

THE POWER OF POWERBALL.

UNCOVERING THE FACTS BEHIND ONE OF AMERICA'S LEADING BRANDS.

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Close your eyes (ok, maybe don't have them completely closed) and imagine a brand that has a greater reputation than the World Cup (coming soon to an America near you in 2026!), provides better value than Starbucks and is recommended at a significantly higher level than the likes of TikTok, DraftKings and Ceasars.

This brand's aided awareness is also significantly higher than world renowned institutions such as American Airlines, Marriott, Major League Baseball (is it still America's pastime?) and United Airlines.

If you said Powerball, you would be correct.

Quite remarkably, for a brand without much fanfare in the landscape of these United States, when more than 30,000 Americans (the largest representative sample I personally have ever managed in 29 years of researching!) were asked which lottery, gaming or gambling brand comes to mind first, the answer once again is Powerball at 17%, beating out the likes FanDuel, and MGM Grand.

Reputation is the cornerstone of power!

The great reputation for Powerball is driven by females (who also score both Amazon and Starbucks significantly higher than their male counterparts), while American men have stronger reputation scores for the likes of BMW, MLB, McDonalds, DraftKings and FanDuel.

Value is more expensive than price.

Powerball currently sits alongside BMW in terms of 'value,' not a terrible brand to be compared with.

Powerball and Mega Millions have remarkably similar USP's (unique

selling positions), but they currently have a strong and significant advantage over other gambling and sports betting brands in terms of value proposition, loyalty, and reputation, such as MGM Grand, FanDuel and Caesars.

"Winning isn't everything, it's the only thing." V Lombardi

One interesting way to get at what a brand stands for is asking an unaided 'key word' association. Powerball is strongly connected to 'Winning'. However, the word 'Jackpot' is significantly lower as a 'top of mind' word among younger Americans (18-34-year-olds), when compared to older Americans, who have witnessed many more jackpots above \$500m in their lifetimes.

The biggest risk is not taking any risk...

In terms of its aided key words (respondents were asked to select words shown to them), Powerball is strongly associated with two major words or phrases - 'Lucky' and 'Risk Taking.' Meanwhile younger Americans (18-34-year-olds) over-index on Powerball's word associations with terms like 'Rewarding', 'Thrilling' and 'American'.



The fact that different generations across America think about the Powerball brand in different ways is definitely a positive for all the ad agencies and marketers in the Lottery industry, allowing wider scope for verbiage and imagery in games, advertisements and promotional tools.

Understanding Powerball and add-ons. An opportunity for new players?

Two-thirds of Americans claim they understand how to play Powerball. This is driven predominantly by males (75%) over females (62%), although as a male myself, I often overestimate how much I actually understand about anything and everything in this





Applying Powerball's strengths to the future of Lottery.

Picture the scene. New Jersey. July 2026. Following the Powerball NFL Super Bowl promotion in February '26, in which Powerball second chance winners were offered the opportunity of winning tickets to the World Cup final, the USMNT (that's the U.S. Men's National 'Soccer' Team for those uninitiated), warm up with balls numbered 1 to 26 to represent the 26 potential red bonus balls. After the warmups, legacy U.S. men's and women's soccer players take penalty shots with those same Power balls to determine the winners.

It is time to dream bigger, utilizing the undoubted power of our Powerball.

Trust me, I'm a researcher. ■

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About the research.

This research project, commissioned by the Multi-State Lottery organization, was an all-encompassing venture conducted by Lotto Research, with balanced interviews across forty-six of the forty-seven seven U.S. jurisdictions that sell Powerball. The total number of online completes was a little more than 43,700, with state representative samples ranging from n=2,000 at the higher end for the likes of Texas and California, down to n=250 in Maine and Delaware, the results of which were all balanced to state demographics for age, gender and ethnicity. The national sample was also balanced by region/states, and for age, gender, ethnicity, and Hispanic/non-Hispanic residents.

The analysis contained in this article represents Lotto Research's interpretation of the results of the research. MUSL and all the state lotteries are still reviewing the full comprehensive report and the individual state level reports as this article goes to press.

All forty-six jurisdictions received their own state level report for the Powerball Brand Study, but if anyone reading this would like to know more, don't hesitate to get in contact with the MUSL team, led by Bret Toyne.

world, which is why my wife hires professionals to do even the most routine household improvements. That said, only just over half of 18–34-year-old Americans claim they understand how to play Powerball right now, so there may be an opportunity to engage with the Gen Z's and younger Millennials sooner rather than later.

One of the most interesting data points in the 15-minute questionnaire came from the Powerball add-ons information. Just over half of all Powerball players 'usually' buy an add-on to their Powerball game, and this number skews noticeably and significantly younger, with three quarters of 18–34-year-old Powerball players claiming to currently buy an add-on. This alone may provide current state jurisdictions without Double Play to build a case for attracting that all important 'new' consumer.

Powerball partners for the future

Powerball's undoubted strengths in the U.S. marketplace have often been questioned by so called 'bigger' brands, but this research firmly underscores the fact that Powerball is among the best and brightest brands in America, and certainly top in the Lottery and Gaming world.

The most forward-thinking aspect of the research was the brand partnership section.

Lotto Research asked more than 43,000 people what brands they felt would be best for Powerball to partner

with in the future. Americans believe Mega Millions is the best brand for Powerball to partner with. This was a perfectly logical and expected response. However, we the people then selected some very intriguing partners out of the thirty total brands tested. The NFL was a particularly strong second place choice after Mega, with MGM Grand, 7-Eleven, Caesar's, Draft Kings, FanDuel and Coke all being brands Powerball should strongly consider partnering with. Perhaps some of these major brands would think about a partnership once they have viewed all this information.

Generational brand partners for Powerball.

Younger Americans recommend the top sports brands (NFL, NBA) as Powerball partners, which will be music to every brand manager's ears, while 55+ Americans are significantly more likely to recommend gambling brands such as DraftKings, FanDuel, Caesar's and MGM Grand.

How iLottery is helping state lotteries remain 'top of mind'

As discussed in the May/June issue of PGRI Magazine, unaided 'top of mind awareness' is strongly and significantly higher for 'State Lotteries' (net) and 'Lottery Games' (net) in iLottery states, compared to non-iLottery states. For those states whose revenues may have started to level off, this may be a good way to help the legislative body understand the power of being in a consumer's hand (literally) every day.