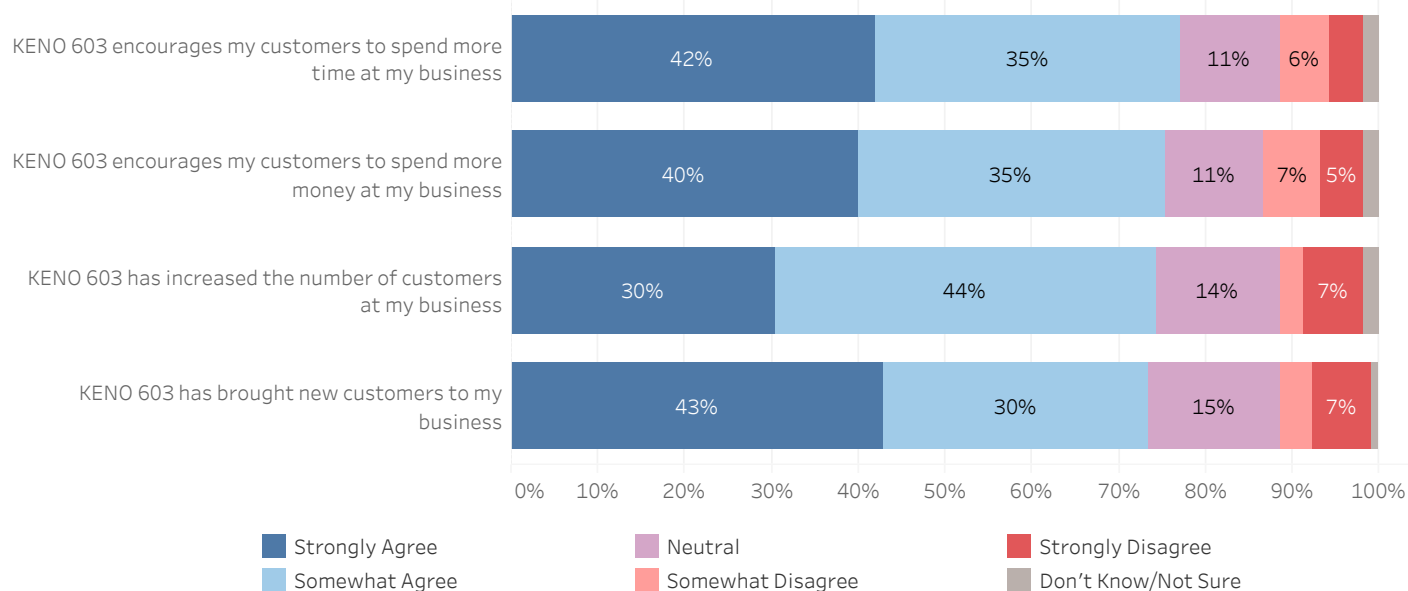


Figure 5b: Main Reason Offer KENO 603 - Selected Quotations



About three-quarters of responding KENO 603 retailers strongly or somewhat agree that KENO 603 encourages their customers to spend more time at their business (77%), that it encourages their customers to spend more money at their business (75%), that it has increased the number of customers at their business (74%), and that KENO 603 has brought new customers to their business (73%). Only around one in ten disagree with each of these statements (Figure 6a).

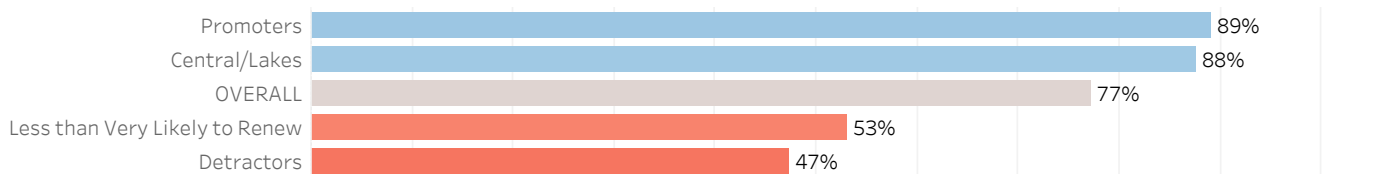
Figure 6a: Please indicate whether you agree or disagree with the following statements about the impact of KENO 603 on your business



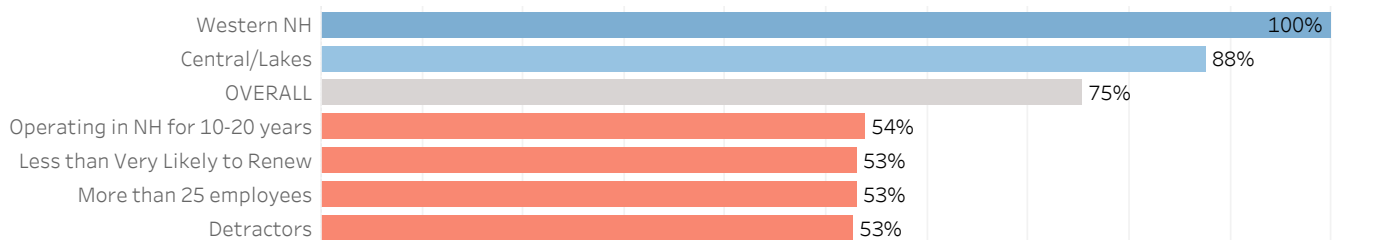
- Respondents who are promoters (gave a score of 10 or 9 when asked how likely they are to recommend that a similar business offer KENO 603) of KENO 603 and those whose business is located in the Central/Lakes Region are more likely than others to strongly or somewhat agree that KENO 603 encourages their customers to spend more time at their business. Those who are less than very likely to renew their KENO 603 license and detractors (gave a score of 6 or lower when asked likelihood of recommending) are less likely to agree with this.
- Respondents whose business is located in Western NH or the Central/Lakes Region are more likely than others to say that KENO 603 encourages their customers to spend more money at their business. Those whose business has been operating in NH for 10 to 20 years, those with more than 25 employees, those who are less than very likely to renew their KENO 603 license, and detractors are less likely to agree.
- Respondents whose business have been operating in NH for 5 years or less, detractors, and those who are less than very likely to renew their KENO 603 license are less likely than others to strongly or somewhat agree that KENO 603 has increased the number of customers at their business.
- Respondents whose business has been operating in NH for 6 to 10 years and those whose business is located in the Central/Lakes Region or in Northern NH are more likely than others to strongly or somewhat agree that KENO 603 has brought new customers to their business. Those whose business has been operating in NH for 5 years or less, detractors, and those who are less than very likely to renew their KENO 603 license are less likely to agree with this (Figure 6b).

Figure 6b: Strongly or Somewhat Agree - By Selected Demographics

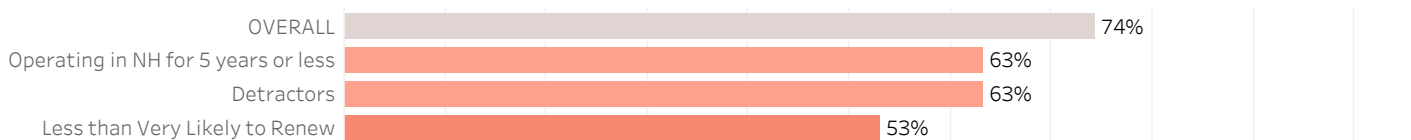
KENO 603 encourages my customers to spend more time at my business



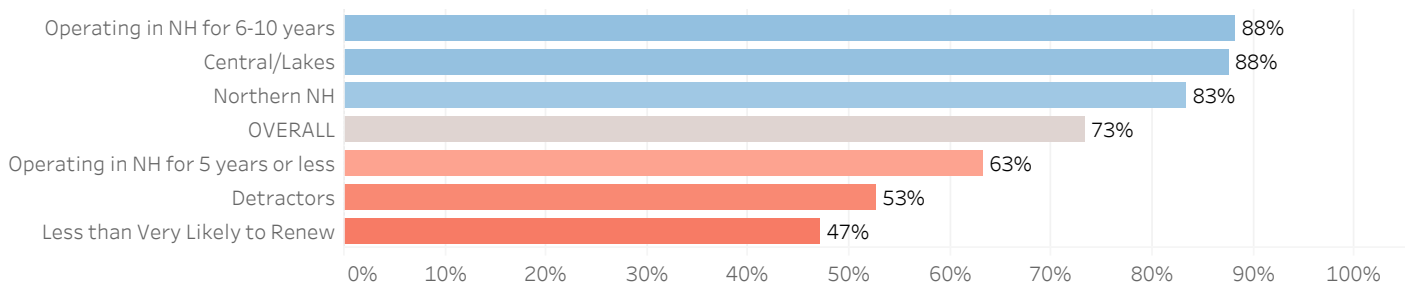
KENO 603 encourages my customers to spend more money at my business



KENO 603 has increased the number of customers at my business



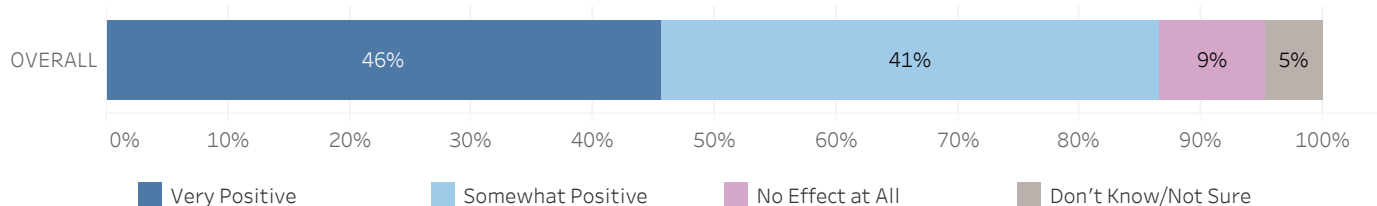
KENO 603 has brought new customers to my business



Customer Experience

Forty-six percent of responding KENO 603 retailers say that offering KENO 603 has had a very positive effect on their customers' overall experience, 41% say it has been somewhat positive, 9% say it has had no effect at all, and 5% don't know or are unsure. No respondents say that offering KENO 603 has had a negative effect on their business (Figure 7a).

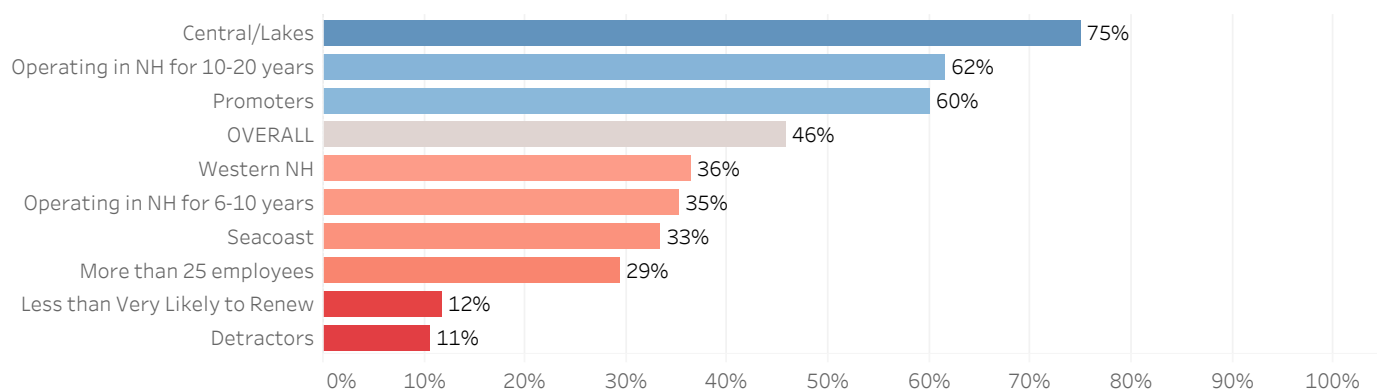
Figure 7a: What effect has offering KENO 603 had on your customers' overall experience?



- Respondents whose business is located in the Central/Lakes Region, those whose business has been operating in NH for 10 to 20 years, and promoters are more likely than others to say that offering KENO 603 has had a very positive effect on their customers' overall experience. Those whose business is located in Western NH or the Seacoast, those whose business has been operating in NH for 6 to 10 years, those who have more than 25 employees, those who are less than very likely to renew their KENO 603 license, and detractors are less likely to say KENO 603 has had a very positive effect on their customers' overall experience (Figure 7b).

Figure 7b: Effect of KENO 603 on Customers' Overall Experience - By Selected Demographics

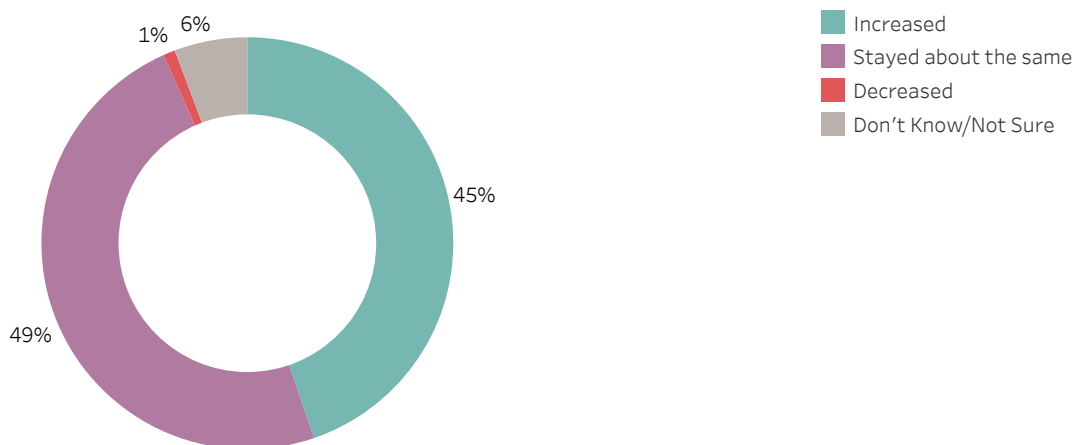
Very Positive



Impact of KENO 603

Forty-five percent of responding KENO 603 retailers say that offering KENO 603 has increased their business's food and beverage revenues. Nearly half (49%) say their food and beverage revenues have stayed about the same after introducing KENO 603, 1% say they have decreased, and 6% don't know or are unsure (Figure 8a).

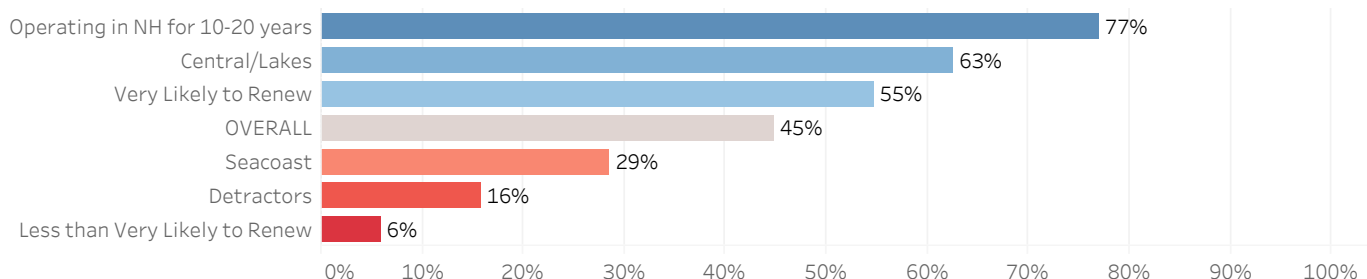
Figure 8a: What effect has KENO 603 had on your business's food and beverage revenues?



- Respondents whose business has been operating in NH for 10 to 20 years, those whose business is located in the Central/Lakes Region, and those who are very likely to renew their KENO 603 license are more likely than others to say that offering KENO 603 has increased their business's food and beverage revenues. Detractors, those whose business is located on the Seacoast, and those who are less than very likely to renew their KENO 603 license are less likely to say their food and beverage revenues has increased (Figure 8b).

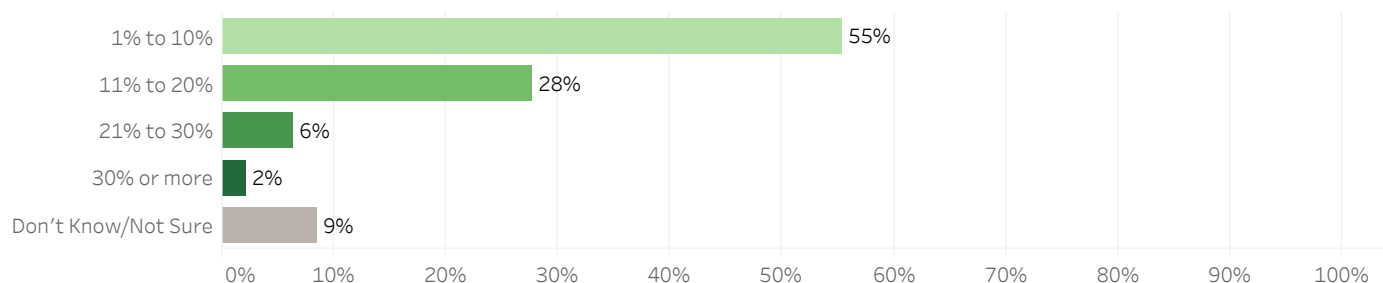
Figure 8b: Effect of KENO 603 on Business's Food & Beverage Revenues - By Selected Demographics

Increased



Among those who say their business's food and beverage revenues has increased as a result of offering KENO 603 (N=47), just over half (55%) think their revenues has increased 1% to 10%, 28% think revenues have increased 11% to 20%, 6% think revenues have increased 21% to 30%, 2% think revenues have increased by 30% or more, and 9% don't know or are unsure (Figure 9).

Figure 9: About how much do you think your business's food and beverage revenues have increased since getting KENO 603?



Four in five responding KENO 603 retailers (81%) say KENO 603 has not had any negative impact on their overall business. Four percent each say it entails more work for their employees, that it provides no new revenues, or has maintenance issues while 7% mention another negative aspect of offering KENO 603 (Figure 10a).

Figure 10a: Has offering KENO 603 had any negative impact on your overall business? (coded)

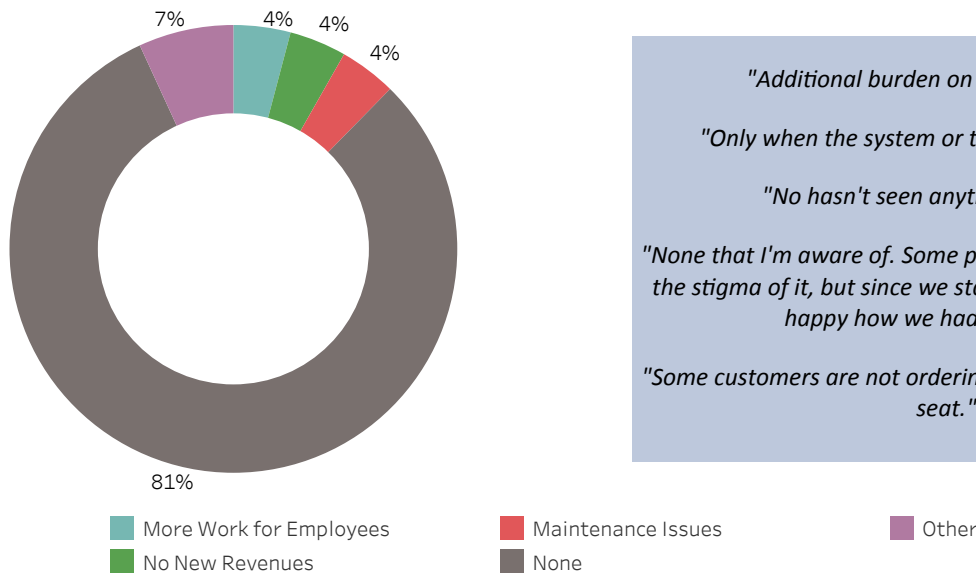


Figure 10b: Any Negative Impact Offering KENO 603 - Selected Quotations

"Additional burden on the bartenders."

"Only when the system or the kiosk goes down."

"No hasn't seen anything negative."

"None that I'm aware of. Some patrons were worried about the stigma of it, but since we started it a lot of people are happy how we had it installed."

"Some customers are not ordering anything but taking up a seat."

Thirty-five percent of responding KENO 603 retailers say there is nothing the NH Lottery Commission could do to improve their experience offering KENO 603. Fourteen percent would like more marketing or promotions, 8% each would like an increased share of the revenue or changes to the structure of the game, 6% would like the kiosk to make change or provide better accounting, 5% would like more or better displays of the game, 4% would like improved system reliability, 15% mention something else they would like, and 5% don't know or are unsure (Figure 11a).

Figure 11a: What, if anything, could the NH Lottery Commission do to improve your experience in offering KENO 603? (coded)

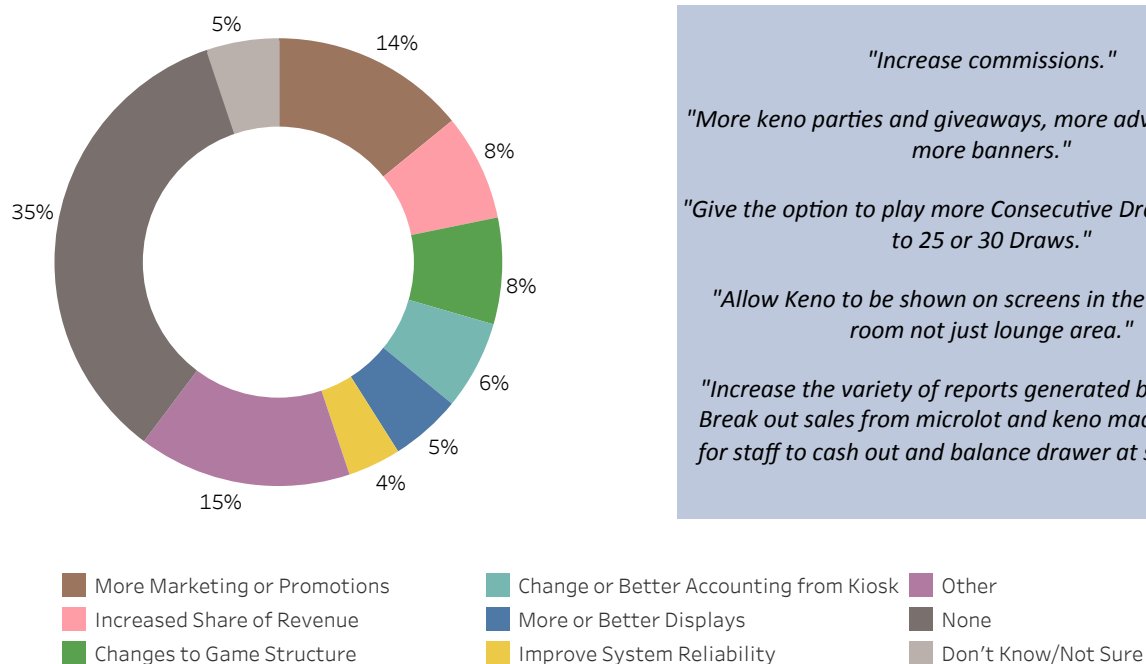


Figure 11b: What Could Improve Experience Offering KENO 603 - Selected Quotations

"Increase commissions."

"More keno parties and giveaways, more advertising for us, more banners."

"Give the option to play more Consecutive Draws, increase it to 25 or 30 Draws."

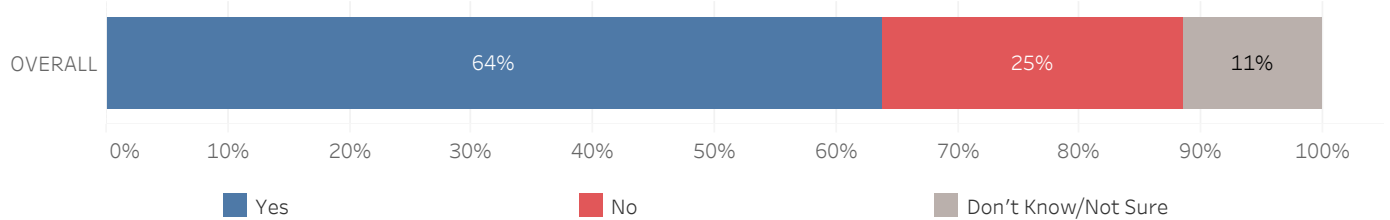
"Allow Keno to be shown on screens in the main dining room not just lounge area."

"Increase the variety of reports generated by the system. Break out sales from microlot and keno machine to allow for staff to cash out and balance drawer at shift change."

Keno Commission

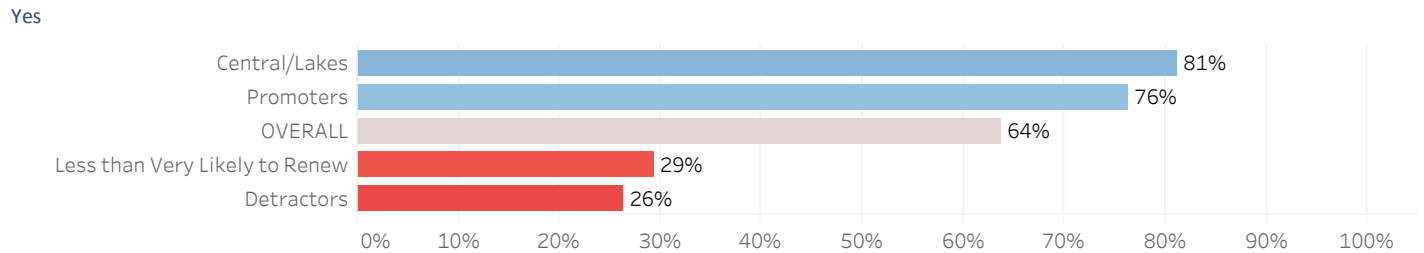
Nearly two-thirds of responding KENO 603 retailers (64%) say that they find the 8% sales commission paid to them to be a fair commission. A quarter of respondents (25%) do not believe this is a fair commission while 11% don't know or are unsure (Figure 12a).

Figure 12a: The Lottery pays an 8% sales commission for KENO 603. Do you find that this is a fair sales commission based on your experience?



- Respondents whose business is located in the Central/Lakes Region and promoters are more likely than others to find the 8% sales commission paid to them to be fair while those who are less than very likely to renew their KENO 603 license and detractors are less likely to believe this commission is fair (Figure 12b).

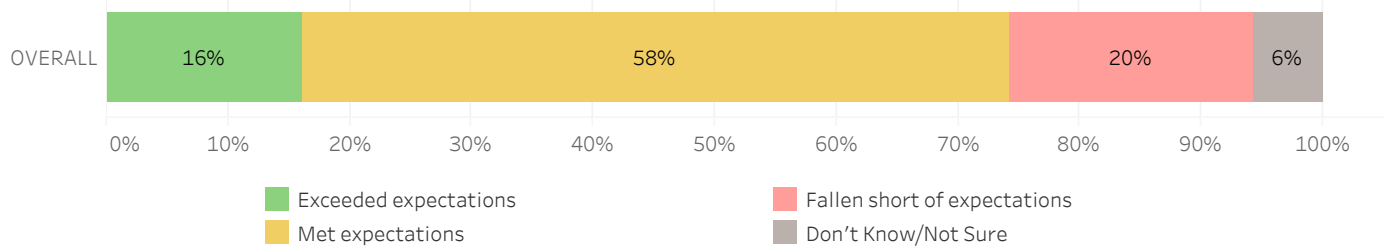
Figure 12b: 8% Sales Commission Fair - By Selected Demographics



Overall Experience

One in six responding KENO 603 retailers (16%) say that their experience with KENO 603 has exceeded their expectations, more than half (58%) say it is has met their expectations, 20% say it has fallen short of expectations, and 6% don't know or are unsure (Figure 13a).

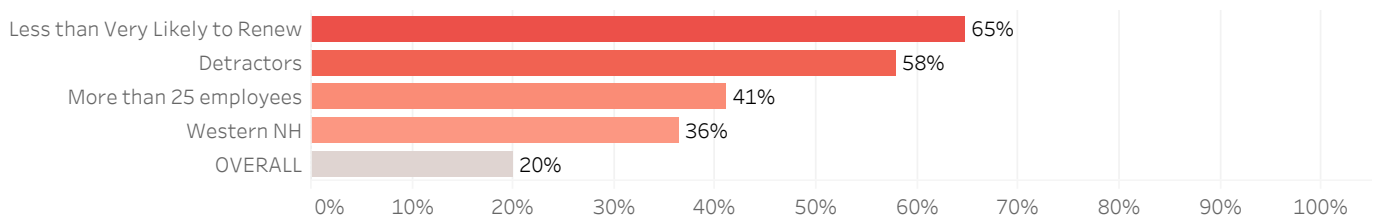
Figure 13a: How has your experience with KENO 603 compared to your expectations?



- Respondents who are less than very likely to renew their KENO 603 license, detractors, those with more than 25 employees, and those whose business is located in Western NH are more likely than others to say that their experience with KENO 603 has fallen short of their expectations (Figure 13b).

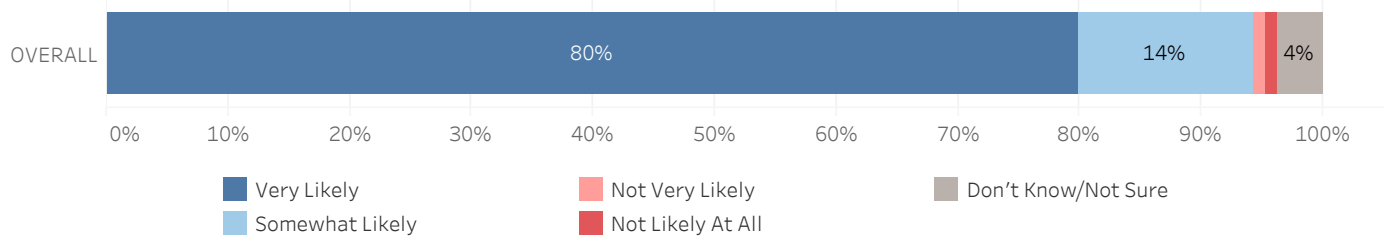
Figure 13b: How KENO 603 Compares With Expectations - By Selected Demographics

Fallen short of expectations



Four in five responding KENO 603 retailers (80%) say they are very likely to renew their license and continue offering KENO 603 at their business in the future. Fourteen percent say they are somewhat likely to do so, 1% each say they are not very likely or not likely at all, and 4% don't know or are unsure (Figure 14a).

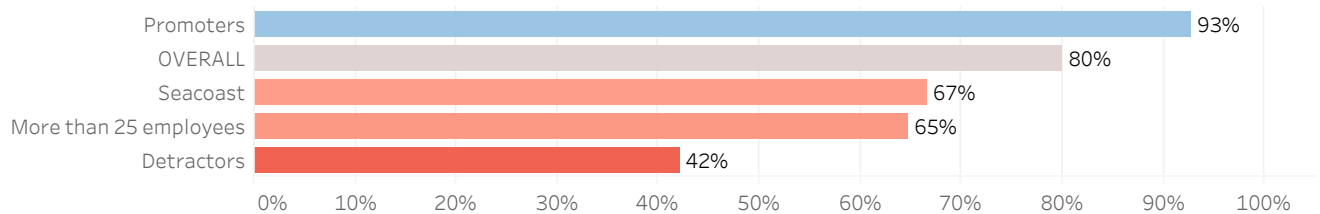
Figure 14a: How likely are you to renew your license and continue offering KENO 603 at your business in the future?



- Promoters are more likely than others to say they are very likely to renew their license and continue offering KENO 603 at their business in the future while those whose business is located on the Seacoast, those with more than 25 employees, and detractors are less likely to say so (Figure 14b).

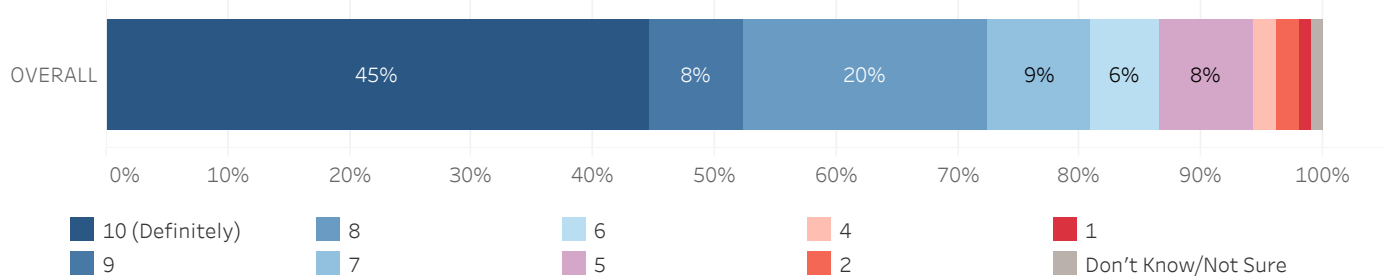
Figure 14b: Likelihood of Renewing License - By Selected Demographics

Very Likely



When asked how likely they are to recommend offering KENO 603 to another bar or restaurant in New Hampshire similar to theirs, 52% of responding KENO 603 retailers are promoters (gave a score of 10 or 9), 29% are passives (gave a score of 8 or 7), and 18% are detractors (gave a score of 6 or lower). According to Net Promoter Score parameters the Net Promoter Score (promoters minus detractors) is +34% (Figure 15).

Figure 15: On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how likely you would be to recommend offering KENO 603 to another bar or restaurant in New Hampshire similar to yours



Among promoters (N=55), 43% say they would be likely to recommend KENO 603 to a similar business because of the increased revenue, 14% mention that it improves the experience of their customers, 12% mention how easy KENO 603 is to offer, 8% say offering it has no downside, and 22% mention another reason (Figure 16a).

Figure 16a: Why would you be likely to recommend KENO 603 to a similar business? (coded)

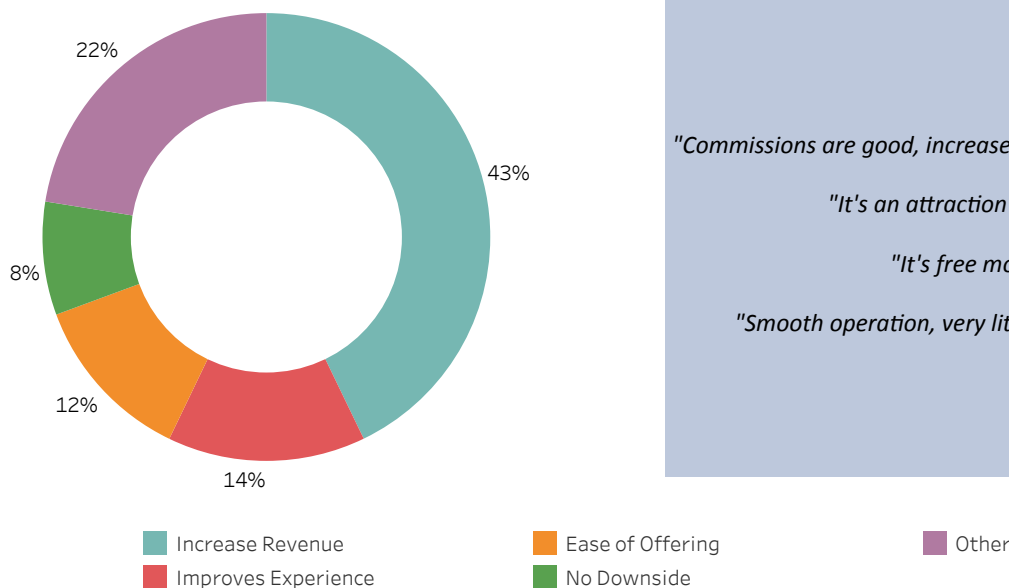


Figure 16b: Why Would You Be Likely to Recommend KENO 603 - Selected Quotations

"Commissions are good, increases customers and business."

"It's an attraction for guests."

"It's free money."

"Smooth operation, very little work to operate."

Figure 17: Why do you feel this way? [Among Detractors] - Selected Quotations

"It has not been a real boom here. Technical issues with the equipment are common."

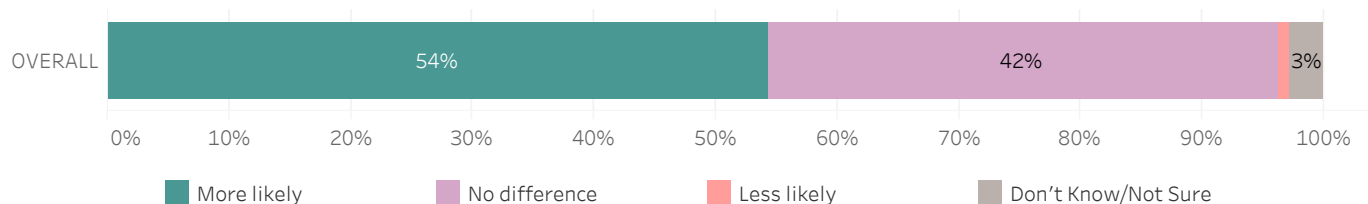
"It's really just in the way. Machine regularly won't accept bills - waiting to recover initial outlay."

"Profits less than expected, work more than we thought"

"The opportunity for theft and loss on top of the lack of controls built into the software strongly outweigh any possible additional revenue from the system."

Just over half of responding KENO 603 retailers (54%) say that knowing that the profits from KENO 603 help fund full-day kindergarten in New Hampshire makes them more likely to continue offering KENO 603, 42% say it makes no difference, 1% say it makes them less likely to continue offering KENO 603, and 3% don't know or are unsure (Figure 18).

Figure 18: The profits from KENO 603 help fund full-day kindergarten in New Hampshire. Does knowing this make you more likely to continue offering KENO 603, less likely, or does it make no difference?



Appendix A

Q1#: What is the main reason you decided to offer KENO 603? (coded)

		<u>Always Offered Gambling</u>	<u>Compete With Options Elsewhere</u>	<u>Customer Demand or Suggestion</u>	<u>Improve Customer Experience</u>	<u>Increase Revenue or Customers</u>	<u>Other</u>	<u>N</u>
OVERALL	2018	2%	6%	17%	7%	63%	5%	104
Number of Employees	1-10 employees		2%	19%	7%	65%	7%	54
	11-25 employees	3%	9%	21%	6%	58%	3%	33
	26-50 employees	8%	8%		8%	75%		12
	More than 50 employees		20%	20%		60%		5
Years Business Operating in NH	Less than 2 years			67%		17%	17%	6
	2-5 years		8%		8%	85%		13
	6-10 years		6%	18%	12%	65%		17
	10-20 years	8%	23%	8%	8%	54%		13
	More than 20 years	2%	2%	18%	5%	65%	7%	55
Recommend	Detractors		16%	16%		63%	5%	19
	Passives	3%	3%	23%	3%	63%	3%	30
	Promoters	2%	4%	15%	11%	63%	6%	54
Likelihood to Renew License	Less than Very Likely		6%	19%	6%	56%	13%	16
	Very Likely	2%	6%	17%	7%	64%	4%	84
Method of Completing Survey	Mail			22%	11%	67%		9
	Phone	6%	6%	6%	12%	65%	6%	17
	Web	1%	6%	19%	5%	63%	5%	78
Region	Central/Lakes			25%	13%	63%		16
	Hillsborough County	4%	7%	13%	2%	69%	4%	45
	Northern NH		17%		8%	75%		12
	Seacoast		5%	25%	5%	50%	15%	20
	Western NH			27%	18%	55%		11

Q2a: Please indicate whether you agree or disagree with the following statements about the impact of KENO 603 on your business - KENO 603 has increased the number of customers at my business

		<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Neutral</u>	<u>Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	30%	44%	14%	3%	7%	2%	105
Number of Employees	1-10 employees	26%	50%	15%	2%	6%	2%	54
	11-25 employees	41%	32%	12%	3%	9%	3%	34
	26-50 employees	33%	42%	17%		8%		12
	More than 50 employees		60%	20%	20%			5
Years Business Operating in NH	Less than 2 years	50%	33%	17%				6
	2-5 years	31%	23%	31%	8%	8%		13
	6-10 years	35%	41%	12%		6%	6%	17
	10-20 years	38%	38%	8%	8%	8%		13
	More than 20 years	25%	52%	13%	2%	7%	2%	56
Recommend	Detractors	16%	47%	11%	5%	21%		19
	Passives	27%	43%	23%		3%	3%	30
	Promoters	36%	44%	11%	4%	4%	2%	55
Likelihood to Renew License	Less than Very Likely	6%	47%	24%		18%	6%	17
	Very Likely	37%	44%	11%	4%	4%	1%	84
Method of Completing Survey	Mail	20%	40%	30%		10%		10
	Phone	24%	59%			18%		17
	Web	33%	41%	15%	4%	4%	3%	78
Region	Central/Lakes	56%	25%	13%			6%	16
	Hillsborough County	38%	33%	11%	7%	9%	2%	45
	Northern NH	25%	50%	17%		8%		12
	Seacoast	14%	57%	19%		10%		21
	Western NH		82%	18%				11

Q2b: Please indicate whether you agree or disagree with the following statements about the impact of KENO 603 on your business - KENO 603 has brought new customers to my business

		<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Neutral</u>	<u>Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	43%	30%	15%	4%	7%	1%	105
Number of Employees	1-10 employees	41%	35%	13%	4%	6%	2%	54
	11-25 employees	44%	24%	21%	6%	6%		34
	26-50 employees	42%	42%	8%		8%		12
	More than 50 employees	60%		20%		20%		5
Years Business Operating in NH	Less than 2 years	17%	50%	33%				6
	2-5 years	38%	23%	23%		15%		13
	6-10 years	47%	41%	6%		6%		17
	10-20 years	54%	23%	8%	8%	8%		13
	More than 20 years	43%	29%	16%	5%	5%	2%	56
Recommend	Detractors	26%	26%	26%	5%	16%		19
	Passives	37%	37%	17%	3%	3%	3%	30
	Promoters	51%	29%	11%	4%	5%		55
Likelihood to Renew License	Less than Very Likely	29%	18%	29%		18%	6%	17
	Very Likely	48%	33%	11%	4%	5%		84
Method of Completing Survey	Mail	10%	40%	40%		10%		10
	Phone	35%	35%		6%	24%		17
	Web	49%	28%	15%	4%	3%	1%	78
Region	Central/Lakes	63%	25%	6%			6%	16
	Hillsborough County	40%	24%	16%	9%	11%		45
	Northern NH	50%	33%	17%				12
	Seacoast	29%	43%	19%		10%		21
	Western NH	45%	36%	18%				11

Q2c: Please indicate whether you agree or disagree with the following statements about the impact of KENO 603 on your business - KENO 603 encourages my customers to spend more time at my business

		<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Neutral</u>	<u>Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	42%	35%	11%	6%	4%	2%	105
Number of Employees	1-10 employees	44%	35%	7%	4%	6%	4%	54
	11-25 employees	35%	41%	15%	6%	3%		34
	26-50 employees	42%	33%	17%	8%			12
	More than 50 employees	60%		20%	20%			5
Years Business Operating in NH	Less than 2 years	33%	33%	17%		17%		6
	2-5 years	31%	38%	15%	15%			13
	6-10 years	35%	41%	24%				17
	10-20 years	54%	31%		8%	8%		13
	More than 20 years	45%	34%	9%	5%	4%	4%	56
Recommend	Detractors	16%	32%	21%	16%	11%	5%	19
	Passives	37%	37%	17%		7%	3%	30
	Promoters	53%	36%	5%	5%			55
Likelihood to Renew License	Less than Very Likely	6%	47%	24%	6%	6%	12%	17
	Very Likely	51%	33%	7%	5%	4%		84
Method of Completing Survey	Mail	50%	40%		10%			10
	Phone	35%	47%		6%	12%		17
	Web	42%	32%	15%	5%	3%	3%	78
Region	Central/Lakes	50%	38%	6%			6%	16
	Hillsborough County	42%	27%	11%	13%	7%		45
	Northern NH	33%	50%	8%			8%	12
	Seacoast	33%	48%	14%		5%		21
	Western NH	55%	27%	18%				11

Q2d: Please indicate whether you agree or disagree with the following statements about the impact of KENO 603 on your business - KENO 603 encourages my customers to spend more money at my business

		<u>Strongly Agree</u>	<u>Somewhat Agree</u>	<u>Neutral</u>	<u>Somewhat Disagree</u>	<u>Strongly Disagree</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	40%	35%	11%	7%	5%	2%	105
Number of Employees	1-10 employees	39%	44%	7%	4%	4%	2%	54
	11-25 employees	50%	24%	12%	6%	6%	3%	34
	26-50 employees	17%	42%	25%	17%			12
	More than 50 employees	40%		20%	20%	20%		5
Years Business Operating in NH	Less than 2 years	67%	17%	17%				6
	2-5 years	31%	38%	15%		15%		13
	6-10 years	59%	12%	18%	6%		6%	17
	10-20 years	38%	15%	23%	15%	8%		13
	More than 20 years	34%	48%	5%	7%	4%	2%	56
Recommend	Detractors	16%	37%	11%	26%	11%		19
	Passives	23%	50%	17%	3%	3%	3%	30
	Promoters	56%	27%	9%	2%	4%	2%	55
Likelihood to Renew License	Less than Very Likely	6%	47%	6%	29%	6%	6%	17
	Very Likely	49%	32%	12%	2%	4%	1%	84
Method of Completing Survey	Mail	60%	30%		10%			10
	Phone	47%	29%		12%	12%		17
	Web	36%	37%	15%	5%	4%	3%	78
Region	Central/Lakes	56%	31%	6%			6%	16
	Hillsborough County	47%	20%	13%	9%	9%	2%	45
	Northern NH	33%	50%	17%				12
	Seacoast	19%	48%	14%	14%	5%		21
	Western NH	36%	64%					11

Q3: What effect has offering KENO 603 had on your customers' overall experience?

		<u>Very Positive</u>	<u>Somewhat Positive</u>	<u>No Effect at All</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	46%	41%	9%	5%	105
Number of Employees	1-10 employees	46%	39%	9%	6%	54
	11-25 employees	53%	32%	9%	6%	34
	26-50 employees	17%	75%	8%		12
	More than 50 employees	60%	40%			5
Years Business Operating in NH	Less than 2 years	33%	50%		17%	6
	2-5 years	38%	38%	23%		13
	6-10 years	35%	59%		6%	17
	10-20 years	62%	31%	8%		13
	More than 20 years	48%	38%	9%	5%	56
Recommend	Detractors	11%	58%	26%	5%	19
	Passives	40%	53%	7%		30
	Promoters	60%	29%	4%	7%	55
Likelihood to Renew License	Less than Very Likely	12%	65%	18%	6%	17
	Very Likely	55%	36%	5%	5%	84
Method of Completing Survey	Mail	50%	40%	10%		10
	Phone	35%	59%	6%		17
	Web	47%	37%	9%	6%	78
Region	Central/Lakes	75%	25%			16
	Hillsborough County	44%	38%	13%	4%	45
	Northern NH	42%	50%	8%		12
	Seacoast	33%	52%	5%	10%	21
	Western NH	36%	45%	9%	9%	11

Q4: What effect has KENO 603 had on your business's food and beverage revenues?

		<u>Increased</u>	<u>Stayed about the same</u>	<u>Decreased</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	45%	49%	1%	6%	105
Number of Employees	1-10 employees	39%	54%	2%	6%	54
	11-25 employees	50%	41%		9%	34
	26-50 employees	58%	42%			12
	More than 50 employees	40%	60%			5
Years Business Operating in NH	Less than 2 years	33%	50%		17%	6
	2-5 years	38%	62%			13
	6-10 years	47%	41%		12%	17
	10-20 years	77%	23%			13
	More than 20 years	39%	54%	2%	5%	56
Recommend	Detractors	16%	79%	5%		19
	Passives	53%	47%			30
	Promoters	49%	40%		11%	55
Likelihood to Renew License	Less than Very Likely	6%	88%	6%		17
	Very Likely	55%	38%		7%	84
Method of Completing Survey	Mail	60%	40%			10
	Phone	41%	59%			17
	Web	44%	47%	1%	8%	78
Region	Central/Lakes	63%	31%		6%	16
	Hillsborough County	47%	42%	2%	9%	45
	Northern NH	42%	58%			12
	Seacoast	29%	67%		5%	21
	Western NH	45%	55%			11

Q5: About how much do you think your business's food and beverage revenues have increased since getting KENO 603?

		<u>1% to 10%</u>	<u>11% to 20%</u>	<u>21% to 30%</u>	<u>30% or more</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	55%	28%	6%	2%	9%	47
Number of Employees	1-10 employees	48%	24%	14%		14%	21
	11-25 employees	53%	35%		6%	6%	17
	26-50 employees	86%	14%				7
	More than 50 employees	50%	50%				2
Years Business Operating in NH	Less than 2 years	50%				50%	2
	2-5 years	60%	40%				5
	6-10 years	75%	13%	13%			8
	10-20 years	60%	40%				10
	More than 20 years	45%	27%	9%	5%	14%	22
Recommend	Detractors	67%	33%				3
	Passives	81%	13%			6%	16
	Promoters	41%	33%	11%	4%	11%	27
Likelihood to Renew License	Less than Very Likely	100%					1
	Very Likely	54%	28%	7%	2%	9%	46
Method of Completing Survey	Mail	67%				33%	6
	Phone	57%	43%				7
	Web	53%	29%	9%	3%	6%	34
Region	Central/Lakes	60%	40%				10
	Hillsborough County	43%	38%	5%		14%	21
	Northern NH	80%			20%		5
	Seacoast	83%				17%	6
	Western NH	40%	20%	40%			5

Q6#: Has offering KENO 603 had any negative impact on your overall business? (coded)

		<u>Maintenance Issues</u>	<u>More Work for Employees</u>	<u>No New Revenues</u>	<u>Other</u>	<u>None</u>	<u>N</u>
OVERALL	2018	4%	4%	4%	7%	81%	73
Number of Employees	1-10 employees	3%	3%	3%	3%	89%	35
	11-25 employees	8%	4%	4%	12%	73%	26
	26-50 employees		11%	11%	11%	67%	9
	More than 50 employees					100%	3
Years Business Operating in NH	Less than 2 years					100%	4
	2-5 years	8%	8%		8%	77%	13
	6-10 years	20%	10%		20%	50%	10
	10-20 years			11%	11%	78%	9
	More than 20 years		3%	5%	3%	89%	37
Recommend	Detractors	6%	6%	11%	17%	61%	18
	Passives		5%		5%	89%	19
	Promoters	6%	3%	3%	3%	86%	35
Likelihood to Renew License	Less than Very Likely		8%	17%	8%	67%	12
	Very Likely	3%	3%	2%	5%	86%	58
Method of Completing Survey	Mail			33%		67%	3
	Phone					100%	17
	Web	6%	6%	4%	9%	75%	53
Region	Central/Lakes	7%			7%	87%	15
	Hillsborough County		7%	10%	7%	77%	30
	Northern NH	11%				89%	9
	Seacoast		7%		7%	86%	14
	Western NH	20%			20%	60%	5

Q7#: What, if anything, could the NH Lottery Commission do to improve your experience in offering KENO 603? (coded)

		<u>Change or Better Accounting from Kiosk</u>	<u>Changes to Game Structure</u>	<u>Improve System Reliability</u>	<u>Increased Share of Revenue</u>	<u>More Marketing or Promotions</u>
OVERALL	2018	6%	8%	4%	8%	14%
Number of Employees	1-10 employees	3%	6%	3%	11%	11%
	11-25 employees	7%	14%	3%	3%	21%
	26-50 employees	10%		10%		10%
	More than 50 employees	33%			33%	
Years Business Operating in NH	Less than 2 years					20%
	2-5 years	23%	8%		8%	15%
	6-10 years	15%	8%	8%	8%	8%
	10-20 years		8%	8%		8%
	More than 20 years		9%	3%	11%	17%
Recommend	Detractors	15%	15%	8%	8%	23%
	Passives		9%	5%	5%	9%
	Promoters	7%	5%	2%	7%	14%
Likelihood to Renew License	Less than Very Likely	9%		9%	18%	9%
	Very Likely	6%	8%	3%	6%	14%
Method of Completing Survey	Mail				67%	
	Phone	6%		12%		18%
	Web	7%	10%	2%	7%	14%
Region	Central/Lakes		7%		7%	21%
	Hillsborough County	9%	9%	3%	9%	11%
	Northern NH	11%	11%	11%		22%
	Seacoast	7%		7%	7%	
	Western NH		17%		17%	33%

Q7#: What, if anything, could the NH Lottery Commission do to improve your experience in offering KENO 603? (coded)

		<u>More or Better Displays</u>	<u>Other</u>	<u>None</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	5%	15%	35%	5%	78
Number of Employees	1-10 employees	3%	6%	50%	8%	36
	11-25 employees	10%	14%	24%	3%	29
	26-50 employees		60%	10%		10
	More than 50 employees			33%		3
Years Business Operating in NH	Less than 2 years	20%	20%	40%		5
	2-5 years		15%	23%	8%	13
	6-10 years		8%	38%	8%	13
	10-20 years	25%	33%	17%		12
	More than 20 years		11%	43%	6%	35
Recommend	Detractors		15%	8%	8%	13
	Passives	5%	23%	32%	14%	22
	Promoters	7%	12%	45%		42
Likelihood to Renew License	Less than Very Likely	9%	18%	18%	9%	11
	Very Likely	5%	15%	38%	5%	65
Method of Completing Survey	Mail		33%			3
	Phone		12%	53%		17
	Web	7%	16%	31%	7%	58
Region	Central/Lakes		14%	50%		14
	Hillsborough County	9%	17%	29%	6%	35
	Northern NH		22%	22%		9
	Seacoast	7%	14%	50%	7%	14
	Western NH			17%	17%	6

Q8: The Lottery pays an 8% sales commission for KENO 603. Do you find that this is a fair sales commission based on your experience?

		<u>Yes</u>	<u>No</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	64%	25%	11%	105
Number of Employees	1-10 employees	67%	20%	13%	54
	11-25 employees	62%	26%	12%	34
	26-50 employees	58%	33%	8%	12
	More than 50 employees	60%	40%		5
Years Business Operating in NH	Less than 2 years	100%			6
	2-5 years	54%	23%	23%	13
	6-10 years	65%	12%	24%	17
	10-20 years	62%	31%	8%	13
	More than 20 years	63%	30%	7%	56
Recommend	Detractors	26%	53%	21%	19
	Passives	67%	23%	10%	30
	Promoters	76%	16%	7%	55
Likelihood to Renew License	Less than Very Likely	29%	53%	18%	17
	Very Likely	73%	17%	11%	84
Method of Completing Survey	Mail	40%	60%		10
	Phone	71%	29%		17
	Web	65%	19%	15%	78
Region	Central/Lakes	81%	13%	6%	16
	Hillsborough County	60%	27%	13%	45
	Northern NH	42%	42%	17%	12
	Seacoast	71%	24%	5%	21
	Western NH	64%	18%	18%	11

Q9: How has your experience with KENO 603 compared to your expectations?

		<u>Exceeded expectations</u>	<u>Met expectations</u>	<u>Fallen short of expectations</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	16%	58%	20%	6%	105
Number of Employees	1-10 employees	13%	65%	15%	7%	54
	11-25 employees	24%	53%	18%	6%	34
	26-50 employees	8%	50%	42%		12
	More than 50 employees	20%	40%	40%		5
Years Business Operating in NH	Less than 2 years		83%		17%	6
	2-5 years	8%	62%	31%		13
	6-10 years	18%	47%	24%	12%	17
	10-20 years	15%	62%	23%		13
	More than 20 years	20%	57%	18%	5%	56
Recommend	Detractors	5%	37%	58%		19
	Passives	17%	57%	17%	10%	30
	Promoters	20%	65%	9%	5%	55
Likelihood to Renew License	Less than Very Likely		29%	65%	6%	17
	Very Likely	20%	65%	8%	6%	84
Method of Completing Survey	Mail	10%	70%	20%		10
	Phone	24%	65%	12%		17
	Web	15%	55%	22%	8%	78
Region	Central/Lakes	19%	63%	13%	6%	16
	Hillsborough County	11%	53%	24%	11%	45
	Northern NH	25%	58%	17%		12
	Seacoast	24%	67%	10%		21
	Western NH	9%	55%	36%		11

Q10: How likely are you to renew your license and continue offering KENO 603 at your business in the future?

		<u>Very Likely</u>	<u>Somewhat Likely</u>	<u>Not Very Likely</u>	<u>Not Likely At All</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	80%	14%	1%	1%	4%	105
Number of Employees	1-10 employees	81%	13%		2%	4%	54
	11-25 employees	85%	9%			6%	34
	26-50 employees	58%	33%	8%			12
	More than 50 employees	80%	20%				5
Years Business Operating in NH	Less than 2 years	100%					6
	2-5 years	77%	15%			8%	13
	6-10 years	82%	18%				17
	10-20 years	85%	15%				13
	More than 20 years	77%	14%	2%	2%	5%	56
Recommend	Detractors	42%	32%	5%	5%	16%	19
	Passives	80%	17%			3%	30
	Promoters	93%	7%				55
Likelihood to Renew License	Less than Very Likely		88%	6%	6%		17
	Very Likely	100%					84
Method of Completing Survey	Mail	70%	20%	10%			10
	Phone	88%	12%				17
	Web	79%	14%		1%	5%	78
Region	Central/Lakes	88%	13%				16
	Hillsborough County	84%	9%	2%	2%	2%	45
	Northern NH	83%	8%			8%	12
	Seacoast	67%	29%			5%	21
	Western NH	73%	18%			9%	11

Q11: On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how likely you would be to recommend offering KENO 603 to another bar or restaurant in New Hampshire similar to yours

		<u>1</u>	<u>2</u>	<u>4</u>	<u>5</u>	<u>6</u>
OVERALL	2018	1%	2%	2%	8%	6%
Number of Employees	1-10 employees		2%	4%	7%	4%
	11-25 employees		3%		6%	6%
	26-50 employees	8%			17%	8%
	More than 50 employees					20%
Years Business Operating in NH	Less than 2 years				33%	
	2-5 years					23%
	6-10 years			6%	12%	
	10-20 years				8%	
	More than 20 years	2%	4%	2%	5%	5%
Recommend	Detractors	5%	11%	11%	42%	32%
	Passives					
	Promoters					
Likelihood to Renew License	Less than Very Likely	6%	6%	6%	12%	18%
	Very Likely			1%	6%	2%
Method of Completing Survey	Mail	10%				
	Phone			6%	12%	6%
	Web		3%	1%	8%	6%
Region	Central/Lakes				6%	
	Hillsborough County	2%	4%		9%	7%
	Northern NH					25%
	Seacoast			10%	5%	
	Western NH				18%	

Q11: On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how likely you would be to recommend offering KENO 603 to another bar or restaurant in New Hampshire similar to yours

		<u>7</u>	<u>8</u>	<u>9</u>	<u>10 (Definitely)</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	9%	20%	8%	45%	1%	105
Number of Employees	1-10 employees	11%	20%	7%	44%		54
	11-25 employees	6%	21%	9%	47%	3%	34
	26-50 employees	8%	25%	8%	25%		12
	More than 50 employees				80%		5
Years Business Operating in NH	Less than 2 years			17%	50%		6
	2-5 years		15%		54%	8%	13
	6-10 years	6%	24%	29%	24%		17
	10-20 years	15%	31%		46%		13
	More than 20 years	11%	20%	4%	48%		56
Recommend	Detractors						19
	Passives	30%	70%				30
	Promoters			15%	85%		55
Likelihood to Renew License	Less than Very Likely	12%	18%	12%	12%		17
	Very Likely	7%	21%	7%	54%	1%	84
Method of Completing Survey	Mail	20%	10%	10%	50%		10
	Phone	6%	24%	6%	41%		17
	Web	8%	21%	8%	45%	1%	78
Region	Central/Lakes		19%	6%	63%	6%	16
	Hillsborough County	11%	11%	13%	42%		45
	Northern NH	8%	33%		33%		12
	Seacoast	10%	29%		48%		21
	Western NH	9%	27%	9%	36%		11

Q12#: Why would you be likely to recommend KENO 603 to a similar business? (coded)

		<u>Ease of Offering</u>	<u>Improves Experience</u>	<u>Increase Revenue</u>	<u>No Downside</u>	<u>Other</u>	<u>N</u>
OVERALL	2018	12%	14%	43%	8%	22%	49
Number of Employees	1-10 employees	12%	12%	46%	4%	27%	26
	11-25 employees	6%	25%	44%	13%	13%	16
	26-50 employees	33%		33%		33%	3
	More than 50 employees	25%		25%	25%	25%	4
Years Business Operating in NH	Less than 2 years		50%	50%			4
	2-5 years		14%	43%	14%	29%	7
	6-10 years	14%	14%	43%	14%	14%	7
	10-20 years	20%		40%	20%	20%	5
	More than 20 years	15%	12%	42%	4%	27%	26
Recommend	Detractors						
	Passives						
	Promoters	12%	14%	43%	8%	22%	49
Likelihood to Renew License	Less than Very Likely	67%	33%				3
	Very Likely	9%	13%	46%	9%	24%	46
Method of Completing Survey	Mail			20%		80%	5
	Phone	13%	25%	50%	13%		8
	Web	14%	14%	44%	8%	19%	36
Region	Central/Lakes	20%	10%	40%	10%	20%	10
	Hillsborough County	5%	19%	43%	14%	19%	21
	Northern NH	50%		25%		25%	4
	Seacoast	11%	11%	33%		44%	9
	Western NH		20%	80%			5

Q14: The profits from KENO 603 help fund full-day kindergarten in New Hampshire. Does knowing this make you more likely to continue offering KENO 603, less likely, or does it make no difference?

		<u>More likely</u>	<u>No difference</u>	<u>Less likely</u>	<u>Don't Know/Not Sure</u>	<u>N</u>
OVERALL	2018	54%	42%	1%	3%	105
Number of Employees	1-10 employees	57%	39%	2%	2%	54
	11-25 employees	56%	41%		3%	34
	26-50 employees	33%	58%		8%	12
	More than 50 employees	60%	40%			5
Years Business Operating in NH	Less than 2 years	83%	17%			6
	2-5 years	54%	38%		8%	13
	6-10 years	47%	53%			17
	10-20 years	77%	15%		8%	13
	More than 20 years	48%	48%	2%	2%	56
Recommend	Detractors	32%	58%		11%	19
	Passives	57%	43%			30
	Promoters	60%	36%	2%	2%	55
Likelihood to Renew License	Less than Very Likely	53%	41%		6%	17
	Very Likely	55%	43%	1%	1%	84
Method of Completing Survey	Mail	50%	50%			10
	Phone	59%	41%			17
	Web	54%	41%	1%	4%	78
Region	Central/Lakes	50%	50%			16
	Hillsborough County	53%	42%		4%	45
	Northern NH	50%	50%			12
	Seacoast	62%	33%	5%		21
	Western NH	55%	36%		9%	11

Appendix B

Q1: What is the main reason you decided to offer KENO 603?

- A lot of their customers enjoy gambling and they wanted the extra revenue and to bring in customers they normally wouldn't bring in
- Additional income
- another reason for customers to enjoy our restaurant
- Another revenue stream as well as attracting new customers
- As an attraction to potential bar patrons and added entertainment for current patrons.
- As commander of our Vfw, talked with other members and thought it would be a good fit along with Nevada tickets to add to entertainment offers for our members and guests
- Attract more business.
- Because a lot of our customers were going to Massachusetts to play, now they can stay here at our business.
- because everyone (all the members) were interested and wanted it
- because he likes it and thought it would be good for the community
- Being a nonprofit we are always looking for ways to bring in revenue
- business
- Bring in more business to restaurant.
- BRING IN MORE CUSTOMERS
- bring in more people
- bring in revenue
- Bring up our business
- Brought new customers
- Charity Gaming Property always (10 years) have offered Lottery Products
- city of franklin voted you can do this and one of the establishers lost it and they closed so it was a good time for them to pick up extra customers and they increased funds
- Create more business for my restaurant
- Create some income
- customer demand
- Customer demand plus the ability to keep customers more entertained during their visit
- Customer requests
- Customers asked for it. Fills a day part that was a slower time.
- Customers demand
- Customers entertainment
- CUSTOMERS HAD BEEN ASKING FOR IT FOR YEARS!!
- customers like it

- Customers wanted it
- Draw in a few new customers and entertain our current customers.
- Earlier customer base
- Entertainment, fund programs
- extra money
- Extra revenue and clientele
- for fun and for the customers who think it is great
- For our members
- Generate customer traffic to our facility, And to increase sales volume.
- get more business
- Give customers another reason to come in or to stay longer, extra money doesn't hurt
- growth with customers and a little income
- Help fund education and increase bar business as well
- I manage a private club, and the members suggested that we offer keno
- I want to improve more business and Massachusetts have Keno for longtime, so I do not want to loss competition. And the customers have fun!
- I wanted to be the first in the area
- Increase business
- Increase business/cash flow
- Increase profits and give our customers entertainment
- Increased over all sales.
- It was offered by the Lottery, and also to bring in more business
- Keep customers longer to buy more food/drink.
- members request
- money
- More revenue and free entertainment for our guests
- New game being offered
- Newest of the game.
- No other towns around offer Keno. Also - to use as a draw for those that are familiar to come in and play. This would increase my food and alcohol sales.
- Our customers
- Our customers love to gamble
- Our patrons asked for it
- Patrons requested that we offer keno. Also to increase revenue.
- Provides additional income. Attracts more customers
- Put more traffic through my establishment
- sales

- Seemed like a great additional way to get people in the door.
- State was easy to work with and a lot of our customers are from out of state and I heard a lot of people with positive things to say about Keno
- the customers
- The patrons requested it
- To add another element to our restaurant for the guests.
- to add business
- To attract more business to my restaurant and encourage customers to stay longer.
- To bring in more business.
- to bring in more customers
- To bring more business in.
- To compete with MA establishments that offered KENO only miles away.
- To draw in more customers
- To drive more business in the door and to have additional reasons for them to stay longer
- To generate more traffic at our organization
- to get more customers and more business
- to help fund our nonprofit base
- To help our business
- To help promote business, keeping patrons here longer.
- To increase business
- to increase business ,to add customer base
- To increase business and customers asked for it
- To increase business and revenue. To offer entertainment for customers.
- To increase business sales
- To increase our cash flow (non-profit)
- to increase profitability
- To increase revenue for our veterans, community and youth programs.
- To keep patrons engaged with extra activity while they enjoy the good food and drinks.
- To offer customers something fun in our restaurant and to retain customers
- To offer something more for our patrons
- To provide a new entertainment experience
- To stay competitive with our close Massachusetts competitors and to offer an attraction that keeps our guests entertained for a longer period of time.
- to try to bring more money in
- try to make more money
- We allowed customers to choose if we should have it or not.
- we have other gambling here and it helps the department of education

- No
- No
- No
- No
- No
- No
- No
- NO
- NO
- no hasn't seen anything negative
- No impact at all - At this point, it hasn't even paid back initial outlay
- No it has been good
- No m
- No negative impact
- No negative impact.
- No negatives
- no not really
- No, it's very simple to run
- No!
- none
- none
- None
- None
- None
- None
- None
- None that I'm aware of. Some patrons were worried about the stigma of it, but since we started it a lot of people are happy how we had it installed.
- none that we are aware of
- not at all
- Not at all!!
- Not really
- Not really, except the bartender frequently needing to pay out winners from the restaurant's till because there isn't enough Keno cash. It isn't the revenue generator we'd thought it would be.
- Not that I am aware of
- Now not at all
- only when it isn't working

- Only when the system or the kiosk goes down.
- pain in the butt
- Public perception is negative from some.
- Some customer crazy, if machine had problems and make wrong ticket or the machine no change, they all want restaurant to take the responsibility to give them money back!
- SOME CUSTOMERS ARE NOT ORDERING ANYTHING BUT TAKING UP A SEAT
- The stand-alone machine has had several maintenance issues and having my bar tender process keno tickets instead of selling alcohol has been a negative impact on my business.
- We are in a property poor town and a few people have commented if we don't have enough problems with our town. We try to explain about kindergarten funding
- Yes, accounting abilities of the system are very lacking, making it extremely difficult if not impossible to account for shortages and prevent theft by employees.

Q7: What, if anything, could the NH Lottery Commission do to improve your experience in offering KENO 603?

- A percentage of winnings would be the only thing. Not everyone tips on their winnings even though we do a lot of work for most in playing Keno
- Advertise more and explain what it is.
- All training should be done at the actual business, with the employees. Off-site training is a waste of time.
- Allow Keno to be shown on screens in the main dining room not just lounge area.
- better advertising
- Better internet... When it goes down customers get upset
- busier
- can't think of anything
- Change program to put inset on screen to tell number of minutes till next game and number of next game. Like Massachusetts does and multiple ways of selecting bonus.
- definitely worked on the machines, make it more user friendly such as signs that say it doesn't give back change, 2 machines and they break often, inconvenient to bar tenders because then they have to manually fix the machines - machines need serious work on tickets going in and out because they jam up and get dusty really easily, they contract out with a 24 hour support line but you aren't calling the state but the service line and she hasn't had a great experience with them she feels like an inconvenience to them 2 people have been nice, recommends they get their own staff
- Do promo at my restaurant
- Don't know. They have been super helpful and supportive.
- Everything is good

- Everything is positive at this time
- Force people to come to our facility. (Obviously, I'm joking...)
- Give the option to play more Consecutive Draws, increase it to 25 or 30 Draws.
- Giveaways, prizes
- Giving away KENO 603 marketing items to patrons. (pens, t-shirts, beer mugs, coasters etc)
- Good income! Help to pay with expensive rent
- happy the way it's going
- Have the keno game come up every 3 minutes. It would be better for the customer to play more games in a shorter period of time. More revenue for state
- I believe that all they've done is right on point. Easy to understand, great training for vendors and excellent people in the field
- I think everything is done perfectly!
- I think the Lottery Commission prepared us well for what to expect upon implementing KENO to our establishment.
- I wish the terminal had a better application for accounting what should be in the drawer and not. For the technology that is available it should be easy to set a till and have it match, pay out and ins. So at the end of the day you close out and know how much should be in the drawer. Instead of doing research to make sure if it is right. Leaves the business vulnerable
- I'm not in that business
- If the machine gave change or had an ATM built in
- Increase commissions
- increase the 8% TO THE CLUB
- Increase the commission to 10-15% - Keno equipment and lottery equipment use electricity and floor space. 8% doesn't break even
- Increase the variety of reports generated by the system. Break out sales from microlot and keno machine to allow for staff to cash out and balance drawer at shift change.
- It is fine the way it is
- It is good the way it is
- Just need public to be more informed on how easy it is to play
- KENO 603 is doing a great job.
- Kiosk should be able to provide change to customers. Some of the other tickets like Powerball they should be able to pick their numbers and they should have French on it too.
- Let us put it on our big screen
- Make it easier to reprint the data sheets
- Make sure Consolidated doesn't have any more glitches in the system. Do more Keno promo nights so more people understand how to play.
- make sure the machines are in working order and the internet isn't always running

- Maybe produce a simple guide to playing Keno for first timers.
- more keno parties and giveaways more advertising for us more banners
- MORE KENO TV'S. LONGER PLAY TIMES. 9AM-1AM
- More Marketing. I feel like there is more marketing for those offering Keno in the Southern part of the state and the Northern part of the state is sometimes forgotten because of the amount of people in the areas.
- More promotional events
- More promotions
- Need a larger disclaimer that kiosk does not give change, payout on winning tickets
- No
- No improvement needed
- none
- none
- none
- None at this time.
- Not a thing
- Not sure
- Not sure yet too new
- Not sure. The experience with the Commission has been a positive one so far. Easy to work with, great response from our rep when help is needed and good response from Intralot with technical issues.
- nothing
- nothing
- nothing
- Nothing
- Nothing
- nothing I can think of
- nothing really, been very accommodating
- pay us 10% ok its worth a shot
- People often complain (rightfully so) that some of the payouts aren't enough for what they put in. For example we have a few players who play 5 numbers. If they put \$1 down and get 4 of 5 they get \$20. They say a \$40 or \$50 payoff is more in line considering they play 10 games with the plus (cost is \$20) and very rarely get 3/5 (another whopping \$2) never mind 4/5. Payouts are WEAK.
- Promote more where the money goes.
- promote slower places

- PUT A MONITOR IN MY DINING ROOM SO THAT THOSE CUSTOMERS CAN SEE THE WINNING NUMBERS
- Slow Service and little reporting
- they could have explained it better, esp. the financial aspects
- They do an excellent job always get answers
- they need to honor what keno is for which is kindergarten
- they should have a countdown to closing of each game
- They should have made it available throughout the state so that the decisions are not up to the individual towns.
- Up to 10%
- We are happy that Keno is now offered to 1am. It would be nice if the machine would display on the monitor that now change is offered.
- You are doing great.

Q12: Why would you be likely to recommend KENO 603 to a similar business?

- Additional patrons and revenue
- anyone but my competition in the area
- Because even though there is no pay out on winnings, it's still brings in at least \$100 extra revenue a week
- because it does increase business
- Because it has been positive at our business and everyone enjoys playing
- Because it increases business and offers the customer a service they want
- because the customers love it
- bigger sales and customer satisfaction
- commissions are good, increases customers and business
- Customer experience a revenue stream and the revenue supports education. It's not fair for the towns and cities that don't support keno sharing of revenue for education
- Extra revenue and it is an extra entertainment
- fast easy fun not a lot of time away from business (paper work is easy)
- Gets people to stay longer.
- good for business (increased)
- good source of revenue, overall increase in sales. really can't go wrong
- I believe that more people would become more aware, we are a Veterans hall and although we solicit outside guest a lot of the general public look at us a private club and do not visit, If more places offered Keno I believe that it would help us also.
- I think it's a good thing!

- If the other businesses asked I would be honest and tell them how easy it is to have in their establishment. But I prefer that we are amongst the few in my town that offer it.
- In a sense it's a no brainer (where the state has taken a lot of the legwork out of our employees hands) but the drawback is watching customers blow \$50 instead of spending it in your business. For the occasional customer it's great but when your regulars are playing daily it stings a little. The payouts for wins are WEAK as I stated earlier in survey
- Increase amount of people and business
- Increase in revenues, thus contributing to the Rooms and Meals tax.
- Increase revenue
- Increased income
- it adds to the experience
- It can't hurt...
- It definitely brings more people In and increases revenue
- it does good things and brings in revenue
- It is a no brainer
- It is good to have the KENO 603 in a bar. Customers enjoys and it's fun to play while you dine.
- It's a lot of work for the staff involved
- It's easy money. People like to gamble. having the machine and other big jackpot games is a no-brainer
- It's fun
- It's an attraction for guests.
- its free money
- Just based on the revenue it brings in
- Makes money for programs and provides entertainment
- Other than the accounting and cash flow side of Keno, there would be absolutely no reason to not offer Keno. It is a win win with relatively little out of pocket costs.
- Positive influence on our business
- Regardless of what the expectations are, it is another avenue for patrons to spend more time and money in the facility.
- Smooth operation, very little work to operate.
- Something to offer to your customers
- Sure
- The Kiosk makes offering this type of entertainment EASY. If it were more labor intensive on my staff, I probably would be less interested. The kiosk is very user friendly.
- to help them also bring in revenue
- To help with revenue

- Very good for our business
- yes
- Yes
- Yes

Q13: Why do you feel this way?

- Profits less than expected work more than we thought
- depending on your bar crowd the demand for it can be too much of a hassle depending on the relationship you have with your staff it's still something that has to be done no matter what season, it's a huge responsibility along with the paperwork you always have to do
- don't want competition
- I feel they should base on their own, all businesses have their own clientele what's good for us may not be the same for others
- It depends on where they are if you had keno in every bar in town what is the advance of them coming here. I want to be the one offering to people
- It has not been a real boom here. Technical issues with the equipment are common.
- It's hit or miss were have poker and rip tickets
- It's really just in the way. Machine regularly won't accept bills - waiting to recover initial outlay
- It's sometimes more of a hassle to run it. We are on the boarder, so their payouts are bigger in mass than NH so why drive over a border for it
- it's a pain and not that much income
- Keno 603 has not met my expectations that were built by those selling the product.
- Personal preferences based on individuals business plan
- The more Keno establishments, it will give more options for people to go elsewhere and play, likely hurting sales.
- The opportunity for theft and loss on top of the lack of controls built into the software strongly outweigh any possible addition revenue from the system.
- Where it does bring in some money, it has not brought as much as we thought and we're not sure it's worth the extra hassle.

Appendix C

INT

Thank you for your participation in this important survey of New Hampshire businesses who currently offer Keno. Your experiences and opinions will help the New Hampshire Lottery Commission better understand how well Keno has integrated with New Hampshire businesses and how we can improve the experience for patrons and businesses like yours. This survey should take only about 5 minutes of your time.

This survey will close on **October 24th**. We appreciate your time and know how valuable it is, so as a token of our appreciation for completing this survey, we will send you a \$50 VISA gift card. At the end of the survey, please provide us the best address to send you the gift card.

This survey is being conducted in conjunction with the University of New Hampshire Survey Center. Your participation is voluntary. Your responses will be confidential and the UNH Survey Center will only report the results of this survey in the aggregate. If you have any questions or concerns, please feel free to contact Zach Azem (Zachary.Azem@unh.edu, 603-862-4858) at the UNH Survey Center.

Q1 What is the main reason you decided to offer KENO 603?

Page Break

Q2 Please indicate whether you agree or disagree with the following statements about the impact of KENO on your business.

	Strongly Disagree (1)	Somewhat Disagree (2)	Neutral (3)	Somewhat Agree (4)	Strongly Agree (5)	Don't Know/Not Sure (98)
KENO 603 has increased the number of customers at my business (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
KENO 603 has brought new customers to my business (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
KENO 603 encourages my customers to spend more time at my business (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
KENO 603 encourages my customers to spend more money at my business (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

Q3 What effect has offering KENO 603 had on your customers' overall experience?

- Very Positive (1)
 - Somewhat Positive (2)
 - Somewhat Negative (3)
 - Very Negative (4)
 - No Effect At All (1)
 - Don't Know/Not Sure (2)
-

Q4 What effect has KENO 603 had on your business's food and beverage revenues?

- Increased (1)
 - Decreased (2)
 - Stayed about the same (3)
 - Don't Know/Not Sure (4)
-

Display This Question:

If What effect has KENO 603 had on your business's food and beverage revenues? = Increased

Q5 About how much do you think your business's food and beverage revenues have increased since getting KENO 603?

- 1% to 10% (1)
- 11% to 20% (2)
- 21% to 30% (3)
- 30% or more (4)
- Don't Know/Not Sure (5)

Page Break

Q6 Has offering KENO 603 had any negative impact on your overall business? If yes, please explain below.

Q7 What, if anything, could the NH Lottery Commission do to improve your experience in offering KENO 603?

Page Break

Q8 The Lottery pays an 8% sales commission for KENO 603. Do you find that this a fair sales commission based upon your experience?

- Yes (1)
 - No (2)
 - Don't Know/Not Sure (3)
-

Q9 How has your experience with KENO 603 compared to your expectations?

- Exceeded expectations (1)
 - Met expectations (2)
 - Fallen short of expectations (3)
 - Don't Know/Not Sure (4)
-

Q10 How likely are you to renew your license and continue offering KENO 603 at your business in the future?

- Very Likely (1)
 - Somewhat Likely (2)
 - Not Very Likely (3)
 - Not Likely At All (4)
 - Don't Know/Not Sure (5)
-

Q11 On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how likely you would be to recommend offering KENO 603 to another bar or restaurant in New Hampshire similar to yours.

- 0 (Definitely not) (0)
- 1 (1)
- 2 (2)
- 3 (3)
- 4 (4)
- 5 (5)
- 6 (6)
- 7 (7)
- 8 (8)
- 9 (9)
- 10 (Definitely) (10)
- Don't Know/Not Sure (98)

Display This Question:

If On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... = 10 (Definitely)

Or On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... = 9

Q12 Why would you be likely to recommend KENO 603 to a similar business?

Display This Question:

*If On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... = 0
(Definitely not)*

1 Or On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... =

2 Or On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... =

3 Or On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... =

4 Or On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... =

5 Or On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... =

6 Or On a scale from 0 to 10, where 0 is "definitely not" and 10 is "definitely," please estimate how... =

Q13 Why do you feel this way?

Page Break

Q15 The profits from KENO 603 help fund full-day kindergarten in New Hampshire. Does knowing this make you more likely to continue offering KENO 603, less likely, or does it make no difference?

- More likely (1)
 - Less likely (2)
 - No difference (3)
 - Don't Know/Not Sure (4)
-

Page Break

Q16 How many employees do you have at your business?

- 1-10 employees (1)
 - 11-25 employees (2)
 - 26-50 employees (3)
 - More than 50 employees (4)
-

Q17 How long has your business operated in New Hampshire?

- Less than 2 years (1)
 - 2-5 years (2)
 - 6-10 years (3)
 - 10-20 years (4)
 - More than 20 years (5)
-

CARD Thank you for completing this survey! **In order to receive your \$50 VISA gift card,** please provide the best address to send it to.

Name (1) _____

Address (2) _____

Address 2 (3) _____

City (4) _____

State (5) _____

Zip Code (6) _____

ADD If you have any additional comments, please enter them below. **Click the right arrow to submit your responses.**
