

Question and Answer Summary - Questions received in response to RFP - FIN19002-MKTRESEARC

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| 1 | II | 2 | 3 | The Successful Bidder will be required to perform a minimum of four (4) separate Assigned Research Studies during the two (2)-year base period of any contract resulting from this RFP. The scope of each individual Assigned Study is outlined in Appendix B of the RFP. The anticipated schedule of Assigned Studies is identified in Figure 1 below: | We provide an online cloud-based insights platform that helps companies create a direct line to their customers (players, retailers) to inform decisions across the entire enterprise. Our clients choose how they use our platform and the types of quant or qual research they would like to conduct – for example: for brand, product, UX, CX or marketing research needs. All of the research our clients do through our platform is online where you have the ability to use in a DIY fashion or receive occasional support from our services team. Is this type of offering of interest to the Delaware Lottery? | The RFP requires the vendor to develop and report on insights to stakeholders. (pg.3.C). However, The Lottery would be open to receiving cloud-based access to the data |
| 2 | Appendix B, Ticket Lottery Player Study | 1 | 51 | In its anticipated format, the Ticket Lottery Player Study will measure Ticket Lottery player satisfaction and relative importance levels for customer service, promotional, and experiential attributes of Lottery Ticket games purchased at licensed Lottery retailers within the State of Delaware. | How many players are in your database and how active is it? What data points do you currently collect on players in your database? | The Lottery does not feel that the player database is representative of the entire State of potential Lottery Players in Delaware. The Player database is not available for research purposes. |
| 3 | Appendix B, Assigned Research Studies | 4 | 49 | Presentation of the results of all Assigned Research Studies to the Lottery Director and designee(s) of the Lottery Director at the Lottery's offices in Dover, Delaware as defined in RFP Appendix B | Majority of our clients do the research themselves using our platform (design study, program, deploy and analyze the results), in which case is there still a need for an in-person presentation of the results? Is there an interest in managing any of the research yourself? Our platform provides reporting and analysis within the backend. | The RFP requires the vendor to develop and report on insights to stakeholders. (pg.3.C). |

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| 4 | General Question | | | | To be awarded this opportunity, is it required that all vendors be located within Delaware? | <p>No, it is not required that you be located within Delaware.</p> <p>However, if you are awarded the contract you would have to apply for a Delaware Business License and register with Division of Corporations.</p> |
| 5 | General Question | | | | How do you define a Lottery ticket player? | <p>A "lottery ticket player" means an individual who is 18 years or older (for drawing games and instant games) or 21 years or older (for sports lottery games) that obtains and plays from one of the licensed lottery retailers within the State of Delaware a ticket for one of the legalized lottery games established and operated by the Delaware Lottery, namely tickets for drawing games, instant games, and sports lottery games.</p> <p>For the definitions of "instant game," "drawing game," and "sports lottery," please refer to the Delaware Lottery's regulations, 10 Del. Admin. C. § 203-2.0, which are available here: http://regulations.delaware.gov/AdminCode/title10/200/202.shtml#P2_24 and also 10 Del. Admin. C. § 204-2.0, which are available here: http://regulations.delaware.gov/AdminCode/title10/200/204.shtml#P2_24</p> |

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| 6 | General Question | | | | Have you performed these research studies previously? If so, what was the total sample size for each? If not, do you have a desired sample size for each? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 7 | General Question | | | | What is your total budget for all four studies? | The Lottery has not set a budget for these research studies. Bidders should use their professional judgment to provide proposed budgets for the tasks detailed in the Scope of Work. |
| 8 | General Question | | | | Has this research been conducted prior to this initiative? If so, can you share any data from the effort? Response rates, incidence rate, interview length, methodology, N=? Sample of previous survey instruments? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 9 | General Question | | | | <i>We provide all of the services outlined on page 4 of the RFP (in terms of methodologies (paragraph 1) and research services (paragraph 3), however, to provide pricing, we will require a better understanding of the following:</i> | |
| 9.a | | | | | Is there a preferred methodology that the Delaware Lottery would like to explore for each study? | The Lottery has no preferred methodology for each study. As per pg.3 II.C in the RFP, it is our goal to consult with the selected vendor to identify and carry out the appropriate methodology or methodologies. |
| 9.b | | | | | Do you anticipate this to be a multi-methodology project (i.e., online, telephone, focus groups, insights community)? | The Lottery is open to a multi-methodology project. |

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| 10 | General Question | | | | Has a budget been established for this project? | The Lottery has not set a budget for these research studies. Bidders should use their professional judgment to provide proposed budgets for the tasks detailed in the Scope of Work. |
| 11 | General Question | | | | Can you define the audience for the Delaware Resident Study? | The audience consists of the adult population of Delaware, 18 years and older for Drawing and Instant games; all other products the audience is 21 years and older. |
| 12 | General Question | | | | Can you define the audience for the Ticket Lottery Player Study? | The audience consists of the adult population of Delaware, 18years and older for Drawing and Instant games; all other products the audience is 21 years and older. |
| 13 | General Question | | | | Are there established sample sizes you'd like to achieve? | The Lottery has not established sample sizes. As per pg.3 II.C in the RFP, it is our goal to consult with selected vendor to identify and carry out the appropriate methodology or methodologies. |
| 14 | General Question | | | | Will the Delaware Lottery provide sample for the Lottery Player Study? | No , the Lottery will not be providing a sample or sample sizes. |

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| 15 | Appendix B | 1 | 50 | Delaware Resident Study The objectives and the majority of the questions will remain the same... | What are the key objectives of the study and how would the State put this information to use (i.e. Marketing activities...)? | <ul style="list-style-type: none"> * To examine Delaware Lottery-related issues among the adult population of Delaware * To determine incidence of having played the Delaware Lottery in the past year. * To determine reasons for not playing Delaware Lottery Games. * To monitor attitudes toward the Delaware Lottery. The Lottery will use this information for marketing purposes, products, new game development and enhancement and promotions. |
| 16 | Appendix B | 2A | 50 | Delaware Resident Study | Does the State of Delaware have access to contact information, including mailing addresses of all adult residents, ideally broken out by county? If yes, could these be provided to the Successful Bidder at no fee for research purposes only? | The Delaware Lottery does not have access to Delaware Residents contact information. This information would need to be obtained by the selected vendor. |
| 16.a | Appendix B | 2A | 50 | Delaware Resident Study | Will the State be willing to share mailing addresses with the successful bidder? | The Delaware Lottery does not have access to Delaware Residents contact information. This information would need to be obtained by the selected vendor. |
| 16.b | Appendix B | 2A | 50 | Delaware Resident Study | Does the state have access to resident email addresses and are can those be shared for research purposes? | The Delaware Lottery does not have access to Delaware Residents contact information. This information would need to be obtained by the selected vendor. |
| 17 | Appendix B | 2A | 50 | Delaware Resident Study | ii – our assumption is that gender within county falls out similar to that of census (50/50 m/f split), can you please confirm if this is an accurate assumption? If not, can you provide the split by county. | This information would have to be obtained by the selected vendor. |

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| 17.a | Appendix B | 2A | 50 | Delaware Resident Study | Besides county and gender, are there other data cuts that we need to consider in our sample design? | The Lottery is open to other data cuts the vendor feels would be appropriate. However, additional cuts would need to be approved by the Lottery. |
| 18 | Appendix B | ii | 51 | Ticket Lottery Player Study Develop random, representative sample of the adult population of the State of Delaware... | You mean, representative sample of Lottery Players? | Yes , for the Lottery Ticket Player Study, we're looking for a representative sample of the adult population of the State of Delaware that are Lottery Players. |
| 19 | Appendix B | ii | 51 | Ticket Lottery Player Study Develop random, representative sample of the adult population of the State of Delaware... | It should be representative according to sales, how are sales distributed by retail channels within county? | This will be discussed with the selected vendor. |
| 20 | Appendix B | ii | 51 | Ticket Lottery Player Study Develop random, representative sample of the adult population of the State of Delaware... | Based on previous studies, can you indicate incidence rates of Lottery Players, what % of Delaware are Lottery Players? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 21 | Appendix B | ii | 51 | Ticket Lottery Player Study Develop random, representative sample of the adult population of the State of Delaware... | Do you know and can you share the gender profile of those that play the lottery in Delaware (i.e., proportion of males/females)? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 22 | Appendix B | ii | 51 | Ticket Lottery Player Study Develop random, representative sample of the adult population of the State of Delaware... | If you had previous tracking efforts, were you satisfied with the outcome? If not, why? | Yes , we were satisfied with the outcome. |

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| 23 | Appendix B 1st paragraph under heading | 1 | 51 | While it is anticipated that the objectives and research topics will change little... | What are the key objectives of the study and how would the State put this information to use (i.e. Marketing activities...)? | <ul style="list-style-type: none"> * To examine Delaware Lottery-related issues among the adult population of Delaware * To determine incidence of having played the Delaware Lottery in the past year. * To determine reasons for not playing Delaware Lottery Games. * To monitor attitudes toward the Delaware Lottery. The Lottery will use this information for marketing purposes, products, new game development and enhancement and promotions. |
| 24 | Appendix B | | | General Questions for both studies | Do you have historical data to integrate into new reports? If so, what was the methodology used? If not, we are assuming we will start from scratch and assume you will share previous surveys and reports as reference, correct? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. Yes , you would be starting from scratch. |
| 25 | Appendix B | 1D | 49 | General Questions for both studies | Our assumption that the reports and presentations from “existing study data” will be from data we capture over the 2-year contract only. No additional outside sources, is that correct? | Yes , that is correct. |
| 26 | Appendix B | 1E | 49 | | Our assumption that the “development and maintenance, and updates to a database or databases containing historical data records from existing lottery research for incorporation into presentations” will come from data we capture over the 2-year contract only. No additional outside sources, is that correct? | Yes , that is correct. |

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| 27 | General Questions for both studies | | | | Who are the Key stakeholders of both studies? If so, do these stakeholders have different objectives and uses of insights? If that is the case, please specify | Delaware State Lottery (DSL) administrative and leadership staff and its advertising agency. No , we do not have different objectives, our objectives are the same. |
| 28 | General Questions for both studies | | | | Will a PA Qualification form filing with the Delaware Division of Corporations along with a Certificate of Existence issued by PA satisfy the Delaware Lottery's certificate of good standing requirement? | No , the winning bidder must file documents and become authorized to do business in the State of Delaware via the Division of Corporations. Delaware law requires every business entity that is doing business in Delaware, but is formed in another state or jurisdiction, to submit a completed "Foreign Qualification" form with the Division of Corporations along with a Certificate of Existence issued by that state or jurisdiction. See https://corp.delaware.gov/faqs/ |
| 29 | General Questions for both studies | | | | Is it a requirement to incorporate our business in the state of Delaware? | No , you do not have to incorporate your company in Delaware. However, if you are awarded the contract, your company would have to apply for a Delaware business license and register with Division of Corporations. See the frequently asked questions posted on the Delaware Division of Corporations website for more information about non-Delaware business entities conducting business in Delaware: https://corp.delaware.gov/faqs/ |

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| 30 | General Questions for both studies | | 23 | | Per page 23, we only have \$2,000,000 per claim/per aggregate for miscellaneous errors and omissions insurance. Will that suffice? | The requirement is \$3 million; however, if you have an umbrella or excess policy, that could make up the difference |
| 31 | Appendix B | 1G | 49 | | How many meetings will this entail in each business year? | A minimum of six meetings during the two year period. However, the Lottery can discuss flexibility with the selected vendor. |
| 32 | General Question | | | | Is there an incumbent who has some these studies in the recent past? Can you share who that was? | No , there is no incumbent. The last research study was conducted in 2009, we are bound by confidentiality and are not be able to share any data. |
| 33 | General Questions | | | | What other types of market research work has the Delaware Lottery conducted in the past 2-3 years? Was it Internet based? i. Using panel sample or player databases, or mix of both? ii. Were there issues with obtaining enough panel sample? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 33.a | | | | | How was the data collected for recent/previous Delaware Resident studies and Ticket Lottery Player studies? Was it telephone or internet data collection, or a mix of both? What were the sample sizes? Were the sample sizes large enough to analyze the data by sub-groups? What is the incidence of the Lottery player population in Delaware (from previous studies)? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |

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| 33.b | | | | | Does that Delaware Lottery have a player database from which research sample can be drawn from to supplement studies? If yes, have database members provided 'opt-in' permission to be contacted for research purposes? | The Lottery does not feel that the player database is representative of potential Lottery Players in the entire State of Delaware. The Player database is not available for research purposes. |
| 34 | | D | 49 | | Is the development of adhoc reports and presentations from existing study data meant to be deliverables above and beyond what would be delivered in either the Resident Study or the Ticket Lottery Player Study; i.e. reports and presentations prepared at a later time once original deliverables have already been provided? Would these reports and presentations be from the data of these studies or other historical studies? | Yes , there would be deliverables above and beyond. The research and presentation requested would be from these studies only. |
| 35 | | E | 49 | | Does a database or databases as referred to here already exist? Or would the vendor be expected to create those part of the deliverables for these studies? Or would this be a separate project(s)? What type of database? A data storage portal for reports, or some type of quarriable database? | No, a Database does not already exist. Yes , the vendor would be expected to create as part of the deliverables. No , it would not be a separate project. The Lottery is open to discussing with the selected vendor the types of databases including quarriable. |
| 36 | | G | 49 | | How many times per year would in-person attendance at meetings be required? Would these meetings be related to the two studies discussed in the RFP (pre-study, post-study, or both?), or are these meetings in isolation from the studies? | A minimum of six meetings during the two year period. However, the Lottery can discuss flexibility with the selected vendor. The meetings would be related to the two studies discussed in the RFP. |

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| 37 | General Question | | | | The RFP appeared on PGRI's website on August 5th, although the issue date is July 30 on the RFP document. We are also awaiting answers to the Q&A (expected August 22) to finalize our intentions to provide a response to this RFP (due Sep 9th). As such would the Delaware Lottery consider extending the submission deadline by at 1 to 2 weeks? | There has been an addendum to the RFP extending the RFP bid submission dates. |
| 38 | Appendix B | 1.E | 49 | Development and maintenance of, and updates to, a database, or databases, containing historical data records from existing lottery research for incorporation into presentations and reports to show analyses of various trends in all Assigned Research Studies." | In what format does the above referenced historical data currently exist? | Historical data begins with contract year 1 of these studies. The format will be mutually agreed upon between The Lottery and the selected vendor. |
| 39 | Appendix B | 1.E | 50 | Development and maintenance of, and updates to, a database, or databases, containing historical data records from existing lottery research for incorporation into presentations and reports to show analyses of various trends in all Assigned Research Studies." | Is there a preferred format for the database deliverable referenced above? | The database format will be mutually agreed upon between The Lottery and the selected vendor. |
| 40 | Appendix B | 1.E | 51 | Development and maintenance of, and updates to, a database, or databases, containing historical data records from existing lottery research for incorporation into presentations and reports to show analyses of various trends in all Assigned Research Studies." | To what degree should this database be a stand alone searchable reference tool vs. a warehouse of combined historical data? | This will be discussed with the selected vendor. |

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| 41 | Appendix B | 1.E | 52 | Development and maintenance of, and updates to, a database, or databases, containing historical data records from existing lottery research for incorporation into presentations and reports to show analyses of various trends in all Assigned Research Studies.” | Given that historical data exists for all Assigned Research Studies, when was the last time these studies were conducted, what data collection method(s) were used at that time, what were the sample sizes collected, and will previous survey instruments be made available to bidders? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 42 | Appendix B | 2.B.i.a | 51 | Questionnaire may contain 3 or 4 open-ended questions | The RFP mentions open-ended questions for the Ticket Lottery Player Study, but not for the Delaware Resident Study. Will the Delaware Resident Study also include open-ended questions? | The Lottery has no preferred methodology for each study. As per pg.3 II.C in the RFP, it is our goal to consult with the selected vendor to identify and carry out the appropriate methodology or methodologies, including developing the questions. |
| 43 | General Questions | | | | Have these projects been previously conducted? For how long? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 44 | General Questions | | | | Who is the current vendor? How long has it been a vendor for Delaware Lottery? | There is no current vendor. |
| 45 | General Questions | | | | What is the budget for the Delaware Resident Study? | The Lottery has not set a budget for these research studies. Bidders should use their professional judgment to provide proposed budgets for the tasks detailed in the Scope of Work. |
| 46 | General Questions | | | | What is the budget for the Ticket Lottery Player Study? | The Lottery has not set a budget for these research studies. Bidders should use their professional judgment to provide proposed budgets for the tasks detailed in the Scope of Work. |

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| 47 | General Questions | | | | What has been the sample size for the Delaware Resident Study? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 48 | General Questions | | | | What has been the sample size for the Ticket Lottery Player Study? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 49 | General Questions | | | | Other than being a full-time Delaware resident, what are the other qualifications to be able to participate in the study? | The audience consists of the adult population of Delaware: <ul style="list-style-type: none"> • 18 years and older for Drawing and Instant games • 21 years and older for all other products. |
| 50 | General Questions | | | | What are the qualifications for the Ticket Lottery Player Study? | The audience consists of the adult population of Delaware: <ul style="list-style-type: none"> • 18 years and older for Drawing and Instant games • 21 years and older for all other products. |
| 51 | General Questions | | | | Are there any open ended questions for the Delaware Resident Study? | The Lottery has no preferred methodology for each study. As per pg.3 II.C in the RFP, it is our goal to consult with the selected vendor to identify and carry out the appropriate methodology or methodologies, including developing the questions. |
| 52 | General Questions | | | | May we see the questionnaire and the final report for the Delaware Resident Study? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |

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| 53 | General Questions | | | | May we see the questionnaire and the final report for the Ticket Lottery Player Study? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 54 | General Questions | | | | Will any of the studies be conducted in a language other than English? If yes, what language(s)? | This is an option and will be discussed with the selected vendor. |
| 55 | General Questions | | | | Has the Delaware Lottery conducted any similar studies in the past, accessible for comparison of outcomes? | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 56 | General Questions | | | | Are you looking for data on all Delaware Lottery games (including KENO®, Video Lottery and Table Lottery games), or only those listed in the RFP? | Yes , we are looking for data on all Delaware Lottery games. |
| 57 | General Questions | | | | Is the ultimate goal of marketing, based on this study, to increase the anticipated YOY growth rates? | Yes |
| 58 | General Questions | | | | Are there any particular characteristics or disciplines you are looking for in the selected vendor? | The selected vendor should meet all the qualifications as set forth in the RFP requirements. |
| 59 | General Questions | | | | Is there any desire to compare the results of these studies back to prior waves/studies? | No |
| 60 | General Questions | | | | Is there a requirement for qualitative research in conjunction with these initiatives to better understand player/non-player needs, trends, etc.? | This will be discussed with the selected vendor. |

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| 61 | General Questions | | | | Who at DSL will be the main user of this research and what initiatives and marketing activities will it inform? | Delaware State Lottery (DSL) Management and Marketing Staff. The Lottery will use this information for marketing purposes, products, new game development and enhancement and promotions. |
| 62 | General Questions | | | | Are there any geographic sub-regions within Delaware that would require a separate read of the results? | This will be discussed with the selected vendor. |
| 63 | General Questions | | | | Are contiguous zip code areas or counties in neighboring states, such as Maryland, Pennsylvania & New Jersey that should be included in the sampling frame (that might draw DSL players)? | This will be discussed with the selected vendor. |
| 64 | General Questions | | | | Can you tell us what percent of the adult population has played DSL scratch and/or draw games within the past year? (e.g., the incidence of player-ship) | The last research study was conducted in 2009, and we are bound by confidentiality and would not be able to share any data from that study. |
| 65 | General Questions | | | | What format would you like to see the proposal submission? (e.g., MS Word? PPT?) | Microsoft Office Products or Adobe. See Appendix A for additional information. |
| 66 | General Questions | | | | Do you require in person presentations of the results for each study? | Yes , see Appendix B. page 49-B |
| 67 | General Questions | | | | Has the Delaware Lottery retained a supplier for past market research services and who was that supplier? | The DSL retained Gfk ARBOR LLC for a past market research study that was conducted in 2009. |
| 68 | General Questions | | | | If there was/is such a supplier, how similar was their work to the requirements outlined in the RFP? | The last research study was conducted in 2009. The requirements have changed for this RFP. |

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| 69 | III | E | 7 | Price Proposal | Can you give us an overall yearly budget or your budget for this research? | The Lottery has not set a budget for these research studies. Bidders should use their professional judgment to provide proposed budgets for the tasks detailed in the Scope of Work. |
| 70 | II | C | 4 | Game awareness, both aided and unaided | Would the Delaware Resident Study include covering the casino aspect of gaming? | Yes , we are looking for data on all Delaware Lottery games. |
| 71 | II | C | 4 | Brand image and awareness as they relate to other well-known Delaware Lottery games | For brand image and awareness will the focus be on all 7 gaming categories (Drawing games, Instant games, Sports lottery, KENO, Video lottery, iGaming, Tabled games) and the many products/locations within those categories or just a specific category? | Yes , we are looking for data on all Delaware Lottery games. |
| 72 | Appendix B | B.ii | 51 | Develop random, representative sample of the adult population of the State of Delaware by county and gender within county. | Would you want to include residents outside of Delaware (non-DE residents) in the ticket lottery player study? | No |
| 73 | | C | 4 | Retail environment (monitors, POS | When you mention 'monitors' with regards to 'Retail environment (monitors, POS)', can you provide more details about these monitors? | We are specifically referring to our Keno monitors located in various Delaware retail locations. |

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| 74 | General Question | | | | <p>I noticed that on pages 2 and 3 and also on appendix B, one of the studies is called "Ticket Lottery Player Study."</p> <p>Should this be changed to "Lottery Ticket Player Study"? Or is this the same thing as a study of "lottery ticket players" or something more expansive?</p> | <p>The study will be of Lottery Ticket Players so it could be referred to as "Lottery Ticket Player Study".</p> <p>A "lottery ticket player" means an individual who is 18 years or older (for drawing games and instant games) or 21 years or older (for sports lottery games) that obtains and plays from one of the licensed lottery retailers within the State of Delaware a ticket for one of the legalized lottery games established and operated by the Delaware Lottery, namely tickets for drawing games, instant games, and sports lottery games.</p> |