

INSIGHTS

January/February 2018

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RESPONSIBILITY: LOTTERIES

Insights looks at the lottery industry's responsible gambling initiatives and campaigns



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Before we give away those details, here's why your NASPL 2018 trip to Cleveland will be more than just a conference.

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Westin Downtown Cleveland

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More than just a conference

Nicknamed "The Land," Cleveland offers something for everyone. Our city was recently lauded by National Geographic as one of the 21 must-see places to visit in 2018. It's a vibrant, world-class city with a bustling cultural and social scene.

Ever wonder what's so "great" about the Great Lakes? Check out the view at either of our conference accommodations and you'll see why.

Better yet, extend your stay and explore all that Cleveland has to offer. From the Flats on the Cuyahoga River, to the metroparks on Lake Erie, you'll be sure to find the recreation style for you.

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Come in on Sunday and check out the Cleveland Indians as they take on the Boston Red Sox. Or catch an NFL game at one of our pubs on East 4th Street.

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See the world's largest outdoor chandelier. Take in a show at Playhouse Square, the second-largest theater district in the United States. Attend a concert with the world-renowned Cleveland Orchestra, or check out one of our several museums.

Intrigued?

You should be. We're the birthplace of Rock and Roll, Superman, and the first street light. Come spend some time with us in September and experience it for yourself. We can't wait to share "The Land" with you.



SEPTEMBER 25-28, 2018



FROM THE PRESIDENT

“This is the west, when the legend becomes fact, print the legend.”

These are the iconic words from the classic John Ford movie *The Man Who Shot Liberty Valance* about how the legend often matters more than what is factually accurate. We prefer heroes and villains, and easily digestible versions of both, and the truth can be murky and complicated and require work on our part, so it's no wonder how news is rendered. Want some lottery examples...? Of course you do...



One state was the subject of a massive investigative report, Woodward and Bernstein-type stuff. Their detailed analysis found that one poor county of approximately 30,000 people played lottery far more than other counties – wealthier counties. Smoking gun found, they wrote. And wrote. And then approached the lottery, who calmly informed them that the county in question bordered a jurisdiction that had neither Powerball nor MegaMillions and that the foreign traffic was skewing the numbers. Thankfully that factual information was nearly alluded to in paragraph seven, sentence three. Nearly...

Never let the facts get in the way of a good story.

A number of years ago, the *New Hampshire Lottery* was written about because we had fallen so far behind on revenue projections for the final month of the fiscal year, and what was going horribly wrong. The reporter didn't know – or bother to ask – that we transfer two times in the final month of the fiscal year, and had written the story prior to the second transfer. But, with the damage done, months of explaining to state legislators was my reward.

When the legend becomes fact, print the legend.

A dynamic quarterback is alleged to have released some air from footballs. Despite numerous physicists' assertions that it indeed could happen, the story about the quarterback was written and the facts of his innocence were ignored.

That football felt fine to me.

Charles McIntyre
*Executive Director, New Hampshire Lottery/
NASPL President*



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inspiration

growing with partners

in a world of endless possibilities

Modernizing lotteries in a digital world

intralot

IGT Appoints its First-Ever Vice President of Diversity and Inclusion



an excellent choice for this position. Her personal contribution to IGT, true passion for diversity and inclusion, and unwavering commitment, mark her as exactly what this position calls for," said Mario Di Loreto, IGT Executive Vice President of People and Transformation.

"IGT has established itself as the industry leader in gaming because of our unique understanding of players across the globe. Our goal is to meet the needs of our global customer base through a diverse and energized workforce. It's not just about numbers or demographics," said Kim. "Diversity and inclusion goes beyond gender and race. We want to embed into our values a culture of inclusion where all our employees feel valued, respected, listened to, engaged, and empowered to contribute to the success of the Company. IGT will continue to achieve success by recognizing that diversity is an asset and a business imperative in today's global marketplace."

Kim began at IGT in 2011 as Vice President, Legal and Regulatory Compliance, for Northstar Lottery Group in Illinois. Her role at Northstar allowed Kim to successfully implement recognized supplier diversity programs that surpassed Northstar's contractually established goals. Kim holds a law degree from New York University School of Law and a Bachelor of Arts from Yale College. She recently relocated from Chicago, Illinois to Providence, Rhode Island. ■

IGT has appointed Kim Barker Lee to the newly-created role of Vice President of Diversity and Inclusion. Kim will be responsible for developing and implementing the Company's first-ever global diversity and inclusion strategy. Kim will also chair the Executive Diversity and Inclusion Council (EDIC), which is comprised of global senior and emerging leaders and provides leadership support for the Company's diversity and inclusion

initiative, ensuring that the Company's diversity and inclusion goals are relevant, have an impact, and are measurable.

"IGT is committed to ensuring that our workforce reflects the global customers and communities that we serve. Bringing more diverse perspectives to the table drives innovation and will enable IGT to continue to deliver the best products and services to our customers. Kim is



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Her Royal Highness The Princess Royal Celebrates 40 Years of Lottery Instant Game Design and Production at Scientific Games in UK

In late January, Scientific Games Corporation announced that Her Royal Highness, The Princess Royal, visited the company's Leeds, UK, manufacturing and technology facility to coincide with 40 years of lottery instant game design and production in Yorkshire. Scientific Games is the largest supplier of instant games in the world, with five instant game facilities across four continents, providing innovative games, technologies and services to over 150 lotteries worldwide. The company's global lottery headquarters are north of Atlanta in Alpharetta, Georgia, Scientific Games' largest instant game facility.

During her visit to the Hunslet site, Her Royal Highness was accompanied by the High Sheriff, as she was greeted by Scientific Games' leadership and employees and President of the World Lottery Association, Jean-Luc Moner-Banet, as she toured the state-of-the-art facility and learned about the design and production process of instant games enjoyed by players in the UK and throughout Europe. The company was amongst the first to be certified by the World Lottery Association for both responsible gaming and environmental sustainability practices.

As an official supplier of instant games to the National Lottery in the UK, the games created in Leeds have helped benefit charities all over the country, including the Haworth-based branch of Riding for the Disabled Association, of which Her Royal Highness is the long-standing president.



With highly advanced game manufacturing technology and world-renown security practices, Scientific Games Leeds creates 6.8 billion of the Company's 53 billion instant games per year (2x4 units), each contributing to the raft of good causes which is at the heart of every lottery program. On a global scale, lottery programs saw \$82.4 billion donated to good causes in 2016 alone across a breadth of charitable enterprises, including initiatives for education, health and welfare, sports and the environment.

Kevin Anderson, Vice President, International Business Development, Scientific Games, EMEA, said "We were extremely honored to host The Princess Royal, and the visit recognizes the dedication of our talented team of designers, technologists and manufacturing professionals here at Scientific Games Leeds over the last 40 years. With an interest in the National

Lottery good causes through her numerous charity patronages, it was a pleasure to show her first hand the fascinating processes and science that is involved in the creation of modern instant games."

Her Royal Highness unveiled a permanent plaque to celebrate the visit and follows Scientific Games being presented with the Queens Award for Enterprise in the International Trade category in 2005.

The global lottery and gaming company has had roots in Leeds since the mid-1970s, when it first licensed the production of lottery instant 'scratch-off' products to local company Norton & Wright, which became Opax International and was eventually acquired by Scientific Games. The physical facility along the River Aire in Leeds dates back to an early 1900s printing house. ■



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*By Teri Wood,
Vice President Marketing, Iowa Lottery*

Gaining Valuable Insight with Simple Website Polls

The Iowa Lottery enjoys engaging players in conversation. We appreciate learning their playing habits, their game and promotion preferences and various attitudes and opinions. But traditional research methods can be time consuming, cumbersome and expensive.

In a recent survey about our website, we learned players visit us for two primary reasons. The first is to learn the current jackpot amount and the second is to view the winning numbers of the lotto games.

In analyzing this data, we found ourselves wondering about other ways to capture players' attention and engage them while they are already on our homepage.

We realized the idea of placing a quick little survey under the winning numbers and jackpot amounts on our homepage could get our players' attention and allow us to gather some qualitative information in a fun and engaging way.

Imagine our surprise when our first little survey resulted in nearly 2,000 votes. All we had done was ask a few simple questions. With that kind of response we knew we were really on to something.

Since that time, we have dedicated a place on our homepage specifically to PollDaddy surveys. Each survey runs about a week. Players can only vote

one time per survey, but they can see the results throughout the week. We average around 2,000 votes per survey and players seem to like giving us their opinions.

We ask qualitative and insightful questions such as:

Which social media site do you use most? Choices were: Facebook, Twitter, Instagram, Google+ or Pinterest

How plugged in are you when you watch TV? I watch using a: Smart TV, Streaming box (e.g. Roku, Apple TV, and Chromecast)

What cell phone platform are you on? Choices were: Android, iOS, I don't have a smart phone, Other, Windows

We ask questions that give us insight into players' habits such as:

When do you play scratch games? Choices were: On a break at work, After work, When I am by myself, Whenever I feel like it

Which Iowa Lottery tickets are your favorites to play? Choices were: Scratch tickets, Lotto games, All of them, InstaPlay, Pull-tabs

How do you decide which scratch tickets to play? Choices were: I play the new ones, I play the ones that take a while, I play tickets that tie to a promotion, I take the clerk's advice on what to buy

We ask questions about upcoming (or potential) promotions such as:

- Which prize would you most like to win in an Iowa Lottery Play It Again drawing?
- Which prize would you most like to win in a lottery pop-up contest?
- Have you ever thought about living in a tiny home?
- And, we intersperse fun questions to keep our players engaged, such as:
- What are your plans for the holidays?
- What college team do you cheer for?
- Did you make a New Year's resolution?

In the short time we've been compiling data from those who have participated in our homepage website surveys, we have been able to uncover buying trends, media viewing



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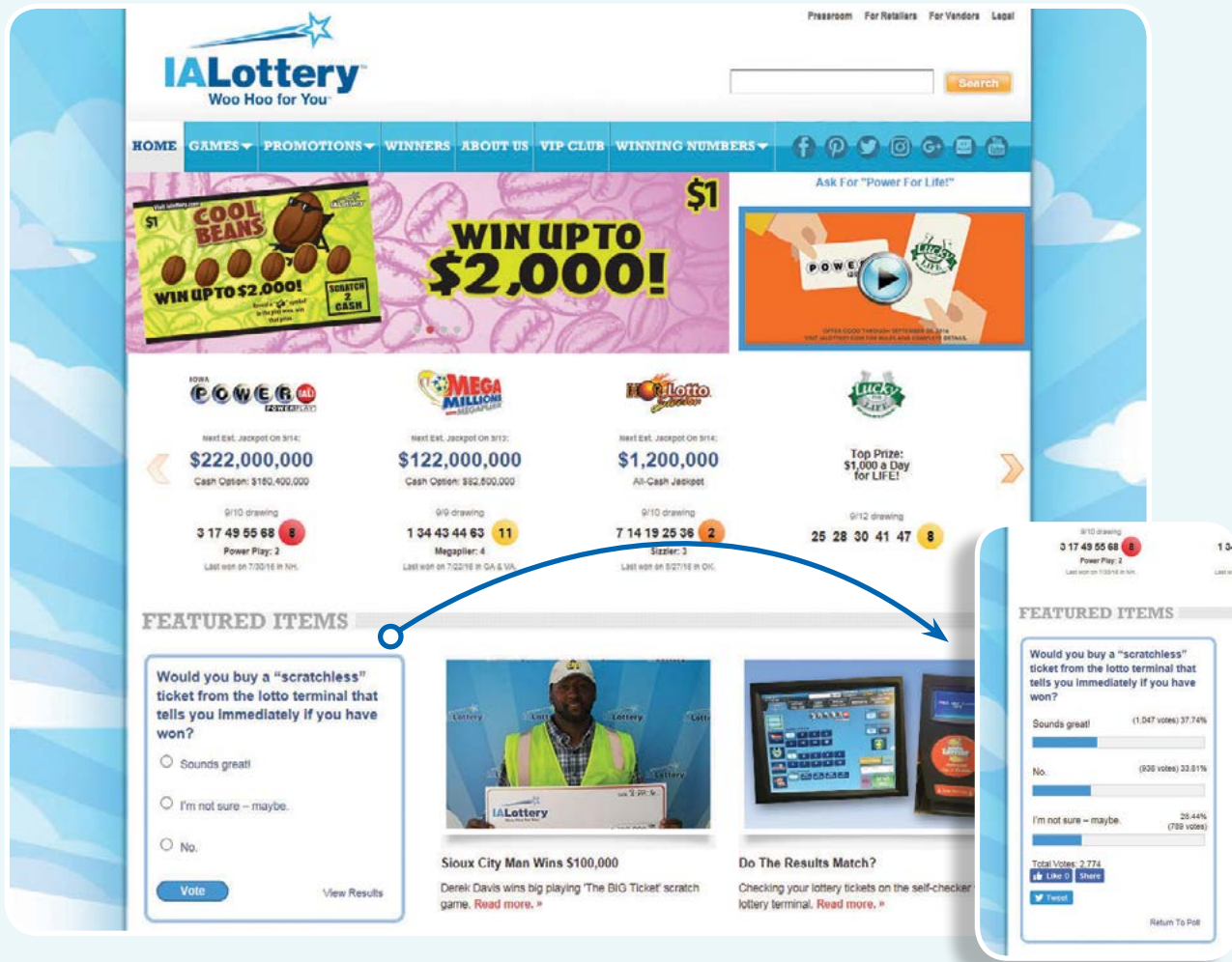
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and listening habits, social media engagement, game likes and dislikes and have gained valuable insight on our promotions.

We frequently refer to this information when making critical decisions about our website, media buying, Play It Again promotions, jackpot awareness initiatives, mobile, SMS, etc.

Some examples of recent polls:

92 percent of respondents told us that they check the lotto winning numbers on our website and 70 percent stated that the primary reason they check our website is to check winning numbers.

78 percent of respondents told us that the prize they like to win most in our Play It Again promotions is cash and 71 percent said the same goes for our Pop-Up contests.

66 percent of respondents said they listen to over-the-air programming for radio and 67 percent watch TV via satellite or cable.

44 percent own a smart TV and 9 percent own a streaming box (Roku, Apple TV, Chromecast).

76 percent of our respondents surprised us when they said it doesn't matter how high the jackpot is before they play and only 3 percent stated it needs to be over \$300 million before they play.

The house is equally divided

between scratch and lotto players, with 39 percent preferring scratch, 39 percent preferring lotto and 19 percent playing both.

A similar story played out regarding cell phone preferences with 46 percent preferring Android and 36 percent preferring iOS; 14 percent don't own a cell phone.

And for fun, 79 percent of those who responded did not make a New Year's resolution.

The Iowa Lottery is excited about this easy and engaging way to collect player data, at virtually no cost to us. As we continue to use these homepage surveys, we hope to discover more new ways to catch players' interest. ■

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By Angela Woo, Alter Agents

Lottery and Gaming Research Redefined:

How to Meet New Consumers on Their Own Turf

At my market research firm, Alter Agents, we specialize in finding out just what makes the consumer tick – what drives purchases, where does the shopper journey take them and just how it all affects brands and marketers. Consumers expect seamless, omni-channel interactions with companies that reflect their values and listen to their input. They want personalized communications in their medium of choice – email, text, apps, phone and more. These needs and desires spill over into the top of the research funnel.

Currently, lottery and gaming research is stuck somewhere in the middle when it comes to outreach. For example, phone is still a common practice used by lotteries because it still provides the most peace of mind on state representation, although some states have migrated to mixed methodology of online and phone. State populations, demographics and budget all vary widely, so even though phone is costly, sometimes it is the only option for reaching quotas. There is no magic bullet.

Our Consumer is Evolving, So Must We

However, as researchers, we must eventually bring it back around to the consumer. Technology and consumer attitudes and behaviors will continue to evolve in ways that affect the gaming industry and its market research practices. When the gaming industry thinks about research design, it is important to keep in mind that consumers are used to technology and solutions that make their lives easier. Attention spans are down and convenience is expected with every interaction. Intrinsicly, this means that the number of people that answer phone surveys are becoming smaller as well and may not be entirely representative as we look to the future.

What's the first step in obtaining quality data from our research samples? We meet them on their own turf.

Online: According to recent research 88.5 percent of Americans have access to the internet compared to only 52 percent in the year 2000.

Smartphone: Smartphone adoption has grown even faster than internet adoption with 2 percent of Americans having a smartphone in 2005 and 81 percent now. Apps dominate with 89 percent of consumer media time in mobile apps vs. 11 percent in mobile web according to latest statistics by Nielsen.

Phone: A new survey by the National Center for Health Statistics showed that majority of American homes had only wireless telephones, with more than 70 percent of adults between 25 and 34 years old living in wireless-only homes.

Mail: By far the costliest (and slowest) of outreach methods, experts have varying opinions on the effectiveness and response rate expectations for paper outreach. It is definitely an antiquated approach, but can still reach some populations.

The bottom line is that we need to get the highest number of responses from a representative sample in order to have solid data quality. When thinking about research design, consumer needs must be considered.



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Like so many other industries, lotteries and the gaming industry need to pursue a consumer-first strategy when it comes to market research.

They are used to a seamless, service-oriented approach that give them a good experience. As a society, we are becoming more irritated by little inconveniences. A sharply decreasing number of people are willing to spend 20 minutes on a phone call without a clear benefit to them.

Moving Toward a Consumer-First Approach

So how do lotteries and gaming leaders still get the reliable data and insights needed to ensure that investments in games, purchase channels and marketing meet new consumer demands? It depends on where current strategies are positioned. Here are some ways to start to pivot and find better ways to garner insights.

Weaning off Phone Research: Start by performing parallel testing to address concerns of representation and understand how it compares to past data. From our experience, there will be some differences when you change approaches and to account for those differences we recommend conducting online data calibrations so data can still be tracked over time as needed. As discussed above, consumers want to respond via the medium with which they are most comfortable. Studies show that's probably not the phone anymore, so to reach these important groups strategies need to shift.

Finding the Right Panel: Those currently using online sample need to think about online sample acquisition beyond traditional panels for representation— you need to keep in mind how the sample is sourced to ensure representation. By pulling from more types of panels, you allow for representation of customers beyond those who opt in to be part of traditional panel. Multi-source and points-based panels generally include younger target groups, plus those who we intercept during a search experience (not part of a traditional panel to widen scope of customers).

Utilizing Online Communities: Sometimes, in this industry, we need a quick turnaround: to get customer feedback on lottery/gaming brand and sentiment, messaging, public relations and more using qualitative and

quantitative research designs. Online communities – branded or unbranded – provide a cost efficient way to get feedback from any group we want, targeting them as needed for all types of research. As states move toward online gaming, it makes sense to turn to online research (including use of communities) to get at this group's voice.

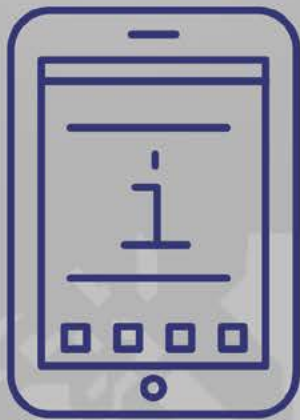
Implementing Mobile Geofencing: This is becoming an increasingly effective way to capture the voice of the customer at moment of purchase. We now are able to get specific groups (e.g. types of players, demographics, etc.) by geofencing a specific location/area where lottery games are played/sold and get at-the-moment purchase sentiment, spend and other data points. This would be an effective way to understand casual players and spend more accurately and be able to tie it back to any internal data.

Stakeholder Involvement: At our firm, we emphasize the importance of upfront planning and communication before getting lost in the weeds of tactics such as scheduling, budgeting and timelines. Communicating larger goals and desired outcomes clearly from the beginning is vital to success. This applies to all industries, and lotteries can also benefit from this approach. Involving all stakeholders – research, product team, advertising – to form an agreement on strategy and buy-in is critical.

Like so many other industries, lotteries and the gaming industry need to pursue a consumer-first strategy when it comes to market research. By meeting respondents on their own turf and utilizing new techniques, we can start to get the data quality needed to continue moving into the gaming future. ■

Angela Woo is the Founder and Chief Strategy Officer of Alter Agents, a market research firm. She participated in a research panel at the NASPL annual conference in Portland last September and this article expands upon her comments during that session.

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**Making @
Difference**

Gary Butler

**Director of Lottery Operations,
New York State Gaming Commission**

A lot has changed in the past 34 years – and no one knows that better than Gary Butler, who has been working with the New York Lottery for almost that long. Currently Director of Lottery Operations, he spent much of his lottery career focused on information technology.

“Gary is just amazing,” exclaimed Gweneth Dean, Director of the Lottery Division of the New York State Gaming Commission. “I really appreciate his approach to innovation, always with an eye toward bringing new concepts to life. When an idea is brought forth that may be especially complex, there’s nothing more impressive than watching Gary work through the challenge. Gary has been here since the early days and he’s helped the New York Lottery grow to what it is today. He was an early adopter and implementer of many of the technical solutions lotteries use today.”

Starting at the Lottery as a computer programmer while barely out of college, Butler worked his way up to the

position of Manager of Information Technology Services. A few years ago, for a short time he technically worked for the state’s Office of Information Technology Services – where all state agency technology needs were consolidated – but never moved his office as he kept working on behalf of the Lottery. In 2014, the position of Director of Lottery Operations opened up; Butler applied for and was hired for the position.

In this role, he oversees the Lottery’s drawings and gaming services units. “Primarily I’m involved in working with our full-service vendor (IGT) on what we can do next – preparing for what’s coming in the next quarter in terms of games, drawings and operations,” explained Butler.

Over the years, he has been instrumental in developing several new systems – including vendor audits, prize payments, agent applications and subscriptions, calling on that innovative spirit to make a difference for the New York Lottery.

Butler has always been an active sports enthusiast, although in a nod to age he has slowed down his choice of activities. These days, he enjoys going out with friends to play pool a couple of nights a week. Otherwise, he and his wife Nancy (and sometimes their two children and a grandson) enjoy vacationing at Disney in Florida – they are members of the Disney Vacation Club. “There is always something new to do there,” he said of the frequent visits. “The customer service is top notch – if anything goes wrong, they are there immediately to make it right for you. That is something more lotteries could be doing.”

He has a bachelor of science in computer science from Rensselaer Polytechnic Institute, with minors in Management and in Philosophy and the Science of Logic.

How do you develop and cultivate new ideas in a mature industry, especially when you’ve been in the business for so long?

You have to look at what other lotteries are doing – would things that are working elsewhere work for the New York Lottery? We also have to look at what other businesses are doing, and how we fit into a player’s entertainment dollar. We were one of the later states to join a multi-state game, for example. We saw what Powerball and Mega Millions were doing for other states. Joining Mega Millions was obviously a big step for us. Our own lotto game was very successful up to that point, but it was time to grow.

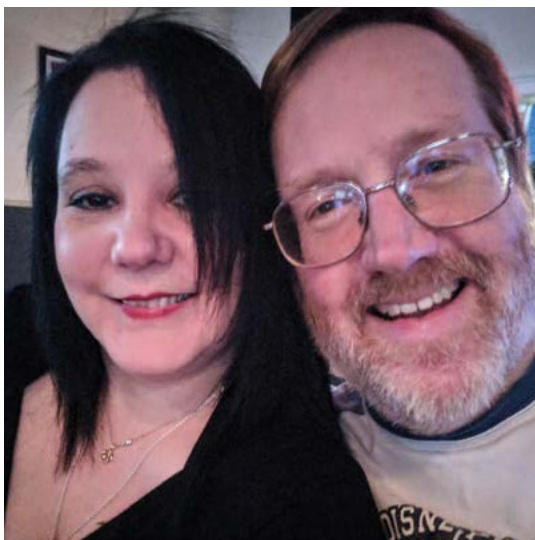
Today’s gaming system contracts are often for 10 years. How do you ensure that lotteries can keep up with technology when things change so quickly?

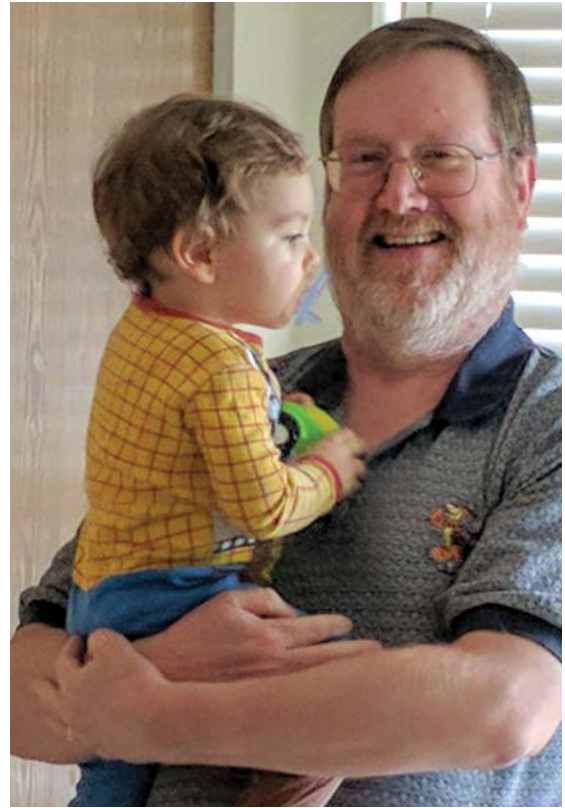
On the software side, there is development going on all the time, so I don’t see that being an issue. The hardware side is different. There’s a big investment

on the part of the vendor at the time the contract is signed. Lotteries need to take into consideration probable and possible technological changes over a ten-year contract period and ask their vendor partners for solutions to this technology challenge. Perhaps the industry needs to take a fresh look at expectations and how we manage these partnerships. Technology is changing faster than ever and consumers can find entertainment elsewhere if lotteries don’t keep up with demand.

What would you like to see lotteries doing from a technology standpoint that they are not currently doing?

As much as possible, we should all have mobile solutions of some kind in order to capture today’s consumers. Ultimately, we need to be able to sell lottery products through mobile channels. From an operations standpoint, I’d like to see us sharing sales information and draw results for the multi-state games in a more automated way. Right now there’s still a lot of data entry and information being faxed, when we should just be able to send files and have everything updated automatically. I’d love to see a realtime dashboard so I can see exactly how we are doing today. A lot of our information is ‘how did we do yesterday.’ If we have billion dollar jackpot, and reporters call asking how we are doing, I need to know what we are doing today.





Where will technology take the industry in terms of future games and customer interaction?

As I said, we definitely need to be thinking about mobile apps, because that's where our players are going to be. We also need to handle cashless payments. We need to gather information from players to better provide entertainment for them, perhaps automating some of the feedback mechanisms to learn more easily what they think of our games and how much time they spend with them. And you have to be willing to innovate. We have two games still in the market that have a 3-D mobile play component to them. They were just a small step to see how players would react to a game with a mobile play experience; players still have to buy and cash at retail. We're still evaluating those games, trying to determine if they are attracting new players. No matter what, though, you definitely have to try new things in this business. You need to find out what's going to work and what's not going to work. Otherwise, we'd still just be running daily numbers tickets.

What excites you most about the future of the lottery industry?

I think there's still room for growth and things we can get excited about. We are definitely looking at how instant tickets are vended, because we still see that as a growth area. Engaging consumers through mobile app innovations is another potential area of growth. Yet another interesting avenue is working more with our corporate partners, perhaps setting up cross-promotions with their loyalty programs. Players could buy lottery tickets and get points in a retailer's loyalty program, for example.

What do you love about working at the New York Lottery?

I love knowing that no two days are alike. You walk in every day and find out something new. For example, you may find out that people play your products in a way you never imagined. We were doing some work on instant tickets not long ago, and I went down to the customer service center to watch how people played. I saw people just scratch off the bar code to check to see if they'd won without even playing the game. I was just amazed by that. They wanted it even more instant than "our" instant.

Another time stands out in memory. During the Y2K frenzy, we had everything ready and were comfortable enough that our Director proposed we hold a special game with a drawing on New Year's Eve. It was very exciting getting that game up and running in just a few months, given all the danger stories of things that were going to happen when the date rolled into the year 2000. It was something nobody else had done, and we were going to have the drawing live with the results before midnight at the turn of the century. And as we all know – everything worked out just fine! ■

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THE AGES OF LOTTO

Have younger people always matured to play more Lotto, or is their current lack of participation unprecedented?

STEPHEN WADE, PRINCIPAL, LOTTERY MANAGEMENT CONSULTING, LLC.



It is an observable fact that current players of classic lottery games like Lotto are mostly over the age of 45. This seems to be true no matter how we measure play - whether in dollars spent or in participation as measured in surveys. Among people who have only recently become old enough to play the lottery, participation and spending on the classic games is very low.

What does this mean for the future viability of these games? There two main schools of thought. The first is that extremely low participation among people who are now in their twenties and thirties will carry forward as these people age, while natural attrition will reduce the activity of those players who are now in their fifties and sixties; consequently the future of classic lottery games is bleak. Alternatively, people who are in their twenties and thirties will, as they age or mature, discover the appeal of these classic games and by the time they are in their fifties and sixties will support these games just as well as the current player population.

These two views lead to profoundly different ideas about what we should be doing in developing future lottery games. The first view leads us to urgently try to discover ways to make lottery games appealing to people who do not now participate. The second view leads us to focus on current customers, and give them more of whatever now seems to motivate them to play.

At the 2017 NASPL Professional Development Seminar held in Nashville, Tenn., these two views were briefly discussed among those who were fortunate enough to attend the very last research track session on the last day, and the question arose whether our enterprise data might speak in favor of one

alternative or the other. Have younger people always matured to play more Lotto, or is their current lack of participation unprecedented?

As I will show in this article, the answer is "Yes." The "or" is nonexclusive. The younger age classes of twenty years ago did gradually increase their level of Lotto play as they aged, and the younger age classes of today are starting from a level of play around half that seen 20 years ago. This analysis supports hope but not complacency.

A big part of my aim here is to show how I used available data to address this question. All the information used here is from Washington State, and it is limited to one game. Other states may have more extensive data that could replicate, refute or extend what is shown here.

This analysis calls on two types of data: 1) year-by-year records of Lotto wins reported to the IRS by the lottery, and 2) year-by-year estimates of the population of the state, by age classes. Why only Lotto? Because only Lotto produced enough reportable (i.e. $\geq \$600$) wins each year, over a period of two decades, to support a breakdown of wins by age class. Most of these wins were due to a \$1,000 prize for matching 5 of 6 numbers. The value proposition of Lotto, while not constant over this whole period of time, has been recognizably consistent.

Now, concerning methods. Winning tickets are a random sample of all tickets, and the files that support IRS reporting normally reveal the age of the claimant. Consequently, the count of winning tickets by age relates to the level of Lotto play by people of that age. The range of ages is great (18-100), and the number of reportable wins in any year of operation

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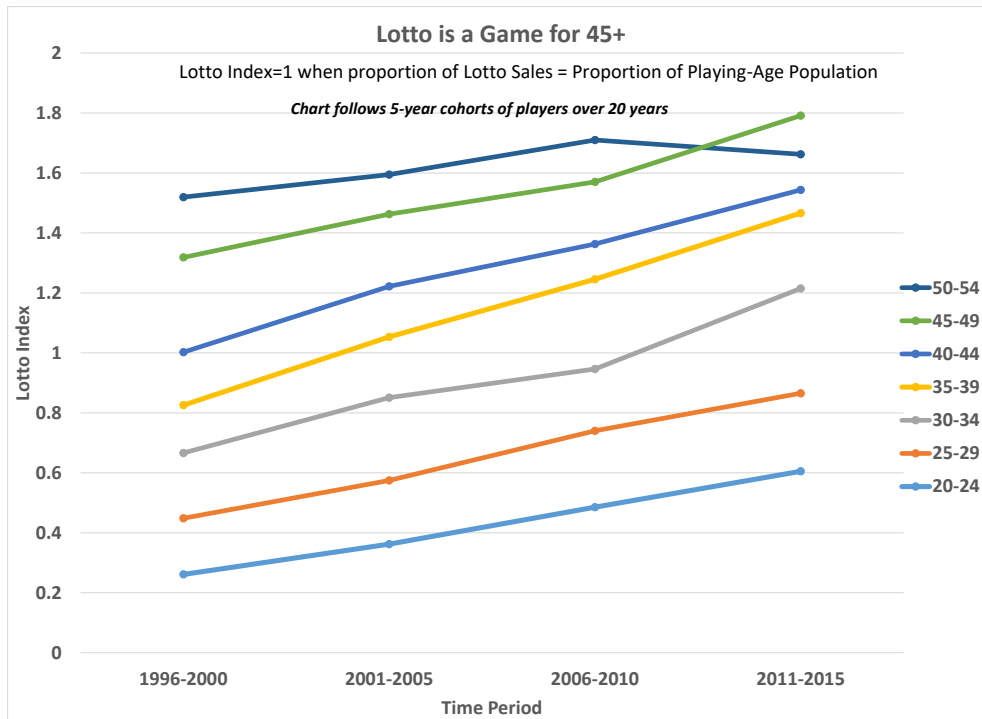
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is modest (mostly 1,500-3,000). Consequently it makes sense to aggregate the win data to a few age classes, and likewise to group years of operation. Since the available population estimates were framed as 5-year age classes, I chose to aggregate the winning data to these same age classes, and to combine five years of lottery operation so as to represent 20 years of history in four periods of five years.

The data available to me allowed me to examine 20 years' worth of records, 1996 through 2015.

Do you remember 1996? If so, you may remember being younger then, and seeing lots of people around who were older than you. Now, probably, you see more people who are younger than you. People of about your age make up a certain share of the population, and that share may change over time. As it happens, people in the 20-25 age class have made up between 9 and 10 percent of the over-20 population of Washington in every year since 1996. People in the 60-64 age class, on the other hand, accounted for about 4.8 percent of the population in 1996 and have increased to 8.4 percent.

If, in any particular year, people played Lotto with the same intensity regardless of age, we would expect to see about 4.8 percent of Lotto spending attributed to the 60-64 age class around 1996, and about 8.4 percent of spending currently. That is to say, if age is not a factor in how people play Lotto, the proportion of play and the proportion of the population should be the same. In any one of our time periods, if we divided the proportion of Lotto play attributable to an age class by their proportion of the population, we would get a

result very close to 1. We might call this, just for this discussion, "the Lotto Index."

When we actually calculate the Lotto Index, we are not surprised to see that it is much greater than 1 for older, and much smaller than 1 for younger, age classes. This is just expressing quantitatively what we recognized already in the first paragraph of this article. The advantage of using this quantitative expression is that it lets us untangle the changing age structure of the population from people's changing behavior. If, as a group of people grows older, their Lotto Index increases, this is because they are playing with greater intensity than other age groups, not because they comprise a greater proportion of the playing-age population. Using this Lotto Index gives us a solid footing for looking at changes in behavior over decades.

In the first chart above, I show the Lotto Index for seven 5-year groups (cohorts) of people, starting with the period 1996-2000. The chart then tracks changes in the Lotto Index for these cohorts over three following five-year periods. The oldest age class in 1996-2000 is 50-54; those people are 70-74 years of age in the last period. I do not show an older age class in the first period, because I wish to avoid statistical instability that might arise as the cohort is depleted by natural mortality.

First, the situation at the start: Lotto was clearly a game for those 40 and over. People in the 40-44 age group accounted for precisely the same share of Lotto sales and of the potential player population, so their index was 1. Those who were older played harder and had a higher index, those who were

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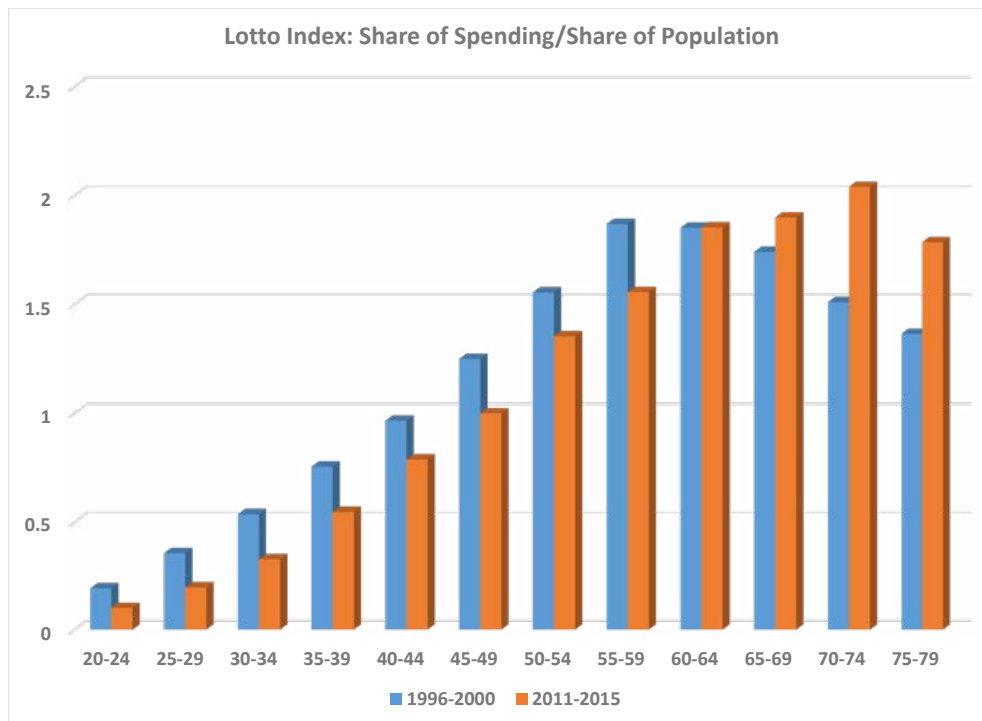
There is something appropriate about the fact that a game based on money also happens to be the #1 selling licensed lottery game brand in the world.

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younger played less, to the extent that those who were 20-24 spent about one quarter as much, on a per-person basis, as the 40-44 year olds.

Now, revisiting these same groups in the next five year period: everyone is older and everyone is playing relatively more. This is possible because of people not belonging to the seven age groups tracked here: the over-20 population of potential players has been expanded by new people coming of age and playing little, and some of the oldest people are playing less. This trend of increasing share of play continues for each cohort with the sole exception of those who were age 50-54 in 1996: the youngest of these reached 65 in the last period, and their share of play declined.

To summarize this story about some of our “current” (2011-2015) players: each age cohort has accounted for an increasing share of Lotto play over the years. Those who reached ages 35-39 in this last period had a Lotto Index of 0.60, having started as 20-24 year olds with an index of 0.26. Those who reached ages 50-54 in the last period, with an Index of 1.47, started as 35-39 year olds with an index of 0.82. But notice: while in 1996-2000 the 35-39 year olds had an index of 0.82, current 35-39 year olds had an index at 0.60. That is, people who are currently in this age class account for a smaller share of Lotto play than people who were in this age class 20 years ago.

The second chart focuses on this kind of comparison, bringing in data from more age classes both in the 1996-2000 period and in 2011-2015. Unlike the first chart, this one does not follow cohorts through time, but simply averages over all those belonged to an age category over a period of five years. What has changed? Two notable things: the more recent distribution is shifted to the right by 5 to 10 years, and the right tail runs off the chart, indicating more intense Lotto play

by people in their 70s.

This chart does tend to tie in with other things we know about changes in the working world: young people are getting “real” jobs later and starting families later, and old people are working longer. The lottery world can no doubt adjust to these changes, if that is all that is happening.

On the other hand, another way to look at this right-shift is that the people who are in their seventies now are playing much like they did at their peak of engagement, 15 to 20 years ago. If people who are now in their fifties have hit their peak of engagement and maintain in the same way, we will see lower spending 20 years out.

Still another ominous sign is that the age differential in playing intensity – that is, the index of the most-active cohort divided by that of the least-active – doubled from 1996-2000 to 2011-2015. In 2011-2015, the most active cohort played 20 times harder than the least active.

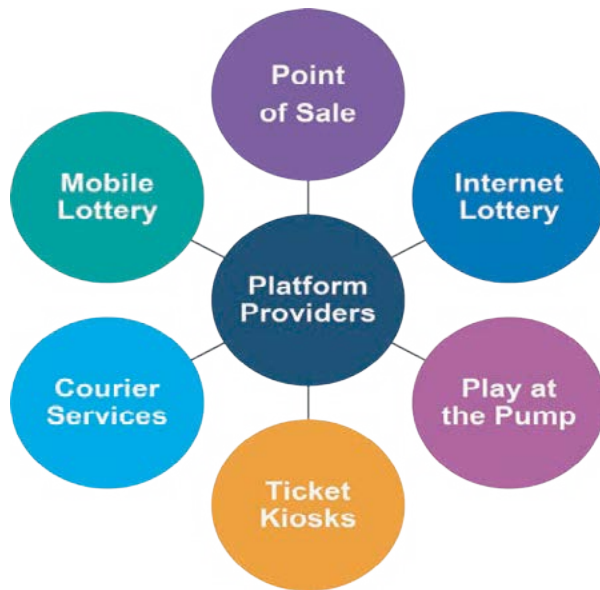
Further, only an optimistic view assumes those who are now represented by the tiny orange block on the left will follow in the path of their elders. There is nothing in this review of recent history that speaks to whether those on the younger side of the “digital divide” will behave like those on the older side. The youngest age group in Chart 2 mostly includes mostly people who graduated high school between 2005 and 2009. The development of their lottery play as they mature will tell its own story, and it may not follow the pattern suggested by the next older group.

In summary, I have not settled this very interesting question about the future of classic lottery games, but I hope I have outlined a way of analysis that may be useful, as we try to use the data generated by our business to understand what is developing. ■

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The Convenient Truth of Self-Service Terminals: The Culture of Instant Gratification

By Fivi Rondiri, Corporate Marketing Manager,
INTRALOT USA

Gen X grew up with fast food. Millennials enjoyed fast entertainment. For Generation Z, it's instant everything - instant information, instant communication and above all instant gratification. The key characteristic of all generations is that which they seek most in all areas of their lives: convenience.

In our times, we consume more convenience items than ever, viewing them as necessities rather than luxuries. It's not that we are lazy. We simply see convenience as the driver of efficiency - and technology as the vehicle that will get us there.

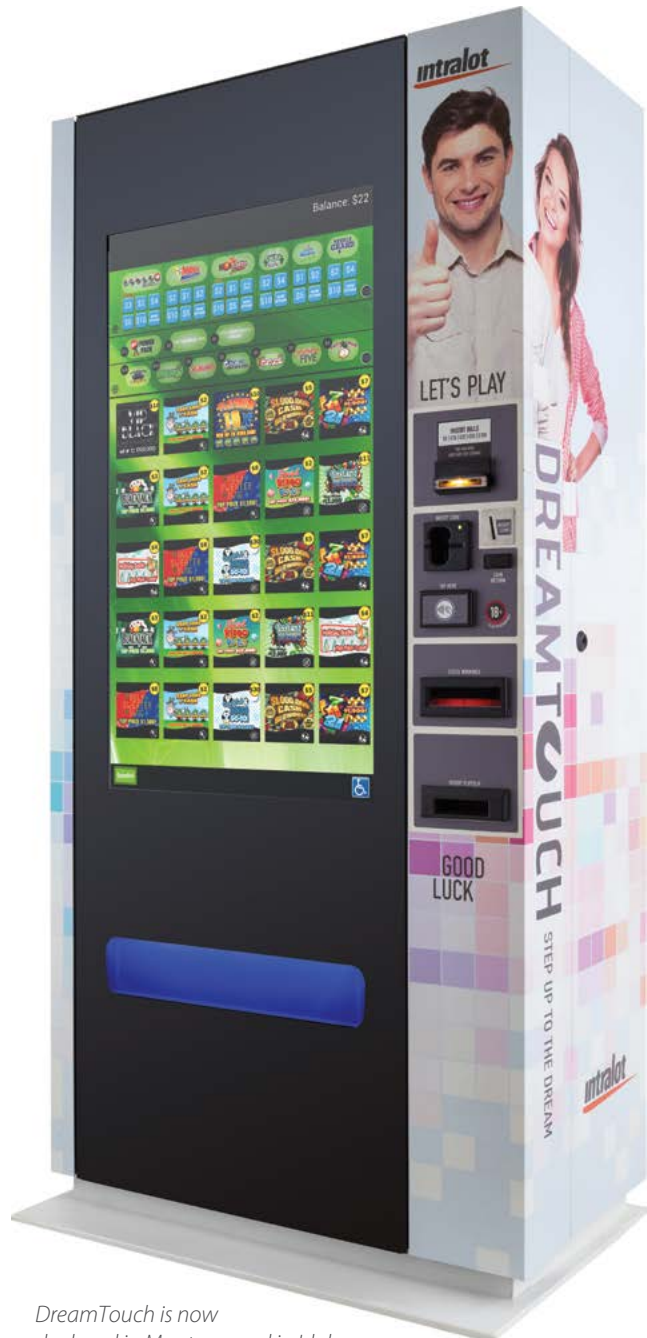
Access endless information. After growing up in a world of infinite options and limited time, we consume information incredibly quickly. As a result, our attention span has shrunk, leaving us feeling impatient, distracted and overwhelmed.

Demand simplicity. The downside of a short attention span is that we can easily become distracted and overwhelmed. To meet the needs, things need to be clear, uncluttered and optimized.

Be self-reliant. We have the ability to find whatever we want, whenever we want it. We can often do without the help of intermediaries: we book our own vacations, shop for homes and file our own taxes online.

Want instant gratification. Self-reliance and a short attention span have also made us impatient. We hate waiting. We have a need for speed and expect technology to work at the click of a button or the tap of a screen.

Do all of these sound familiar? How is this for a new POS customer strategy? Instant gratification. Not just in the form of instant games, but rather in the form of a customer experience in the retail environment.



*DreamTouch is now
deployed in Montana and in Idaho*

Content

Friendly UI | ADA mode | Scratch tickets | Unlimited Draw Games
 Unlimited Draw Instant Win Games | Draw Interactive Games



In the last few years, more and more lotteries are deploying self-service machines. The acceptance of self-serve is hardly surprising. It does fit with the instant gratification fulfillment and desire of players to get immediate answers to questions, experience high levels of personal service and use easy forms of payment all in one. A well-designed self-serve kiosk can help meet these needs and address three main steps of the customer journey:

1. Attract:

- Call to action gaming messages
- Gaming advertising on screens
- Personalized content based on special occasions/ events
- Real-time game announcements (i.e. jackpot amounts, winning numbers)

2. Play:

- Variety of content (based on local legislation)
 - o Traditional lottery games
 - o Scratch games
 - o Draw instant-win games (i.e. Fast Play)
 - o Sports betting
 - o Racing and virtual racing games
 - o Interactive instant-win games

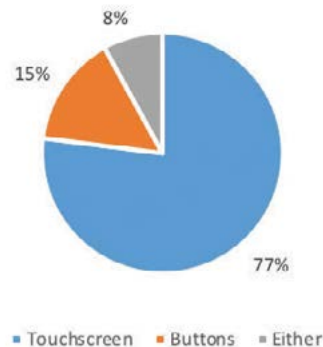
3. Engage:

- Promotional messages
- Real-time news (i.e. Amber alerts, weather alerts)
- Third party advertising

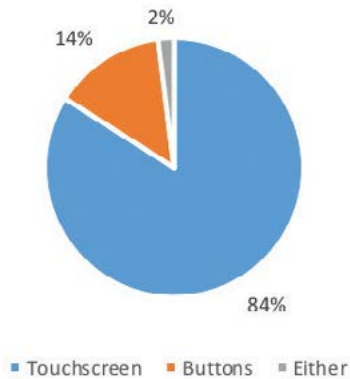
Next generation vending machines such as INTRALOT's DreamTouch can offer scratch tickets, draw games and interactive instant-win games. When idle, they are also a powerful advertisement channel with programmable rich multimedia content and call to action messaging.

In recent focus groups and face-to-face intercept studies, the DreamTouch was compared to existing lottery vending machines that instead of a touch screen have buttons. Consumers reacted well to the touchscreen machine, preferring it 6 to 1 over the older machine.

Do you prefer physical buttons you have to press or touchscreen?



Which of the two machines do you like more?



Moreover, consumers liked the touchscreen and found it easy to use. Some of their comments were focused on:

Increased functionality.

- "You can buy Powerball, your pick games, your own numbers." (Light Player)
- "New games pop up, just like they tell me how much the Powerball is Saturday." (Core Player)
- "Personally, I think this is better because it's wheelchair accessible." (Lapsed/Non Player)
- "Think about buying this from a clerk, they wouldn't know about half of these." (Light Player)

Attractiveness.

- "Look how beautiful that is." (Core Player)
- "This is like a giant iPad." (Core Player)
- "I really like how when you touch it, you got that animation of it coming down and then it comes down. I found that very cool." (Light Player)
- "It's interactive, flashy." (Lapsed/Non Player)
- "It's just so bright, it draws you to it." (Light Player)

"As the Idaho Lottery implemented our migration to all new systems and equipment in 2017, we deployed the new DreamTouch vending machines in our retail locations throughout the Gem State," said Idaho Lottery Director Jeff Anderson. "We've received positive feedback from our retail customers. They like the look and functionality of the DreamTouch. The technology of the vending machines eliminates time and effort for them."

Anderson added, "The advertising opportunities embodied in the machines are enhanced by the high-definition graphics that provide amazing visuals and allow us a lot of flexibility in how we go to market presenting the Idaho Lottery to the public. We've had the new vending machines in the field for a short time but we're seeing an increase in engagement by players that's resulted in increased sales from the DreamTouch. It's a win-win-win for our retailers, our players and the Idaho Lottery."

To conclude, self-service machines, a retail solution that was virtually unknown to lottery customers a mere 10-15 years ago, have grown to be a ubiquitous part of the lottery shopping experience in retail stores around the nation. Self-service machines have undoubtedly moved beyond being a passing trend. Both shoppers and retailers have come to rely on the convenience, speed, and ease of using this tried-and-true technology.

But by no means is it stagnant. Innovations in self-serve are evolving now more than ever before. New concepts are being developed to offer an even wider range of machines as well as new, exciting content, so lotteries around the nation can customize the experience to best meet the needs of their customers and to deliver real return on their technology investment.

"The new DreamTouch will change the landscape of retail vending machines as well as the way that people experience and perceive instant gratification," said John Donahue, Chief Executive Officer and President of INTRALOT USA. "It will also enable our lottery partners to customize the look and feel of each vending machine based on the preferences of their customers in the those locations, as they will have instant feedback from remotely altering the content of the screen/planogram. At INTRALOT we are working with our lottery partners to shape the future and the market by constantly innovating and creating better customer experiences." ■



Fivi Rondiri, Corporate Marketing Manager, INTRALOT USA



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40 Years of Revenues in Vermont

February marks the Vermont Lottery's 40th anniversary, and a year-long celebration is underway as it prepares for organizational changes.

By Patricia McQueen

Vermont may be known as the Green Mountain State, but the Vermont Lottery has delivered a lot of plain old green – as in cash – to state coffers since its inception 40 years ago. The last state in the Northeast to launch a lottery when sales began on Valentine’s Day (February 14), 1978, the Vermont Lottery has generated a cumulative \$616 million in revenue for the state. Since fiscal 1979 those revenues have gone to the state’s Education Fund.

In fiscal 2017 alone, \$25.5 million was transferred to the Vermont Education Fund, from total sales of almost \$122.4 million. That revenue comes from a regular staff of just 21 employees (20.8 full-time equivalent).

Those numbers continue to impress new Executive Director Danny Rachek, who has been on the job only since mid-November. A CPA and former head of the Vermont office of the Federal Bureau of Investigation, Rachek is “amazed at the amount of money that we generate for such a small staff, a small little storefront. It’s a pretty good thing for the state.”

Gov. Phil Scott wants to make it an even better thing – a year ago he issued an Executive Order to merge the Vermont Lottery Commission with the state’s Department of Liquor Control. According to the Order, the goal is to “eliminate duplicative processes, improve accountability, and realize cost savings – maximizing revenue for the State.” Just how that plays out is something Rachek is waiting for. At this writing it was expected that the legislature would approve a bill this session to complete the merger, which would take effect at the beginning of the next fiscal year in July.

“We are just trying to see how that is going to impact us, whether it will have any impact on operations,” said Rachek. “We want to make sure that we continue to operate efficiently and not be constrained by another layer of management.”

Although the Governor wants to improve efficiencies for Vermonters, making it easier to purchase goods that are provided by the state, there are of course unique security and integrity measures that apply only to lottery operations. Combined with

existing contractual obligations, it’s unlikely there will be any merging of systems, at least not any time soon. Rachek thinks that the most likely improvements in efficiencies will come from the back office, accounting and human resources areas, but doesn’t see any immediate loss of personnel.

Meanwhile, the Vermont Lottery has a lot to celebrate in this, its 40th anniversary year.



Celebrating 40 Years

The extra fun started last July with the release of a family of 40th Anniversary instant tickets, one game each at \$1, \$2, \$5 and \$10. They have the highest prize payouts ever offered at their respective prize levels, and are the anchor point for the Lottery’s invitation-only “Big Event,” which will take place on June 1 at the Champlain Valley Expo Center at the fairgrounds in Essex Junction. Invitees can look forward to giveaways, entertainment, the Cash-N-Ator, games and a chance to win exciting prizes – over \$500,000 in cash and merchandise will be given away.

All non-winning 40th Anniversary instant tickets can be entered into three second chance drawings, each resulting in 150 invitations to the Big Event for the winners, plus their guests. After entering their tickets into the second chance promotion, players can also play online interactive games for even more chances to enter the drawings for Big Event invitations and to win 40th Anniversary Cash coupons redeemable at retail.

Another anniversary promotion is centered around Valentine’s Day. A 24-hour promotion on February 14 called “40 Shades of Green” will give away up to \$40,000. Anyone making a draw game purchase of \$4 or more on a single ticket has a chance to win \$40; the prize is awarded randomly and up to 1,000 prizes are available.

Recent Strategies

The Vermont Lottery offers a variety of games – instant tickets, Powerball, Mega Millions and Lucky for Life, plus the Tri-State games Megabucks, Fast Play, Fast Play Pro, Pick 3, Pick 4 and Gimme 5. The Tri-State games are offered with Maine and New Hampshire; together the three lotteries formed the very first multi-jurisdictional lottery organization back in 1985.

Under the direction of Marketing Director Jeff Cavender, the Lottery has undergone a shift in recent years in the way it advertises and promotes the products. “Before I got here, we spent a lot of money advertising jackpot games and some of the Tri-State games,” he explained. With instant games accounting for 75 to 80 percent of sales annually, it was time to shift that advertising spend to reflect sales. “Now we spend the majority of our advertising money on our instant tickets,” said Cavender, spending on both media advertising and promotions.

Promotions are now often built around instant games, from sponsorships to road shows. Last summer, for example, the Lottery supported the minor league baseball team in Burlington, and visited retailers throughout the state with cash booths. “That has proven very successful from a community outreach standpoint,

putting a face to the Lottery,” said Cavender. “We see our players and the agents see us supporting them. Basically it’s a summer tour and road show.”

In addition to the advertising shift, Vermont has made other changes to its instant product line, including extending the print runs and adjusting some of the prize structures. “Knock on wood, I think we know our Vermont players pretty well.”

With so much of its revenue coming from instant games, Vermont is less impacted than some lotteries by the ebbs and flows of the big national jackpot games. “It means we can control 75 to 80 percent of what we do,” said Cavender. That said, it’s great when Powerball and Mega Millions have good years. “They are much more profitable for us than are instant tickets,” said Rachek. “So when we do have a nice jackpot, it’s nice to see the sales go up.”

Promoting Educational Benefits

Although the Lottery’s profits are sent to the Vermont Education Fund, Cavender noted that it is still hard to explain to the public exactly what that means. They can’t point to specific programs at specific schools that benefit from lottery dollars.

So the Lottery partnered with the Vermont Agency of Education in the Educate/Innovate program, and for two years provided grants to supply Chromebooks and iPads to schools in need. The grants were funded from the Lottery’s operating budget to help some of the schools jump into 21st century technology.

With most schools now having these kinds of digital technologies available, the Lottery is in the process of revamping that grant initiative with the Agency of Education. In the works is a MakerSpace program offering things such as 3D printers and laser cutters, designed to help schools improve their STEM programs (science, technology, engineering and math). There have also been discussions of opening them up into community



Jeff Cavender explains how these 4th graders will be using their new iPads, compliments of the Vermont Lottery.

MakerSpaces, expanding their availability beyond the schools.

Despite taking a small bite out of the Lottery’s operating budget, Cavender thinks the Educate/Innovate program has been a winner. “It does a lot of things 10-fold for us. It really helps people understand that when they are buying a scratch ticket or a Megabucks ticket, it does end up going for something. Everyone – teachers, school administrators, the public – has been appreciative of what we have done. While they know we support the Vermont Education Fund, this allows them to see it and touch it.”

Future Growth

Planning for the 40th anniversary and working on the Educate/Innovate program are just two things that have kept the Lottery’s staff busy while maintaining course – after all, they were without an Executive Director from October 2016 until Rachek’s arrival in November.

And while many things are still up in the air, Rachek has several ideas about what the future should bring. Along the lines of making life easier for Vermonters (one of the goals of the Executive Order mandating the merging of the two state agencies), he’d like to see more things done

online. That could mean something as basic as providing the online purchase of subscription play.

The Lottery does not yet have a mobile app, but expects to remedy that before long once things get settled. With its focus on instant games, an online presence for certain games – especially licensed properties – would be valuable and include mobile entertainment opportunities. Other consumer-friendly mobile tools, and hopefully a mobile purchase option, would be valuable.

“All these are things that would bring us up to the way commerce is occurring now,” said Rachek. Acceptance by stakeholders would be required, but “it’s the direction we need to move towards” in order to capture a new generation of lottery players. ■





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RESPONSIBILITY: LOTTERIES

The lottery industry has embraced responsible gambling initiatives in a big way, seeking to ensure long-term sustainability through player health.

By Patricia McQueen

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It wasn't all that long ago when the gaming industry feared the term "problem gambling." So much so that the phrase evolved into something that sounded better – "responsible gambling." And not surprisingly, responsible gambling is evolving even further, with some jurisdictions building a program focusing on overall player health. That is particularly the case with the lotteries using brands such as GameSense, PlaySmart and PlayWise (see article on page 44).

No matter what you call it, the underlying programs are critical to the prosperity of the gaming industry, and lotteries are an integral part of that industry. It's not easy – there is a delicate balance between growing sales on the one hand and doing so responsibly on the other. But responsible gambling is fully ingrained in the culture of some of the most successful lotteries in the world, those who have realized that addressing the issue actually helps their future growth rather than inhibit it.

"We endeavor to keep abreast of best practices and to build

a coherent approach that sets responsible gambling at the heart of our activities," said Éric Meunier, Director, Responsible Gambling, for Loto-Québec. "The importance of maintaining a healthy balance between our commercial social responsibility mandates cannot be understated. It is this balance that has created a strong consensus in Québec as to the role Loto-Québec must play. Responsible commercialization is a core value that we must continually cultivate and improve."

The North American Association of State and Provincial Lotteries (NASPL) is committed to helping its member lotteries find that balance. Last fall, the association added a responsible gambling expert to its team, Dr. Lori Rugle, Ph.D., who has spent most of her career in clinical and administrative work specializing in gambling addiction disorders. One of her first goals was to create a template for responsible gambling best practices, which should be available in early spring. "The goal is to offer NASPL members a comprehensive listing of responsible gambling best

practices that they can choose from in designing their strategies and programs," said Rugle.

She has drawn upon numerous resources from around the world, including the responsible gambling programs established by lotteries which have received national and international certifications for their efforts. Not surprisingly, lotteries that have achieved such recognition are proud of the work they do.

"In addition to raising funds for education programs in Tennessee, the Tennessee Education Lottery Corporation is deeply committed to its role as a socially responsible organization," said President and Chief Executive Officer Rebecca Hargrove. "One of the strategies to fulfill this pledge is our Responsible Gaming Program, which has received a Level 3 certification from the World Lottery Association and is an integral part of our daily operations."

Tennessee is one of many North American lotteries that have reached Level 3 or Level 4 certification by the WLA. That association's Responsible Gaming Framework was established in



2006; the late Arch Gleason was the driving force behind that development while he served as Chief Executive Officer of the Kentucky Lottery Corp. Other lotteries with Level 3 certification include those in Illinois, Kentucky, Missouri, New York and Texas.

Reaching the pinnacle of WLA certification at Level 4 are the California Lottery, the Hoosier Lottery, the New Jersey Lottery and the North Carolina Education Lottery in the United States; and Atlantic Lottery, British Columbia Lottery Corp., Loto-Québec and Ontario Lottery and Gaming in Canada. Loto-Québec was the first lottery in the world to achieve Level 4 certification in 2009.

NASPL Verification Program

While the WLA Responsible Gaming Framework is the global industry standard, not all American lotteries are members of that association and not all are ready for its rigorous application process. In 2015 NASPL and the National Council on Problem

Gambling (NCPG) launched a joint responsible gambling verification program, providing independent certification by the nationally-recognized NCPG. Importantly, this program helps lotteries even at the early stages of building a responsible gambling program by providing independent assessment of their plans.

Lotteries may be verified at one of three levels – Planning, Implementation and Sustaining. An independent assessment panel, under NCPG’s guidance, reviews all applications for verification. The eight areas of assessment include research, employee training, retailer training, player education, new/existing product oversight, budget, advertising and engagement/awareness.

A total of 12 American lotteries have successfully completed the verification program to date. Verified at the planning level, for those beginning to plan and fully develop a responsible gambling program, were lotteries in Massachusetts, Michigan, Rhode Island and Virginia. The implementation level assesses more robust programs already in

place, and completing verification were Connecticut, Kentucky, Maryland, Minnesota, Missouri, North Carolina, Ohio and Oregon.

After the last of the 12 received their verification last summer, the program underwent a thorough review and revision based on the lessons learned. Changes to the process were approved in January and a new round of applications will be accepted this spring. “We are incredibly proud of the responsible gambling verification program and the partnership we have with NASPL,” said NCPG Executive Director Keith Whyte. “We continue to believe the program sets a standard for the U.S. gaming industry and we challenge other trade associations to follow suit. We give a lot of credit to NASPL for being brave enough to engage with an advocacy group like NCPG to conduct an independent verification of their members’ RG plans. And we know it isn’t easy for a lottery to have an outside group review their RG, but that gives the process itself and a successful verification so much more credibility.”



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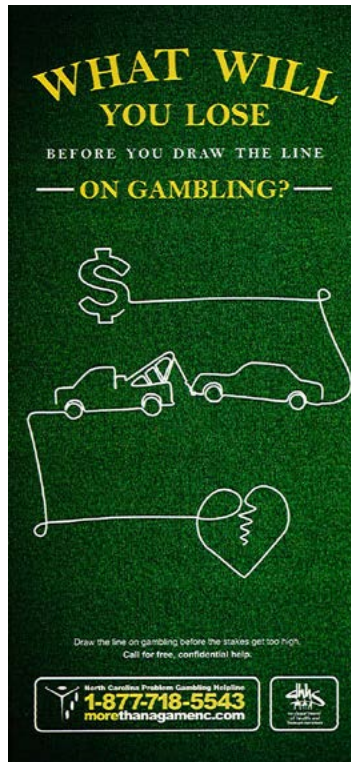
An Abundance of Tools

Lotteries have a wide range of options when it comes to building their responsible gambling programs. In addition to the partnerships, messaging and awareness strategies and retailer initiatives described in the following articles, there are other tools available in the responsible gambling toolbox.

For example, lotteries operating some form of casino gaming usually have voluntary self-exclusion (VSE) programs in place, as do those with online ticket sales. The latter channel is of course the easiest to implement and enforce, as the players are not anonymous. Even traditional ticket sales can be part of VSE programs, as they are in Illinois, Maryland and Missouri. In these jurisdictions, players can typically exclude themselves from receiving any direct mail/email promotional material and are also banned from claiming any lottery prizes (above the threshold required for formal claims, of course).

For lotteries with online ticket sales, perhaps the best summary of responsible gambling tools available comes from NCPG. Its Internet Responsible Gambling Standards, available on the NCPG website, provide a comprehensive review of best practices gathered from sources around the world.

NCPG has also developed the Internet Compliance Assessment Program (iCAP), which allows both gaming operators and vendors to receive an independent assessment of their responsible gaming programs, which often go beyond state requirements to meet the higher NCPG standards. Lotteries achieving iCAP certification to date include Georgia, Kentucky and Michigan.



Plenty of Challenges

In addition to the overarching challenge of maintaining balance, lotteries may face other challenges as they develop ever more robust responsible gambling initiatives. In some jurisdictions, efforts to obtain state funding for any sort of awareness or treatment programs have fallen on deaf ears. And while many jurisdictions mandate that a portion of lottery revenues is allocated to problem gambling programs and treatment, responsible gambling awareness campaigns and messaging programs may still be funded from lotteries' own operating budgets. Where those budgets are small, the biggest challenge is simply finding the necessary monetary

resources. That was the most often cited roadblock to doing more in the area of responsible gambling, even by lotteries with comprehensive programs already in place.

Lack of other resources was also cited as a challenge – time and personnel, for example. Sometimes it's about not getting the proper buy-in from upper management. There is still some residual thinking in the industry that because lottery products are less "serious gambling" than other forms of gaming, lotteries don't need to address the issue beyond some of the basics.

Outside resource management, probably the biggest challenge is in the area of educating retailers. For many lottery retailers, employee turnover is a problem. Spending the time and resources to educate every store clerk about responsible gambling is not always practical when clerks may not even last two months on the job. And if a lottery concentrates on training the store owner or manager, how can it be sure that the information trickles down to the other employees, those who have direct interaction with players?

Despite the abundance of challenges, they are not insurmountable. Collaborative efforts between different organizations (see article on page 54) can sometimes help by sharing the resources necessary to build programs. And as evidenced by the material presented on the following pages, lotteries have taken the challenges head-on and created an impressive array of programs and campaigns to ensure the future health of the lottery industry, and the health of the players on which it depends. ■



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GAME CHANGERS

Changing the Message

Branded programs focus on player health, sometimes adding humor for more effective communication of a serious topic.

By Patricia McQueen

GameSense. PlayWise. PlaySmart. If there's a common theme there, it's no coincidence.

These programs are all designed to help players make informed choices about their gambling, an approach that tries to move away from the terms 'problem gambling' and 'responsible gambling' and towards overall player health and understanding.

GameSense was launched by the British Columbia Lottery Corp. (BCLC) in 2009, and has since been licensed to the Connecticut Lottery, the Alberta Gaming & Liquor Commission, Manitoba Liquor & Lotteries, SaskGaming, the Saskatchewan Indian Gaming Authority, the Massachusetts Gaming Commission and MGM Resorts International.

PlayWise made its debut for the Atlantic Lottery (AL) in 2012, and Ontario Lottery and Gaming (OLG) introduced PlaySmart in 2016.

"I think branding these programs is a great idea, and using language like 'smart,' 'wise' and 'sense' is

really important in order to be inviting to consumers," said Dr. Lori Rugle, NASPL's new responsible gambling associate. "We all would like to do things with more sense and wisdom and spend our money smarter."

The fully-integrated programs are designed to help consumers understand the games and the odds, with tools and techniques to help them plan their play and build positive playing habits. And of course, there's information on how to get help when they need it.

PlaySmart

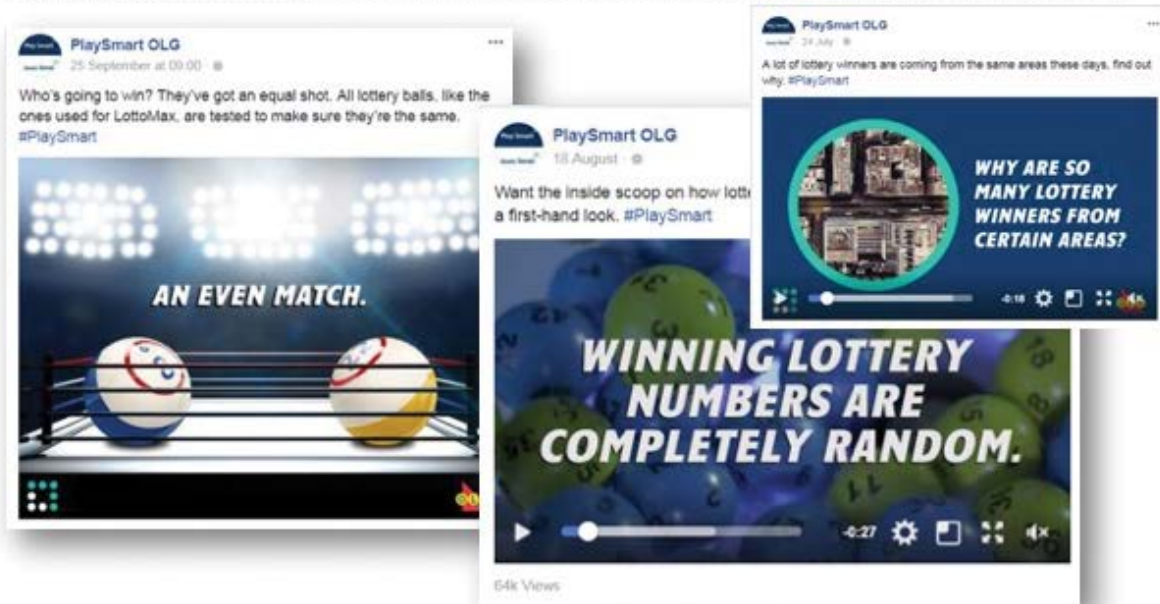
OLG is the most recent entrant into this type of programming, and for Director of Social Responsibility Strategy Sheona Hurd, PlaySmart is a way to get rid of the past, to move beyond the term responsible gambling because people will always equate it with problem gambling. She explained that just about everyone will agree that it's important to have a responsible gambling program, but most of those same people will say it's not relevant to them – because they



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associate it with problem gambling, and most people are not problem gamblers. But if you position it as explaining the odds, or explaining game mechanics, most people would say they are absolutely interested in that information. “So they are interested in RG, it’s just that they are not comfortable with that term, and they don’t realize that type of information is indeed RG information. The term itself is problematic. It prevents them from absorbing that information.”

So responsible gambling becomes about learning how to play the games, what the rules and odds are. “Our philosophy is that if people actually understand these things, that’s going to change how they experience interacting with that product, hopefully for the better. So what we’ve done with PlaySmart is try to educate people on the games and how they work.”

And if people understand the games, they are more likely to have a pleasant experience based on reasonable expectations. If a scratch game has 1 in 4 overall odds, for example, that doesn’t mean a player is guaranteed to win if he/she purchases four tickets. “Knowing that will improve their lottery experience.” In addition, many players stick to the same games they have played for years, often because they are too intimidated to ask how to play something else. “We want to come along with PlaySmart at the right touch points to educate people on how to play different games.”

Importantly, OLG is trying hard to integrate PlaySmart into product marketing. “We’re moving away from being an afterthought,” Hurd said, where for RG you slap a logo on this piece, or a hotline number on that ticket. “Instead, we are at the table with the marketing people at

the beginning of the concept, and integrating PlaySmart into the actual marketing. So with a new game like our Hit or Miss, we have a PlaySmart ad that shows people how to play the game. It’s just really about connecting with the key touch points with the marketing division. And making it truly integrated.”



PlayWise

In Atlantic Canada, AL started branding its responsible gambling efforts in 2012. “With the PlayWise brand, the first thing we did was test the name to make sure it resonated

“Problem gambling is serious, but we’re trying to create a fun message”

- Ashley McGuigan

with people, and to see what it meant to people,” said Corporate Social Responsibility Specialist Ashley McGuigan. “From there we made sure all of our materials had more of a consistent look and feel, whether you went to a ticket lottery site, a video lottery site, or a Red Shores casino. Everything looks the same and you can find PlayWise wherever you go.” That was an improvement on the previous situation, where everything looked different depending on the venue.

The messages under the PlayWise brand are continuing to evolve, including using humor to help engage more players. “Problem gambling is serious, but we’re trying to create a fun message,” said McGuigan. As AL and other organizations have learned, people still think this kind of information is only for problem gamblers, so the messages don’t always resonate. “We’re really trying to let people know this is for everybody – wherever you fall in the continuum, we have information for you. We’re trying to break down the barriers, and the stigma, and create more soft, fun, simple messages.”

And simplicity is key. One difficulty AL faces is low literacy rates in some areas, so delivering text-heavy materials doesn’t work well. Printed materials have gotten smaller and more to the point, easy to read and easy to discreetly put into a pocket. Going forward, AL is moving much more into social media, developing and using more video than text.

It does seem to be working. “We are starting to see more people access our services, more people using the self-exclusion program, more people taking our pamphlets and materials. And I think we still have a ways to go with it,” noted McGuigan.



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GameSense

GameSense

Constant development and evolution is the hallmark of any successful venture, and BCLC's GameSense has just undergone a major refresh. Established in 2009, the ground-breaking program has become a well-known brand in several jurisdictions. While new research and tools are always a work in progress, many things are

different today than they were in 2009 – significant changes in technology that impact how gaming operators communicate with their customers, knowledge gained over the years from those customers and changes in responsible gambling in general.

"We wanted to take a deep dive into GameSense and make sure that what we were doing in 2009 was meeting the requirements of people today," said Candice May, Business Development Manager for GameSense. "It was more of a validation, and we expected to

get the answer that we needed to change."

BCLC launched a lengthy examination of the product – hiring a marketing agency, conducting stakeholder interviews, and talking with lottery, casino and e-gaming players, and non-players, about what they wanted from a responsible gambling program. "What we did hear in the end was that GameSense was often overloading people." People today want to get their messages in 140 characters or less, and you only have a few seconds to get somebody's attention and communicate a message.

In addition to being copy-heavy, a few other things came out of the research: the messages seemed to be a little "preachy" at times; the average person still doesn't see the difference between responsible gambling and problem gambling; and lottery players don't necessarily see themselves as gamblers, compared to casino customers who do see their play as gambling. "And some of our focus group participants felt that we were talking as if gambling was the only thing people were doing in their lives, when gambling is just part of what they do, an activity they take on."

Another issue was GameSense' visual identity. Historically it had been very focused on images of people. But that presents a few challenges, explained May. Photography is expensive, but just as important is the wide ranging audience you're going after – different ethnicities, different ages, etc. – while trying to evoke different moods and feelings. "It's really hard to capture that in photography, so we looked to see how to better communicate outside of using people."

All of these things have been incorporated into the brand refresh.



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The “new” GameSense includes short, simple messaging that is very easy to retain. The visuals are less about people and more about icons that are easy to remember. The messaging is shifting to more conversational peer-to-peer discussions, with an emphasis on finding the relevant audiences.

As it continually strives to improve the program through research, BCLC is moving away from strictly awareness to strategies that have more impact on player health. “Information is critical, absolutely, in terms of doing what we can to have the informed consumer, and giving people the information they need to make the best decisions about their gambling,” said said Jamie Wiebe, Director, Player Health,

Responsible Gambling. “But at the end of the day, we know that information is not enough, and we’re making a very deliberate move to look at ways that we can actually have more impact, and what we can do to influence players in the name of safer play and reducing harm.”

Some of the things BCLC is looking at are ways to focus on positive play and ways for consumers to manage play. It will pilot test a Play Planner this spring, a way for players to set limits for money and time. It will look for opportunities to encourage safer play through its products and environments. And it will still look for new ways to provide assistance for those who need it.

The partnership with MGM Resorts will help – it includes funding for responsible gambling research, a joint effort between BCLC, MGM and the International Gaming Institute at the University of Nevada Las Vegas. The team is also working closely with the University of British Columbia’s Centre for Gambling Research. “These big organizations are working on data mining and finding trends and understanding what challenges are ahead,” said May.

Appeal in Connecticut

The Connecticut Lottery became the first – and to date only – lottery in the U.S. to

Look for Responsible Gambling Information in Every Issue of Insights Magazine!

As part of NASPL’s ongoing responsible gambling efforts, the Association has hired Dr. Lori Rugle as its RG Specialist. She brings a wealth of knowledge to NASPL with 35 years of experience in the field.

In each issue of Insights magazine going forward, Lori will use that knowledge to offer the latest RG information to our readers. She’ll provide updates on the work of NASPL’s RG Committee and on various NASPL RG initiatives, and will address topics of general interest in the lottery industry.

Feel free to contact Lori directly at any time if you have article ideas, RG-related questions or just to have a conversation on this important topic.

Lori Rugle

NASPL Responsible Gambling Specialist
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license GameSense in early 2016. Coinciding with the launch of its keno game, the program was added to complement existing messaging on the help line which tends to focus on people already in crisis mode. "GameSense is really a harm reduction model, designed to keep healthy players having healthy habits," said Chelsea Turner, the Lottery's Interim Chief Executive Officer and Chief of Strategy and Government and Operational Affairs. "The new rebrand of GameSense messaging is very relevant to today's consumer, using humor and iconography to catch peoples' attention in simple ways."

Research done less than a year after GameSense was introduced in Connecticut showed a high level of brand awareness, especially considering how new it was to the market. "Even more impressive was that awareness of some of those messages – like 'set a budget and stick to it' – was really high for a campaign less than a year old."

Director of Communications and Public Relations Linda Tarnowski has seen the results – in fact she was quite surprised when a couple of big winners last year actually said 'I use my GameSense when I'm playing' during their interviews. That is evidence that

the GameSense concept works. "The message for help before it happens is a different approach – people read it and don't just gloss over a 1-800 number as a helpline," said Tarnowski.

"Fortunately most people tend to be on the healthier side of the [problem gambling] spectrum, and that's where we want them to stay," added Turner. "This reinforces healthy playing habits in a positive way." She hopes that other lotteries, especially those in New England and in other nearby states, will adopt GameSense to provide a consistent message across state lines.

Growing the Foundation

All lotteries strive to provide fun – entertaining games, the chance to win a lot for a little, the chance to dream. These latest evolutions in responsible gambling programs – or whatever they end up being called – work to keep the games fun through knowledge.

"I think they clearly demonstrate what positive programs can be developed when the gambling industry, responsible/problem gambling professionals and advocates and decision makers (regulators and government

agencies) can collaborate on responsible gambling," said Rugle. "I think these programs represent state-of-the art interventions that are beginning to have a foundation in evidence-based practices."

She does agree that ongoing research is necessary, so that lotteries can continue to learn which elements of these programs are most useful in helping consumers incorporate responsible gambling practices into their lottery play.

In the end, that's what it's all about. "RG has always been seen as sort of the fun police, or the sales prevention office," said Hurd, who acknowledged that it is hard to completely change a corporate philosophy and get buy-in from everyone, right down to the sales team. "OLG's PlaySmart program, central to our overarching business strategy, is widely embraced by leadership, services providers and community partners. That's because PlaySmart is designed to benefit the business – and the player. By providing players with knowledge and confidence, we help to improve their overall gambling experience. It's a win-win for everyone." ■



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WORKING WITH PARTNERS

Lotteries often work closely with other organizations, including state agencies and local partners in the problem gambling treatment community.

Lotteries are not in this alone. Although in many jurisdictions lottery revenues are the sole source of funding for problem gambling prevention and treatment programs – even when other forms of gaming exist – they often work hand in hand with other organizations to create and implement those programs. In fact, they often are leading the charge.

Sometimes their partners are local affiliates of the National Council on Problem Gambling – some 30 lottery jurisdictions have such affiliates. But the absence of a local affiliate doesn't mean there's no one to work with. Take Missouri, for example. They have no NCPG affiliate, yet the Missouri Lottery is one of the most active lotteries when it comes to working with other organizations on responsible gambling. It was a founding member of the Missouri Alliance to Curb Problem Gambling, the first-of-its-kind statewide partnership of the gaming industry and treatment providers. Many jurisdictions now

have similar coalitions involving multiple agencies – other gaming operators, regulators and the problem gambling treatment community, for example.

In all cases, lotteries work with these agencies during Problem Gambling Awareness Month (PGAM) in March and the annual Holiday Lottery Campaign, but most also have year-round relationships. Examples of some of the campaigns related to PGAM may be found in the roundup beginning on page 69.

Highlights of what some lotteries are doing:

The **Arizona Lottery** partners with the Arizona Department of Gaming's Division of Problem Gambling, collaborating on advertising and social media, primarily during PGAM each March. The Lottery provides a state-mandated \$300,000 in funding to the Division each year,

which is used to deliver services to Arizonans.

The **Atlantic Lottery** annually hosts a Community Partnership Day in New Brunswick, Newfoundland and Prince Edward Island. The goal of this day is to bring together various community partners with the intent of sharing information, educating one another, and increasing awareness of RG related topics. Attendees include Health PEI – Addiction Services, First Nation communities, and credit counseling agencies and organizations. The topic for CPD in 2018 is on Concurrent Disorders and Problems Gambling, along with a Clinical Workshop facilitated by Janine Robinson. There is no cost to organizations attending this event; it is entirely funded by Atlantic Lottery.

Since 2013, Atlantic Lottery has been a member of the Addictions Treatment Services Association (ATSA) NL, which advocates for new and progressive addictions treatment services, promotes improvements in existing services,

improves public and professional awareness, and coordinates networking among addictions treatment professionals, mutual aid and self-help groups, and interested members of the general public.

For the **British Columbia Lottery Corp.**, the GameSense program is a cornerstone of its player health strategy to increase safer gambling practices and decrease gambling-related harms (see article on page 44). It includes GameSense Advisors (GSAs), on-site advisors that have proven to be a valuable resource in the promotion of responsible gambling and the prevention and mitigation of gambling-related harms. In December, BCLC announced that it will enhance customer education, support and information related to player health when it expands and assumes full responsibility for the GSA program. Previously, GSAs were on contract with the Province's Gaming Policy and Enforcement Branch (GPEB) and managed on a day-to-day basis by BCLC. A third-party review had found that while GSAs provide necessary support to players and casino staff, there were also inefficiencies and areas for improvement specific to the current co-management delivery model between BCLC and the GPEB. Not only will GSAs transition to BCLC employment, but the program is expanding beyond casinos to all Community Gaming Centres in the province.

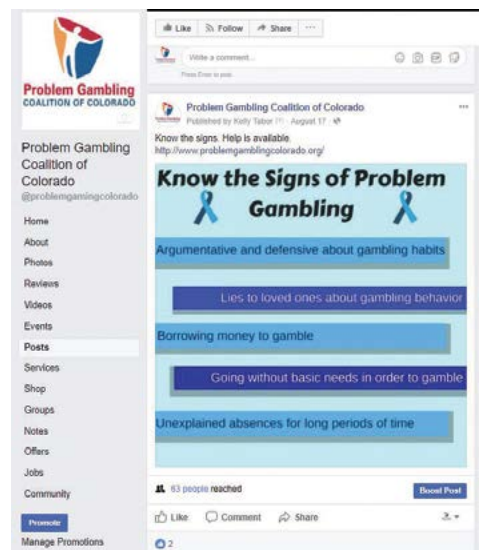
The **California Lottery** has a long-standing relationship with the California Council on Problem Gambling (CCPG); it serves as a member of the organization's Board of Directors. CCPG has also provided RG training to the Lottery's Sales Division and provides guidance on the



development of the Lottery's mandatory RG training for its employees. The Lottery also has a strong relationship with the California Office of Problem Gambling (OPG), serving as a member of its Advisory Group, a committee comprised of state regulating agencies, gambling industry representatives, educators, researchers, and advocates whose focus is problem gambling-related issues. Finally, the Lottery also holds an Interagency Agreement with the California Department of Public Health (which oversees the OPG). As part of the agreement, the Lottery provides funding for the maintenance of the 1-800-GAMBLER helpline, and the OPG provides reports on the Helpline data; literature and brochures for distribution to Lottery retailers; and articles and content

for the Lottery's publications, e-newsletters and websites.

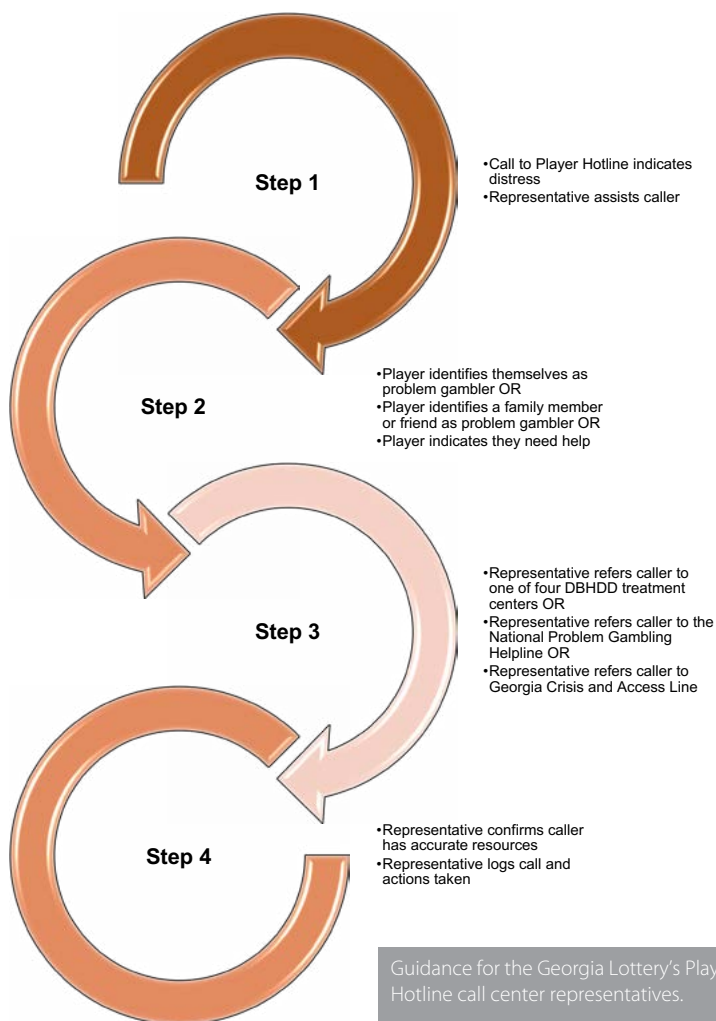
The **Colorado Lottery** works with the Problem Gambling Coalition of Colorado (PGCC), and funds one-fourth of the annual cost of the problem gambling hotline (1-800-522-4700) run by Rocky Mountain Crisis Partners. The number is included on every lottery ticket and in most printed materials. The Lottery supports the PGCC in other ways as well – sponsoring the Coalition's



scholarship contest and its annual golf tournament fundraiser. The Lottery hosts the organization's monthly meetings in Denver and at least one Lottery staff member attends those meetings.

The **Connecticut Lottery** actively works with the Connecticut Council on Problem Gambling (CCPG) on several initiatives. Last year, the Lottery helped raise money for CCPG during PGAM through various creative employee fundraisers, including wearing jeans on Thursdays, a donut day, and a breakfast sandwich day sponsored by the Lottery's Information Technology department. All profits went to CCPG and in total, Lottery employees raised \$1,305 for the CCPG last March. The Lottery also partners with the CCPG for the annual "Do a 'Lotto' Good, Give a Toy!" holiday toy drive to raise responsible gambling awareness that lottery tickets are not suitable gifts for children.

The **Georgia Lottery** partners with the state's Department of Behavioral Health and Developmental Disabilities (DBHDD) to refer players for treatment, and is statutorily required to return \$200,000 annually to DBHDD for treatment of compulsive gambling. The Lottery proactively adds an additional \$200,000, sending a total of \$400,000 annually. The Lottery also works with DBHDD for treatment referral to further its partnership over and above funding. As that organization creates effective treatment programs based on problem gambling research, information sharing is a core tenet of the relationship, helping both the Lottery and DBHDD better focus efforts to target problem gambling in Georgia.



Last year, both organizations collaborated to advance problem gambling resources on the local level. As a result, DBHDD created and now manages the Georgia Crisis and Access Line, which serves as the Problem Gambling Helpline within the state of Georgia. Their call center receives the relevant calls and refers them to the nearest DBHDD resource. The Lottery manages its own call center to take inquiries and requests from players, but from time to time, the Player

Hotline does receive calls from distressed players. The call center representatives have received responsible gaming training and are well prepared to spot problem gambling warning signs. Every other year, they undergo training in a class-like atmosphere with a certified addiction counselor from DBHDD. The counselor walks employees through gambling addiction risk factors, the impact of addiction and local recovery options. As DBHDD specializes in gambling recovery resources, the

counselor educates employees on how to refer individuals to relevant treatment services, either for themselves or for someone they know. This is in addition to the Lottery's annual responsible gaming training, which is required for all employees.

The **Hoosier Lottery's** Corporate Social Responsibility Manager is the Secretary of the Indiana Council on Problem Gambling Board, and participates in their conferences and the hiring committee. The Lottery hosts the Council's quarterly meetings, and with the Council's assistance has also conducted panel discussions and meetings.

The **Illinois Lottery** is a founding member of the Illinois

Alliance on Problem Gambling, which was established in 2013. The Alliance is a collaboration between the gaming industry, state regulators and addiction experts. Its aim is to raise awareness, coordinate resources, and prevent excessive and underage play. The Lottery also provides funds for the Gambling Hotline (1-800-GAMBLER).

In Kansas, the Kansas Expanded Lottery Act established state-owned casinos, which generate millions of dollars for responsible gambling education and treatment, all under the oversight of the **Kansas Lottery**. Two percent of net gaming revenue from expanded gaming goes to the Problem Gambling and

Addictions Grant Fund; since the first casino opened eight years ago, \$44.7 million has been transferred to the Grant Fund. The Kansas Department for Aging & Disability Services administers the state's problem gambling programs, including the "Know Your Limits" public awareness campaign, www.ksgamblinghelp.com, and the 800-522-4700 hotline.

The **Kentucky Lottery**, along with Churchill Downs, helped found the Kentucky Council on Problem Gambling. The Lottery has done a broad number of initiatives with the Council, everything from Problem Gambling Awareness Week activities, conference sponsorships and underwriting of counselor exams, all the

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way to the creation of the Arch Gleason Responsible Gambling Leadership Award. “They are a tremendous partner in our efforts here in Kentucky,” said Chip Polston, Senior Vice President of Communications, Public Relations and Social Responsibility.

Loto-Québec works closely with the Centre de référence du Grand Montréal, a non-profit organization that manages Gambling: Help and Referral. This service provides information, referrals and a support line for problem gambling in the province, available 24/7. Counselors encourage people to think carefully about their gambling habits, they lend a listening ear in moments of distress, and they refer problem gamblers and their families to specialized support services or an expert crisis management resource.

The Gambling: Help and Referral service has been providing free telephone counseling to the general public in Québec since 2012; it’s offered as a form of short-term support. It includes an assessment interview and six one-hour telephone meetings on the following themes: motivation, finances, misconceptions, triggers, relapse prevention and progress maintenance. Four follow-up telephone meetings conclude the program.

The first \$500,000 in annual **Louisiana Lottery** proceeds is earmarked for the Louisiana Department of Health and

Hospitals’ Office of Addictive Disorders to help fund the problem gambling programs provided by the Louisiana Association on Compulsive Gambling (LACG), which operates the state’s toll-free helpline. The Lottery shares and amplifies LACG content, especially in social media and in the retailer newsletter. Also, the Lottery tracks the group’s problem gambling prevalence studies and helpline usage reports and communicates findings.

The **Maine Lottery** collaborates with both public and private sector stakeholders to promote responsible gaming throughout the state and provide resources to those in need of help. The stakeholders are part of a group called the Maine Gambling Advisory Committee (MGAC) and include representatives from the Lottery, Maine

Centers for Disease Control, two privately operated casinos, the Maine Council on Problem Gambling and the Maine Gambling Control Board. In addition to ongoing messaging, the group holds a one day annual conference that allows treatment providers to obtain training

and resources along with showcasing the various work being done by the group to the media to help promote responsible gambling. The Lottery works with the other members of the MGAC to coordinate campaigns whenever possible. For example, a consistent message about setting limits was developed with the Maine CDC, with digital advertising at retail with the message “Know your limit – stay within it.”

The **Maryland Lottery and Gaming Control Agency** works collaboratively with the state’s problem gambling treatment community and other stakeholders through its leadership of the Maryland Alliance for Responsible Gambling (MARG), a group it helped create in 2010. MARG is a statewide partnership to coordinate and

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maximize resources to address problem gambling in Maryland. The consortium is comprised of Maryland Lottery and Gaming officials, representatives from the Maryland Department of Health and Mental Hygiene, Maryland Department of Public Safety and Correctional Services, the Maryland General Assembly, the Maryland Council on Problem Gambling, the Maryland Center of Excellence on Problem Gambling and representatives of the state's casinos. Maryland Lottery and Gaming maintains the MARG website (mdgamblinghelp.org), which includes a video message on responsible gambling from Director Gordon Medenica.

The **Massachusetts State Lottery Commission** has a longstanding relationship with the Massachusetts Council on Compulsive Gambling, dating back to 1988 when the Council first secured legislation to provide funding from lottery revenues to address problem gambling. Since then, the Lottery has provided funding to support the Council's outreach and programs for people who need assistance with gambling problems. The Council provides responsible gambling

training for Lottery employees. The Lottery requires all retailers to post the Council's 800 hotline number on lottery terminals and vending machines, and also provides the Council with radio inventory as part of its holiday advertising campaign.

The **Michigan Lottery** works with the Michigan Association of Problem Gambling. The Lottery's RG director typically serves as a member of the association's board of directors.

In 2001, the **Minnesota Lottery** became one of the founding corporate members of the Northstar Problem Gambling Alliance (NPGA). Staff members from the Lottery have volunteered to assist in special projects, and one staff member has always been assigned to be the Lottery's representative on the NPGA Board of Directors. Through its website and marketing efforts, the Lottery has played an active role in promoting responsible gaming and communicating the availability of educational and treatment services for problem gambling in the state.

The **Missouri Lottery** is a founding member of the Missouri Alliance to Curb Problem

Gambling, the first-of-its-kind statewide partnership of the gaming industry and treatment providers. The Lottery oversees all marketing, publicity and media needs on behalf of the Alliance. In the 20 years since the Alliance's inception, the coalition has:

- Secured passage of Missouri Senate Bill 902, which provided dedicated funding for problem gambling treatment, education and prevention programs.
- Founded the 1-888-BETSOFF program, which connects problem gamblers and their loved ones with free help in Missouri. To date, more than 40,000 callers from across Missouri, 15 states and Canada have used the Bets Off service, and more than 44,000 referrals have been given to the free help available in Missouri.
- Established the country's first statewide awareness month dedicated to responsible gaming.
- Created a youth addiction prevention program – "Beat Addiction: Choose the Right Path" – with the Missouri Department of Elementary and Secondary Education.
- Distributed public awareness campaigns across Missouri in the form of billboards, brochures, posters, public service announcements (PSAs), exhibits and a speakers' bureau.

- Submitted problem gambling related questions in the Missouri Department of Health and Senior Services' Behavioral Risk Factor Surveillance Survey (BRFSS) five times since 2004.

The Lottery has also been an active contributing member of the Midwest Consortium on Problem Gambling and Substance Abuse since the group was founded in 2003. The Consortium's main initiative is planning and implementing the annual Midwest Conference on Problem Gambling



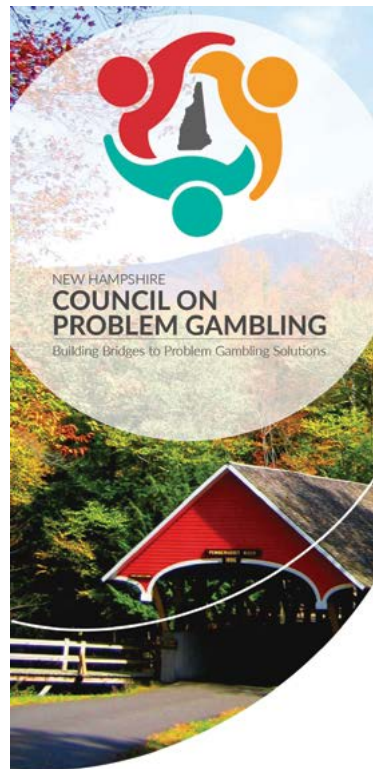
and Substance Abuse, which is hosting its 16th annual conference in 2018.

By law, at least five percent of the **Nebraska Lottery's** advertising budget is provided to the Nebraska Gambler's Assistance Program for problem gambling prevention, education and awareness messaging.

The **New Hampshire Lottery** is a major supporter of the NH Council on Problem Gambling, and Marketing Director Maura McCann serves as the Council's Vice President. The Lottery provides in-kind donations through designing and printing brochures and other materials for the Council; hosts the Council's website; provides an annual \$25,000 sponsorship; and together with the Maine and Vermont lotteries, provides a problem gambling television spot. The Council's Executive Director recently gave a very well received presentation about problem gambling to the Lottery's sales staff.

The **New Mexico Lottery** and the New Mexico Council on Problem Gambling teamed up to create player problem gambling brochures for lottery retailers. The Council drafted the original text and the Lottery designed, printed and distributed the brochures.

The **New York State Gaming Commission**, which encompasses the New York Lottery and all other forms of gaming in the state, founded the Responsible Play Partnership (RPP) in 2013. The RPP is comprised of the Commission, the NYS Office of Alcoholism and Substance Abuse Services and the NY Council on Problem Gambling. The RPP works on a variety of issues surrounding problem gambling, including ensuring that gaming venues comply with all rules and regulations and undertake proper outreach measures, reevaluating



self-exclusion policies across the state to ensure consistency, and considering the best ways to advance New York's long-term commitment to prevent and treat disordered gambling.

Since 2013, the RPP has executed many statewide events to increase awareness of problem gambling, including public meetings, roundtable discussions and symposiums. At these events, prominent local, regional and national representatives from the prevention and treatment communities share the stage with gaming operators and regulators to educate the gambling public how to recognize problem gambling behaviors in themselves and others, and to provide information on the growing number of community-based resources available to individuals suffering from disordered gambling behavior

as well as their friends and family members.

The RPP collaborated with Dr. Jon Kelly, then-Chief Executive Officer of the Responsible Gambling Council of Canada, on the production of the "Best Practices Manual for Crafting Your Problem Gambling and Responsible Gambling Plan," for distribution at the NCPG's Annual Conference in 2016.

The RPP also collaborated on the launch of what the NCPG has called "the broadest Voluntary Self Exclusion program in the nation." The program replaces property-specific self-exclusions with a blanket VSE policy, closing a regulatory loophole allowing a gambler to exclude from one facility only to travel down the road and resume playing at another.

Although its local NCPG affiliate is not active, the **North Carolina Education Lottery** is an active member of NCPG. Two of the Lottery's staff serve on NCPG committees, and two or three staff attend the organization's annual conference. Additionally, the Lottery works closely with the NC Problem Gambling Program, housed in the NC Department of Health and Human Services, fully funding the program with \$1 million annually. The program uses these funds to operate the NC Problem Gambling Helpline, pay for treatment for problem gamblers, train treatment providers, and offer middle, high school and college outreach programs to educate students about problem gambling. In partnership with the program, the brochure entitled "What will you lose" is available at all lottery retailers.

The Director of the **North Dakota Lottery** serves on the North Dakota Department of Human Services Problem Gambling Advisory Council.

Since the 1990s, the **Ohio Lottery** has worked closely with mental health and addiction services in the state, but didn't have a very active NCPG affiliate. After casino legislation passed in 2010, by the time casinos and Lottery-operated VLTs opened in 2012 a formal partnership called Ohio for Responsible Gambling (ORG) was created between the Ohio Lottery Commission, the Ohio Casino Control Commission, the Ohio State Racing Commission and the Ohio Department of Mental Health and Addiction Services. The Lottery's major monetary contribution to the ORG supports the award-winning public awareness campaign "Get Set Before You Bet."

As part of ORG, the Lottery has also developed a relationship with the Problem Gambling Network of Ohio, the state's NCPG affiliate which is now much stronger. The Lottery's Problem Gambling Coordinator Karen Russo is a member of the network's advisory board. Partnering with the Network, the Ohio Lottery will co-host the 2018 National Conference on Problem Gambling, scheduled for July 20-21 in downtown Cleveland.

Ontario Lottery and Gaming (OLG) credits much of the success of its social responsibility team to extensive collaboration with responsible gambling agencies, credit counselors and local problem gambling treatment providers. "We need their insights, skills and expertise to deliver the best possible program," said Director of Social Responsibility Strategy Sheona Hurd. To guide these important partnerships, OLG has Memoranda of Understanding (MOUs) with national and regional organizations like the Responsible Gambling Council, the Centre for Addiction and Mental Health, the YMCA, the Gambling Research Exchange of Ontario, Credit Canada Debt Solutions and the Ontario Problem Gambling Helpline. OLG also partners with 22 problem gambling treatment and credit counseling agencies across Ontario to help deliver its voluntary self

Building a complete program in Rhode Island

Although the Rhode Island Lottery has had a Play Responsibly program in place since 1998, which included working with the Rhode Island Council on Problem Gambling (RICPG), the Lottery-sponsored 24/7 Helpline, and working with retailers and the gaming facilities on responsible play initiatives, the Lottery had not been involved in any aspects of treatment and data collection. So when legislation in 2012 charged the Lottery with establishing problem gambling programs, with an annual reimbursement by the facilities of no less than \$100,000 in aggregate, Dr. Susan Storti was brought on board to assist in the development of these programs, including a plan for treatment services, data collection, and strategic planning.

One of the major issues we faced was that there had never been any type of study conducted to determine the level of problem gambling in Rhode Island. This information was crucial to us in laying the foundation for prevention programs, treatment services, and informational resources.

Dr. Storti enlisted the services of Mr. Philip Kopel, Research and Data Director of the Massachusetts Council on Compulsive Gambling, to conduct a Needs Assessment Study. This study (paid for by Twin River and Newport Grand, conducted in late 2013 and submitted in draft form as a working document in July of 2014) provided a snapshot of the extent of gambling behaviors and treatment needs among Rhode Islanders. With this information, we were better able to develop a treatment services program and improve the public's awareness of the resources available to those who experience problems with gambling. It was clear that we needed to make treatment more accessible, convenient and affordable for those with a gambling problem.

With that in mind, the Lottery entered into a contract with CODAC to administer a treatment program, which has developed into an entity within CODAC called Problem Gambling Services of Rhode Island (PGSRI). PGSRI offers treatment services at locations around the state for problem gamblers regardless of insurance coverage. Again, all costs associated with this program are funded by Twin River and Newport Grand.

Another goal was to bring the three pieces of the program – awareness, prevention, and treatment – together. By working closely with and bringing together the Helpline, RICPG and PGSRI to work as a group, the Problem Gambling Program is streamlined and easier for the problem gambler to get the information and help he/she needs.

While we have accomplished much in a short period of time, we have more to do and we continue to work towards improving and growing this program to ensure that we continue to bring awareness to the issue of problem gambling, educate the public in an effort to prevent problem gambling, and ensure that those individuals who have a problem and their families have accessible treatment and assistance.

As part of this growth, the Lottery recently added a new position, Problem Gambling Program Manager, and we have been fortunate to have Nancy A. Murray, CAGS, LCDP, NCGS, join us in this new position. Nancy brings years of experience and knowledge in the area of problem gambling. She will be overseeing all aspects of the Lottery's Play Responsibly Program, including enhancing current training programs for employees and retailers, working closely with the Lottery-sponsored Treatment Program and Helpline, continuing an active role with the RICPG, of which she currently holds the office of President, as well as representing the Lottery on the National Council on Problem Gambling (NCPG), the New England Consortium, and the Association of Problem Gambling Service Administrators (APGSA).

- Peg Rose, Deputy Director, Rhode Island Lottery



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exclusion program at their premises. Now people who want to enter the program can do it where they want, in an environment they choose, with support services available and offered on the spot.

The **Oregon Lottery** is currently working with the Oregon Council on Problem Gambling [OCPG], the NCPG Oregon affiliate. The Lottery's Director of Corporate Social Responsibility Stacy Shaw currently serves on the OCPG board and is an active member. As part of this partnership, the Lottery has helped the OCPG redesign their entire website to be more user friendly and engaging. The Lottery has also partnered with OCPG to create a Problem Gambling Resource guidebook that contains very useful information specific to Oregon. The purpose of this guidebook was to provide factual information to citizens, legislators and service providers regarding the

potential impact of gambling along with prevention and treatment options available for Oregonians who may be vulnerable to engaging in problem gambling behaviors. This guidebook is downloadable to anyone who visits the OCPG website.

The **Pennsylvania Lottery** funds the Council on Compulsive Gambling of Pennsylvania, which operates the Problem Gambling Helpline (1-800-GAMBLER). The Lottery works on a continuing basis with the Council and other state entities, such as the Gambling Control Board (which regulates Pennsylvania's casino industry) and the state Department of Drug and Alcohol Programs, to promote responsible play and coordinate messaging.

The **South Dakota Lottery** provides \$214,000 annually to the Department of Social Services to help fund problem gambling services, and Lottery Deputy Executive Director Clark Hepper serves as the treasurer of the South Dakota Council of Responsible Gaming.

The **Tennessee Education Lottery (TEL)** is a member of the Tennessee Association of Alcohol, Drug and Other Addiction Services (TAADAS) and collaborates with the University of Memphis Gambling Clinic. In addition to membership and attendance at monthly TAADAS meetings, the TEL helps market the organization's REDLINE, a helpline dedicated to providing assistance to those who call about gambling and other addictions. Decals are placed on play stations

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and ticket vending machines with the REDLINE number, addiction resource rack cards are available at play stations, and information is provided on the TEL corporate website. The TEL and the Memphis Clinic regularly share research information and are partnering on a gambling addiction marketing study.

The **Vermont Lottery** includes the contact information for Problem Gambling Vermont, problemgambling.vermont.gov, on the back of all instant tickets. The Lottery also supports the Parent's Home Companion, a non-profit sourced resource guide for Vermont families. Each year the Lottery also funds and issues a \$150,000 grant to provide problem gambling services to Vermonters who struggle with gambling addiction.

The **Virginia Lottery** partners

with the state's NCPG affiliate, the Virginia Council on Problem Gambling. That partnership has grown much closer since Virginia became one of the four initial lotteries in the NASPL/NCPG Responsible Gambling Verification program. Last year, the Council's director gave an hour-long presentation to the Lottery's sales force at their annual conference for the first time. "Our sales reps rated the session positively and told us they appreciated hearing from this different perspective," said Director of Communications Jill Vaughan.

The country's newest lottery, the **Wyoming Lottery**, is a member of the Wyoming Responsible Gambling Coalition, along with the Wyoming Department of Health, Wyoming Governor's Office, Fremont County Counseling Service, Wyoming Department

of Corrections and the Wyoming Pari-Mutuel Commission. Members of the coalition from the treatment community bring their valuable expertise to the Lottery's efforts. At the beginning, the coalition needed to get a better understanding of gambling disorders and how Wyomingites might be impacted from problem gambling. "It took time to do the necessary research and studies, but once that was completed we were able to use the data to guide the projects we are working on and the messaging and execution of our campaigns for awareness," said Chief Operations Officer Robin Reining. The Lottery also funds a certification program through the University of Duluth for mental healthcare providers in the state of Wyoming to become certified in treating gambling disorders. ■

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INVOLVING THE RETAILERS

Retailers are often the first to suspect that a lottery player has a problem, but knowing the appropriate response can be a challenge.

By Patricia McQueen

Lottery retailers are the front line – they sell the tickets and interact with the players. They are the first to notice if a player might have a problem. In more jurisdictions than ever, lotteries are helping them learn how to recognize those signs and what they should do to help.

Beyond the basics of signage and helpline numbers provided at retail, lotteries have created numerous additional tools with which retailers can learn how to sell lottery tickets responsibly. Retailer newsletters are an easy way to share responsible gambling information, such as awareness messaging, problem gambling warning signs, tips and techniques to encourage responsible play and any other retail topics.

Increasingly lotteries are moving beyond these passive tools and taking active steps to make sure their retail partners comply with the responsible gambling philosophies they have embraced.

Training Programs

All lotteries require general retailer training for new retailers, and responsible gambling discussions are typically part of that training. In all cases, the training reinforces the need to ensure that lottery tickets are not sold to minors

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NEW YORK LOTTERY

– usually a matter of law in each jurisdiction – and that point is often hammered home through specific programs.

The New York Lottery, for example, provides custom We Check ID training at new retailer orientations, and encourages refresher training via mandatory terminal messages throughout the year. We Check ID door decals, vending machine laminates and posters are distributed to retailers for use as a sound business practice.

Loto-Québec's Ici, on cartel, an online training course, also focuses on the ban on underage sales. In an industry where staff turnover is high, offering this type of training is an effective way to improve compliance.

Most lotteries go beyond the basics of addressing underage play at retail, providing responsible gambling brochures and signage at all retail locations. Many take this still further, providing retailers with information on how to recognize players with potential gambling problems and how to provide those players with helpful information. Videos are often used as part of the training.

Some lotteries not only require detailed training upon their initial licensing, but also mandatory periodic refresher courses in order to maintain that license.

Atlantic Lottery, for example, requires at least one person per retail location to complete responsible gambling training as part of its retailer agreement, and retailers must go through training every two years. This is monitored and non-compliance can result in a license suspension.

The Hoosier Lottery trains its retailers at least once every three years. During the current fiscal year, Hoosier implemented

on-site training that includes education on the responsible gaming terminal button (more on that later) and three scenarios demonstrating when and how to make a referral to treatment. A leave behind job aid was given to each retailer to train new staff. Hoosier also contracted with Indiana University to do a project evaluation that included an environmental survey four months after training, to determine if the concepts from the training were still being applied in the retail environment.

The North Carolina Education Lottery also requires its retailers to be trained in RG once every three years. When a retailer has been trained, they receive a "Responsible Gaming Certified" stamp on their lottery license.

Seeing is Believing

Using videos for training, either mandatory or encouraged, is a practice that is gaining ground, especially after the North Carolina Education Lottery, in conjunction with NASPL and the National Council on Problem Gambling, created a responsible gambling training video for retailers in 2014. Many lotteries have used that video as part of their retailer responsible gambling program. Others have created their own. The Virginia Lottery, for example, will have its retailer RG video ready in time for National Problem Gambling Awareness Month, and retailers will need to verify they watch the video on a periodic basis.

The videos provide examples of how to recognize a player with a gambling problem and how to offer that player resources for help. The NASPL videos (including a lottery employing training

video) will soon be refreshed as part of the association's expanded commitment to provide responsible gambling materials to its members – lotteries are already looking forward to that.

"As we now have iPad-based tablets for our field staff, the hope is to be able to include annual RG training for each retailer on the device through a short video or the like," said Chip Polston, the Kentucky Lottery's Senior Vice President of Communications, Public Relations and Social Responsibility. "We're anxious to see what updated materials NASPL is able to produce for use in the field."

Press the Button

One tool that is starting to spread among lotteries is a button on the retail terminal that prints out a responsible gambling message along with a lottery ticket – something a clerk can discreetly hand to a player that may have a problem. Lotteries using the button have found it to be a very effective way to communicate the message to the audience that needs it most.

North Carolina introduced the button four years ago, and there the message might be "Is playing the lottery no longer fun? Help is available." The gambling helpline number follows the message. It's a discreet, non-confrontational way for retailers to share resources with players they think may be struggling with a gambling problem.

The Maryland Lottery is among the handful of lotteries that have also added such a button, as is the Hoosier Lottery. The Connecticut Lottery took the concept one step further when it added the button last year.

There, the message can be easily swapped out to promote various responsible gambling initiatives throughout the year, like Problem Gambling Awareness Month and the Holiday Lottery campaign. The helpline, of course, is always printed. Training materials, including a video, on when and how to use the button were distributed, and retailers are reminded about the new button at least once a month in ongoing education efforts.

The Ohio Lottery added a button to its clerk-operated terminals at the end of 2016, and last fall the feature was added to all of its self-service terminals as well.

All of the lotteries implementing the button have the ability to track its use. Data is collected on when and where the button is used, allowing lotteries to work closer with problem gambling resources in localities where there seems to be a problem. Lotteries may also direct awareness messages to specific regions if a problem is indicated. Monitoring the button's use has another benefit for lotteries – it can help them enhance their responsible gambling programs moving forward.

Part of the Code

All these elements and more are ways lotteries are taking responsible gambling seriously and many are formalizing the process along the way. The Oregon Lottery is just one that has developed a thorough Responsible Gambling Code of Practice to guide its efforts. A key element of that Code is an employee and retailer training program. "This training promotes evidence-based best practices for retailer and employee engagement. It focuses

FY 17 KEY ACCOMPLISHMENTS

During fiscal year 17 the Lottery focused efforts on building and launching a series of comprehensive training programs called *Responsible Gambling & You*.

The first program in the series was for retailer staff in locations which offer Video Lottery. The Lottery developed the training with industry experts using input from retailer staff including executives, managers, bartenders and waitstaff. The training was delivered as a 30-minute, online, interactive module. Lottery sales staff visited retailers to encourage participation.

The Lottery fielded a post training survey to understand the relevance and utility of the training for participating retailers.

In fiscal year 18 the Lottery will expand retailer training to include specific training for retailers who sell "traditional" Lottery products like Scratch-Its™ and Powerball!

Video Lottery Retailer Staff Completing Training

Video Lottery Retailer Staff Training Effectiveness



Year	Statement	Percent of retailers agreeing with the statement
2017	Promoting responsible gambling is a responsibility Lottery and retailers share equally.	78%
2016	Retailers should do more to promote responsible gambling than display the materials the Lottery provides.	39%

Source: 1 & 2

Excerpt from the Oregon Lottery's RG Impacts Report.

on preparing and providing employees and retail staff with information and resources that they can share when there is an opportunity to help someone at risk or experiencing the effects of problem gambling," said Krystal Smith, the Lottery's Corporate Social Responsibility Program Lead.

All responsible gambling training for Oregon's employees and retailers was built on leading practices and leading research in the field of responsible gambling. An industry consultant was engaged to help develop the content, functionality and assets of the training programs. It was

based on input from multiple focus groups including high volume, high profile video lottery retailer executives and members of their staff, Lottery staff (both player-facing and non-player facing) and public health stakeholders.

The training is designed to enable staff to provide accurate information about the games; provide accurate information about responsible gambling and problem gambling resources; and recognize and take advantage of opportunities to direct people to resources for information and help. It's designed to be taken on any device – desktop, laptop, tablet or phone.

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4. Answer 4 quiz questions about the video!
5. Review your answers, and print out your certificate. Congratulations! You've completed the Responsible Gaming Retailer Program, and you're entered to win!




The Oregon Lottery is able to track how many employees at each location have completed training, and can provide this information to owners and managers. Once the training module is completed by any individual, the system can either generate and print a certificate of completion or it can be saved as a PDF. Retailers and staff are encouraged to take the RG training annually as a refresher.

During the last fiscal year, the Lottery focused on training for video lottery locations. Encouraged by the Lottery's sales reps, virtually 100 percent of these retailers completed the RG

training, involving more than 3,800 employees. In this current fiscal year, the focus is on retailers that sell traditional lottery products.

From the ground up in Georgia

The Georgia Lottery's 8,600 retailers include convenience stores, corporate chains and airport kiosks. In November, the Lottery introduced its very first Responsible Gaming Retailer Education Program with the goal of completion by the end of February. "In the past, our sales

representatives have spoken with our retailers and delivered materials," said Corporate Responsibility Coordinator Betsy Bradfield. "We recognized an opportunity to strengthen our efforts, and we incorporated this into our training program." The new program targets the retail employees who are in the locations daily observing player behavior and connecting with customers. It includes flyers, brochures, terminal messages and video training; the Lottery's sales reps have been given a trove of additional information to use when speaking to retailers. As the program was developed, several lotteries' retailer training programs were evaluated in search of processes applicable to Georgia's retailer network. It was also modeled after the Lottery's employee training program, which was designed with the help of the NASPL/NCPG training videos.

"Our program focuses on responsible gaming awareness at retail, including what problem gambling looks like and what options retailers have when interacting with players that demonstrate potential gambling problems," explained Bradfield.

As the first line of defense for players with potential gambling problems, retailers are expected to approach the training with the utmost sincerity. Lottery sales representatives evaluate each retailer to ensure the proper signage is displayed and provide new materials as they become available. Before leading the retailer training program, the Lottery's sales reps underwent the internal employee training program in order to understand problem gambling and how to discuss the issue with retailers; they also helped provide feedback during the program's design.

There are three steps to the program:

1) The sales representative will visit the retailer when delivering the Play Responsibly brochures for display. At this visit, the sales representative will discuss the training and deliver the training information flyer.

2) The retailer is expected to complete the video and evaluation. Several terminal

messages will be periodically disseminated to retailers' lottery terminals to remind them of the training and the deadline.

3) Should the retailer fail to complete the training, the sales representative will make contact with the retailer to address the non-compliance.

To kick off the retailer training program, Georgia launched a promotion that runs

until February 28th, offering any retailer completing the program a chance to win a free ticket pack.

As of late January, sales reps have reported that the response from retailers on the program has been overwhelmingly positive. Retailers have spoken highly of the program, noting that it is simple to understand while being very comprehensive, and has provided them with useful content that is easy to learn. ■

A responsible approach for VLTs

Nine American lotteries and four Canadian lotteries are involved in casino-style gaming in some fashion, operating or regulating casinos and/or video lottery terminals (VLTs). Having such gaming ups the ante in terms of responsible gambling programs. Just one example of the efforts being made comes from Loto-Québec.

As part of its overall responsible commercialization plan, all retailers sign a commercialization framework agreement outlining their obligations as a retail agent. VLT operators must post the Responsible Commercialization Code so that it is visible to players at all times.

By signing the agreement, VLT operators agree to take the 'Taking Risks Is No Game' online training course. Operators are also responsible for ensuring that their staff is trained, and a person who has taken this training course must be present in the establishment at all times. A training evaluation process was set up in order to assess

its relevance by measuring its effect on the attitudes, knowledge and behaviors of video lottery terminal operators and their employees who took the course.

Loto-Québec uses a wide range of communications initiatives to ensure that video lottery terminal operators understand the Responsible Commercialization Code and adhere to the commitments it entails. All VLT operators receive a newsletter (Infovideo) and a manual describing all aspects of the machines' operations, as well as the procedures and operations related to responsible gambling. Updates are sent each time a new game is introduced. The representative for their sector can also provide them with information as needed.

Players will find Loto-Québec's Stick to Your Limits brochure at all VLT establishments, and stickers with the Gambling: Help and Referral number are on all VLTs. The home screens on the VLTs feature a responsible gambling message and also display the helpline number.

All VLT operators may take part in Loto-Québec's Well Played! program, which specifically targets owners of bars and brasseries. The program's goal is to showcase and award those who demonstrate a real commitment to the responsible

commercialization of games of chance, and to give operators added incentive to fully adhere to the principles of responsible commercialization, and even exceed expectations. The awards come in the form of prepaid gift cards.

Operators and their employees are both eligible for the award program. Employees have to take practical, proactive steps related to customer service and responsible gambling and must have taken the Taking Risks Is No Game course within the last three years. Employee names can be entered by the operator or colleagues.

To take part in the Well Played! recognition program, VLT operators must meet specific criteria. Bar and brasserie owners must have successfully completed the Ici, on cartel training course on how to identify minors; successfully completed the Taking Risks Is No Game course (including all staff); still be the owner of the establishment on the last day of the promotion period; and respect the commitments set forth in the Responsible Commercialization Code.

Employees must have successfully completed both the Ici, on cartel training course and the Taking Risks Is No Game training course.

SPECIAL CAMPAIGNS

Problem Gambling Awareness Month and the Holiday Lottery Campaign are two opportunities for lotteries to focus on responsible gambling measures during times of heightened awareness.

While lotteries endeavor to promote responsible gambling throughout the year, there are specially designated time periods that focus on specific messaging. The National Council on Problem Gambling (NCPG) has designated March as Problem Gambling Awareness Month (PGAM) to increase public awareness of problem gambling and the availability of prevention, treatment and recovery services. NCPG also partners with McGill University's International Centre for Youth Gambling Problems and High-Risk Behaviors in the annual Holiday Lottery Campaign, which is designed to help lotteries make adults aware of the risks of giving lottery products as holiday gifts to minors.

All American lotteries recognize PGAM in some fashion, from press releases and social media posts to increased advertising and public service announcements to in-depth activities including conferences and daily participation in expanded messaging programs.

Most North American lotteries also participate in the annual Holiday campaign.

Lotteries around the world support the Holiday campaign; NASPL members participating in 2017 were lotteries in Arkansas, Atlantic Canada, British Columbia, California, Colorado, Connecticut, DC, Delaware, Florida, Georgia, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Maine, Maryland, Massachusetts, Michigan, Minnesota, Missouri, Montana, Nebraska, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Ontario, Oregon, Pennsylvania, Quebec, Rhode Island, South Dakota, Tennessee, Texas, Vermont, Virginia, Washington, West Virginia and Wyoming.

With these special and other responsible gambling campaigns, the level of participation depends on numerous factors, such as available partners, budgets and other resources. We asked lotteries to provide us with information about their campaigns. Of those

responding, highlighted here are some of the more extensive campaigns – often in conjunction with partners – or those where lotteries have found little ways of supporting the messages beyond the press releases and social media outreach that all lotteries provide.



Arizona Lottery

In partnering with the Arizona Department of Gaming's Division of Problem Gambling for PGAM, every March we donate our billboards for the Division's use in creating awareness. They provide new messages for those billboards

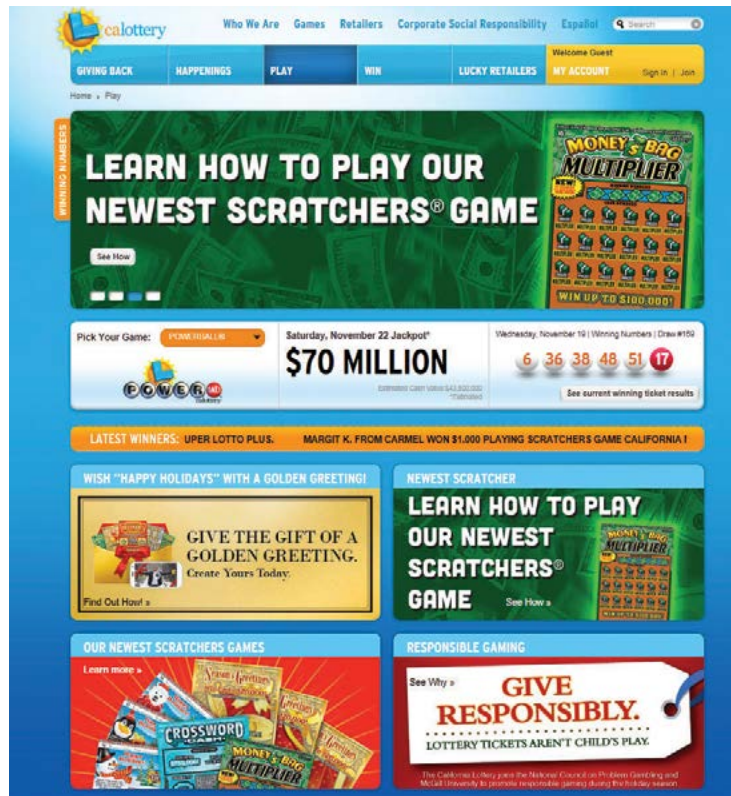
during the month. We also donate money for their annual symposium each March, giving us a small supporting role there.

British Columbia Lottery Corp.

For the past decade, BCLC has supported the Holiday campaign. In addition to the annual campaign, BCLC's GameSense for Parents program creates awareness of how gambling impacts minors and gives parents tools and supports to talk to their kids about gambling. In 2015 and 2016, BCLC engaged with influential and select mommy bloggers to promote key messages on the topic of gambling risks and youth. Following the 2015 and 2016 campaigns, BCLC evaluated the campaigns to determine if they reduced the incidence of parents and other adults purchasing lottery tickets for kids as gifts. Research results indicate the campaign did not appear to create a behavior change or attitudinal shift in adults as intended. In some instances, the intended message had even been confused with a generic sales message around Scratch & Win tickets. Acknowledging the importance of this message, while taking into consideration these results, BCLC continues to educate our retailers, including messaging around this topic for our November and December Retailer Newsletters. We are currently evaluating our programs and will explore how we can approach the annual holiday campaign from a refreshed marketing perspective for the 2018 holiday season.

California Lottery

We participate in both the Holiday campaign and PGAM



every year. We produce new messaging annually for things like videos for promoted social media posts, press releases, copy for non-promoted social media posts, and campaign write-ups for the Retail Product Plan (a monthly lottery brochure used to communicate with the retailer network), Player's Lounge (e-newsletter), our intranet site, and the Executive Weekly News/Financial Updates. Other messaging is refreshed less often, including our ePOS slides, Hot Spot monitor messaging, ticket messaging, print buys and our telephone system greeting (a responsible gambling message is added to the main greeting during both campaigns). On social media, we add a responsible gambling message weekly during PGAM and

the Holiday campaign. For print and radio, wherever possible we complement California's Office of Problem Gambling's media plan by running PGAM advertisements in regional newspapers/ethnic media.

Colorado Lottery

We do a grass-roots style campaign during PGAM, which includes social media posts and a press release. We also have admin privileges to post directly to the Problem Gambling Coalition of Colorado's Facebook page, so we often add content to their page as well. We have done paid posts on Facebook in order to boost awareness there and that has allowed us to reach thousands of people.



Connecticut Lottery

Each year we recognize PGAM, and this year's efforts were much bigger and much bolder than ever before. We literally celebrated PGAM and promoted responsible gambling (RG) every day during the month of March, in big and small ways. We believe that no other lottery, and perhaps no other organization, has ever done so much to promote PGAM. These collective efforts demonstrate a groundbreaking effort and

commitment in this regard. Among the highlights:

- On every single lottery ticket printed during three weeks of the month, there was either a header or footer with an RG message. Approximately half of the messages were about the Helpline and half were GameSense messages.

- On every single live broadcast throughout the month, there was a TV crawl about PGAM.

- We conducted online RG training for employees and retailers. We had 100 percent participation from employees, and 1,163 of our approximately 2,900 retailers participated. This was the largest percentage of participation by retailers ever.

- We created a calendar for PGAM, showcasing our robust efforts each day through the month of March. This helped keep our corporate responsibility team organized and was a nice visual to share with stakeholders outlining our work.

- We led and coordinated efforts to get a proclamation issued by Governor Malloy in support of PGAM on behalf of all the gaming entities in the state:

the Lottery, the Connecticut Council on Problem Gambling, the Department of Mental Health and Addiction Services Problem Gambling Services Department, the Department of Consumer Protection, SportTech (off-track betting), and the two tribal casinos, Foxwoods and Mohegan Sun.

- We had three 'Go Dark' days where our media efforts are solely focused on RG and not product advertising.

- We increased all our RG messaging, and advertised PGAM through billboards, our website and our retail displays, and took out full page PGAM ads in the CT Association of Boards of Education's newsletter, The Advisor and CT Parent magazine.

- We issued our quarterly Chatter that Matters corporate responsibility newsletter filled with various RG messaging.

- We sent payroll inserts to 50,000+ state employees with PGAM messaging on one side and GameSense messaging on the other.

Hoosier Lottery

We participate in three national campaigns each year: PGAM, Responsible Gaming Education Week (RGEW), and the Holiday campaign. We do an evaluation and continuous improvement review on each campaign to refine it for the following year. Our PGAM focus is on 'Know Your Game. Know Your Limit. Stay Within it.' We also promote the Hoosier Lottery's free financial literacy course (www.LearnFinancialLiteracy.com) to reinforce setting limits and creating budgets. For RGEW, we focus on employee education. A responsible gaming idea contest is held among employees and educational materials are distributed via email. For the





Holiday campaign, a dedicated responsible gifting logo appears on all point of sale materials and a dedicated social media campaign with a new graphic runs each week of the holiday season. This year we promoted the responsible gift giver test and included two animated graphics. Still graphics are promoted on Facebook through paid advertising to increase reach to a broader audience.

Louisiana Lottery

We participate in the annual observance in March through news releases, website promotion and 'tip of the day' posts in social media. NCPG-produced materials, taglines and hashtags are utilized. We also update and promote a web video that highlights problem gambling awareness, tips for responsible play, the Lottery's responsible gambling efforts and outside resources for help, including the helpline. The Louisiana Lottery's statute explicitly allows the purchase of lottery tickets for gifting to those under the age of 21. Because we do not set policy, but instead operate under the spirit of the law and intentions of lawmakers, we are unable to proactively participate in holiday campaign messaging instructing the public not to do something Louisiana law explicitly allows.

Maine Lottery

The Maine Gambling Advisory Committee (MGAC) includes representatives from the Maine Lottery, Maine Centers for Disease Control, two privately



operated casinos, the Maine Council on Problem Gambling and Maine Gambling Control Board. In addition to ongoing messaging, the group holds a one day annual conference that allows treatment providers to obtain training and resources along with showcasing the various work begin done by the group to the media to help promote responsible gaming. The conference is typically held in March as part of PGAM. Also in March, we try to keep some consistency with the NCPG by using their imagery as much as possible.

Massachusetts Lottery

We participate in PGAM, the Holiday campaign and Responsible Gaming Education Week. For the Holiday campaign, we conduct a holiday toy drive, with a POS and social media campaign discouraging the gifting of lottery tickets to those under the age of 18. The toy drive supports local 'Toys for Tots' programs and other regional efforts, while raising awareness that lottery tickets are not suitable gifts for children. We participate in PGAM in a variety of ways, including keno monitor displays; draw game ticket messages; signage in customer service areas of our Braintree headquarters and regional offices; Mass. Council on Compulsive Gambling information table in Braintree and Worcester; notification in our agent newsletter; prominent presence on our website home page; and social media activity.

Missouri Lottery

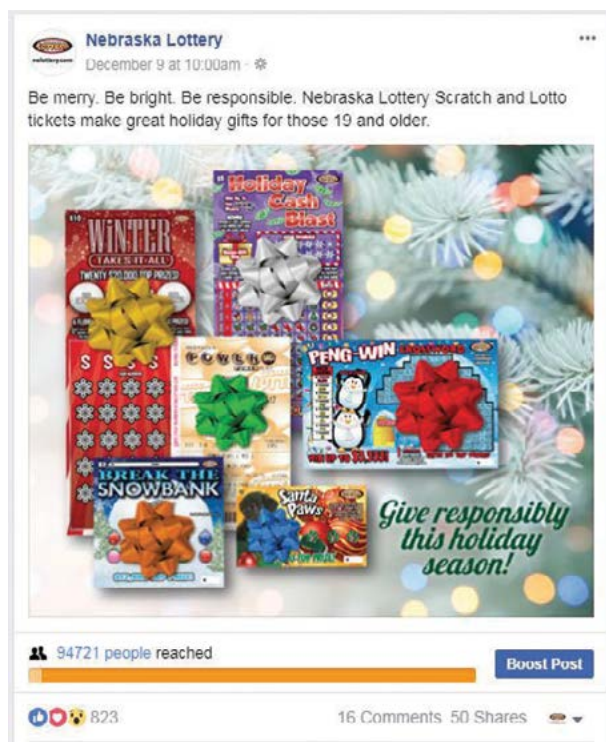
We support not only the national PGAM in March, but also Missouri's Responsible Gaming Awareness Month in August. In both months, we distributes PSAs across the state and issue a news release to all media outlets on behalf of the Missouri Alliance to Curb Problem Gambling, of which we are a founding member. PSAs are typically updated every two years. For PGAM, all Lottery employees and vendors are required to complete responsible gaming and problem gambling training via a video program created by NASPL; a survey is completed



following the video. For our August awareness month, our sales division carries out the 'Do The Right Thing: Retailer Integrity and Responsibility Program' with all retailers. The program focuses on responsible gaming, cashing procedures, inventory tracking and selling procedures. Responsible gaming content includes age verification, accessibility of responsible gaming material for employees and customers, a review of what problem gambling is, the 1-888-BETSOFF program and the Lottery's Self-Exclusion Program. We are also an active participant in the annual Holiday campaign by including messaging on all holiday product-related news releases and website pages, in addition to social media posts and messaging in retailer, employee and stakeholder newsletters.

Nebraska Lottery

Every March we post information about the signs of problem gambling on our website and in our player and retailer publications for PGAM. 2017 was our first year of active participation in the Holiday campaign, and over the holidays we reminded players that Nebraska Lottery tickets make great gifts, but only if you're at least 19 years old. This message was distributed to media and posted our website. Promoted social media posts with a





similar theme were displayed on the Lottery's Facebook, Twitter and Instagram accounts.

New Mexico Lottery

The holidays are a special time, and we remind players to 'Gift Responsibly.' Banners are posted on our website home page and Scratchers page to remind players that lottery tickets are not for children. Player Advertising Displays feature our 'Gift Responsibly' message on screen at the point of purchase in each retail location. We refresh the look of the graphics each year. Due to the New Mexico legislative mandate of a 30 percent monthly return, we have a very limited budget for all items, including responsible gambling messaging. Prior to the mandated return, we ran TV, radio and newspaper ads for National Problem Gambling Awareness week. Since the mandate, all budgets have been cut, so we work within our limited funds.

New York Lottery (A Division of the NYS Gaming Commission)

The New York State Gaming Commission founded the Responsible Play Partnership (RPP) in 2013; it is comprised of the Commission, the NYS Office of Alcoholism and Substance Abuse Services and the NY Council on Problem Gambling. The RPP works together to produce multi-media, multi-lingual problem gambling awareness campaigns throughout the year, including PGAM. These campaigns are distributed to traditional and digital media outlets, using our relationship with the not-for-profit NY Council on Problem Gambling to secure free placement. Elements of these campaigns are also designed to leverage the availability of state-owned assets such as closed-circuit TVs and poster stanchions at DMV and highway rest stops, which also allows us to extend our out-of-home reach with no

media costs. We maintain a library of multi-language posters and other collateral materials that are made available to prevention and treatment professionals statewide on an on-demand basis.



North Carolina Education Lottery

We participate in both PGAM and the Holiday campaign. We air a television ad during March, and for this past holiday season, our Commission chairman was featured in a video shown in all of our claims centers reminding players not to give lottery tickets as gifts to minors.

Ohio Lottery

We have an annual campaign designed to generate broad awareness about gambling, specifically the health science portion of the disorder, and it targets at-risk players, their family and friends. The tagline is "It's a disorder, not a decision." The campaign includes a custom microsite (problemgamblingohio.org), statewide TV/radio buys on a quarterly basis, and digital and social buys on an alternating monthly schedule. During PGAM, the campaign and storyline runs on all paid media channels.

Oregon Lottery

Working with the NCPG and our communications team, and after surveying affiliate members, we decided that the existing 'Have the Conversation' theme and overall

brand look and feel were very recognizable and did not need to be changed. The same materials have been utilized for the past few years with color pulse changes as needed to give the campaign a fresh look. Each year, we work with NCPG on developing templates, marketing support, and social media and website content for posting during PGAM. Affiliates, including the Lottery, run information locally each year during the month of March.

Pennsylvania Lottery

In addition to issuing news releases for both PGAM and the Holiday campaign, we promote both efforts on social media, through top-of-ticket messaging and scrolling text on our nightly TV drawing show.

Rhode Island Lottery

For PGAM, we have public service announcements airing throughout the month and 30 billboards go up around the state with the message ‘When gambling is no longer a game – start the conversation’ and the Helpline number included. As part of PGAM this year, we have the third annual RI Council on Problem Gambling Conference scheduled for Friday, March 9. This year’s conference will focus on the legal issues associated with problem gambling, and we have a distinguished list of speakers and presenters including Mark G. Farrell, Senior Justice in the Amherst, New York, Criminal and Civil Court; Michael Burke, motivational speaker and author, whose book has been published by the American Bar Association; Shirley Hoak, JD, IGCC-II, CPRS; and Susan D. McLaughlin, M.P.A., C.P.P., Primary Prevention Services Coordinator, DMHAS Problem Gambling Services.



South Dakota Lottery

For the Holiday campaign we issue press releases and post on social media. Our local media took interest in this matter during the recent holiday season, as we

conducted additional interviews with radio stations and saw the press release published in various newspapers.

Virginia Lottery

The Virginia Lottery has a history of debuting new materials on March 1 for PGAM. This includes new public service announcements, brochures and an employee RG education video. In March 2018, we plan to introduce our retailer RG education video. During March, we run RG ticket messages, increased social media and website messages, increased employee education efforts, and paid media messaging. For the past three years, an op-ed from the Lottery’s Executive Director has run in a major Virginia newspaper, encouraging public awareness. We also participate in the Holiday campaign, and all year long scratcher tickets contain messaging reminding players they must be 18 or older to play and not to give tickets as gifts to minors.

It’s Problem Gambling Awareness Month

By Paula Otto

Otto is Executive Director of the Virginia Lottery

How many of us have ever played some sort of a game of chance? A friendly wager among friends? A card game? The office “March Madness” pool? The impulse buy of a lottery ticket at the convenience store where you stop for gas?

For most people, this is not a problem. Gambling is, after all, one of the oldest of human activities. However, for some people gambling is as dangerous as a harmful drug. Gambling addiction can ruin lives. It can lead to bankruptcy, divorce, theft, prison and, in some cases, suicide.

March is National Problem Gam-

would be considered problem gamblers; that is, they do not meet the full diagnostic criteria for pathological gambling but meet one or more of the criteria and are experiencing problems due to their gambling behavior.

Raising awareness means helping to understand what gambling addiction is – and what it isn’t. Someone doesn’t need to gamble until she’s broke to be an addict. Conversely, just because a person gambles a lot doesn’t necessarily make him an addict.

The essential features of gambling addiction, according to the NCPG, are increasing preoccupation with gambling; a need to bet more money more frequently; restlessness or irritability when attempting to stop; “chasing” losses; and loss of control manifested by continuation of the gambling behavior in spite of mounting, serious, negative consequences. The signs of problem gambling include: becoming restless or irritable when trying to stop or cut down on gambling, lying about gambling to loved ones, and developing financial problems due to gambling.

What are some of the warning signs? If a person gambles down to his last dollar, if thoughts of gambling cause her to lose sleep, if bills go unpaid because of gambling, if a person has gambled to try to get money to meet financial obligations



Paula Otto

Wyoming Lottery

We are in the first year of our responsible gambling campaign, and we will plan for the next year starting in March to determine any future campaigns and communications. This will also define needs for the future of the Wyoming Responsible Gambling Coalition, of which we are a member. ■

BUILDING AWARENESS

In the lottery industry, there's no shortage of responsible gambling messaging. As responsible government entities, lotteries have taken the lead in several ways when it comes to the broader commercial gambling world. Working with other organizations or on their own, lotteries have developed an arsenal of responsible gambling communications.

We asked lotteries to highlight examples of some of their RG messaging, including specific campaigns and taglines – whatever they wanted to share. Their edited responses follow. Readers should note that these examples are just a sampling of what lotteries are doing – every lottery does some form of RG messaging year round, usually including dedicated website information pages and messages/helpline numbers on tickets and at retail.

What lotteries are doing at specific times of the year, like during Program Gambling Awareness Month and the Holiday Lottery campaign, or how they work with retailers or other partners, are included in the previous articles in this section.

Atlantic Lottery

We use everything from digital signage messages, pamphlets, posters, social media clips/images, coasters, etc. All of our information pamphlets are available for download on our website at alc.ca. We also have a PlayWise Information Centre located at our casinos.

British Columbia Lottery Corp.

BCLC requires that all lottery product promotions, displays and advertising materials comply with the Gaming Policy and Enforcement Branch Responsible Gambling Standards for B.C.'s gambling industry, as well as our BCLC Advertising standards. This

includes the following requirements on Scratch & Win tickets: GameSense responsible gambling tip, 19+, Declaration of age and the Problem Gambling Help Line. For advertising and point of sale materials, we require a responsible gambling bar, which includes a responsible gambling tip and the BCLC and GameSense logos. The same applies for social media advertising. For social media campaigns, we require inclusion of a responsible gambling message and a 19+ reference in the text portion of the ads.

In addition to the responsible gambling message that is included on lottery products and advertising, BCLC also includes GameSense messages at the retailer point of sale. These are included as part of our digital messaging to players, and include messages around

balancing gambling with other activities, understanding the odds and understanding how the games work.

The majority of British Columbians gamble responsibly. Gambling can be a fun, social activity when a player determines a budget and sticks to it, balances gambling with other hobbies and aspects of life, and is aware of the help and services available.

California Lottery

The California Lottery was the first U.S. lottery to achieve the World Lottery Association's Level Four responsible gaming certification. Since its inception, the Lottery has aligned RG practices with its strategic growth and planning to ensure that it positively impacts and empowers its consumers, employees and stakeholders. We provide RG messaging on the back of every playslip and Scratchers, and on the front and back of draw game tickets. Our electronic point of sale slide show includes an RG message every 110 seconds at over 22,000 retail locations. On social media, in addition to extra RG messaging during Problem Gambling Awareness Month and the Holiday Lottery campaign, we have twice weekly RG messaging when Powerball or Mega Millions jackpots are over \$300 million.

Connecticut Lottery

We had two television awareness ads created titled Gamble Responsibly. The concept was developed by Fuseideas and the Director was Tobor Nemeth, from Element. The ads started airing the week of July 11, 2016, and their focus was GameSense. Each television ad evoked a non-judgmental, genuine quality. In the 15-second ad, knowledge is central. The actors portray responsible gamblers, unassuming and speaking as if the viewer and the actor knew one another. "I know ... the odds, when to take a break, because I use my GameSense." The spot ends "but if it ever stops being fun ..." and then offers the Helpline number. The 30-second ad is more detailed. "I know the odds, I set limits, I play for fun..."; "If it is no longer fun or not a game anymore... you should know, there's help ..." and then the actors deliver the Helpline number and websites. In this ad, as well as in the 15-second spot, the Helpline number is both verbal and in text on the screen.

Florida Lottery

The Florida Lottery is committed to using all available resources to promote responsible gambling issues. This includes play responsibly messaging, reminders that you must be 18 to play, and scam awareness.

All lottery tickets, POS materials and radio advertisements include play responsibly messaging. The



GAMBLING SHOULD NEVER BE A PROBLEM



Florida Lottery games are designed to be a fun, low-cost form of entertainment with the added benefit of helping fund education. While most of our players enjoy the fun and entertainment of playing our games, for some, gambling of any kind can be a problem.

Based on a 2013 Survey of Problem Gambling Services, conducted by the National Council on Compulsive Gambling (NCCG), an estimated 1.1% of Florida adults are believed to have a gambling-related problem. And while this is among the lowest percentages of all states in the nation, people with this problem cannot safely manage any kind of wagering.

To assist individuals and families struggling with addiction, the Florida Lottery encourages them to contact the Florida Council on Compulsive Gambling (FCCG) which offers a variety of free services to callers based on the needs of the individual. Callers are given the opportunity to share about the problems they are experiencing so they may be connected with the appropriate resources. Their multilingual Helpline number is: 888-ADMIT IT (888-236-4848)

Additional Resources:

National Problem Gambling Helpline
Call: 1-800-522-4700
Text: 1-800-522-4700
Chat: ncpg.org/help

communications office routinely issues press releases and social media reminders on responsible gambling and scam awareness. Similar messaging is found on multiple pages of our website including a prominent warning on our Where to Play page.

Georgia Lottery

Promoting responsible play has been at the core of the Georgia Lottery's advertising tenets since inception. We promote the notion that our business is about providing entertaining lottery games for the benefit of Georgia's

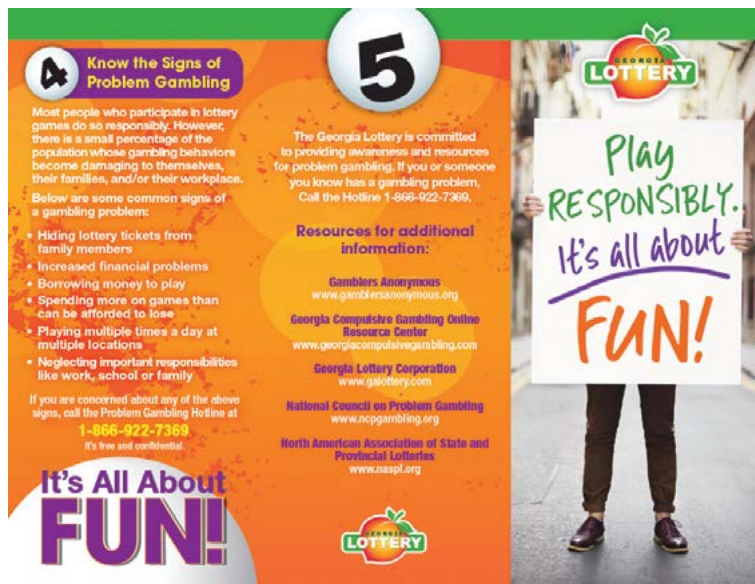
citizens, which includes protecting our players. This means that we do not create false hopes for winning or encourage customers to act irresponsibly in any way. Our advertising, marketing and communications employees all follow the same GLC Advertising Policy as well as adhering to advertising standards from NASPL and WLA. Our advertising agency under contract, BBDO, adheres to this policy as well as their own policies governing responsible advertising and communications.

We maintain two prominent responsible gaming slogans: 'Play

Responsibly, it's all about fun!' and 'Please play responsibly. Always check and sign your tickets.' The former is tagged on all external communications, and the latter is featured on all broadcast or radio ads. Our play responsibly messaging is present on all instant tickets, play stations and linked on every page of our website. We've also released a Play Responsibly brochure that is placed in play stations at all retail locations, and it details problem gambling warning signs and local and national problem gambling resources.

We're improving on our commitment to promoting responsible play every day. We understand that it is truly our job to exceed expectations and ensure the efficacy of our responsible gaming program. With that in mind, we established a goal to make our responsible gaming program and resources more visible, including on social media and on our website. We recently launched a new website, and our Play Responsibly microsite is now on the front page, within eye level of the player. The microsite has received new logos and new content and is constantly being updated. Also on the front page is our new Player Tips campaign, which rotates monthly with tips and information to protect our players.

The Player Tips Campaign will run for the current year and consists of: First Quarter – Check and Sign Your Tickets; Second Quarter – Holiday Campaign: Lottery Tickets are Not Gifts for Kids; Third Quarter – Dedication to Problem Gambling Awareness Month; Fourth Quarter – Information on Playing Responsibly. It is displayed on our website and social media channels. The campaign will promote our



position that lottery tickets are a form of entertainment and should always be played in moderation. However, if playing the lottery is no longer fun and becomes a concern, we will have prominently displayed resources for our players to look to for assistance.

Hoosier Lottery

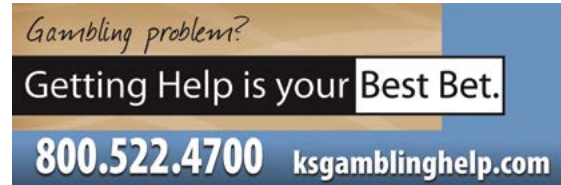
All Scratch-Offs have 'Must be 18 or older to play. Please play responsibly' on the front of the ticket, and the responsible gaming logo with helpline number on the back of ticket. The responsible gaming logo also appears on the back of draw tickets, and on all point of sale marketing as well. On social media, we dedicate at least one corporate social responsibility or responsible gambling message per week. For our drawings, we provide scripting for various CSR and RG messages for the draw hosts.



Illinois Lottery

Responsible gaming is a consideration in all aspects of lottery operations. Our goal is to attract more people to play responsibly, not to encourage existing players to play excessively. The Illinois Lottery is one of six U.S. lotteries to achieve Level 3 certification from the World Lottery Association – the second-highest level of responsible gaming certification. Our commitment to responsible gaming also includes providing funds for

the Gambling Hotline (1-800-GAMBLER). We publish ads quarterly in newspapers across the state regarding responsible play. We allow a person to ban him/herself from receiving Lottery prizes or any direct mail/email promotional materials through the Voluntary Self-Exclusion Program.



Kansas Lottery

The Kansas Lottery places problem gambling messages on multiple materials: play slips, ticket stock, instant ticket backs, retailer newsletters, player newsletters, how to play pieces, all games brochures and business cards. Information on our website includes Problem Gambling Warning Signs, as well as appropriate links to www.ksgamblinghelp.com, the National Council on Problem Gambling and Gamblers Anonymous.

Kentucky Lottery

Probably 20 years ago, Kentucky was one of the first lotteries to adopt a responsible gambling program. One of the key concepts of the initiative involved where our Play Responsibly logo would appear. From that directive, it's mandated that the messaging (which includes our 1-800-GAMBLER helpline number) appear on all advertisements and pretty much all other public-facing material for the company. It was even on a hot air balloon at one point! When we launched Keno a few years ago, we felt like we needed to redouble our efforts on publicizing the program beyond what we were able to post in retail. That's when we started a billboard campaign across Kentucky to again let folks know about our hotline number and how to reach out for help.

Loto-Québec

Loto-Québec is proud to have been the first member of the World Lottery Association (WLA) to obtain, in 2009, Level 4 certification (the highest) in terms of responsible gambling.

A toll-free number for problem gambling appears on all lottery and scratch tickets and on our website. Loto-Québec promotes the services and telephone number of the Gambling: Help and Referral helpline

Tips TO KEEP IN MIND

It is important to establish your limits before you gamble. Bet only the amount of money you can afford to lose (a portion of your entertainment budget), and not your budget for essential needs.

TO MAKE SURE A GAME REMAINS A GAME:

- » Remember that gambling is not a way to make money.
- » Don't try to recover your losses.
- » Avoid gambling when you are sad, depressed, worried or upset.
- » Don't gamble if you are under the influence of alcohol or drugs.
- » Take up activities other than those related to games of chance.
- » Stay realistic and vigilant, as chance is the only determining factor.

SIGNS TO LOOK OUT FOR

If you apply these tips, and your gambling habits still result in negative consequences for you or your loved ones, lower your limits and think about how gambling is affecting your life.



If you recognize yourself in any of these elements of risky behaviour, don't hesitate to ask for help.



Gambling: Help and Referral
1-800-461-0140 aidejeu.com

From Loto-Québec's Stick to Your Limits brochure.

(1-800-461-0140) through different means of communications, including lottery tickets, validation coupons, video lottery terminals, slot machines and responsible gambling advertising, as well as the Corporation's websites.

The website AGameShouldRemainAGame.com is an interactive website specifically addressing the questions related to gambling, providing critical information and awareness tools that demystify games of chance. This website is designed to teach the public about the characteristics of gambling and the role that chance plays, as well as strategies people can use to avoid losing control of their gambling. The website's address appears on all TV advertising. In addition, 18+ also appears on all lottery and scratch tickets, POS

materials as well as TV, radio and outdoor advertising. A section of our website is also dedicated to responsible gambling.

Louisiana Lottery

The Louisiana Lottery prints and stocks responsible gaming placards in all of its play centers at retail. The placards prominently feature the state's toll-free problem

gambling helpline and tips for responsible play. All of our POS, tickets and advertising contain the helpline number and campaign call to action to play responsibly. The Lottery also has a dedicated section on our website which features tips for responsible play, the warning signs of problem gambling, how to get help and links to outside resources.

**KEEP IT FUN
 PLAY RESPONSIBLY**

If you or someone you know has a gambling problem

CALL 1-877-770-7867

See reverse side for additional information

GAMBLING PROBLEM?

It's easy to get caught up in the excitement of a huge Powerball jackpot but please remember that it's *just for fun*. We want everyone to have fun but always play responsibly and only play what you can afford. It only takes one to win. Good luck.



Maine Lottery

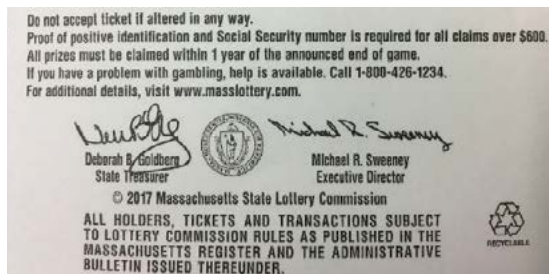
The Maine Lottery works with the other members of the Maine Gambling Advisory Committee to coordinate campaigns whenever possible. We worked with the Maine CDC to have a consistent message about setting limits. This campaign focused on setting limits on how much you play, so the Maine lottery created digital advertising at retail with the message 'Know your limit, stay within it.' We have also developed messaging that we display at retail and social media when the Powerball and Mega Millions jackpots get extremely large and begin to gain national attention. It's an exciting time for everyone and there is a great deal of media attention and hype so we want to be sure that we are doing our part to promote responsible play. We also developed a specific radio spot for when the Powerball jackpot gets extremely large as well.

Maryland Lottery

All Maryland Lottery scratch-off tickets, draw game ticket stock, advertising and point-of-sale materials carry responsible play messaging. Scratch-off ticket backs include the 1-800-GAMBLER helpline number, along with the URL of the Maryland Alliance for Responsible Gambling (mdgamblinghelp.org). In addition, all advertising states that lottery players must be at least 18 years of age.

Massachusetts Lottery

We require all retailers to post the Massachusetts Council on Compulsive Gambling's 800 hotline number on lottery terminals and self-service vending machines, and we print that number on all instant tickets and bet slips. We also post the hotline number on KENO monitors between each game and on our mobile apps.



We have a prominent graphic promoting the MCCG on our website home page. We include responsible gambling messaging in print, broadcast, digital and POS advertising; the messaging includes 'You must be 18 years or older to play the Lottery,' 'If you have a problem with gambling, help is available. Call 1-800-426-1234;' and 'Please play responsibly.' We generate original content and share relevant content on social media pertaining to responsible play. We include responsible gaming messaging in talking points for media appearances when there are large jackpots in popular multi-state games. Odds and payouts are accurately reflected advertising and promotional materials and on our website.

Michigan Lottery

We use 'Knowing your limits is the best bet' as our RG tagline. That's included on all of our advertising and also is on the back of our instant game tickets, and is featured on our website. We send a monthly RG email out to all of our online players, which now total nearly 680,000.

Missouri Lottery

We have a new BetsOff campaign that started with billboards and will also soon be available on posters and brochures. Our play responsibly 'It's Only



a Game' logo is on all tickets, sell-in materials and how-to-play brochures. In addition to social media posts during PGAM and Missouri's Responsible Gaming Awareness Month and the holiday campaign, we also do posts during high jackpot runs.



Nebraska Lottery

Some of the items we use to promote responsible gaming include on-ticket messages, radio messages during high jackpot runs, responsible play messaging on advertising and point of sale materials, and social media posts. We have included responsible gaming articles in our Lottery Times player newsletter, and we also issue releases during periods of high jackpots.

New Mexico Lottery

In New Mexico, all Scratchers feature an area on the back of each ticket that reminds players to Play Responsibly. The message

includes the 1-800 phone number and website address for the New Mexico Council on Problem Gambling. Problem Gambling brochures are offered at each retail location in the play center or brochure rack. Additionally, most Lottery ads include the

Play Responsibly phone number and website address on each piece and the Play Responsibly message and contact information is available on all pages of our website. Our radio spots remind players to play responsibly at the end of each spot. As jackpots grow, New Mexico is very aware that dollars spent on Lottery tickets increases. So we remind players

in our news releases and media messaging to play responsibly.

North Carolina Education Lottery

We put 'play responsibly' and 'must be 18 to play' messaging on all instant tickets, draw ticket stock and marketing materials. We also include the problem gambling helpline number on all of our materials as well as the odds of winning a top prize and the overall odds of winning. The NCEL also shares RG information through its social media platforms and players' club blog. The problem gambling helpline number is also prominent on our social media pages. Just this year, we refreshed our website, including an expanded Play Responsibly page.

Please Play Responsibly

North Carolina Problem Gambling Helpline

Talk:
877-718-5543

Text:
morethanagamenc to 53342

Chat:
morethanagamenc.com

NC Education Lottery
Must be 18 to play. ncelottery.com

North Dakota Lottery

All our point of sale materials state 'Please Play Responsibly,' and any TV/video spots also have that message displayed. The footer of every page on our main website and on our players club website has a responsible gaming disclaimer stating 'If gambling is no longer fun call 2-1-1 or contact Gamblers Anonymous or GamblerND' with the appropriate links. All lottery terminals have a sticker with the 2-1-1 message visible to players.



Ohio Lottery

The Ohio Lottery uses standard language on TV, radio, digital radio, digital videos, digital banners (select sizes), out-of-home materials and all customer-facing printed materials: 'Lottery players are subject to Ohio laws and Commission regulations. Please play responsibly.' Our annual campaign is designed to generate broad awareness about gambling, specifically the health science portion of the disorder, and it targets at-risk players, their family and friends. The tagline is 'It's a disorder, not a decision.' Media support includes a custom microsite (problemgamblingohio.org), statewide TV/radio buys on a quarterly basis, and digital and social buys on an alternating monthly schedule.

As part of Ohio for Responsible Gambling, we also provide resources for its annual campaign, currently 'Get Set Before You Bet.' (www.beforeyoubet.org). ORG updates its campaign annually. This year's theme is a continuation of the organization's 'Be the 95%' campaign.

Problem gambling is a disorder, not a decision.



Get or give problem gambling help.

Ontario Lottery and Gaming

OLG's efforts to entrench knowledge of responsible gambling practices and to raise awareness of problem gambling prevention, awareness and support is a year-round endeavor. We have a comprehensive player education program with an ability to connect with all kind of players in many different ways. Here are our main points of contacts with players:

Online: Our key hub is PlaySmart.ca, an all encompassing digital destination full of facts, tools and advice for players.

Gaming Locations: From lottery kiosks and casinos to charitable gaming centres and PlayOLG, we're available to players when and where they play.

Social: Our players are social, and so are we. It's where we give our players content that's informative and entertaining. We call it 'Edutainment.'

PlaySmart Centres: We also connect through our PlaySmart Centres at all land based gaming venues across Ontario – physical destinations that can be found at all casinos and charitable gaming locations. Here players can access learning tools, referrals to gambling support services, or at some centres, even have a coffee with trained PlaySmart staff.

Pennsylvania Lottery

All Pennsylvania Lottery tickets, coupons, vending, POS monitors and signage include the words 'Please Play Responsibly' and the 1-800-GAMBLER hotline number. We also promote this message through scrolling text on our nightly televised drawing show. We also have a problem gambling cards that we make available to retailers and through our satellite offices. When multi-state jackpots are high, we put a play

**Is gambling a problem
for you or
someone you know?**

1-800-GAMBLER
(1-800-426-2537)



responsibly TV spot into rotation and increase messaging on social media. We also promote Pool Play (teaming with friends or coworkers) as a way to get extra chances to win while sticking to a budget. We also remind players to understand the odds and emphasize that they only need one ticket to win.

Our messaging has become much more direct in recent years. We now say such things as, "If you have a gambling problem, we do not want your business – we want you to get help." We also emphasize that playing within your means, setting a budget and understanding the chances of winning are key components of playing responsibly. Lottery games are a form of entertainment. Play only with your discretionary income (whatever is left after all the essentials are handled).

**Is gambling a problem for you
or someone you know?**

Call the Problem Gambling HELpline
1-888-781-4357
CHOOSE OPTION 2

AVAILABLE 24/7 • FREE • CONFIDENTIAL

Support for the Helpline is provided by the
South Dakota Council for Problem Gambling, Inc.



South Dakota Lottery

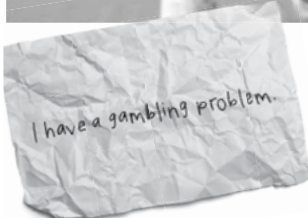
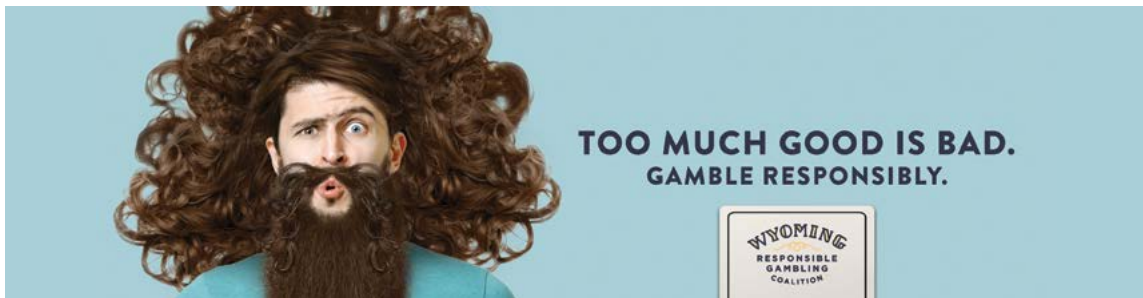
One of the South Dakota Lottery's primary objectives is to ensure that our players enjoy the good fun our games provide while also playing responsibly. All of our point of sale publications and advertising contain a message pertaining to responsible gaming. This messaging can also be found on our scratch tickets, lotto tickets, and most video lottery terminals. Our lotto tickets and most of our video lottery terminals include a toll free phone number related to responsible gaming. Our website also features a page related to problem gambling.



Tennessee Education Lottery

The TEL includes 'Play Responsibly' in all marketing materials as a visible reminder encouraging responsible play. The brand uses our Play Responsibly logo, and any additional call-outs outside of the stand-alone logo to encourage players to 'Have Fun. Play Responsibly.' We also promote the Tennessee REDLINE, a phone-in helpline dedicated to providing assistance for gambling and/or other addictions.

Marketing formats for our Play Responsibly brand include television commercials, radio, outdoor billboards and web advertising; point of sale marketing materials at retailers; TEL mobile apps; social media content; promotional items; digital monitor displays; VIP Players Suite website; and our corporate



If a family member has a gambling problem, so does the rest of the family. But there's help. Call 1-800-522-4700 or go to ProblemGambling.Vermont.gov for free, confidential counseling – 24 hours day, 7 days a week.

Problem Gambling is a Family Matter.

PLEASE PLAY RESPONSIBLY
problemgambling.vermont.gov

This message is brought to you by the Vermont Lottery. Please play responsibly.

service terminals and clerk-operated terminals have a 'Play Responsibly' button that prints a ticket-sized notification of the helpline number. Our Play Responsibly logo, which includes the phone number, appears on all advertising and marketing materials, the Lottery's website homepage, and every edition of the retailer magazine Playbook. We have produced Play Responsibly brochures designed to educate the public (gamblers and non-gamblers alike) about problem gambling and gambling addiction. Our in-house media production team has produced award-winning problem gambling public service announcements, which have television and radio versions in both English and Spanish.



website. Additionally, RG messaging is part of our media and public relations activities such as press releases and media interviews.

Vermont Lottery

We include all Problem Gambling Vermont, problemgambling.vermont.gov, contact info on the back of our instant tickets. We also support the Parent's Home Companion, a non-profit sourced resource guide for Vermont families.

Virginia Lottery

Every Virginia Lottery ticket contains the number for the toll-free Virginia Problem Gambling Helpline, which was created by the Virginia Lottery. Self-



Wyoming Lottery

When we launched in 2014, the Wyoming Responsible Gambling Coalition needed to get a better understanding problem gambling, and it took time to do the necessary research. Once that was completed we were able to use the data to guide the projects we are working on and messaging and execution of our campaigns for awareness. Our first RG marketing material launched on January 18, 2018, using the tagline 'Too much good is bad.' ■

WHERE ARE YOU GOING?

SEPTEMBER 25-28, 2018

www.naspl18.com



2018 CALENDAR

March 2018
NCPG Problem Gambling Awareness Month

March 7-8, 2018
GLI Roundtable
Luxor Hotel
Las Vegas, NV

April 9-12, 2018
NASPL Lottery Leadership
Embassy Suites Downtown
Des Moines, IA
Hosted by the Iowa Lottery

June 11-14, 2018
NASPL Directors Meeting & Dialogue
Westin Portland Harborview
Portland, ME
Hosted by the Maine Lottery

July 13-15, 2018
NCLGS Summer Meeting
Cleveland, OH

July 23-26, 2018
NASPL Professional Development Seminar
Swan Hotel
Orlando, FL
Hosted by the Florida Lottery

September 25-28, 2018
NASPL 2018 Annual Conference
Hilton Cleveland Downtown Hotel
Cleveland, OH
Hosted by the Ohio Lottery

November 18-22, 2018
World Lottery Summit 2018
Buenos Aires, Argentina

December 2018
NCPG/McGill University RG Lottery Holiday Campaign

2019 CALENDAR

March 2019
NCPG Problem Gambling Awareness Month

April 15-18, 2019
NASPL Lottery Leadership
Hyatt Regency Cleveland
Cleveland, OH
Hosted by the Ohio Lottery

June 17-20, 2019
NASPL Directors Meeting & Dialogue
KingsMill Resort
Williamsburg, VA
Hosted by the Virginia Lottery

July 29 – August 1, 2019
NASPL Professional Development Seminar
Arizona Grand Resort
Phoenix, AZ
Hosted by the Arizona Lottery

December 2019
NCPG/McGill University RG Lottery Holiday Campaign

2020 CALENDAR

March 2020
NCPG Problem Gambling Awareness Month

April 20-23, 2020
NASPL Lottery Leadership
Drury Plaza Hotel
Pittsburgh, PA
Hosted by the Pennsylvania Lottery

June 15-18, 2020
NASPL Directors Meeting & Dialogue
Westin San Diego
San Diego, CA
Hosted by the California Lottery

July 20-24, 2020
NASPL Professional Development Seminar
Grand Hyatt Denver
Denver, CO
Hosted by the Colorado Lottery

December 2020
NCPG/McGill University RG Lottery Holiday Campaign



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