

FROM THE PRESIDENT

Know From Whence You Came

“Know from whence you came. If you know from whence you came, there are absolutely no limitations to where you can go.” The lottery industry can pay heed to and take satisfaction in African-American novelist and playwright James Baldwin’s wisdom.

Looking back on lottery history – the essence of our existence – we discover our core purpose. Whether we are raising funds to build roadways, give our seniors a better quality of life, protect our natural resources for future enjoyment, or put our kids through college, we are working towards the same types of public missions that gave birth to the very first lotteries centuries ago.

Lotteries’ roots can be traced as far back as the Roman Empire where Caesar used a lottery to help repair the city of Rome. In 15th-17th century Europe, money generated from lottery sales financed everything from construction and charities to funding for the North American colonies.

A lottery also allowed the first American colony to raise enough money to sustain itself through harsh winters. In 1777, the Continental Congress held a lottery to raise funds for similar projects, and Benjamin Franklin used a lottery to pay for cannons in the Revolutionary War. After the Revolutionary War, lotteries became quite popular, providing a way for people to pay for the rebuilding of cities. In fact, a lottery funded the infrastructure to allow for the country’s western expansion from Virginia under President George Washington.

Today’s lotteries continue the noble tradition of pooling citizens’ resources on a voluntary basis to fund projects that benefit their communities. You can read more about the fruits of this legacy in this issue of Insights that features lotteries’ contributions to our beneficiaries.

Lottery history also reveals what happens when the public mission of lotteries plays a back seat to private interests.

The first lottery in my home state of Louisiana was established in 1868 by a group of entrepreneurs who sold tickets nationwide. The company burgeoned, keeping nearly half of its revenue tax free in exchange for a relatively small sum given to the charity hospital in New Orleans. Amid charges of corruption, the company moved overseas and eventually shut down after the federal government passed laws banning the sale of lottery tickets through the mail. By 1894, private lotteries were no longer legal in the U.S.

And so Baldwin’s counsel rings true still. The games may change, technology may change and politics may change, but our success as an industry hinges on our staying true to our mission and the beneficiaries we serve.

Here’s to our future prosperity, which from the looks of these pages, appears quite bright. Happy New Year!



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January/February 2017

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FOCUS ON: BENEFICIARIES



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Ten Years of Virginia Lottery Super Teacher Awards

A Beneficiary Message with a Surprise Twist



The auditorium was filled with elementary school students, excited to have a mysterious break in their normal Tuesday afternoon routine. Some of the teachers may have wondered why the newly-appointed executive director of the Virginia Lottery, Paula Otto, had come all the way to their little school, Indian Valley Elementary in Radford, Virginia.

Otto told the students she was there because the Virginia Lottery had a new program to recognize outstanding K-12 public school teachers in the state. A murmur of excitement swept the young crowd. Was one of the best right here in their midst?

It was May 13, 2008, and the first Virginia Lottery Super Teacher Award was about to be presented.

When Otto announced the name of the winner, fifth-grade teacher Jennifer Bunn, the young students squealed with excitement. The shocked teacher walked to the stage, looking a little dazed, to receive a check for \$2,000 and a \$2,000 credit for classroom supplies.

Since that day, the Virginia Lottery has presented 71 additional

teachers with Super Teacher Awards – all of them without the recipient knowing about it beforehand. This year marks the tenth anniversary of the awards.

Eight awards are presented each year, one in each of the Lottery's eight sales regions. Each teacher is nominated by a parent, co-worker, friend, spouse, or any adult Virginian, for his or her talent, hard work and dedication. The nominating essays are evaluated by a panel of distinguished educators and community leaders.

"It's a very difficult job narrowing it down to eight recipients each year," said Otto. "There are so many great teachers in Virginia, and they often don't get the recognition they deserve."

The awards are a partnership between the Lottery, the Virginia PTA and The Supply Room Companies, which contributes the \$2,000 credit for classroom supplies.

"The Super Teacher Awards were conceived as a great way to highlight our beneficiary, K-12 public education," said Otto, a former educator. "It's a bonus that we get to surprise the teachers in front of their students and often their coworkers and family." ■

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AROUND THE INDUSTRY

Missouri Lottery first to serve up Snapchat Geofilters



Missouri residents had a fun new way to celebrate the holidays – they could frame and share their selfie using one of the Missouri Lottery’s new holiday Snapchat Geofilters. The Missouri Lottery is the first U.S. lottery to purchase location filters for Snapchatters; those who live in Missouri and are 18 years old or older may participate.

“Snapchat is growing tremendously; it’s the new craze,” said Missouri Lottery Executive Director May Scheve Reardon. “We offered a total of five holiday filters.”

Snapchat is a mobile social app that allows users to share text, photos and videos with their followers. It gives users the opportunity to add exclusive content to their videos and photos, and makes it easy to share in real-time. Content only lasts 24 hours, unless specifically saved by the user.

The app has dynamic lenses – photo filters that change and edit photos – but these are currently only sold on a national level. In contrast, Geofilters are available only within a specified geographic area. They are creative overlays for Snaps in different places. When Snapchatters in certain locations take a Snap, they’ll be able to swipe left or right and see a Geofilter and use it to explain where, when and why they took the Snap. They can then send a Snap with a Geofilter to other Snapchatters or add it to their daily Story.

Reardon said the Lottery works hard to be innovative and fun. Adding these Geofilters to Snapchat is one way to reach new potential players – they allow the Missouri Lottery to take part in the millions of Snaps sent between friends each day on Snapchat. “Roughly 80 percent of daily Snapchat users are over 18,” she said. “So it now makes sense to use this entertaining platform.”

“The first filter we offered was December 12, and it was used by thousands of people and seen by well over a hundred thousand people,” she added. “It’s been very popular. But they were only available for one day.”

The holiday Snapchat Geofilters campaign was completed with 2,295,450 impressions; overall, 1,086,014 filters were viewed in sent snaps and stories. The initial conclusion was that the program was an efficient use of advertising funds, and there are likely more Snapchat promotions in the Lottery’s future. “Even my kids think the Missouri Lottery is cool,” stated Reardon. ■



MAKING MORE OF WHAT YOU HAVE

At Washington's Lottery, when we consider changes or additions to our portfolio of games, we usually do research with current and potential players assessing whether we have a good idea. The Lottery relies on a contractor to field co-operatively designed research. This article recounts some work that was done in 2013 through a contract with Crestwood Associates. Although the study dates from 2013, the points made in this article are potentially relevant and interesting to anyone who is designing research now.

At the time, we were considering adding an instant-win game as an option players could select when buying our traditional in-state Lotto game. What we want to convey here has little to do with the virtues of the add-on games we were considering. Rather, our point is about research methods, and what we learned by adding a particular "control" to our research design.

As background, Washington has an in-state Lotto game that produces sales comparable to one of the national games. Our sales of the national games are pretty light compared to many other jurisdictions, and the in-state game is a valuable franchise. In FY2013, we had a year of relatively low Lotto sales and there was fear that the game had been damaged by the addition of Powerball to our portfolio in 2010.

Through an internal analysis, we concluded that the weakness was due to chance jackpot development, not cannibalization from Powerball. Put another way: although Lotto sales in FY2013 amounted to only about 87 percent of the goal we set for the game, they were 97 percent of what we would have expected, given the jackpots we had. The conclusion was that Lotto had not "broken" under pressure from Powerball, and that we might expect natural variation to produce better years.

Making Old Seem New

In order to gauge player reactions to adding instant-win opportunities, a "control" was included in the experimental design. Our "control" involved the slight subterfuge of presenting the very same Lotto game that players had been buying for a decade as "new." The same old Lotto game designated "New Lotto" was one of three concepts to which players responded; the other two concepts offered an extra-cost optional purchase of an instant-win game.

We first exposed these three concepts in focus groups of a few players, to get a qualitative sense for the attributes of each concept that players found relevant. We then framed a quantitative phase where a main objective was to assess how introducing one of the concept games might influence spending across the whole lottery product portfolio. Our method was to recruit nearly 1,000 people to participate in an online survey: 820 people who had played WA Lotto within the past year, and



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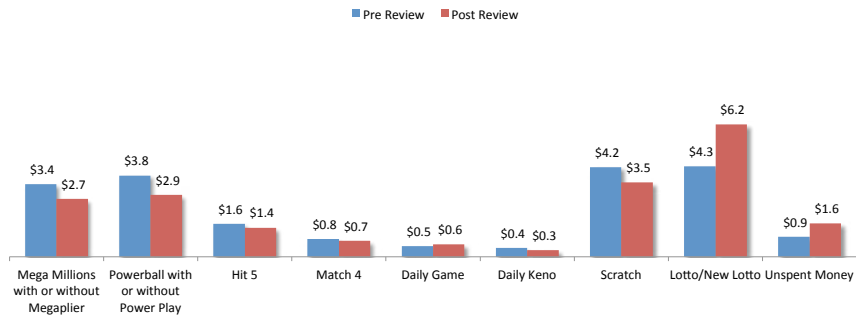




Control (Current Lotto) – Spending Exercise Pre Review vs. Post Review – Past Year Lotto Players

- Among past year Lotto players, showing the current version of Lotto positioned as a new version of Lotto resulted in an increase in Lotto spending of \$4.3 to \$6.2 pre vs. post.
- Increases in Lotto spending would likely result from cannibalization from Mega Millions, Powerball, and Scratch.

Control (Current Lotto) – Game Spending Exercise Pre Review vs. Post Review
Base = All Respondents (n=820)



Q1 / Q21A.1 Imagine you had \$20 to spend on Lottery games. How much would you spend on each of the following games?

WA Lottery - Lotto New Game Alternatives

crestwood
ASSOCIATES

August 23, 2013

1

156 people who had played some lottery game but not Lotto. The order in which the new concepts was presented was balanced so that each was presented first, second or third in order to a similar number of participants.

There were two particular observations from the research that we want to discuss.

The first observation involves the spending model employed. Each respondent was asked, "Imagine you had \$20 to spend on lottery games. How much would you spend on each of the following games?" Participants were asked this question before being shown any of the "new" concepts, and then again after seeing each of the three test concepts. On average about \$0.90 went unspent by players before seeing any new concepts. There was thus little "room" for players to increase their spending after seeing the new concepts. As it happened, though, players showed no tendency to increase their spending once they saw the new options. Rather, they re-allocated their \$20 toward the new Lotto options, and away from the multi-state games and Scratch, and left more money unspent!

So our first point, from a research point of view, is to be aware of the implications of how a question is framed. This particular framing of the spending question may have worked against discovery of any real tendency for players to spend more (or less) when given different options. An alternative might have been to ask players about their typical spending pattern first and then ask them how they would spend with a new game option available.

The second observation revolves around the "control" concept, where we presented the current Lotto game as "New Lotto." The "New Lotto" control consisted of calling out features of the old game that had been identified as relevant in the qualitative phase of research.

With the control, respondents moved money away from the multi-state games and away from Scratch, and spent more of it on

Lotto. This was true regardless of whether players saw "New Lotto" as the first, second or third option. Spending on "New Lotto" was 44 percent higher than on old Lotto; with the optional add-on games the increase in spending was 56 percent to 60 percent.

Conclusion

The significant learning here is that we often assume players are more engaged with our games than they may be. Note that by simply reminding players of relevant features of the existing game, we got them to "spend" more on it in relation to the rest of the portfolio. The increase in "spending" due to actually offering an add-on game was a little larger. However, considering that the add-ons run at a higher prize expense than the basic Lotto game, these results did not lead us to expect more profit from adding an instant-win feature than we might get simply by marketing the existing game more effectively. And this work suggested that the features we used to describe "New Lotto" were features worth promoting.

Although in this brief note we focused on one quantitative result, more qualitative items pointed in the same direction. Consequently, we felt confident in advising our Marketing department to position Lotto versus other parts of our portfolio by emphasizing "two chances to win for \$1," "better odds of a big win," "played only in Washington State," and so on. Washington's Lottery is still pursuing this approach.

What if we had not included "New Lotto" as a control? We would probably have advised adding one of the instant-win options, since players responded favorably to them. This might also have been a productive move. However, new game add-ons and changes can be expensive. Having the control helped us realize that we could support Lotto not only by adding features, but also by marketing features that were already there. ■

Is your lottery...

BIG LOTTERY DAY 1
MOBILE APP COMING SOON!
Big fanfare

BIG LOTTERY DAY 30
WORK IN PROGRESS...
Drawn-out development

BIG LOTTERY DAY 60
NEARLY THERE...
Dwindling interest

BIG LOTTERY DAY 120
STILL NO APP...
No market testing

BIG LOTTERY DAY 180
LAUNCH DAY
But will players like it...?

BIG LOTTERY DAY 365
VERSION 2
Slow to update

your LOTTERY DAY 1
iLottery Coming Soon!
Engage players

your LOTTERY DAY 28
Check Results
More soon...
Simplest product

your LOTTERY DAY 42
Check Results
Store locator
More soon...
Regular updates

your LOTTERY DAY 56
Check Results
Store locator
Buy ticket
More soon...
Respond to feedback

your LOTTERY DAY 70
Check Results
Store locator
Buy ticket
Instant wins
Iterate and learn

your LOTTERY DAY 84
New Features
Continuous fortnightly updates

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Holiday Campaign a Big Success in 2016!

A record number of lotteries participated in the holiday responsible gambling campaign, in which lotteries discourage gifting lottery tickets to minors.

By Patricia McQueen



A record 57 lotteries from around the world participated in the annual Holiday Campaign, a responsible gambling program that shares the message that lottery tickets should not be purchased as holiday gifts for minors.

The campaign is a collaborative initiative between the National Council on Problem Gambling (NCPG) and McGill University's Youth Gambling Centre. It is endorsed and supported by the North American Association of State and Provincial Lotteries (NASPL), the European Lottery Association (EL) and, for the first time in 2016, by the World Lottery Association (WLA).

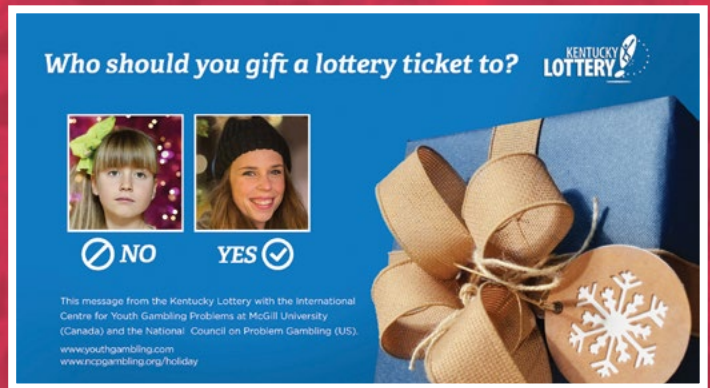
"We are delighted by the exponential growth of the campaign and we welcome the new participants," said Dr. Jeffrey Derevensky, Director of the McGill Centre and a renowned expert on problem gambling among youth. "Lotteries worldwide value corporate social responsibility as reflected by the significant increase in the number of participating lotteries. We greatly value the support of NASPL, the WLA and EL, and look forward to even greater expansion of the campaign in the coming years."

Research shows that a majority of adolescents gamble at least occasionally, and that lottery products may be a gateway to problem gambling. In fact, data indicate that there is a strong association between the age of gambling onset and the severity of problem gambling. Additionally, youth gambling is known to be linked to other risk-taking and addictive behaviors such as smoking, drinking and drug use. The goal of the Holiday Campaign is to raise awareness about these issues and to help make a difference in preventing underage gambling and gambling problems.

Recruitment effort

Many American lotteries participated in the campaign for the first time in 2016, or offered their own campaign using the same principles. In total, almost every American lottery joined the effort.

"I really think NASPL's Responsible Gambling committee was crucial in the growth of the program," said NCPG Executive Director Keith Whyte, adding that members of the committee have been explaining to their colleagues what the program is – and isn't. It's



Some gifts are better left to the grown-ups

Lottery tickets aren't child's play

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PLAY RESPONSIBLY

GIFT RESPONSIBLY.
LOTTERY TICKETS
AREN'T CHILD'S PLAY.

MD MARYLAND LOTTERY

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A joy to give,
but not to kids.

A reminder that lottery tickets are for adults only.

bcl

GameSense

Samples of some of the campaign materials lotteries used in 2016.

not a general prohibition on giving lottery tickets as holiday gifts, but a prohibition on giving those tickets as gifts to minors. "It's a responsible gaming campaign that focuses on youth and underage play. I think sometimes that message gets lost."

"The committee made a concerted effort to get 100 percent participation from all U.S. lotteries and Canadian provinces," explained Alice Garland, Chair of the NASPL RG committee and Executive Director of the North Carolina Education Lottery. "This was done by contacting states that had not yet signed up and encouraging them to join the group. We didn't quite make 100 percent but came really close and added fourteen states over the previous year."

The Holiday Campaign is designed so that each lottery organization can tailor the message to the needs of its own jurisdiction. There are pre-designed promotional and PR materials provided, and lotteries can use any or all of these, or design their own. "There are different ways you can send that message, and we encourage creativity," said Whyte.

He appreciates every effort from every lottery, but is pleased that many lotteries take it to the next level. "We've seen some really exciting and innovative stuff," including some fun and unique multi-media campaigns.

Those efforts don't go unnoticed. Each year at its annual conference, the NCPG gives an award for the best holiday campaign. Past winners include the British Columbia Lottery Corp., Hoosier Lottery, Illinois Lottery, Connecticut Lottery and Austrian Lotteries. ■

Complete list of 2016 Holiday Campaign participants:

United States

Arizona Lottery, Arkansas Lottery, California Lottery, Connecticut Lottery, Delaware Lottery, DC Lottery and Charitable Games, Florida Lottery, Georgia Lottery, Hoosier Lottery, Idaho Lottery, Illinois Lottery, Iowa Lottery, Kansas Lottery, Kentucky Lottery, Maine Lottery, Maryland Lottery & Gaming Control Agency, Massachusetts State Lottery, Michigan Bureau of State Lottery, Minnesota State Lottery, Missouri Lottery, Montana Lottery, Nebraska Lottery, New Hampshire Lottery, New Jersey Lottery, New Mexico Lottery, New York Lottery, North Carolina Education Lottery, Ohio Lottery, Oklahoma Lottery, Oregon Lottery, Pennsylvania Lottery, Rhode Island Lottery, South Carolina Education Lottery, South Dakota Lottery, Tennessee Education Lottery, Texas Lottery, Vermont Lottery, Virgin Islands Lottery, Virginia Lottery, Washington's Lottery, West Virginia Lottery, Wisconsin Lottery, Wyoming Lottery

Canada

Alberta Gaming and Liquor Commission, Atlantic Lottery, British Columbia Lottery Corp., Loto-Quebec, Manitoba Liquor & Lotteries, Nova Scotia Provincial Lotteries and Casino Corp., Ontario Lottery and Gaming Corp., Saskatchewan Lotteries

International

AB Svenska Spel (Sweden), Austrian Lotteries, Hrvatska Lutrija d.o.o. (Croatia), Lottotech Limited (Mauritius), Lotto New Zealand, Tatts Group Limited (Australia)



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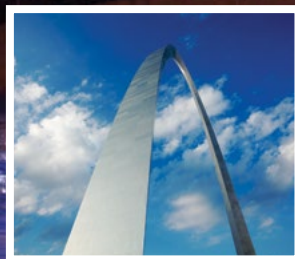
Dr. K. Kay Potetz is a Management Consultant and has been conducting seminars since the early 1980s. Her qualifications include 25 years of management and administrative experience, a Master's Degree in Business Administration and a Ph.D.



John R. Rodgers, Jr.

John R. Rodgers, Jr. is a 1984 graduate of Pennsylvania State University. He then earned a master's degree in History with an emphasis in Research Methods from Shippensburg University. He is the franchise owner for JR Rodgers & Associates, Inc., the Dale Carnegie Training® Franchisee in Pittsburgh, Pennsylvania, which represents counties in Pennsylvania, New York, Ohio, and West Virginia. As owner, he manages all instruction and marketing for Dale Carnegie Training® in his franchise.

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Passionate about lottery in the Keystone State

The Pennsylvania Lottery celebrates its 45th anniversary in early March, and the country's seventh-largest lottery has a lot to be excited about going forward.

By Patricia McQueen

Punxsutawney Phil may be the most famous groundhog in Pennsylvania, and probably in the world, but the annual weather prognosticator sometimes takes a back seat to the second most popular groundhog, Gus. You see, Gus has been the official mascot of the Pennsylvania Lottery's instant games since 2004. He may not predict if there will be six more weeks of winter each February, but he does a great job promoting a lottery that benefits older Pennsylvanians.

The Pennsylvania Lottery is unique in that regard, with 100 percent of its proceeds funding programs for seniors, including property tax and rent rebates; free transit and reduced-fare shared rides; the low-cost prescription drug programs PACE and PACENET; long-term living services; and the 52 Area Agencies on Aging, including senior centers throughout the state. Since the Lottery conducted its first drawing on March 15, 1972, almost \$27 billion has been raised for these programs.





“We’ve had countless dedicated, committed and passionate professionals work here at the Lottery over the years, and still do,” said Executive Director Drew Svitko. “For us, ‘Benefits Older Pennsylvanians’ is not just a tagline, it’s why we do what we do.”

He wants to make sure Pennsylvania remains what he somewhat ironically refers to as a “CRUMmy” lottery – his acronym for Convenient, Relevant, Ubiquitous and Modern. Convenient for retailers to sell the product and for players to play the product. The product needs to be relevant and it needs to be sold in a relevant way. Lottery tickets need to be ubiquitous – everywhere consumers are, so they always have the option of buying a lottery ticket for entertainment. And it has to be modern – keeping up with technology, changes in the retail world and in consumer behavior. “We continue to think about how we can do that going into the future. Innovation has been something that we’re passionate about, and taking smart, intelligent, measured business risks is one of those things that our stakeholders have supported.”

Learning from challenges

Like most lotteries, Pennsylvania has had its share of challenges. It has the dubious distinction of triggering sweeping change in the lottery industry after a 1980 drawing fix in its Daily Numbers game. “It happened because nobody had ever thought that it could happen, so it really was a wake-up call not just to this lottery but to the industry, that we needed to dramatically tighten up drawing security,” said Svitko. After that incident, experts were brought in to completely redesign the security around lottery drawings. And to this day Pennsylvania continues to be obsessed with security; after all, lotteries rely on people, and people are flawed. So lotteries have to be constantly vigilant, have plenty of redundancy and multiple layers of security.

“The drawing is the core of our soul. It’s our integrity on display. Ours is certainly an integrity business and we never forget that. I think it was a lesson for us and for the industry that changed, for the much better, all of us.” It certainly helped make the Pennsylvania Lottery what it is today – committed to integrity, to its retailers and players, and providing good entertainment value for the dollar, all while thinking about the future.

Generally speaking, the Lottery has had a lot of stakeholder support over the years that has helped it grow and prepare for changes sweeping



across the retail industry. “It’s enabled us to build a foundation for the growth that we’ve been enjoying – the foundation necessary to run a big lottery.” That means excellent execution out in the field and all the important, behind-the-scenes, back-office work that has to happen to license retailers, pay prizes and, well, run a \$4 billion lottery operation.

Even with that support, it hasn’t always been a smooth ride. Although a proposal to privatize some Lottery functions did not come to fruition, Svitko said discussions around it helped policymakers realize that the Pennsylvania Lottery was already one of the nation’s most effective and efficient lotteries. “The reality is that most lotteries are already very dependent on private sector partners – for our systems and our instant games.” Some of the most vocal opponents of privatization were, in fact, players. “We quickly found out that the Pennsylvania Lottery holds a special place in the hearts of our players and they respect us as a public institution.”

Still, he welcomes a healthy degree of criticism in any aspect of lottery operations, whether it comes from employees, players, politicians or other stakeholders. “It forces us to analyze what we do and make good business decisions. I think we grow as individuals and as an organization if we are open to criticism.”

And beyond just criticism, he welcomes suggestions of all kinds. “Everyone always has ideas on what we can do differently. And I think that’s healthy – it forces us to acknowledge that

Pennsylvania Lottery At-A-Glance

	Total Sales	Prizes	Net Proceeds
FY2016	\$4,135,164,810	\$2,639,838,073	\$1,121,317,537
FY2015	3,819,642,911	2,411,651,816	1,060,861,471
FY2014	3,799,568,494	2,376,681,975	1,081,499,159
FY2013	3,699,665,694	2,299,005,529	1,067,376,666
FY2012	3,480,900,689	2,120,499,549	1,060,891,546

Current games:

Instant tickets: About 70 new games per year; \$1, \$2, \$3, \$5, \$10, \$20 and \$30

Terminal games: Powerball, Mega Millions, Cash4Life, Match 6 Lotto, Cash 5, Treasure Hunt, Pick 2, Pick 3, Pick 4 and Pick 5; Fast Play is expected to launch in late February

Millionaire Raffle twice per year

Vital statistics:

Number of employees: 240

Number of licensed retailers: 9,200+

Vending equipment: 2,248 self-service terminals; 5,020 ITVMs

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FEATURING

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this is an idea business, and we don't even remotely claim to have all the ideas. We are always looking for new opportunities."

Game strategy

Games are obviously a big part of where those opportunities lie. Pennsylvania currently offers 10 terminal games – Powerball, Mega Millions, Cash4Life, Match 6 Lotto, Cash 5 and Treasure Hunt, plus the daily numbers suite of games, rebranded in 2015: Pick 2, Pick 3, Pick 4 and Pick 5. It also has more success with raffles than any other American lottery – currently offering two each year.

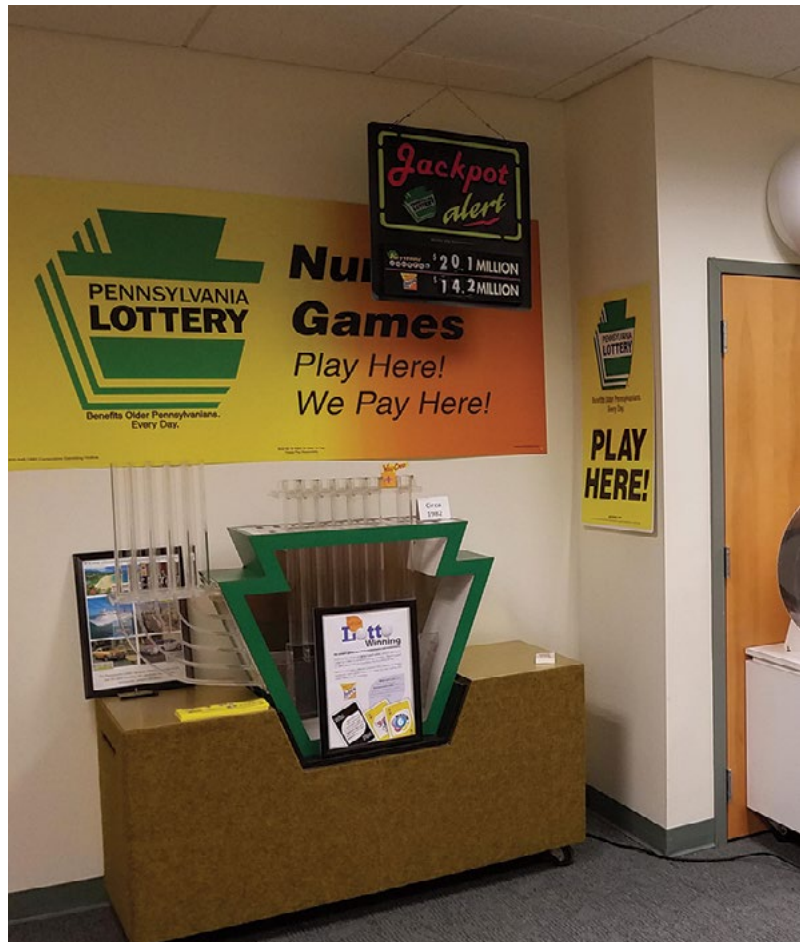
"We absolutely take a portfolio approach to our games – we consider games not just on their own merits but how they fit in the portfolio. We believe in having a diverse portfolio of products, because one size doesn't fit all." Svitko and his team closely evaluate the value proposition of each game, and each potential new game, relying heavily on research. "Our product team and research team work very closely together listening to our players and looking for opportunities."

In addition to conducting research among its players and non-players, Pennsylvania also watches what the rest of the industry is doing, particularly in the areas of scratch games and add-ons for draw games. Promotions are another area where imitation is the sincerest form of flattery. "It's fun and interesting to engage in those conversations with the many great and smart lottery professionals in this business," explained Svitko.

He knows that there aren't many big opportunities out there for new games. "So we shifted our thinking, in addition to our approach, to look for small wins – games that might only generate a couple of cents per capita, but that are incremental and that we can add to our product portfolio without hurting other games." He said sometimes games that fill a gap don't really stand out as an opportunity, so that's why his team always looks deeper. Add-on games were one area where they could take advantage of a small opportunity for a net gain. In 2016, the Lottery added Wild Ball, an add-on to its PICK family of games, and so far it seems to be well received by numbers players. The Lottery also plans to add a new category of games to its lineup in late February 2017 when it launches Fast Play.

On the scratch side, Svitko thinks there is still plenty of room for growth. The industry may be close to maxing out on price points and prize payouts, which have driven sales since the turn of the century, but there are other avenues to continue that growth. Expanding distribution is one way. Scratch tickets are often impulse items, so they need to be seen, and seen in as many places as possible. That's one area in which Pennsylvania has been very progressive – expanding points of sales through the use of vending machines. Other opportunities for scratch lie in more subtle, but critical, changes – making them easier for retailers to sell them and account for them.

In developing games, he welcomes disappointments almost as much as successes. If a game doesn't work, "you don't fail as much as you learn what not to do." In fact, he was excited when the industry came together



with MONOPOLY Millionaires Club. Although the game died a quick death, "we tried and we learned. And I'm thrilled that the industry groups are still talking about the future. One of the worst things that can happen is that everybody gets gun shy and innovation slows. That's a concern I have."

He's sure there will continue to be development on the national game front, knowing that the existing games have such strong branding; there's room for more. "There certainly is opportunity to develop products that complement the rest of our multi-state portfolio as well as our overall portfolio. You can't stop thinking about it."

Strong at retail

Distribution – and the use of vending machines – has always been a strong point in Pennsylvania. "We use vending to get us the "U" in CRUMmy," noted Svitko. For example, the machines help get lottery products visible in large stores with multiple entrances, especially grocery stores – effectively taking the product to the consumer instead of making the consumer find the product at the customer service counter. "Those machines are an important tool for us."

Pennsylvania has great relationships with all its retailers, thanks to the hard work by lottery employees. "I'm really proud of and impressed by our field staff. They are out there every day." Retail is a hard environment in which to compete, given that many other product suppliers pay for premium space and the Lottery does not. Because of the great work done by its sales reps, "our retailers understand that our product has value in their stores." And that means not just through sales of lottery products, but by bringing people in the door who then purchase other items in addition to lottery – not every product does that.

"We are always striving to protect those retailers and their sales and profits, and the great relationship we have with them goes a long way to that."

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Select Pennsylvania Milestones



March 15, 1972

The Pennsylvania Lottery holds its first weekly drawing; its first tickets were 50 cents and offered a \$1 million prize.

May 27, 1975

The Lottery's first instant game launches.

March 1, 1977

The Daily Number, the first of the Lottery's numbers games, debuts with a live, televised drawing. Today, the game is named Pick 3.

April 24, 1980

The Daily Number's "6-6-6" drawing fix leads to a complete overhaul of drawing security and protocols in Pennsylvania and prompts sweeping changes across the entire lottery industry.

August 14, 1986

The Pennsylvania Lottery introduces Super 7, the first lottery game of its type in the nation. Jackpots start at \$2 million. In 1989, it would award the state's single-largest jackpot to date: a \$115.5 million annuity shared by 14 winning tickets.

April 23, 1992

Cash 5, Pennsylvania's longest-running jackpot game, makes its debut. A version of the game is still offered today.

July 1993

The Pennsylvania Lottery begins installing its first instant ticket vending machines (ITVMs).

October 5, 1994

One of the earliest lottery games to be drawn electronically, Hearts & Diamonds debuts. A computer randomly selects and displays 5 of 26 playing cards from a deck containing the hearts and diamonds suits. It runs until March 10, 1996.

Early 1998

The Lottery launches its website at palottery.com.

May 19, 2004

Always an industry leader in the use of instant ticket vending machines, Pennsylvania becomes the first state lottery to offer its players self-service units that sell both instant and terminal-based games when it unveils its Player Activated Terminals (PATs).

November 22, 2005

Sales begin for Millionaire Raffle, the first raffle-style lottery game in the nation, with 500,000 tickets and four guaranteed \$1 million top prizes. Tickets sell out in less than two weeks. Raffles are still popular in Pennsylvania, and Millionaire Raffle is offered twice each year.

July 2016

Total annual sales surpass \$4 billion for the first time, generating a single-year record of more than \$1.12 billion to benefit older Pennsylvanians and record winner prizes of \$2.63 billion. Since its inception, the Lottery has generated almost \$27 billion in revenues for its beneficiaries.

Current projects

Svitko's passion for trying new things has Pennsylvania undergoing a number of tests right now – all in areas that will help expand distribution. One is Play at the Pump, a great way to increase the number of points of sale. Another is card payments – using credit and debit cards for lottery purchases. "This test is an effort to figure out whether it makes business sense and what the rules of engagement should be moving forward with those payment options."

And along the same lines of creating cashless payments to keep up with retail trends is the testing of gift cards for lottery purchases. Gift cards would help lotteries distribute product into non-traditional locations, again helping with that desire to be ubiquitous. "If the test pans out, and it makes sense for us to offer gift cards, maybe we'll have our product in places where you might not normally see it, like in some big box stores and other retailer channels that sell a lot of gift cards but that might not sell lottery products."

Pennsylvania is also continuing to add value to its existing games by adding more and more interactive digital components such as second-chance drawings. "Adding value doesn't just mean increasing the prize payout – it can mean more play value.

Until the day comes when Pennsylvania can offer lottery games for sale through online and mobile channels – that is not currently legal in the state – the Lottery will continue down existing paths to provide as much of what the consumer wants as possible under current constraints. He sees iLottery as something that is likely a competitive necessity in the future, whenever that may be. So he's closely watching what other states are doing, and continues to forge those relationships with retailers – "the core of our business."

While he's always looking for opportunities, he wants to make sure lotteries don't overlook the small ones. "There are very few \$10 million ideas out there, but there are 10 million \$1 ideas. It's still important that we keep looking for the nickels and dimes in the cushions." Doing so will no doubt help the Pennsylvania Lottery stay CRUMmy. ■



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WHAT IS IT ABOUT EL GORDO?

This game is built as if to rely upon records kept in ink on paper, and tickets that are transported by mule. It is in some ways a better game than those most of us sell now, not in spite of this constraint but because of it.



STEPHEN WADE, RESEARCH AND DEVELOPMENT MANAGER, WASHINGTON'S LOTTERY AND PRINCIPAL, LOTTERY MANAGEMENT CONSULTING, LLC.

"A whole village wins..." That's what we in the English-speaking lottery world say about the Spanish Christmas Lottery (Sorteo de Navidad), often referred to as "El Gordo." We know that there is something very positive about that "whole village" effect. This article is about why the Spanish game works this way, and also why we respond so positively to it.

"El Gordo," as you probably know, just means "the fat one" in Spanish. A big top prize in any lottery game might be called "El Gordo." The top prize in the game run each Christmas season by the Spanish National Lottery is big, but not that big: 4 million euros. This game is considered the biggest lottery game in the world not because of the top prize, but because of the total value of all prizes that are awarded from a single drawing event. In 2016, 16.5 million tickets sold at 200 euros apiece should bring in 3.3 billion euros – over \$3.45 billion. About 2.4 billion euros will be paid out in prizes – a generous prize fund amounting to about 70 percent of sales.

The drawing itself is a festive spectacle, embodying long tradition and watched by millions of TV viewers. You will find good descriptions of the drawing elsewhere. My purpose here is to understand less visible properties of the game.

In 2016, there are 165 prizes at the top value of 4 million euros, and also 165 of the second prize (1.25 million euros.) This produces a "shower of millions." There are eight lesser prize levels, with notable abundance of prizes at 200 euros and 1000 euros. In fact, when I studied the prize structure of the game, I was surprised to see that it has features I would recommend for an instant game, if someone asked me to design an instant game with a \$200 ticket. The overall odds

of the game are 1 in 6.35. There is a pretty good chance to win five times your wager. The chart on the next page (a graph of the type I described in the May 2013 *NASPL Insights*) conveys that if you can spend \$5,000, you can be pretty sure of winning back one-third of it. (The chart uses dollars but is based on the El Gordo prize structure in euros.)

This prize structure may help explain why the game has succeeded since it started in 1812! And yet, that is not the main focus of this article. Instead, I want to explain how the information technology and logistics of the early 19th century shaped the structure of this game, and why the authorities have been wise to change it very little for 200 years.

This game is built as if to rely upon records kept in ink on paper, and tickets that are transported by mule. It is in some ways a better game than those most of us sell now, not in spite this constraint but because of it.

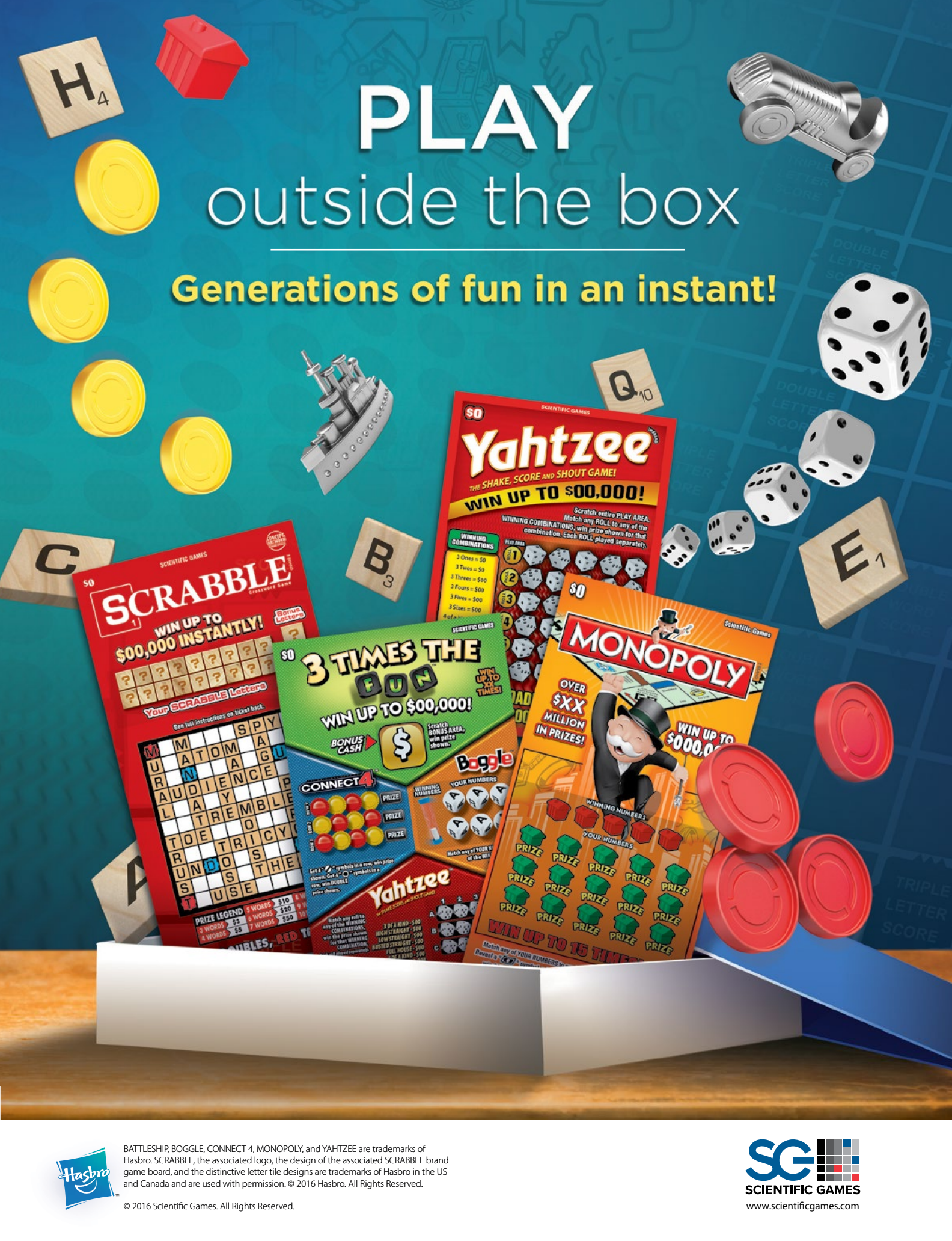
An idea that arose naturally in this information technology (IT) environment is the sub-divisible lottery "ticket." The ticket is the element of a lottery system to which an outcome gets attached: individual tickets are winners, or they are not. Today, producing, tracking, and assigning outcomes to individual tickets is routine lottery IT business, and we think nothing of having millions of individual tickets vying to be the big winner on several nights each week. It is natural to produce as many tickets as each individual player wants, almost without limit.

However, in the days when the printer was a person who engraved a plate and turned a big screw to press it onto paper, there were obvious limits to how many tickets could be produced. It has always been desirable to have many players, but in the old days it was clear that many players could share

PLAY

outside the box

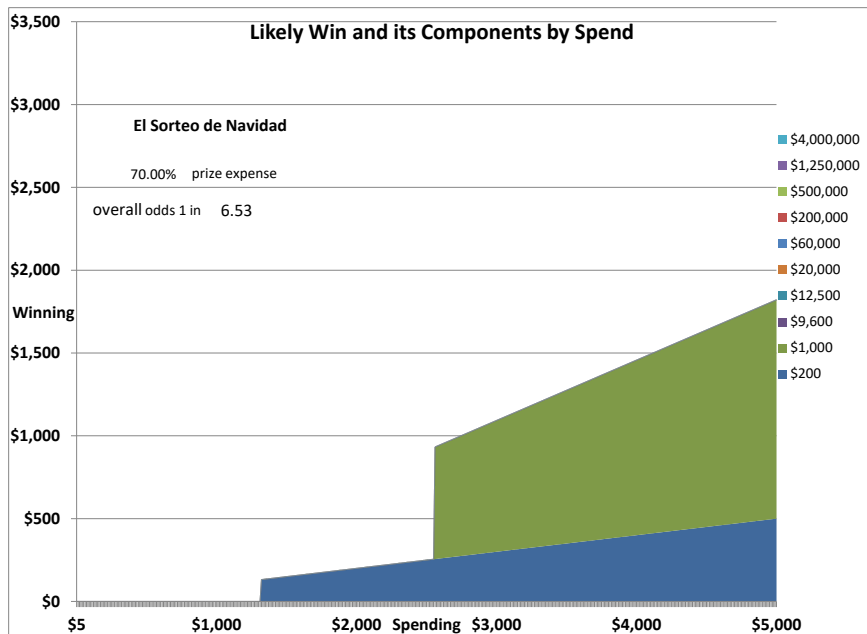
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Norton.) I also think that the sad prospect of failing to share in a win enjoyed by one's social circle motivates people to play. Whichever imagined emotion dominates, the outcome is the same and it is positive for the lottery. This is partly why people join lottery pools at work, and partly why El Gordo works so well.

Can we duplicate this sharing effect of "El Gordo" in North America? Perhaps, but not by building a game of the same structure. The success of the Christmas Lottery rests not only on the merits of the game design, but on tradition. This is something of incalculable value, for which no advertising can substitute. I also believe that the social linkage among people who buy at the same shop is stronger in Spain than it is in North America. It is not merely a matter of day-to-day habits, but of long familial association with a place. Few of my friends in North America live in the same neighborhood where their grandparents lived, while in Europe this is more often so. The likelihood that two shoppers in the same store are related by blood, marriage, or shared experience is higher outside of urban North America. Mobility works against the retail shop as a social nexus. Within Washington State, I have used records of winners to show that only about 40 percent of lottery draw game tickets are bought in the zip code where the player resides.

I do believe that we can use this understanding - that people vividly imagine the good feeling of sharing and the bad feeling of being excluded from sharing - to design better lottery games for North America. The key is to center the opportunity to share on a current social nexus, rather than merely on location. We do not have tradition in our favor - we must use innovation. ■

a ticket. Rather than "at least one ticket per player," the rule of thumb was "at least one ticket per retailer." The price of an individual ticket was set so high that few players would buy a whole one; instead the ticket was built to be broken into one-tenth shares or "decimos." Because of this, several individual players who are patrons of the same retail shop will share in the outcome of a single ticket.

That single ticket would have been delivered by mule. Some mules delivered a single ticket to a village tobacco-seller; other retailers received several tickets. But in the retail environment of the time, with many small shops, probably no retailer required more than one mule to be fully provisioned with lottery tickets.

It was also clear that the drawing ceremony, entertaining and elaborate as it was, was not scalable beyond a certain point. Only so many winning outcomes can be determined in a night, by children who draw wooden balls representing ticket numbers from one vessel, and papers showing prize amounts from another, and sing the result. The obvious solution was to stick with limited set of ticket numbers and to issue the tickets in multiple series. All the tickets having the same number, across however many series, receive the same outcome.

Printing, distributing, and assigning outcomes to tickets was thus organized around the retailer, rather than the individual player. When a winning outcome was associated with a ticket, it was instantly associated with a retailer, and usually to players within walking distance of the retailer's physical location. Further, some retailers arranged to have the same ticket numbers across multiple series delivered to them. This is how it happens that "the whole village wins:" the retailer captures the outcome, perhaps in multiples, and each player who holds a share of the lucky ticket number wins.

The charming social aspect of El Gordo is thus a product of IT and logistics at the start of the 19th century. The Spanish lottery has astutely recognized that this is something to be complemented but not superseded by modern technology. So nowadays El Gordo tickets have machine-readable bar codes for authentication, but the ticket is still meant to be shared. The price and the layout of the ticket support this.

Clearly, I think that this sharing aspect is important and something to be desired. Why? Basically, because I think the happy prospect of sharing a win within one's social network motivates people to play. There is now significant academic research that supports the idea that humans are "wired" to experience joy in sharing (see a popular account of this work in the 2013 book *Happy Money - the New Science of Happier Spending* by E. Dunn and M.

STEPHEN WADE

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Connie Miller

Deputy Director of Operations,
Ohio Lottery

One of the most ambitious projects for any lottery in recent years was the video lottery effort in Ohio. With some 11,000 machines spread over seven racetrack casino locations, most of which went live in the span of a few months in 2013 and 2014, the project was massive. Directing it all was Ohio Lottery Deputy Director of Operations Connie Miller, whose position often leads her to manage any new project that comes along until the dust settles.

“Connie Miller is a long-term employee at the Ohio Lottery who has served in many key roles over her tenure,” said Executive Director Dennis Berg. “Connie has always been a hands on, in the trenches, get it done type of worker. She’s proactive, a team leader and leaves the credit for others to take. She’s been invaluable to the organization and has been instrumental in executing many important projects for the Ohio Lottery.”

Because she gets involved in all the cool new stuff at the Lottery, Miller is always having fun and learning things. She was quick to acknowledge all the other lotteries that graciously share information to help move new projects along. That was especially true for the VLT operations.



The introduction of VLTs in Ohio also has the potential to improve some of the lottery's traditional operations. "Casino/racino operations are fascinating – the way they analyze their customer data, analyze their floors and look at performance by machine," she said. It is really important to understand your customers, and the gaming operators excel at customer data analysis. "We're learning a lot about that, and I'm hopeful we can apply that to lottery."

She added that a cross-promotion is coming up called Jackpot Party, something borrowed from the New York Lottery. It will include a second-chance offer on the instant ticket that includes events at the racinos, and also involves the loyalty programs for the Lottery and the racinos. "We should end up with a list of players interested in each of the racinos, and the racinos will end up with a list of lottery players," further improving the customer database for everyone involved.

Miller has served on several NASPL committees and is a recipient of the association's prestigious Powers Award. She has a degree in political science from Wisconsin's Marquette University.

When she's not working, you can often find her on a boat – what more would you expect of a Pisces with boating genes in the family? "None of us can swing a golf club or tennis racket, but there's not a sailboat or power boat that I'm afraid of." She was a competitive sailor for several years, racing small boats while in high school and college.



(Top) One of the Lottery's food bank efforts ("Facing Hunger") at Cash Explosion road shows. (Bottom) Connie with a friend at a Cash Explosion road show.

She has been a member of the Put-in-Bay Yacht Club since 1990, and is currently serving her third term as recording secretary; she is also past president of the Auxiliary.

She also serves on the Board of Trustees for the Inter-lake Yachting Association, and is co-chair of that group's Sail Regatta 2017, the largest freshwater regatta in the world. Away from boating, she is also a member of the Friends of the West Side Catholic Center, which raises funds to help the homeless and provide for a shelter for women and children.

With a degree in political science, you seemed destined for public service. What first brought you to the Lottery in 1992?

I worked on George Voinovich's gubernatorial campaign and was offered an administrative assistant position in his office in Columbus. I was there for a while but really wanted to go back to Cleveland. One day I saw a posting for a position on the Lottery's Cash Explosion Game Show production team there and asked if I could apply. I saw it as an opportunity to have a good time doing something in Cleveland. The position went to an internal applicant, but I was offered the administrative assistant position in the Director's Office. Amusingly enough, Cash Explosion is still on the air, and now reports to me.

What's it like rising through the ranks at a lottery, starting as administrative assistant?

It has been gratifying to be able to move



(Above) Connie and her entire family. (Above right) The Lottery's operations team. (Right) Connie with her VLT team (Joe Angelillo, Dawn Bendel and Jennifer Wilson) at the Thistledown opening.

up along with many of my co-workers including Director Berg (he started as an auditor). Right away as an Admin I was handed a list of departments and told to follow up with them on various items (there was another admin who took the other half of the agency). So immediately I was directing everything – and nothing – at the same time.

You've been involved in several functions, including information security and operations. What interests you the most, and what has been most rewarding?

Every challenge is rewarding, especially ones that bring new skills. Right now I really am enjoying learning the racino side of the business – there are so many variables to consider in how the floors work but also layers about promotional play and compliance with AML (Anti-Money Laundering) standards. It really is fascinating. And there's also nothing like watching a thousand or more people waiting outside a building for the ribbon-cutting of a new casino. When you roll out new lottery games, there's fanfare. But nothing like the casinos – they are just so alive. It's the most amazing thing.

You were instrumental in establishing video lottery in Ohio, which in several ways are outperforming the state's four casinos. What was the hardest part of getting VLTs up and running? What was the most interesting?

The hardest part was actually making the up-front decisions. For example, how we regulate companies wishing to do business here – we treat

them the way we treat other vendors in the lottery industry, not the way some casino jurisdictions do. And other decisions: Do we use the AGA multi-jurisdictional licensing process? (We do.) Do we accept reciprocity for license holders? (We do.) Do we own the machines? (We don't.) Generally speaking, we followed the West Virginia VLT model, and they were incredibly helpful every step of the way.

Every item required research, an evaluation of the pros and cons, stakeholder comments, and enabling Administrative Rules to enact them. Once we built the framework, our first launch at Scioto Downs was a learning curve but we pulled it off. We then had 10 months before our next facility went live to improve our "punch list" of all the things that needed to come together – minimum internal controls, financial procedures, operations procedures, marketing controls, security and surveillance, problem gambling materials, etc.

The most challenging is also the most interesting – understanding how the regulators in each state structure their program and why. If you look at the Ohio Lottery versus the Ohio Casino Control Commission, which regulates four commercial casinos, our operating practices are completely different. I think that as lotteries, Ohio and the seven other



What’s the most challenging thing lotteries in general, and the Ohio Lottery in particular, face going forward?

For the past decade or so, lotteries struggled with the change in retail habits towards big box retailers, which we have had only limited success in recruiting. Shoppers at Target and Walmart and CVS (to name a few) never see a lottery ticket. So the question was how to get consumer attention. Currently, it is the same question, but now there is also the explosion of digital and cashless commerce. As an industry, we need to look at the leaders there (like Michigan) and imitate their best practices to move into that marketplace.

What’s the most fun you have had at the Ohio Lottery?

In 2009, when the Intralot system went live, it was a thrill to realize that we pulled it off. It was the same thrill in 2012 when we opened the doors of the first racino at Scioto Downs. Both of those provided huge feelings of accomplishment. But when it comes to fun, nothing beats several thousand people at the State Fair taping of the Cash Explosion Game Show. It is such a great day with our player base, and we also have a contest each year to see who can find the most interesting fair food – think deep fried butter or roast beef sundaes. Cash Explosion actually gets recorded in various places throughout Ohio, and wherever we show up, you’d think we were giving away gold bricks. People line up in snow, in rain and even overnight! There’s nothing like it. ■

VLT states comfortably rely on technology to deliver safe and fair gaming. The gaming commissions tend to use humans for the things we use systems for.

How did you learn about gaming and what will help Ohio keep growing that segment of the business?

I went though the Casino Operations Management course work at the University of Nevada Las Vegas through a distance learning program, and also received a UNLV/ CDC Slots Leadership certificate from the UNLV International Gaming Institute. The eight video lottery states discuss collaboration frequently. We have a current multi-state progressive jackpot and are discussing other options. For Ohio, our philosophy is to keep barriers to the marketplace low, so we have 17 active machine providers, including some very small manufacturers. This allows us to have a game library of nearly 5,000 approved themes. At G2E we met with several international vendors who are considering the US marketplace.

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CHARITIES



Winning for Good Causes

North American lotteries have been on a mission since New Hampshire became the first in the modern era to sell tickets beginning in 1964 – a mission to fund good causes.

By Patricia McQueen

Education. Environment and natural resources. Economic development. Cities and towns. Senior citizens. Tax Relief. Veterans. These are just some of the dedicated causes that North American lotteries were created to benefit. And for those lotteries supporting a general fund, they are benefiting all of these causes and more – wherever a government needs to send the revenues.

And what revenues they are! Since modern lotteries began in the U.S. in 1964, they have raised a combined \$431 billion for the good causes they support. Roughly two-thirds of that has been raised for education, the most common beneficiary among America's 45 lotteries. In just the most recent year, fiscal 2016, these lotteries raised some \$22.5 billion for good causes. All numbers include traditional lottery operations and revenues from video lottery terminals and gaming in a few jurisdictions.

In Canada, the five lottery operators have raised an estimated CA\$115 billion for their governments since Loto-Quebec became the first Canadian lottery in 1970. That number, however, incomes a very large portion coming from casino gaming, as three of the country's five lottery operators also run extensive casino operations and the cumulative proceeds aren't separated. In fiscal 2016, they raised CA\$3.3 billion for their provincial governments, and that number does represent revenues allocated from lottery and video lottery operations only.

While every lottery's mission is to raise funds for these beneficiaries, let's not forget the economic contribution they make as a result of that mission. Consumers benefit the most – with prizes currently averaging of almost 63 percent of sales across all American lotteries; a little less than that in Canada

due to their product mix. In fiscal 2016, American players won more than \$46 billion in prizes for traditional lottery games, with considerably more prizes generated from the video lottery terminals and other gaming activities in a few jurisdictions. Lottery products produced CA\$4.8 billion in prizes in Canada last year.

Retailers are the other major group benefiting from lottery operations. On average, American retailers receive about six percent of traditional lottery sales, or roughly \$4.4 billion in fiscal 2016. Retailers selling traditional lottery products in Canada earned more than CA\$600 million in fiscal 2016.

In addition to the direct dollars raised for beneficiaries, prizes paid to winners and commissions paid to retailers, lotteries have benefited their communities in so many other ways. Many of them support sports teams, state and county fairs and other local activities through sponsorships and other means. Lottery employees also often volunteer their time in activities related to their beneficiaries.

On the following pages you will read first about some of the lotteries funding specific causes using specially-designated tickets, and then beginning on page 46, you'll find a roundup of some of the creative ways lotteries are getting the message out about their beneficiaries. "It's important for us to raise awareness and celebrate success in as many ways as possible," said Rebecca Hargrove, President and Chief Executive Officer of the Tennessee Education Lottery. "This messaging is a valuable opportunity to share the positive impact lotteries have on so many." That sentiment is echoed from lottery to lottery, each finding whatever ways it can to spread the word. ■

U.S. Lottery Beneficiaries and Proceeds

United States	Year of First Sales	Cumulative Funds Raised Since Inception (in millions)	Current Beneficiaries
Arizona Lottery	1981	\$3,500	Heritage Fund Commerce Authority Arizona Competes Fund Mass Transit Healthy Arizona General Fund Court Appointed Special Advocate Fund Homeless/Transitional Services University Bond Fund Victims' Rights Problem gambling programs
Arkansas Scholarship Lottery	2009	605	Educational Trust Fund
California Lottery	1985	30,900	Education Fund
Colorado Lottery	1983	2,987	Conservation Trust Fund Colorado Parks and Wildlife Great Outdoors Colorado Trust Fund Building Excellent Schools Today
Connecticut Lottery	1972	8,869	General Fund
Delaware Lottery	1975	4,805	General Fund Health & Social Services-Problem Gambler Programs
DC Lottery	1982	2,045	General Fund
Florida Lottery	1988	30,100	Education Enhancement Trust Fund
Georgia Lottery	1993	17,600	Lottery for Education Account (HOPE scholarships and Pre-K programs)
Idaho Lottery	1989	744	Idaho Public Schools (K-12) Permanent Building Fund
Illinois Lottery	1974	19,458	Illinois Common School Fund (K-12) Illinois Veterans Assistance Fund Ticket For The Cure Fund Quality of Life Endowment Fund Multiple Sclerosis Research Fund Special Olympics Fund Capital Projects Fund
Indiana/Hoosier Lottery	1989	5,100	Build Indiana Fund Teachers Pension Fund Police & Firefighters Pension Fund
Iowa lottery	1985	1,716	General Fund Veterans Trust Fund
Kansas Lottery	1987	1,634	Economic Development Initiatives Fund Juvenile Detention Facilities Fund Correctional Institutions Building Fund General Fund

U.S. Lottery Beneficiaries and Proceeds

United States	Year of First Sales	Cumulative Funds Raised Since Inception (in millions)	Current Beneficiaries
Kentucky Lottery	1989	4,600	Post-Secondary and College Scholarships Literacy Programs and Early Childhood Reading
Louisiana Lottery	1991	3,250	State Treasury - Earmarked for Education Problem gambling programs
Maine Lottery	1974	1,320	General Fund Outdoor Heritage Fund
Maryland Lottery	1973	16,770	Maryland General Fund (lottery proceeds) Maryland Stadium Authority (lottery proceeds) Education Trust Fund (gaming proceeds) Local Impact Grants (VLT proceeds) Small, Minority, and Women-Owned Businesses (VLT proceeds) Responsible Gaming (gaming assessments)
Massachusetts Lottery	1972	24,657	Cities and Towns Cultural Council Compulsive Gamblers Fund
Michigan Lottery	1972	20,546	School Aid Fund (K-12)
Minnesota Lottery	1990	2,688	General Fund Environmental and Natural Resources Trust Fund Game and Fish Fund Natural Resources Fund Problem gambling programs
Missouri Lottery	1986	5,432	Public Education
Montana Lottery	1987	224	General Fund
Nebraska Lottery	1993	607	Education Improvement Fund Environmental Trust Fund State Fair Support and Improvement Fund Compulsive Gamblers Assistance Fund
New Hampshire Lottery	1964	1,798	Education
New Jersey Lottery	1970	24,800	Education and Institutions
New Mexico Lottery	1996	700	Lottery Tuition Fund
New York Lottery	1967	58,020	Aid to Education
North Carolina Education Lottery	2006	4,605	Education
North Dakota Lottery	2004	85	General Fund Drug Task Force Compulsive Gambling Fund
Ohio Lottery	1974	22,370	Lottery Profits for Education Fund
Oklahoma Lottery	2005	757	Oklahoma Lottery Education Trust Fund Department of Mental Health

U.S. Lottery Beneficiaries and Proceeds

United States	Year of First Sales	Cumulative Funds Raised Since Inception (in millions)	Current Beneficiaries
Oregon Lottery	1985	10,834	Economic Development Public Education Parks and Natural Resource Programs Gambling Addiction Prevention & Treatment Programs
Pennsylvania Lottery	1972	26,965	Older Pennsylvanians
Rhode Island Lottery	1974	6,226	General fund
South Carolina Education Lottery	2002	4,124	Education Lottery Fund
South Dakota Lottery	1987	2,580	General Fund Capital Construction Fund Department of Social Services
Tennessee Lottery	2004	3,810	Lottery for Education Account (Scholarships and Grants) After School Program
Texas Lottery	1992	25,500	Foundation School Fund Multi categorical Teaching Hospital Fund for Veterans Assistance
Vermont Lottery	1978	591	Education Fund
Virginia Lottery	1988	10,632	Direct Aid to Public Education K-12
Washington's Lottery	1982	3,821	Washington Opportunity Pathways Account King County Stadium and Exhibition Center (CenturyLink Field) Economic Development Account Problem Gambling Account
West Virginia Lottery	1986	9,018	Education Bureau of Senior Services Tourism and State Parks Department of Health and Human Resources Other state funds
Wisconsin Lottery	1988	3,900	Property Tax Relief
Wyoming Lottery	2014	2	Cities, Towns and Counties Common School Account
Total United States		\$431,295	

Notes:

Numbers may be rounded and are through the end of FY16. Includes proceeds from video lottery/gaming in Delaware, Maryland, New York, Ohio, Oregon, Rhode Island, South Dakota and West Virginia.

Canada Lottery Beneficiaries and Proceeds

Canada	Year of First Sales	Cumulative Funds Raised Since Inception (in millions)	Current Beneficiaries
Atlantic Lottery	1976	CA\$8,960	Lotteries Commission of New Brunswick Provinces of Newfoundland and Labrador Nova Scotia Gaming Corporation Prince Edward Island Lotteries Commission
British Columbia Lottery Corp.	1985	19,500	Government of British Columbia
Ontario Lottery & Gaming Corp.	1975	44,000	Province of Ontario
Quebec/Loto-Quebec	1970	34,045	Consolidated Fund Government of Canada Special Commissions to Non-Profit Organizations Independent Community Action Support Fund Agricultural Ministry Culture & Communication Ministry Social Services Ministry Aid Action International Humanitarian Contributions to the Fight Against Excessive Gambling
Western Canada Lottery Corp.	1974	N/A	Member Provinces and Associate Territories
Total Canada		N/A	

Notes:

Numbers may be rounded and are through the end of FY16. Includes proceeds from casino gaming operations in British Columbia, Ontario and Quebec, and from video lottery in Atlantic Canada and Quebec.

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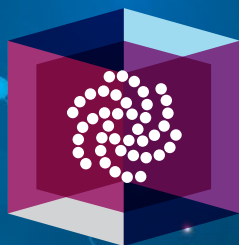
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TICKETS FOR A CAUSE

Several lotteries offer specific games that provide proceeds to a dedicated cause.

By Patricia McQueen

L

otteries were created to generate revenue for good causes. Typically revenues from all games combine to produce the bottom-line proceeds that are allocated to those causes as defined in each jurisdiction. In a few cases, however, special games are offered, and proceeds from those games are dedicated to specific causes.

The Illinois Lottery has had the most varied offering, with specialty instant tickets supporting causes including veterans, the Special Olympics, and research on breast cancer, multiple sclerosis and HIV/AIDS. The Maine State Lottery has long offered instant games where the proceeds are dedicated to the Outdoor Heritage Fund, which helps fund critical conservation and wildlife projects throughout Maine. Elsewhere, veterans programs are the most common recipient of dedicated lottery game proceeds.

Most of these dedicated games are scratch tickets, but Washington’s Lottery tried a Veterans Raffle. Directed by legislation passed in 2011, the Lottery offered the raffle in the fall with a drawing on Veterans Day. It seemed like a good idea at the time, with support from the Veterans Affairs office and a good population base of retired military in Washington.

As it turned out, raffles just don’t do well in the state. As good a cause as it was, the Veterans Raffles did poorly, mirroring the Lottery’s experience with its other raffles, which have since been discontinued. The Veterans Raffle lasted only two years.

So while the cause is worthwhile, with strong support by the general population, there is still a lottery game involved – and that has to work within the framework of each jurisdiction. That’s why, for most lotteries, scratch tickets are the way to go.

CHANGING THEM UP

The Texas Lottery sold \$3.7 billion in scratch tickets last year, and knows a thing or two about instant games. Although generally the Lottery’s proceeds go to education, legislation passed in 2009 directed the organization to offer scratch tickets that would benefit the Fund for Veterans Assistance, managed by the Texas Veterans Commission. The Fund awards reimbursement grants to charitable organizations, government agencies and veterans service organizations, all of which provide direct services to Texas veterans.

The first game was launched in November 2009, just in time for Veterans Day. Through December, a total of \$74.9 million had been raised by the Lottery, which is by far the greatest contributor to the Fund. In fiscal year 2016 alone, a record \$14.7 million was raised off of \$59.7 million in sales.

The Veterans Commission gets to weigh in on game design and how the games are marketed. In the beginning, they wanted only very patriotic themes like Veterans Cash and Veterans Winnings, with a strong military feel dominated by red, white and blue. And that worked well initially. But in Texas, lottery players thrive on change – it’s why the Texas Lottery produces more scratch games per year than any other lottery.

So it’s not surprising that in the third year of veterans ticket offerings (2012), sales took a pretty big dip, noted the Lottery’s Products and Drawings Manager Robert Tirloni. “Over time, we had to convince the Veterans Commission to step away from the patriotic theme and offer more generic themes.” The first of these new games, On the Money, was released in March 2014, and there was a dramatic increase in sales. There is a callout on these games, currently “Supporting Texas Veterans,” to identify them to the public, with 3D stickers also placed on the ticket dispensers to call attention to them.

There is still a traditional themed Veterans Cash type of ticket produced each year in time for Veterans Day in November, when both the Lottery and the Veterans Commission put out a press release announcing the game. Both organizations also play up that launch in social media.

Texas always has at least one veterans-dedicated game in the market at all time, and usually two – as sales for one game wane, another is introduced. “This has worked really well in terms of us being able to generate revenue for the Veterans Commission,” said Tirloni. They are all \$2 games. With rare exceptions,



the Lottery reserves the \$2 price point for its core games and for the veterans games, so as not to crowd the price point. “We try to select games that will be good sellers,” he added, noting that one recent game had a unique play style and players loved it.

In addition to the stickers on retail ticket dispensers, the Lottery supports the games on its in-store advertising displays for the first two weeks after release. On its in-store play stations, part of the space on the POS insert is dedicated to veterans games. Veterans games are also included in the Lottery’s various promotional events. For example, if you buy \$10 worth of veterans game tickets, you’ll get a camo cap and get to spin a prize wheel.

When the Lottery does big experiential events, “it’s pretty easy to get our retail and other partners involved with veterans as it’s a good cause,” said Tirloni. One such event was during a University of Texas football game. “We got to have veterans on the field for the coin toss,” and there was a big check presentation at halftime showing the revenue the Lottery had raised to date for the Fund. “It’s really easy to incorporate veterans and call attention to how we support veterans at those different kinds of events.”

With strong sales, the Lottery has been able to increase its contribution to the Fund in each of the last three years. “It has all been very positive since we made that change to the generic tickets.”

He noted that the Veterans Commission has been very supportive of the Lottery and what it does for veterans in Texas. “Without us, they aren’t awarding millions of dollars in grants, so it has significant impact on them and their ability to help Texas Veterans.”

KANSAS COMES FULL CIRCLE

The Kansas Lottery also started with patriotic-themed games, and then made the switch to generic games but for different reasons than Texas. Then it ran into another challenge, and has come full circle, going back to patriotic themes.

The Kansas Legislature authorized the Lottery to sell special Veterans Benefit games in 2003. Initially the tickets were sold from Memorial Day through Veterans Day, but beginning in fiscal year 2009, they were sold year round. The legislature determines how the proceeds are allocated, and currently they are distributed 30 percent to the Veterans Enhanced Service Delivery Program (mobile vans), 40 percent to Kansas National Guard Education Scholarships and 30 percent to Kansas Veteran Homes and Cemeteries.

With its first patriotic themed games,

Lottery officials discovered that players had the incorrect perception that these veterans games had less favorable payouts than the Lottery’s other scratch games. So in fiscal 2012, Kansas switched to other themes for its veterans games and sales increased dramatically.

However, that produced the complaint that the games weren’t easily identifiable

to players, and the Lottery has returned to patriotic themes for the tickets and added a yellow ribbon to their face. This year, “we plan to launch a new veterans game that will feature Kansas Medal of Honor recipients; we are working with a Kansas artist to develop artwork for the new game,” said Director of Public Affairs Sally Lunsford.

One of the mobile vans for veterans services in Kansas.





Kansas offers veterans games at both the \$1 and \$2 price points. They are supported through social media, and with brochures, articles in the player newsletter, videos highlighting the programs paid for through their sale and other means. Recently, yellow ribbon clings were added to the front of ticket dispensers so players can easily find the games.

One thing that really helps with visibility are the mobile vans that provide veterans services all over the state – “they have ‘Funded by Veterans Lottery Ticket Sales’ on them which is a great acknowledgment of our contribution to this veterans program,” said Lunsford.

Players like playing these games because even if they don’t win, they are happy to help support veterans. “The Kansas Lottery is very proud to offer games that benefit our Kansas military veterans. We are honored to pay homage to those who have given so much. Having the Kansas Lottery associated with such an important cause is certainly positive for the Kansas Lottery brand.”

ANOTHER WAY IN IOWA

No matter the cause, a lottery game is a lottery game, and sales will vary. The Iowa Lottery solved that problem by going another route. From 2008 through 2015, Iowa produced scratch tickets with proceeds benefiting the Iowa Veterans Trust Fund. But toward the end of that period, revenues were declining and proceeds to the Fund in fiscal 2014 had dropped below \$2 million. That was the threshold that Lottery officials had pledged from the beginning. “We do not believe that public support for the cause had waned, but simply that any project receives its highest support when it is new,” said Mary Neubauer, Vice President of External Relations for the Iowa Lottery.

“We decided to push for a change in the program,” she said, explaining that in 2015, the Iowa Lottery filed legislation to change the funding stream for the Iowa Veterans Trust Fund from individual games to simply \$2.5 million of the lottery’s general fund proceeds. The legislation making the change was signed into law in March 2015 and took effect on July 1, 2015.

“In making the change, veterans groups now know that they can count on a set amount – \$2.5 million – from the Lottery to the Iowa Veterans Trust Fund each year. And we have changed our messaging to note that now a portion of the sale of all lottery tickets in Iowa benefits the Iowa Veterans Trust Fund,” added Neubauer.

Each January, the Lottery participates in Veterans Day At the Capitol in Des Moines. “We meet with veterans and veterans advocates, providing information about the Lottery’s support for the Iowa Veterans Trust Fund.” Lottery contests give people chances to win lottery prizes. “The event is attended by hundreds of people each year, giving us a great opportunity to spread the word.”

Since 2008, the Iowa Lottery has raised more than \$22 million to benefit Iowa veterans and their families through the Fund, which is used in a number of ways as approved by the Iowa Veterans Commission.

ROOM FOR THE CAUSE

Compared to the \$22.5 billion in revenues to good causes American lotteries generated last year, the funds raised through these types of dedicated games are clearly very small. But to the organizations that receive the funds, they are critical – sometimes their only source of revenue. They give them the opportunity for them to offer programs and services that they would otherwise not be able to provide.

The games may vary – patriotic themes, generic themes – but no matter the solution, they are a worthwhile cause indeed. ■



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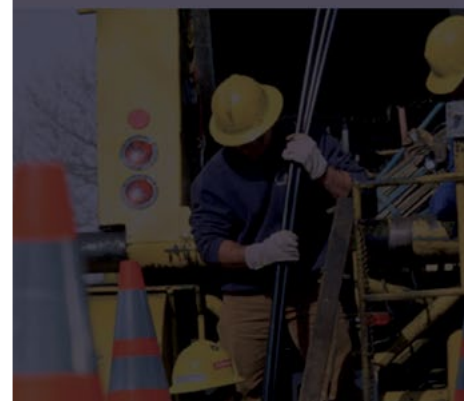
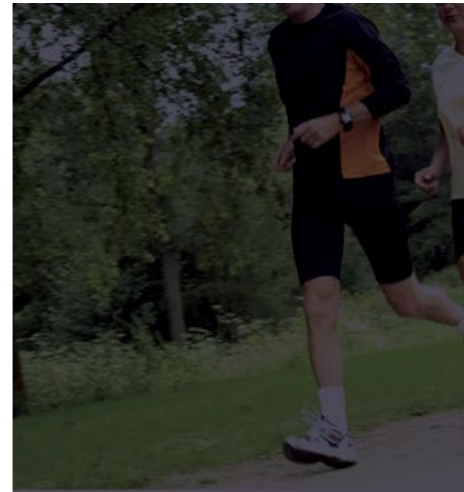


Communicating the Cause

A roundup of what lotteries are doing to create beneficiary awareness.

Lotteries are always creative in the way they advertise and promote their games. More and more, they are applying those skills to promote beneficiary awareness. There's no doubt that lotteries with specific beneficiaries – education, the environment, senior programs – have more obvious opportunities to communicate where the money goes. And those with larger budgets have an advantage over others with tighter purse strings. But every lottery, no matter the cause, no matter the budget, benefits its communities, so sometimes it just takes a little more creative thinking to get the message across.

We found a lot of that creative thinking around the industry when we asked NASPL members to describe some of the ways they communicate the message. In fact, we were overwhelmed with the response. Lotteries are eager to tell their stories and showcase how they do it; often what they do transcends specific beneficiaries and can be applied in other circumstances. We thank the lotteries that participated in this roundup; their edited responses follow.



Arizona Lottery

We are unique because we transfer dollars to 12 different funds that fund 18 beneficiaries who serve several different missions. So we have many stories to tell!

We highlight our beneficiaries' stories through native advertising articles on Arizona's top news website, azcentral.com. We use Facebook, Twitter and Instagram, and our own website also has beneficiary messaging. Our beneficiary videos are also on our YouTube page.

At various events we have signage and large mounted posters. We have our own "Giving Back" logo that we feature on beneficiary-related marketing materials. We often feature a representative from one of our beneficiaries to speak at an event we host. We created excellent videos featuring different beneficiaries, and in addition to being on our YouTube page, we show them at local events around town and in our offices.

Our sports partnerships sometimes have events for us to attend. Instead of lottery employees attending, we give tickets and experiences to our beneficiaries and community partners/non-profits. For example, the Arizona Diamondbacks held a beneficiary event at the pool in the stadium – we invited multiple organizations to attend and they had a blast eating ballpark food, swimming and watching the game, and they were even featured on the jumbotron.

Internally, we try to get our employees involved with our beneficiaries – for example, we hosted a toy drive for one of them during the Christmas season. We also schedule quarterly meetings with our beneficiaries to ensure we are making the most of our partnerships; we try to find fun, new ways to get the word out about the great work they do and how our dollars help.



British Columbia Lottery Corp. (BCLC)



Our Play it Forward program demonstrates that communicating how gambling revenues benefit communities has a positive impact on social license and public perceptions of gambling. The goal was to raise awareness for not just BCLC, but for the entire gaming industry: service providers, contractors, provincial and municipal governments, our regulator and community organizations.

We leveraged a major milestone, our 30th anniversary in 2015, to launch this campaign. In all of our communication, the message was simple: every time a lottery ticket is purchased, or the dice in a casino is rolled, it funds programs all over B.C. When you play with BCLC, you Play it Forward.

Television PSAs were created to share the Play it Forward stories through traditional media. A digital campaign was launched and a website was created to share landmark and provincial stories, along with regional and local content:

British Columbia Lottery Corp. (BCLC) (Continued)

playitforward.bclc.com. In the first 10 days of going live with the website, there were nearly 3,000 unique visits and an average session time of roughly one minute. This will be a legacy, a place where we can continue to update and add content each year. We supported the website through BCLC's social media channels. In just one example, we posted on Facebook about Burnaby Lake, which had a \$4 million restoration project funded through the City of Burnaby's share of gaming revenue.

All of BCLC's sponsorships shared and promoted the Play it Forward message, and a Scratch and Win product was created to promote BCLC's 30th anniversary and that message.

Ipsos conducted research on the results of the Play it Forward campaign and in September 2015 specifically looked at the effectiveness of the PSAs in informing the public on where the gaming revenue is allocated in B.C. The results showed that all PSAs were effective in positively shifting public perceptions toward BCLC with regards to gaming revenue allocation.

Our 2016 research from Ipsos indicates that the campaign had a positive impact of the perception of BCLC among British Columbians. If seen and linked to BCLC, the campaign has the potential to improve knowledge about where proceeds go, with the majority of recent lottery players and non-players mentioning the different beneficiaries. Awareness of BCLC has significantly grown since our initial research in 2015.

We will continue to build on the storytelling success of Play it Forward with the goal of increasing awareness and support of the contributions that gambling revenues make to communities across B.C. These stories resonate with residents in Host Local Government communities and help BCLC build trust, which contributes to our social license to operate with stakeholders and the general public.

In 2017, Play it Forward will take stories one step further to find emotional elements to make the connection between gambling revenues and benefits. We will tell the stories of "real people" and how their lives have been changed, which means our focus will shift to those who benefit from revenues, and away from those who spend them.



Colorado Lottery

Nearly all of our beneficiaries return money to recreation and open space conservation. The Conservation Trust Fund (CTF) receives 40 percent, Colorado Parks and Wildlife (CPW) receives 10 percent, and Great Outdoors Colorado (GOCO), funded entirely by the Lottery, receives 50 percent (up to a cap). A spillover fund, Building Excellent Schools Today (BEST), receives any excess over the cap on GOCO, and provides capital construction funds for K-12 schools. It is estimated that nearly all residents have used areas (park, trail, pool, field, open space etc.) funded through the Colorado Lottery.

Three years ago we kicked off an advertising campaign that featured proceeds; it included a locally produced commercial, an out of home advertising campaign and a unique tagline – "Funding the way Colorado plays." We continue to use this advertising campaign, including the TV spot and the advertising materials.

We have a page on our website highlighting where Lottery dollars go; it includes our most recent proceeds TV



Colorado Lottery (Continued)

commercial, information on all four beneficiaries and our annual review, "The Look Into The Lottery." That review now highlights our beneficiaries and promotes projects they have funded in recent years. The website also has a special page for our annual Starburst Award. Dating back to 1992, the Starburst Award recognizes excellence in the use of funds and rewards a small handful of Lottery-funded projects.

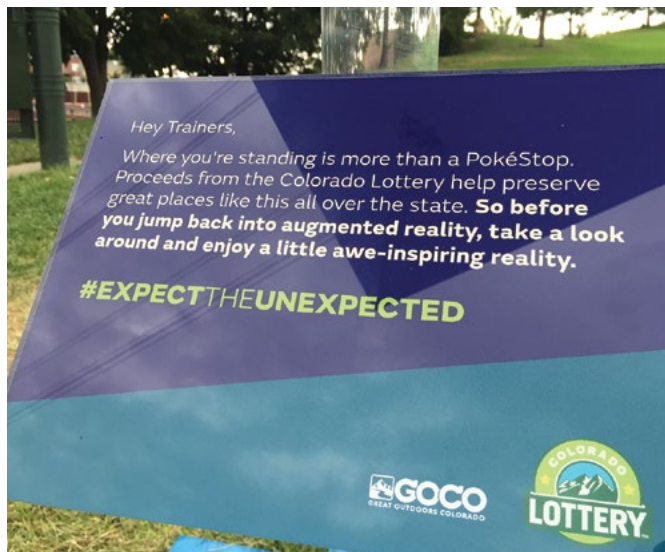
We are continuing to expand and brand our presence on social media – we have made a recent shift to showcase our Lottery proceeds and proceed-funded projects. For example, the Pueblo Zoo contains over \$1 million in proceed dollars throughout the facility. This past Christmas the Colorado Lottery and the Pueblo Zoo collaborated to provide four behind-the-scenes experiences at the Zoo that were given away via a Facebook and Instagram contest. The contest received over 350 entries, making it one of the most interactive social media giveaways in the Lottery's short history of doing special promotional drawings on social media.

For several years we have produced a yearly calendar for our retailers, players, beneficiaries and their recipients. This year the calendar focused on a "bucket list" of things to do in Colorado where there was a close proceeds tie-in.

Our 3,200-plus retailers are kept aware of how their sales have impacted the state through proceeds. Each spring, we provide certificates that show the total proceed dollars generated through their sales. From our largest retailers to the outlying locations, each retailer's sales make a difference in how Colorado encourages outdoor recreation and conservation.

Throughout the year, the Lottery sponsors and attends events that have a tie-in to the outdoors or recreation, and we hope to expand to even more events to continue to spread our message of Lottery funds benefiting local communities.

We joined the Pokémon Go craze last summer. As this game encouraged all players to "catch 'em all," it was a perfect opportunity to brand a high-traffic location with Colorado Lottery messaging. Working with the Lottery's marketing firm, we created a Pokestop at the confluence of the South Platte River and Cherry Creek in downtown Denver. This stop was placed where hundreds of commuters, recreation enthusiasts, visitors and pedestrians would pass by every day for one week. The Pokestop contained specific Lottery messaging that encouraged players to take a break and look around at the awe-inspiring reality that the Lottery funds. The area where the Pokestop was located has approximately \$7 million in Lottery proceeds.

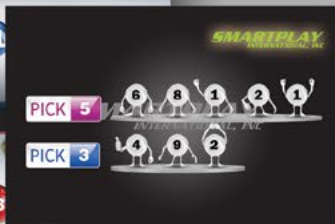


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Connecticut Lottery

Beneficiary messaging is included in several areas of our website, and is also on our app. Posts are also made on Facebook and Twitter.

We run paid radio spots (:30 spots, two versions) that mention how purchasing a lottery ticket supports the great residents of the state of Connecticut. The spots also includes the billions of dollars that have been delivered to the Connecticut's General Fund since the start of the Lottery.

Another way we try to get the message out to the public is during television or radio interviews. This is one of the topics our President and CEO normally discusses along with our responsible gaming initiatives.

In the past we have included a message about our beneficiaries as part of special signage that is hung in our legislative building during session. We also have a pull-up banner that our sales/recruitment team uses for events.



DC Lottery



Since we are one of the older lotteries and our charter does not include a designated beneficiary, we promote our Where the Money Goes message to the public. This overarching message includes the lottery's transfer of funds to the city's general fund, which in turn supports all city services such as education, infrastructure, etc. We also use a Where the Money Goes message in talking points on our media

interviews and mentions; it helps drive people to our website and/or YouTube page to view the video.

The last time we ran a full campaign on the Where the Money Goes message, to include TV, print, radio, social media, signage and brochures was in 2012.

As of late, we have been pushing the message Winners Everyday (updated annually). It's slightly different from Where the Money Goes, but has elements of the campaign. We also have an unclaimed prize fund and we put emphasis on that money being returned to players through unique promotions and player-centered events, such as our Big Payback Promotions (2015) and The Big Payoff (2016). All three messages are used interchangeably – it all depends on which message we choose to promote to support the campaign. Our goal is to give players a sense of who benefits from the lottery and how.



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Hoosier Lottery



We have a somewhat complicated message so we try to simplify it as much as possible.

There is an interactive tool on our website that allows viewers to click on a county (on a full state map) with a graphic showing the amount of money going to that county based on most recent fiscal year results. This is possible because of the way our proceeds are allocated. Part of the Hoosier Lottery proceeds go the State Teachers Retirement Fund and the local police and firefighters pension fund. We have a formula that prorates the contribution based on the number of retirees in each county. The bulk of our contributions to the state goes to the Build Indiana Fund, which is currently used to reduce auto excise taxes by 50 percent. In Indiana,

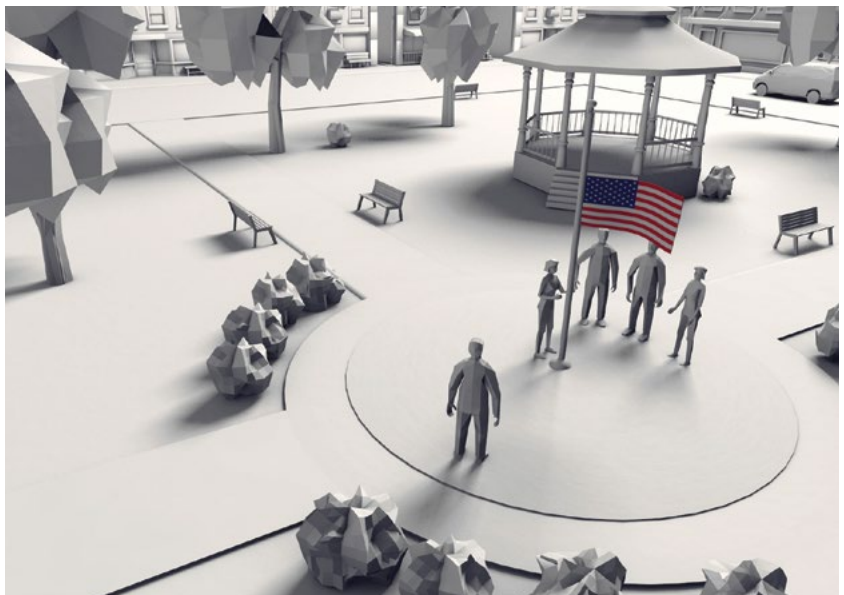
auto excise taxes are paid with the annual auto registration renewal. The taxes are collected by the BMV and then remitted to the counties for streets/roads. The Lottery contribution to the Build Indiana Fund is distributed to the counties to offset the lost revenue from the reduced auto excise taxes.

We use several vehicles to tell our beneficiary story. We include a message on all printed materials, a footer on news releases and a signature bloc template on outgoing emails. We use social media content, including links to videos of beneficiaries. We provide messaging in scripts for the television stations that air our daily draws, and beneficiary messages are key in all speaking points, presentations and speech scripts. Our sponsorship graphics also include messaging, including a dedicated graphic at Lucas Oil Stadium/Indianapolis Colts.

Iowa Lottery

In the past year we did a new round of beneficiary advertising. The Iowa Lottery does not budget for beneficiary advertising every year, so when we produce such ads, we try to make them as timeless as possible, understanding that we likely will utilize them for a few years at a time. Our last round of proceeds commercials had been completed in 2013, so when we began considering concepts earlier this year, as always, we wanted something memorable.

We ended up creating a series of ads that “unfold” as they tell the story of how the Lottery is helping Iowans grow. The digital commercials were all produced locally and use a technique called low-polygon origami. Through the ads, folder paper appears to come to life to illustrate the story of how Lottery proceeds make a positive impact in Iowa. We have origami ads that focus on





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Iowa Lottery (Continued)

Lottery proceeds for veterans' causes and help for a variety of programs through the state General Fund, including education and natural resources. We likely will produce at least one more ad in the series before we are done.

In addition to traditional advertising, we purchase ads regarding Lottery proceeds to state causes in specialty publications, including those for our petroleum marketers and grocers groups here in Iowa; Des Moines Performing Arts publications to hit the entertainment market; on social media at different times throughout the year; and on our website and LIM display screens at lottery terminals in retail locations.

We also do outreach work specifically to highlight our proceeds for the Iowa Veterans Trust Fund. Each year in January, we participate in Veterans Day At the Capitol in Des Moines, where we meet with veterans and veterans advocates, providing information about the Lottery's support for the Iowa Veterans Trust Fund. We also hold contests through the event to give those in attendance a chance to win lottery prizes. The event is attended by hundreds of people each year, giving us a great opportunity to spread the word.

Kansas Lottery

Kansas has somewhat of a challenging story in regards to beneficiaries. The first \$50 million in proceeds is divided by a formula which first transfers \$80,000 to the Problem Gambling and Addictions Grant Fund. Then 85 percent of the balance is transferred to the Economic Development Initiatives Fund, 10 percent to the Correctional Institutions Building Fund, and five percent to the Juvenile Detention Facilities Fund. Any receipts in excess of \$50 million must be transferred to the State General Fund.

Because our beneficiaries are several and not just one, such as education, messaging is sometimes challenging. We rely on a few tools to let people know how Lottery proceeds are used.

Our website has detailed information on where the money goes. News releases, such as those when a new Veterans Benefit ticket is launched or when we describe fiscal year results, have where the money goes information included. We have YouTube videos that highlight various veterans, Dept. of Commerce and other programs. We use social media postings for new veterans tickets and links to videos and news releases. Our quarterly player newsletter includes stories that highlight programs benefiting from Lottery revenue. We also have brochures that highlight where the money goes, and also brochures that showcase our veterans tickets; these are available at all retailer locations. In addition, we provide them to legislators and distribute them at special events and use them at in-store promotions.

Kansas also offers Veterans Benefit \$1 and

Veterans Benefit Tickets

The Kansas Lottery sells \$1 and \$2 Veterans scratch games, in which net profits go directly to programs that help our state's military veterans. Since sales started



in 2003, the Lottery has transferred nearly \$14 million to designated programs. The Kansas Legislature determines the distribution of proceeds from Veterans games. The three current beneficiaries are:

- 30% Veterans Enhanced Service Delivery Program
- 40% National Guard Scholarships
- 30% Kansas Veterans Homes and Cemeteries



Veterans ticket sales pay for two mobile units that travel the state, serving veterans and their families where they live.



Fiscal Year 2014 was a record year for Veterans games transfers. We celebrated by presenting ceremonial checks to Veterans organizations.

Expanded Lottery (Casino) Revenue

The state's share of revenue from state-owned and -operated casino gaming is deposited into the Expanded Lottery Act Revenues Fund for purposes of reduction of state debt, state infrastructure improvements, reduction of local ad valorem tax, and/or for other purposes as directed by the Kansas Legislature. Casino revenue is also directed to local governments in which casinos are located and to the Problem Gambling & Addictions Grant Fund.

Every time someone plays the Kansas Lottery, someone in Kansas wins! Players win prizes, retailers earn commissions and important state programs are funded. To find out more, go to kslottery.com.



Kansas Lottery
128 N. Kansas Avenue
Topeka, KS 66603-3638
785-296-5700

Must be at least 18 to purchase Lottery tickets.
PLEASE PLAY RESPONSIBLY.

Get connected. Join us online.



WHERE THE MONEY GOES

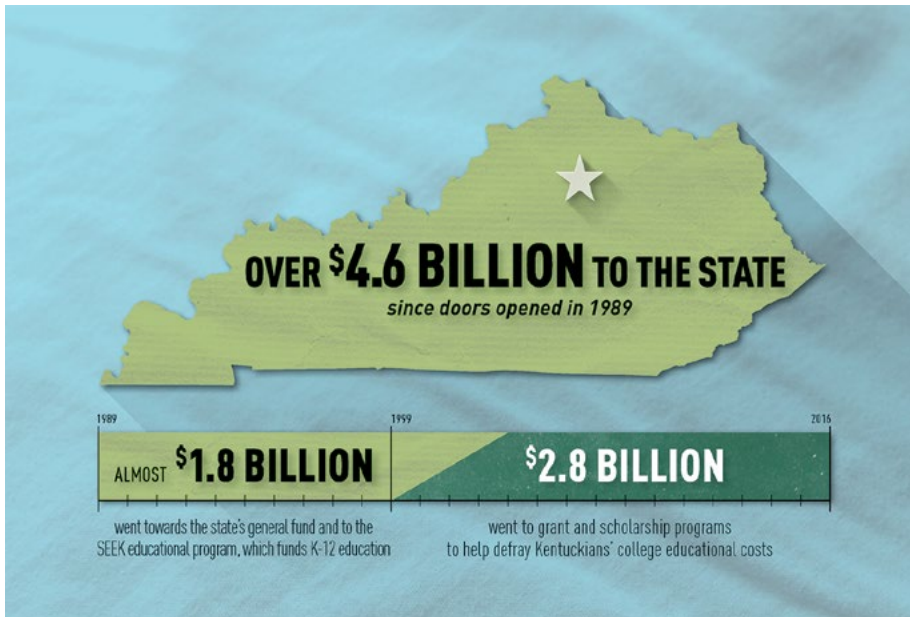


When you play, everybody wins!

\$2 instant tickets, with the proceeds going to in-state veterans' programs, and that is an area we can emphasize. We have done YouTube videos on the veterans mobile vans paid for with Lottery revenue, and on the National Guard scholarships also paid for with Lottery revenue.

The mobile vans that provide services all over the state have "Funded by Veterans Lottery Ticket Sales" on them, which is a great acknowledgment of our contribution to this veterans program. The event we got the most mileage out of was a few years back when we hit a record year for Veterans ticket sales. We presented checks to the veterans' programs that receive funding from us, and Kansas Governor Sam Brownback was on hand to recognize the Lottery for its record sales year for veterans tickets.

Kentucky Lottery



For a long time, the Kentucky Lottery was prohibited from doing any paid advertising directed at where the money goes. When the Lottery began, there was concern among legislators that ads could potentially over-promise the benefits. Over the years efforts had been made to remove that restriction, and it finally happened beginning in fiscal 2014 with a new provision in the state budget.

Without paid advertising, we had to find ways to communicate our message through public relations efforts and events. For example, we had a speakers bureau where we went out to tell the story, and anytime there were media interviews, the conversation would be steered back to where the money went.

In fiscal 2014, with the advertising restriction lifted, we changed our tagline to “Fueling Imagination. Funding Education.” Beginning in August 2014, we started doing beneficiary television and other media spots, so we could finally get out there and let people know where the money went. And our tracking research shows that awareness of how lottery proceeds are used in Kentucky has risen pretty well, and that will help us in the long run.

One of the cool things we do now is award our media partnerships based on what kinds of added value the television stations will provide, especially with respect to beneficiary messages. So as they are competing for the Lottery’s business, the stations will pitch ideas. Some of the good ideas that have come out of this are Teacher Feature and Student Spotlight. The stations do all the work on these spots, which are subject to Lottery approval. We have really been pleased at some of the work our media partners have done in the area of beneficiary messaging, all as added value to their contracts.

Louisiana Lottery

In Louisiana, proceeds are earmarked for the Minimum Foundation Program, a formula for funding public education. Our funds co-mingle with what the legislature has already budgeted, so it is impossible for our messaging to point to specific qualitative benefits or increases in education spending.

We do educate the public on what we contribute by making the where the money goes messaging the core of our public relations efforts; it appears in our news release boilerplates and in a quarterly statewide news release regarding our treasury transfers. Of course, this news is also shared in social media, our website, retailer newsletter and related communications channels. Archives of these releases are maintained on our website.

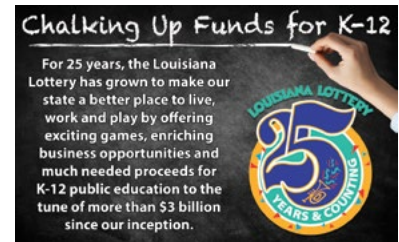
Annually, we run beneficiary print ads in business publications throughout the state and address our transfers in advertorial



Louisiana Lottery (Continued)

content such as the “President’s Forecast” or “Economic Outlook” sections offered by select newspapers at the beginning of each year.

Although beneficiary messaging is at the heart of our public relations efforts, it is not typically a core part of our paid media campaigns, except during the celebration of our anniversary. We did produce a television commercial for our 20th anniversary, and prepared several regional print ads in business publications. We also ran anniversary ads in various programs for events that we sponsor; the creative tied in with the theme of the event or the organization we sponsored.



Maryland Lottery



Maryland Lottery profits go to the Maryland General Fund, where they are used by the General Assembly for a variety of state programs, including education, public health and safety and the environment. Because Lottery profits are not earmarked for specific programs, our messaging emphasizes the Lottery’s overall contribution to the state.

As part of our sponsorships with the athletic departments at the University of Maryland and Towson University, we committed to going beyond product and sales messaging to promote the Lottery’s support for state programs. We place ads in the printed programs for football, basketball and lacrosse games, using sport-specific art. We also receive LED digital signage in the football stadiums and basketball arenas. The LED signage includes the amount of Lottery profit that is contributed to the state.

In press releases and in blog posts on owned media such as mdlottery.com, we include the amount of the Lottery’s contribution to the state since its inception in 1973 – more than \$15 billion as of the end of fiscal 2016. Our communications

Maryland Lottery (Continued)

staff members also routinely mention these figures in the course of any radio or TV interviews.

The portable backdrop of our display area at major events includes movable panels that give us the flexibility to adjust our messaging depending on the event. We update and change these panels annually with new messaging. The most recent version of the backdrop includes photos showing police and firefighters, emphasizing that Lottery funds contribute to public safety. We also have text-based backdrop panels that include the combined contribution of Lottery and casino gaming revenues to the state – a record-breaking \$1.079 billion in FY2016.

In addition to operating the Lottery, Maryland Lottery and Gaming serves as regulator of the state's six casinos. Casino revenues support the Maryland Education Trust Fund, local impact grants, small-, minority-, and women-owned businesses, and the state's horse racing industry.



Marylanders score big thanks to the Maryland Lottery.

In Fiscal Year 2015, the Maryland Lottery generated \$1.762 billion in sales and more than \$524 million in profit, which is contributed to the state's General Fund. Since its inception in 1973, the Maryland Lottery has generated more than \$14.4 billion to support the good causes of Maryland, including pre-K-12 and higher education; public health; public safety; and the environment.



The Maryland Lottery is a registered service mark of the Commonwealth of Maryland. All other marks and logos are the property of their respective owners. © 2015 Maryland Lottery and Gaming. All rights reserved.

Massachusetts Lottery

Last summer, the Massachusetts State Lottery was a participating sponsor in a series of live local news broadcasts known as "Zip Trips" that originated from a different city or town in Massachusetts each Friday for 10 weeks. In addition to the usual news, weather and traffic, the broadcasts consisted of interviews with elected officials, business leaders and other personalities from the host community, as well as features on items of local interest in the municipality. Sponsor tents surrounded the broadcast area to create a town fair feel. Considering that Lottery profits are the largest source of unrestricted local aid for all 351 cities and towns in Massachusetts, it was a natural fit for us to have an on-site presence at these events.

We incorporated beneficiary messaging into our tent display by posting the amount of local aid the community has received from Lottery profits over the years, along with other fun Lottery facts about the city or town such as grand prize winners, the number of retailers and total sales. We also presented ceremonial checks to elected and public safety officials showing the local aid contribution for the most recent year to reinforce our beneficiary messaging. We were able to extend the reach of this messaging by utilizing our various social media platforms. Most weeks, a Lottery official was interviewed by the local cable access station to expand the messaging even further. In the final broadcast of the series, our executive director was interviewed live on the set in a segment that highlighted the Lottery's contributions to local aid across the state.

The Lottery has taken advantage of these types of events in the past to highlight its beneficiary, the cities and towns. In 2005, the Boston Red Sox had a World Series Trophy Tour – making stops at any Massachusetts city or town that requested a visit. The Lottery served as presenting sponsor of that tour, hitting the road with the Red Sox and creating visibility in a large number of communities where the trophy stopped.



Minnesota Lottery

We began the fiscal year by highlighting the ways that Lottery dollars helped beneficiaries last fiscal year. This included a FY16 highlights report, infographic, blog post and news release (which received quite a bit of media pickup). We include beneficiary messaging in all news releases and sometimes include environmental projects that have received Lottery dollars in the area where a big winner is from. After a Powerball or Mega Millions jackpot run, we issue a news release that explains how money generated from sales benefits Minnesota. Environmental photos and messaging is featured on "LottoVision" screens at all Lottery retail locations, and we include beneficiary messaging in half of our retailer newsletter issues.

We have produced four videos highlighting projects that received support from Lottery dollars, promoting them on Twitter and Facebook (the Facebook posts were boosted). The posts all link to blog stories that include the videos. The videos were also played at our Minnesota Millionaire Raffle kickoff event at Mall of America. They are all available on YouTube and we began running a paid YouTube campaign in January.

Beneficiary messaging was featured on the signage at our Minnesota State Fair booth. We also created brochures that were displayed at the booth. The Minnesota Department of Natural Resources receives a portion of our in-lieu-of-sales tax and they agreed to display our beneficiary brochures at their State Fair booth as well.

In December, we hosted a news conference in Duluth to celebrate some of the environmental projects that have received Lottery dollars through the Environment & Natural Resources Trust Fund (Lake Superior water quality, the Mesabi Trail and declining moose populations). The news conference was held at the Lake Superior Zoo, which receives a portion of the Lottery's in-lieu-of sales tax. A state senator, a state senator-elect and three Trust Fund project managers participated. The three television news stations in Duluth covered the event. We are planning similar events in other regions of the state.

Northern Spark was an overnight multidisciplinary arts festival in downtown Minneapolis that featured installations with the theme Climate Change | Climate Rising. The Lottery featured an interactive display that highlighted beneficiary programs that contributed to combating climate change and asked participants what more could be done.

We incorporate beneficiary messaging into our major game launches when possible; for example, when we launched the Frogger scratch game, we highlighted Trust Fund projects that involved frogs and their habitat.

On January 2, we started 30 days of tweets: tweeting a Lottery fact every day for 30 days. Most of the tweets were about beneficiaries.



LOTTERY PROCEEDS
FUND THE WAY WE PLAY

Since 1991, Lottery funds have supported the development and expansion of state trails to provide a variety of recreational opportunities for ALL Minnesotans.



LOTTERY PROCEEDS
FUND THE WAY WE PLAY

Lottery funds were used to install public boat accesses, fishing piers, or shore fishing stations in every county of the state.



LOTTERY PROCEEDS
FUND THE WAY WE PLAY

From fighting invasive species to numerous research initiatives, many projects designed to improve Minnesota's water quality have been funded with the help of Lottery dollars.

Missouri Lottery



TEACHERS MAKE THE DIFFERENCE

Together we've given over \$5 BILLION back to education



PLAY IT FORWARD



TEACHERS MAKE THE DIFFERENCE

Together we've given over \$5 BILLION back to education



PLAY IT FORWARD

Under executive director May Scheve Reardon, the Missouri Lottery has really ramped up its beneficiary messaging. That includes adding pro sports sponsorships and developing an advertising campaign called 'Play It Forward' in 2012. The campaigns have worked – increasing our brand relevance compared to other brands and increasing the percentage of residents who know that proceeds are used to help support public education from 39 percent to 50 percent.

We partner with all major professional sports teams in Missouri, minor league sports teams, University of Missouri teams and the Show-Me State Games. We host "Stars of the Classroom" programs with the pro teams to recognize outstanding teachers and educators in the local community. These programs include activities like highlighting the educator during a home game, letting them throw out the first pitch and featuring the honorees on our website.

This football season, we teamed up with the Kansas City Chiefs to sponsor a Playing It Forward contest to honor the best classes and schools in Missouri that are incorporating the goals of the Play60 program to make their students healthier through activities, healthy snacks and education. Fans nominated their classes or schools, and the public voted. Four finalists won 100 tickets to a 2017 preseason game, and one grand-prize winner received two tickets to watch a home game in a suite. The educator's school will also get a Play60 Assembly next spring with an appearance by Chiefs mascot Wolf.

We recently launched two new beneficiary-focused TV/cable spots that feature two teachers who made a difference in the lives of two of their students. We created two 30-second and 60-second spots, which ran on TV/cable last November, and the 30-second spots will air again in March. Radio spots are running during those same time frames. Everything is tagged with the Play It Forward reminder.

The Play It Forward beneficiary messages can also be seen on digital billboards, web banners, promoted posts and videos on Facebook and YouTube; we also place the messaging in traditional print advertisements.

Our website and social media pages also feature sections, videos and conversations on where the money goes using elements of the Play it Forward campaign. On our website, we list by fiscal year the programs funded and the amounts, along with maps in which the public can click on their county to see the amount of prizes, retail commissions and money to schools and education program within their county.

Our monthly Retailer Connection newsletter highlights how Lottery proceeds benefit public education; retailers can access the amount of their Lottery sales that goes to education any time through the Retailer Portal. Where the Money Goes brochures are published annually – they are placed in play centers at retail, sent to players and provided to legislators.

Our weekly internal employee newsletter, "Monday Message," highlights A+ scholarship recipients, and beneficiary messages are always laced into copy for the monthly "Director's Update" e-newsletter that goes to employees, legislators and other advocates.

Nebraska Lottery



Over **\$600 million** back to Nebraska's environment, educational system and state fair since 1993.

The mission of the Nebraska Lottery is to generate funds for good causes across Nebraska. We're proud of the strong partnerships we have with our beneficiaries, and use a variety of marketing tactics to make our players aware of how lottery funds are Helping to Build a Better Nebraska.

In January 2014, we passed an important milestone – transferring over half a billion dollars to our beneficiary funds since the beginning of the Lottery in 1993. To celebrate this achievement, we worked with our advertising agency, SKAR Advertising of Omaha, to develop a new beneficiary awareness campaign. Three television commercials were produced, each focusing on one of our three main beneficiary areas: the environment, education, and the Nebraska State Fair. They're not running regularly right now, but they're good spots to run when we need something to plug in; for example, a broadcast of an event we're sponsoring.

Print, radio, and point-of-sale pieces with the "Half a billion dollars back to Nebraska" message were also produced in addition to a dedicated beneficiary microsite at nelottery.com/halfbillion, where players can see a breakdown of how Lottery funds are distributed and read about projects funded with Lottery proceeds. This information is also available in the Lottery mobile app.

The beneficiary awareness campaign was designed for longevity as the transfer amount increases over the years. When the total transfers reached \$600 million in July 2016, the campaign elements were refreshed with graphics showing the new amount.

We try to incorporate beneficiaries into our PR efforts as much as possible. For example, we sponsor radio broadcasts of Nebraska Athletics on the Husker Radio Network, and that's a great opportunity to mention grants for Nebraska college students funded with Lottery proceeds. So that topic will be covered in our sponsor messages and in the pre-game interviews during broadcasts where we are the named sponsor. Similarly, we work closely with the Nebraska Environmental Trust to promote their grant projects. These grants have great local visibility so it's easy to get example projects to highlight in interviews with media or speeches to community groups. Our beneficiaries are willing to work with us on these kinds of PR efforts because they benefit from the extra awareness.



Half a
Billion Dollars Back to Nebraska
Environment • State Fair • Education



Must be 19. Please play and give responsibly. Problem Gambling Help Line: 800-522-4700.



New Jersey Lottery

The New Jersey Lottery has had a longstanding beneficiary awareness program as it is the basis of our mission. Every press release issued by the Lottery includes in its boilerplate our beneficiaries listed by category and/or name and states the total contribution the lottery has made, which is currently more than \$24 billion. The Annual Report Director's message always includes the Lottery's contribution to the state on behalf of its beneficiaries.

We do paid advertising – we just completed production of a new 2017 commercial, which should be airing in mid-January. The television commercial is broadcast on New Jersey's public television station, which is available to most New Jersey residents. The station provides total weekly household impressions of 342,000 and overall total household impressions of 18M. Its web traffic for unique visitors is 78K per month, with page view of 156K per month. The commercial may also be viewed on our website.

In conjunction with this new advertising campaign we are spreading the message through all of our other public channels, including point of sale, digital and mobile, radio, television, OOH (digital billboards), social media, website and VIP club emails. We also do other videos sharing beneficiary news; they are available on our YouTube channel.

The Lottery has a strong relationship with its beneficiaries that we maintain through the Lottery's Public Information Office and their counterparts at the beneficiaries. Our director has visited some of the beneficiary facilities, all three of the state's disabled Veteran's Homes that Lottery contributions fund, and the Katzenbach School for the Deaf.

We participate in hundreds of public events held all over the state. At these events we display a beneficiary banner, standing nearly seven feet tall, that depicts some of our beneficiaries and the contribution amount that the Lottery has generated over existence.

NJ Lottery's contracted management company, Northstar New Jersey, has a corporate social responsibility program. Their current project complements the Lottery's mission as it is working with the Department of Military and Veterans Affairs to undertake renovation projects at the New Jersey State Veterans Memorial Homes to benefit each location's residents. These are the same homes that the Lottery supports.



EVERY TIME YOU PLAY SOMEONE WINS!

The Lottery has contributed **\$24 Billion to residents, since 1970, in support of:**



SCHOLARSHIP PROGRAMS



VETERANS' HOMES



COLLEGES & UNIVERSITIES, SCHOOL LUNCH PROGRAMS AND MORE

\$24 BILLION AND GROWING

FOR DETAILS VISIT THE GIVING BACK PAGE ON

www.njlottery.com








Must be 18 or older to buy a Lottery ticket. Please play responsibly. If you or someone you know has a gambling problem, call 1-800-GAMBLER®.

New Mexico Lottery

We receive updated Legislative Lottery Scholarship numbers from the Higher Education Department annually around Christmas/ New Year's. We air a benefits campaign right after Christmas through Spring as well as with our university athletic sponsorships, including the Gildan NM Bowl. We have been doing these sponsorships with the University of New Mexico and New Mexico State University. We advertise the amount raised for that school and the student count for that school on the long digital floor board at UNM and on a more traditional sign at NMSU. We also use static ads in game programs.

Our current campaign is running right now and consists of TV ads, radio ads, digital media ads that link to the scholarship page, and digital outdoor ads. Beginning in mid-January, we started distributing two pieces in stores – a counter mat and a Lottery Information Center display ad. Those information centers are kept stocked with our current benefits brochures, which are updated as needed. We also include an updated amount raised and student headcount at the tail end of each press release sent out.



North Carolina Education Lottery

The N.C. Education Lottery puts a great emphasis on beneficiary messaging and devotes a great deal of resources to it. Although we deliver more than half a billion dollars a year to education, like other lotteries we face the challenge of helping the public see those benefits. The challenge is compounded in North Carolina due to changes the legislature makes in how the money raised is used, the debate over those changes, and the vigorous debate occurring over public education and how well it is funded.

We have responded with a multi-faceted beneficiary program, where North Carolinians can see or hear a beneficiary message in a number of ways.

At the end of every drawing for in-state games, the drawing host provides an update on how much has been raised so far. In stories about lottery winners, every media release ends with a beneficiary message. One of our web pages explains how the money raised by the Lottery is used and allows a visitor to look up information on education funding in their home county.

Every year, we print 100 versions of our beneficiary brochure, which describes the benefits to education in each of North Carolina's 100 counties. These are placed at every location that sells lottery tickets and also most school district central offices. Our annual report, which is mailed to 800 leaders in the state and posted on our website, has a beneficiary section. We also have a beneficiary newsletter mailed out quarterly to educators and leaders of groups whose programs are supported by Lottery dollars.



We make presentations to civic and community groups and "Town Hall" style regional meetings. Five civic talks and three Town Hall meetings occurred in 2016. We also provide beneficiary messaging using static and digital assets providing the total contributions to education at sporting events and tournaments as part of the Lottery's sports partnership program.

For our 10th Anniversary year in 2016, we developed a major advertising, marketing and communications program with a beneficiary message, celebrating all the "proud moments" in education that raising \$4.6 billion enabled for North Carolina during the Lottery's first 10 years.

The campaign kicked off on our birthday, March 30, 2016. Our logo received a special anniversary treatment, adding a

North Carolina Education Lottery (Continued)

little whimsy and celebration. We used every channel we have – TV and radio advertising, digital and online advertising, out of home advertising, print advertising, point of sale at retail locations, social media channels, and PR and earned media.

For the first time, we tied a consumer promotion to beneficiary messaging. We asked North Carolinians to share their proudest moments in education and how they would use \$20,000 to create more proud moments. We received hundreds of moving responses, and their stories were posted on a special microsite (www.ncproudmoments.com). A panel of judges chose 10 winners from the 100 entries that got the most votes. The Proud Moments campaign was the Lottery's most ambitious effort so far in its beneficiary program. We were pleased that the success of the campaign was recognized with a NASPL Batchy Award last fall.



Ohio Lottery

The Ohio Lottery's mission is to offer entertaining games that maximize profits for K-12 public education. One hundred percent of profits from the sale of Ohio Lottery games through our network of more than 9,800 retailers are sent to the Lottery Profits for Education Fund for public school operations.

We reinforce our mission through a variety of communication channels, including paid advertising, owned media and social media. The beneficiary message is relayed to community groups, along with audiences in the business and education communities on an annual basis.

There is a dedicated page on our website called "Supporting Education," and a number of sub-pages explain our partnership with public education. Through these subpages, the Lottery describes its legal mandate in the Ohio Constitution, educates readers on profits raised for schools, and promotes student and teacher excellence through its Partners in Education program.

As a partner in public school funding, the Lottery celebrates academic and teaching excellence statewide through Partners in Education, our signature program. We promote that program's activities in our blog and on Facebook, Twitter and YouTube. Through the Partners in Education program, the Lottery acknowledges



Ohio Lottery (Continued)

★★★ NOMINATE YOUR STAR TEACHERS AND STUDENTS!



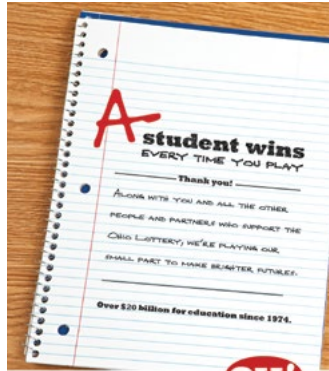
Academic All Star
Nominates K-12 students who are **ACHIEVING, LEARNING and GROWING.**

Teacher of the Month
Nominates K-12 teachers who **INNOVATE, ENABLE and INSPIRE** others to succeed.

Rewards
Academic All Star and Teacher of the Month winners will receive:
• Gift card
• Pinus pack
• Their name posted on our Partners in Education web page.

Every participating school has a chance to become School of the Year!

★ TO NOMINATE
VISIT OHIOLOTTERY.COM AND CLICK ON SUPPORTING EDUCATION, OR CALL 216-774-5888 FOR INFORMATION.



facebook.com/ohiolottery



exceptional students and teachers through its Academic All-Stars and Teachers-of-the-Month awards, offered monthly throughout the school year. We solicit nominations from schools, parents and others with a stake in student success and end the academic year with the selection of a Partners in Education School of the Year. Partners in Education brochures are sent to school districts statewide on an annual basis, promoting the program with school administrators.

We also sponsor a Best in Class annual salute to high school valedictorians, accomplished through statewide TV advertising around graduation time, which reinforces our education beneficiary message. The sponsorship has been in existence for more than 20 years.

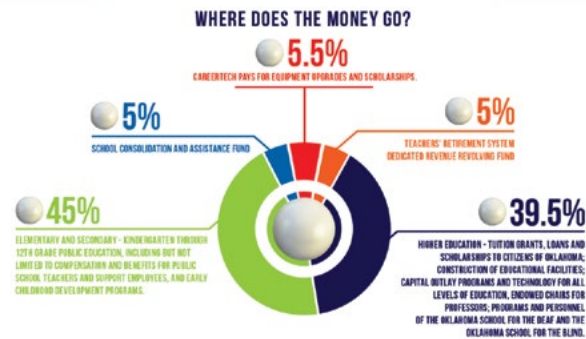
While our app does have basic information about the money the Lottery provides for education, that app is primarily play and player focused.

Oklahoma Lottery

We have a very small marketing budget that limits how much we can spend on advertising and what we choose to advertise. For this reason the only places we have chosen to utilize beneficiary messaging is on our webpage and on our in-store digital advertising screens. The latter is in a playlist that runs all the time.

\$776,662,775

MONEY RAISED FOR OKLAHOMA EDUCATION AS OF 01/15/2017



More than \$349 million contributed to elementary and secondary education.

The Oklahoma State Legislature appropriates 45% of funds in the Oklahoma Lottery Education Trust Fund to elementary and secondary education, K-12. Funding can be used for things such as compensation for public school teachers, support employees and early childhood development programs as well as educational facility construction, capital outlay projects and technology upgrades for school systems.



Ontario Lottery and Gaming Corp. (OLG)

OLG strategically promotes public awareness of the broad scope of benefits derived from its lottery, gaming and charity gaming businesses through a range of tactical messaging. Launched in 2015, our integrated All For Here campaign was created to remind Ontarians that 100 per cent of OLG proceeds are invested in the province to support the things that make Ontario great. Last year, OLG contributed just over \$2 billion to help finance hospitals, education and charities through the Trillium Foundation and amateur sports through OLG's Quest for Gold program.

The All for Here message and branding is prominent on various external and internal OLG communications including our website, paid advertising, social media, OLG banners, tents and signage, event sponsorships and digital signage. The campaign includes a new tagline, Ontario's Lottery and Gaming.

The campaign creative features some of the ways that OLG helps make Ontario better, including several of OLG's sponsored events across the Province such as Pride, Winterlude and The Royal Agricultural Winter Fair; charities that have received funding through our charitable gaming operations; and examples of some of the ways that gaming site host communities have benefited from OLG proceeds.

Beyond the benefits provided through the \$2 billion of proceeds paid to the province, OLG also promotes the benefits of more than \$1.9 billion in overall economic activity, including payroll for approximately 16,000 employees working in approximately two dozen communities, revenue sharing paid to municipalities that host OLG gaming sites and to Ontario First Nations, commissions paid to lottery retailers, and the value of goods and services purchased. A primary tactic is publication of an Economic Benefit Statements that detail activity in local communities where OLG operates.

Collaboratively with OLG, communities that host gaming sites also promote benefits received through OLG activity by staging local events and advertising under the Community Recognition Program, and through charitable gaming announcements and events highlighting funding for local charities raised at bingo halls.

Another exciting aspect of the All for Here program is the onsite activation programs that OLG uses to engage directly with Ontarians at community festivals and events. In 2016, OLG featured "All for Here Gear," turning festival-goers into loyal brand advocates by allowing them to create custom, All for Here t-shirts and totes that demonstrate what it is they love about Ontario. Participants had the opportunity to select either a t-shirt or a tote to design and add a custom badge to their gear, such as "All for Pride" or "All for the Outdoors."

So far, the All for Here concept has been a success for OLG, leading to a multi-year high for its brand reputation metrics and to more people re-engaging with the brand.

The graphic features a dark blue background with a white location pin icon in the center. The words "All for Here" are written in a large, white, cursive font across the pin. Above the pin, the text "ONTARIO'S LOTTERY & GAMING" is written in a white, sans-serif font, following the curve of the top of the pin. Below the pin, the text "100% OF PROCEEDS IN ONTARIO" is written in a white, sans-serif font, following the curve of the bottom of the pin. The word "INVESTING" is written in a white, sans-serif font, positioned horizontally across the middle of the pin.

FOR 40 YEARS OLG HAS BEEN GIVING 100% OF OUR PROCEEDS BACK TO THE THINGS THAT MAKE ONTARIO GREAT. WE'RE ALL FOR HERE.

OLG Ontario's Lottery & Gaming www.modernolg.ca Know your limit. Play within it.

Oregon Lottery

The Oregon Lottery takes our tag line, “It does good things,” seriously. Oregonians voted to establish the lottery in 1984 to recharge the state’s economic development efforts. Fast forward to 2017: Oregon Lottery revenues fund education, state parks, watershed and salmon restoration, veterans programs, outdoor school (an innovative environmental education program for the state’s middle schoolers), economic development and problem gambling treatment.

Our marketing department creates integrated advertising campaigns to connect with Oregonians about the programs and activities Lottery revenues fund. These campaigns, which the Oregon Lottery has dubbed “Oregon Wins,” are focused on one simple message amplified through television, print, radio, web and social media. In addition, a few times each year the Lottery’s marketing department and public affairs group team up to promote a major beneficiary activity, such as the annual Oregon SOLVE state parks beneficiaries clean up event.

SOLVE’s mission is to bring Oregonians together to improve Oregon’s environment and build a legacy of stewardship. SOLVE organizes cleanup events throughout the year, with two major events in the summer and fall. The Oregon Lottery sponsors the fall clean up event. As part of the sponsorship, we produced an integrated media campaign that included a radio ad featuring Lottery Director Barry Pack, a microsite, a television ad that resulted in record numbers of volunteers and a lively social media campaign by the event organizers at SOLVE and the Oregon Lottery. Over 50 Oregon Lottery employees volunteered for the day, enjoying the opportunity to “walk the talk,” under the tagline, “Together we do good things for Oregon.” This campaign not only resulted in positive media attention and exposure for the Lottery, but also gave our employees a chance to work together to improve their communities.

The 2016 Oregon Wins campaign focused on state parks, emphasizing their value and meaning in the lives of Oregonians. The message was simple, “what we get back.” The campaign included television ads, backed by beneficiary messaging on our website and on a microsite dedicated to the message. We used social media to push out the message at regular intervals, and produced radio ads in English and Spanish that ran during the same time as the television ads. We amplified this message with an “Oregon is an Inspiration” ad that illustrated all the investments that the state makes with Lottery revenues to make Oregon, “Our Oregon.”



Pennsylvania Lottery

Probably the best-known fact about us is that the Pennsylvania Lottery benefits older Pennsylvanians, every day. Awareness has been such an important part of our branding since 1972 that today, we sometimes have to remind our players that WINNERS are still our top beneficiaries. (Over \$2.6 billion in prizes paid last fiscal year.)

We have a benefits brochure, which we make available through our offices, on our website and at special events. We dedicate a whole section of our website to benefits, and routinely post about benefits on our social media (Facebook, Twitter). We also have some videos on our YouTube channel. Each news release we issue contains general and county-level benefits information, which makes it easy for reporters to include these facts in their stories.

We do some specific benefits awareness advertising, but the mission/message is always included in all of our advertising (print, radio, TV, out of home). May is designated Older Pennsylvanians month, and we do television advertising at that time.

Pennsylvania residents over age 55 are invited to serve as citizen witnesses on our televised drawing shows. They're not just 'for show;' they actually participate in the drawing processes.

We're quite proud of our mission. Some people who were among our first players 45 years ago now enjoy the important social services that we fund.

Staying Connected



When older Pennsylvanians make the most of programs supported by the Pennsylvania Lottery, we all benefit.

Prescription Drug Programs
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Must Be 18 Years or Older to Play. Please Play Responsibly. Compulsive Gambling Helpline: 1-800-548-3820

South Dakota Lottery

In South Dakota, Lottery revenues go to the state General Fund, nearly half of which supports education; the Capital Construction Fund for development of natural resources and transportation needs; and the state Department of Social Services to fund problem gambling treatment programs. Because "where the money goes" can sometimes be confusing to South Dakotans, when we launched our rebranding campaign earlier this year, we put a lot of focus on who are beneficiaries are. This is how we did it:

WHERE DOES THE MONEY GO?



- 68¢ to Winners
- 15¢ to Retailers, Operators, & Vendors
- 1¢ to Lottery Operating Expenses
- 16¢ to SOUTH DAKOTA!



THAT MEANS **84¢** OF EVERY DOLLAR PLAYED GOES TO WINNERS OR BACK TO SOUTH DAKOTA!

South Dakota Lottery (Continued)



Our Lottery website. The “Where the Funds Go” page details all of the funds in which our proceeds are deposited and the programs those funds support. The public can also access electronic copies of our annual reports for past years and see a breakdown of exactly how much revenue was distributed where.

GoodFunSD website. The GoodFunSD landing page was launched as part of our rebranding campaign to give people quick statistical information on how much is won daily, the breakdown of how a dollar spent on lottery is divided, where the money goes, etc. delivered in a graphic, entertaining and easy to understand manner.

Social Media. We use graphic posts (organic and paid) on Facebook and Twitter to educate fans and followers about how Lottery revenues are spent.

Radio. Our branding campaign utilizes a series of light-hearted radio commercials to illustrate how much money the Lottery raises for the state annually. The ads steer listeners to the GoodFunSD website for more comprehensive information.

Signage. We’ve used in-store POS (posters, window clings, crash bar stickers), our ESMMs in all retailers and digital billboards to get our beneficiary awareness message out to the public.

Press Releases. It’s a simple thing, but we’ve started adding a line to the bottom of our press releases which reads: From 1987 to FY2016, the South Dakota Lottery has provided over \$2.58 billion to support education, develop natural resources, lower property taxes, and provide problem gambling treatment services.

Tennessee Education Lottery

The Tennessee Education Lottery (TEL) was created to maximize proceeds for specific education programs in Tennessee. Since the first awards were given in the fall of 2004, Lottery-funded programs have grown to include 12 different scholarships and grants for Tennessee students seeking higher education. Lottery monies are also used to fund after-school programs and an energy-efficient schools initiative. More than one million scholarships and grants have been awarded.

To raise awareness about these beneficiaries, we use a variety of strategies and channels to promote the total amount of funding raised since inception, the number of Lottery-funded programs, the number of students who have benefited and the number of scholarships and grants awarded.



Tennessee Education Lottery (Continued)

We use print and television advertisements to promote our overall contribution to education. Beneficiary messages are part of our social media content calendar, including Facebook, Twitter and Instagram. Beneficiary messaging is also a key graphic component of our corporate website and part of other marketing strategies. It is also woven into all our other messaging, including press releases and media interviews. We manage a dedicated website (seehowitaddsup.com) specifically to promote Lottery-funded programs. Beneficiary point of sale materials are also created using the designs and themes of these campaigns, and are placed at our retailer locations.

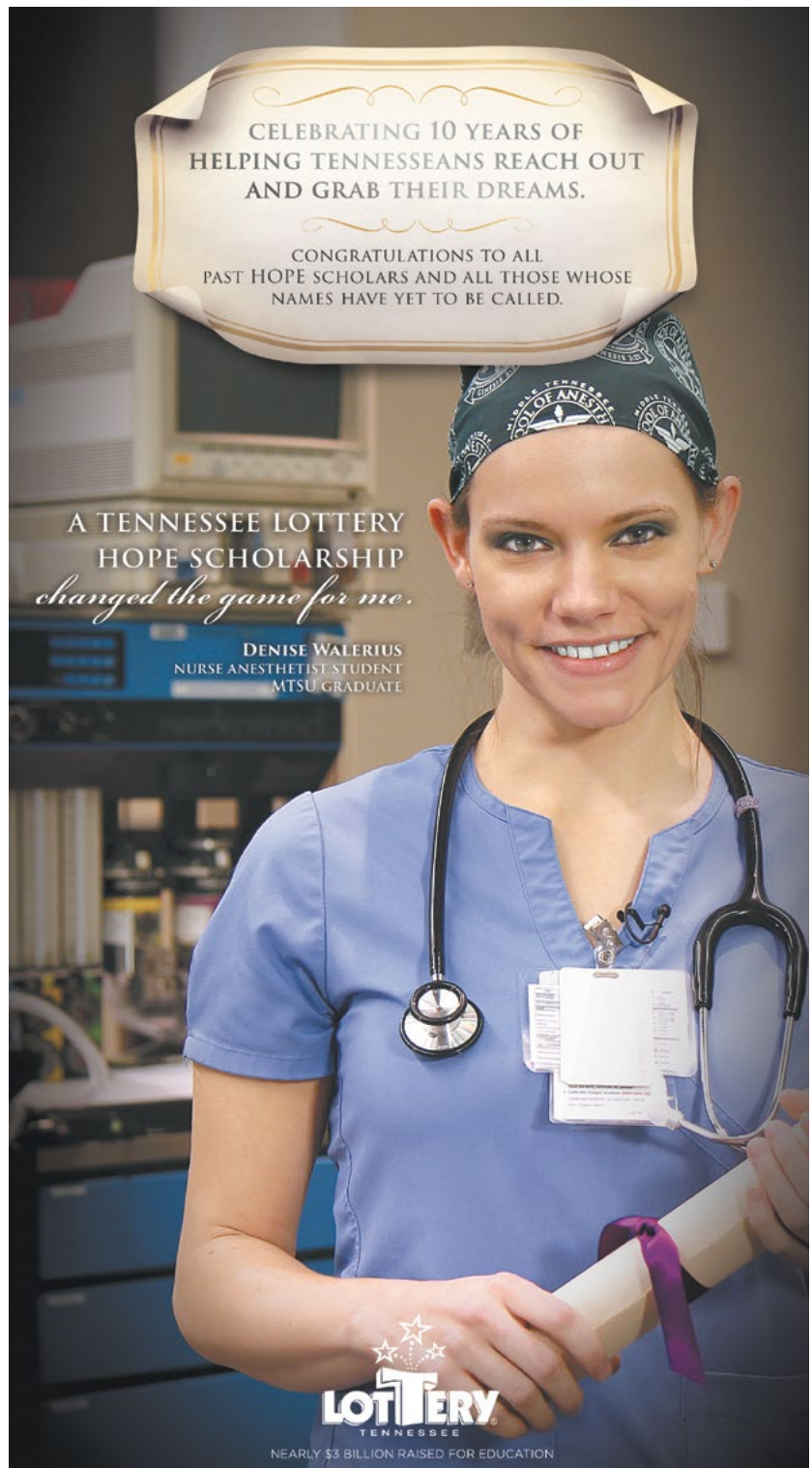
The TEL partners with its television drawing stations in each market to celebrate educators through a “Tennessee Lottery Educator of the Week/Month” campaign. The program culminates each year with an event in each market honoring the winners.

At college and professional sporting events, Tennessee Lottery executives and members of the TEL Board of Directors present symbolic checks during basketball and football seasons representing the total amount of education funds generated.

Specially designed TEL t-shirts include messaging promoting Lottery-funded education programs. The shirts are given to winners and players at a variety of special events as part of sponsorships.

Internally, our team is frequently reminded of the positive impact their work has on education in Tennessee through monthly CEO memos, internal events, mementos and other messaging. Our four district offices promote the number of scholarships and grants awarded with large wall banners.

We provide regular reports to the state, including fiscal updates and information about transfers to the state’s Lottery for Education Account. And we celebrate milestones – such as the times we reached \$2 billion and \$4 billion in proceeds.



Virginia Lottery

The Virginia Lottery has three significant ways in which we spread our beneficiary message: Super Teacher, Thank a Teacher and Making a Difference.

Super Teacher, which began in 2008, is a grassroots effort designed to help put a spotlight on those amazing educators across the Commonwealth who go the extra mile each and every day, demonstrating passion, innovation, collaboration and creativity in the classroom. Nominations are accepted from anyone 18 or older. A blue-ribbon panel of judges selects eight educators, one from each geographic region of the state, to win \$2,000 cash from the Virginia Lottery and a \$2,000 classroom supply credit from The Supply Room Companies. Over the years, we've recognized not only traditional classroom teachers but also music, art, physical education and special needs educators. (Read more about Super Teacher on page 6.)

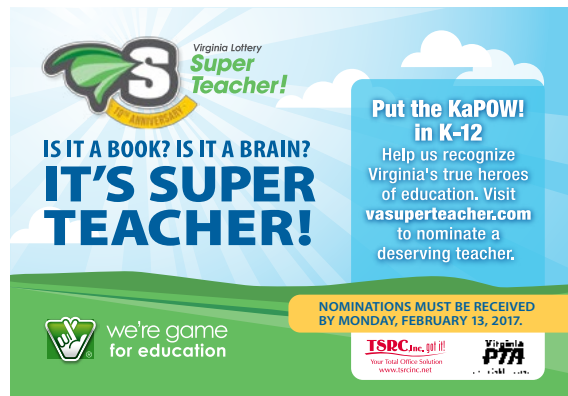
The new Thank a Teacher campaign (2016 was the first year) is designed to increase awareness for the Lottery's commitment to Virginia's public schools. It is planned around Teacher Appreciation Week, at which time the Virginia Lottery pledges to thank all public school teachers in the Commonwealth for making a difference. This initiative involves asking the public for support and encouraging them to send a thank you note to a public school teacher they value, courtesy of the Virginia Lottery.

Making a Difference is an internal effort and a chance for employees to directly connect with our mission. It gives Lottery employees an opportunity to volunteer up to 32 hours during a school year. This initiative focuses on Title One schools that truly benefit from the extra set of hands. Employees volunteer in a variety of ways, from serving as lunch buddies to assisting in the classroom. News about this program is supported on our intranet, LottoLand.

We use paid advertising to support Super Teacher and Thank a Teacher during those campaigns – TV, radio and print. Both programs are supported with our owned media, with dedicated pages on our website (Super Teacher also has a dedicated URL at www.vasuperteacher.com.) For Thank a Teacher, we invite people to send a thank-you note to teachers through our website; teachers can enter a unique code on each note for a chance to win a vacation courtesy of our partners at Virginia Tourism Corporation.

All three of the programs receive social media support throughout their active campaign periods on all of our social channels (Facebook, Twitter, YouTube, Instagram and LinkedIn). The Super Teacher and Thank a Teacher campaigns also receive social media support on partner channels such as the Redskins and several public colleges and universities throughout the state.

The three campaigns also have a variety of collateral material associated with them including branded folders, tablecloths, pull-up banners and printed materials (postcards, magnets). We have these and other items and informational



2016 Teacher Appreciation Week

brochures available when we do onsite setups at education events or in the Virginia General Assembly building when it is in session.

Through partnerships with education-related organizations (at least two dozen statewide and including our great partners at the Virginia PTA), we receive dedicated content in electronic newsletter distribution, and digital advertising to include logo placement, digital banners and broadcast spots. As part of these partnerships, we also have several opportunities for our executive director or members of the Communications staff to speak to educator-filled audiences at professional development conferences and awards banquets.

We are working to further strengthen our partnership with Virginia Department of Education. Since that agency is responsible for the distribution of Lottery proceeds, we continue to seek out ways in which we can clearly, consistently share the message of our support of public education.

Washington's Lottery

Our beneficiary message is mainly shared through our owned channels (website, social media and YouTube) and also through paid media with NPR podcasts and public radio.

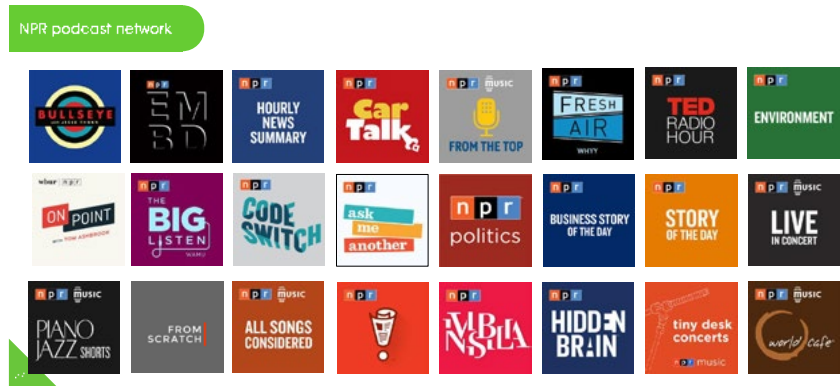
Our website, social media channels and YouTube are where our fans, and those who are interested in seeing where the money goes, come to find out about the benefit that Washington's Lottery provides to the state. So it makes sense to have our message live in these spaces. We are launching a new beneficiary video early this year; it speaks to all the benefits that the Lottery provides to the state.

For our paid media advertising, we are trying spots during NPR podcasts for the first time this year. Typically, podcasts last 20 minutes to an hour and are spent discussing topics of interest to our fan base. They are downloaded (much like a music track), as opposed to listened to on-the-go as with traditional talk radio. NPR podcasts offer professional and immersive storytelling in an environment that feels authentic and approachable. The benefit of this is that we deliver brand messages "in the ear" that translate into an increased awareness and affinity while also combating neutrality as they deliver our message. We are providing our message in 15 second spots that speak about all the good that the Lottery does, and participating in the entire collection of NPR podcasts.

We also use public radio to focus on the targeted reach within news and informational programming that airs during key commuter dayparts.



► BENEFICIARY: NPR PODCASTS





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ICE Totally Gaming
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February 8-10, 2017

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March 15-16, 2017

GLI Round Table
Luxor Las Vegas
Las Vegas, NV

March 20-22, 2017

PGRI Smart-Tech
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March 2017

*Problem Gambling
Awareness Month*

March 2017

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April 2-7, 2017

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Washington, D.C.

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on Problem Gambling*
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July 24-28, 2017

NASPL Professional Development Seminar
Renaissance Hotel
Nashville, TN
Hosted by Tennessee Education Lottery
Corp.

September 13-16, 2017

*NASPL 2017 Business Development
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NACS
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December 2017

NCPG Holiday Lottery Campaign



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