

The Official Publication of the North American Association of State & Provincial Lotteries

# INSIGHTS

March/April 2019



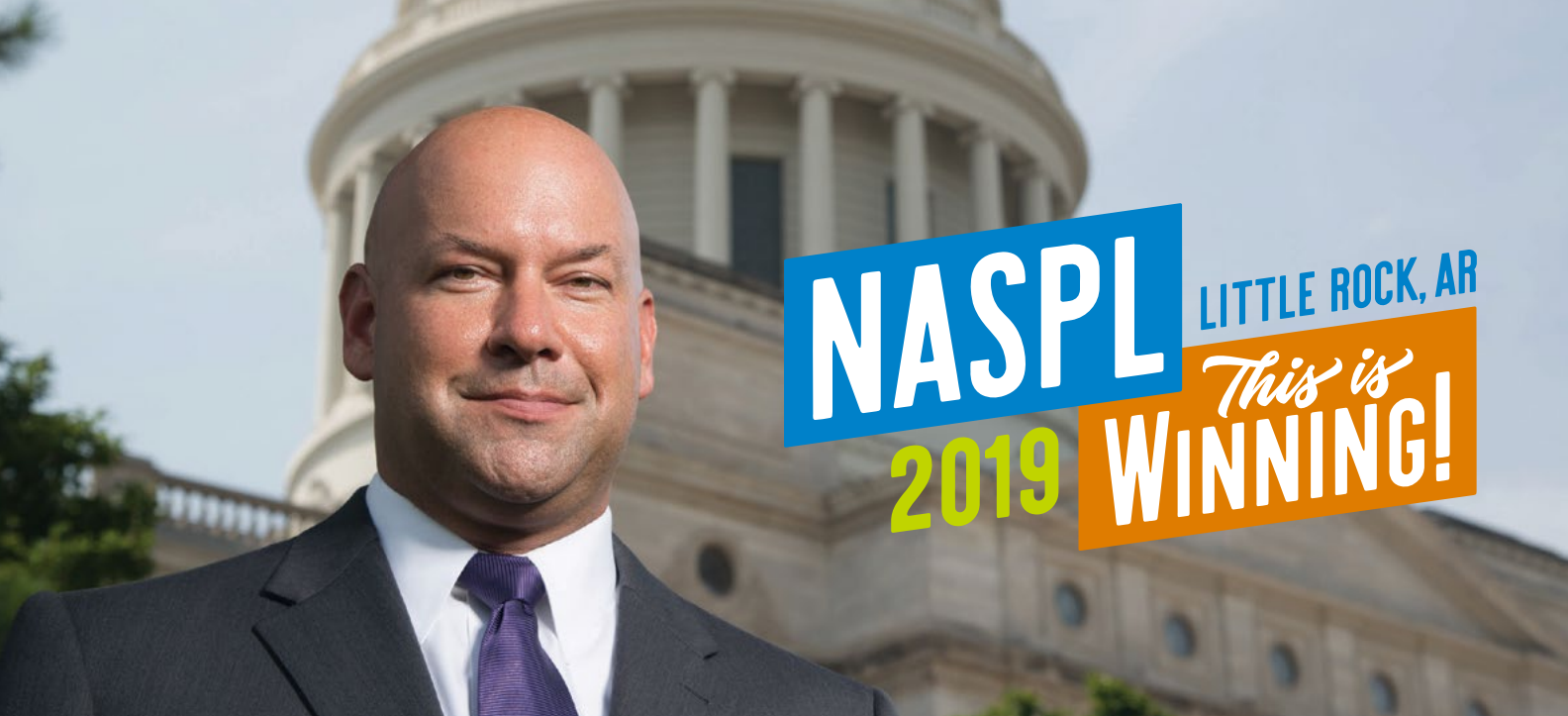
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## American Lotteries Embrace Online Sales



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Dear Lottery Friends,

I would like to extend a personal invitation to you to attend the **2019 NASPL Conference, September 17-19 in Little Rock**. The theme this year is **"This Is Winning,"** and our conference committee is working on an outstanding lineup of speakers and break-out sessions that should educate, motivate and inspire you. Plus, we're planning some fun activities with great food and music.

The conference will be headquartered in downtown Little Rock alongside the Arkansas River in close proximity to the River Market District. The Little Rock Marriott and the Doubletree by Hilton Hotel are offering rooms for a reasonable \$169 a night (plus tax). Both hotels and the Statehouse Convention Center are a short walk or trolley ride to many of our outstanding food and beverage establishments as well as the Clinton Presidential Center.

You will have the opportunity to explore the Clinton Library and its lighted pedestrian bridge on Tuesday night during the all-delegate event. The fascinating permanent and rotating exhibits of the center will grab your attention and talented Arkansas musicians will provide an enjoyable evening of music and dancing while you feast on a delicious blend of local favorites and internationally inspired cuisine..

I suggest you extend your stay and explore all that Little Rock has to offer. The city was named one of **"15 Southern Cities All Food Lovers Should Visit Now"** by *Food and Wine* and *Southern Living* magazines. With world-class attractions, great outdoor activities and unique neighborhoods with incredible restaurants, you are certain to experience a memorable visit to Arkansas' capital city.

**The 2019 NASPL Conference website is live at [naspl19.com](http://naspl19.com).** You can register for the conference and make hotel reservations now through the website. As more details of the conference are confirmed, they will be added to the website.

**I hope to see you in September!**

**Bishop Woosley**  
Director, Arkansas Scholarship Lottery

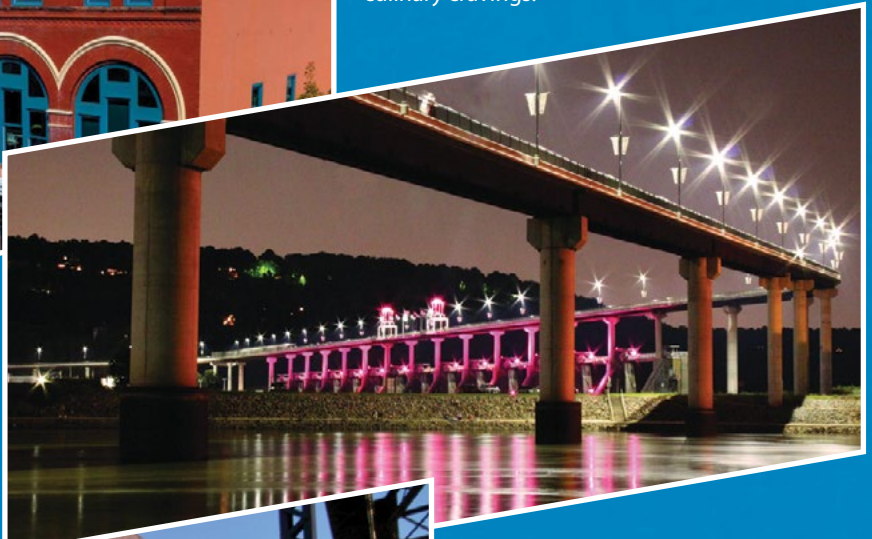
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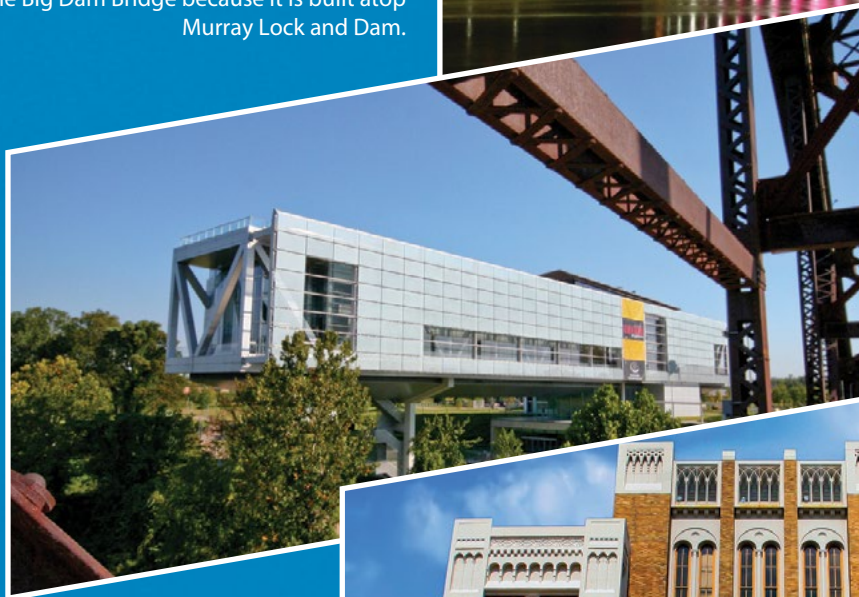
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# FROM THE NASPL PRESIDENT



**S**pring has arrived in Arkansas. In our state, the arrival of Wye Mountain daffodils means it's time for Razorback baseball, horse racing at Oaklawn, and lots of outdoor activities in phenomenal weather. It's the time of year that heralds birth, renewal and new beginnings, so it's probably not a coincidence that it's also the time for the annual NASPL Lottery Leadership Institute Seminar. This leadership program is designed to bring out the very best performance in lottery professionals, not only educating them on how the lottery industry works, but also helping to develop our future lottery leaders. Each year the Arkansas Lottery sends several staff members to the seminar and they always return raving about the experience. If you haven't attended the Lottery Leadership Institute, I urge you to make every effort to do so this year. It is worth the time and effort.

In speaking with the staff at NASPL regarding my first column as NASPL President, they suggested that I might write a little bit about leadership from my own perspective. I have to be honest, even though I am now the President of NASPL and have been Director of the Arkansas Lottery for seven years, I seldom take time to think about my leadership style; I just show up and do it. That said, the discussion caused me to reflect upon the path that has taken me to where I am today.

Like most of you, I have had the good fortune of being influenced by many great people whose qualities I have borrowed or adopted as my career developed. From my parents, teachers and coaches, to mentors who took me under their wing when I began practicing law, and from some incredible people in the lottery industry, I have had my share of leadership examples over the years.

For context, I'll share some personal history. I am a lifelong Arkansan, raised in a small rural town. In my last semester of college, I started doing the math, trying to figure out what a Political Science major with a minor in Geography was going to do for a career. On a whim, I decided to take the law school entrance exam and did well enough to get into law school. After law school, I returned to my home town, opened a law firm and volunteered to serve as the county Deputy Prosecutor. Approaching burnout after eight years of private practice, I was offered a chance to join the Arkansas Attorney General's office and began my next adventure in life. At the AG's office, I volunteered for every job I could. From the



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legislative team, staffing troublesome state agencies, agreeing to help enforce the court order from a historic school funding case to volunteering to help draft the controversial Arkansas Lottery Act – I tried it all.

The Arkansas Scholarship Lottery was officially established in 2009, and I was initially hired as the agency's first Procurement Director. After three months, I took on the dual role of Procurement Director and Chief Legal Counsel. Two years later, the Lottery Director position suddenly became vacant, so I submitted my application and resume. In hindsight, I probably had no business being the Lottery Director, but I knew the opportunity was not likely to come up again. Much to my surprise, I was hired – thus becoming the youngest Director in the lottery industry at the time.

In 2014, I was asked to serve as the MUSL Legal Chair at a time that coincided with the beginning of the Eddie Tipton scandal. In 2016, I ran for NASPL Secretary and was elected. Two years later, here I am.

So why do I tell you these things? There is a point and I hope I make it as I write this piece: Embrace opportunity.

Now, on to what you have been waiting for.... my list of the foundational elements of leadership:

### 1. Show Up

Early on I heard the following quote: "80 percent of success is just showing up." Over time, I have witnessed many people pass on opportunities that could have made all the difference in their careers. Every opportunity I have been given has been a direct result of my volunteering for duties that were above and beyond what I did on a daily basis. Had I not volunteered so much, you would likely be reading a column written by someone else. When an opportunity presents itself, show up.

### 2. Attitude Is Everything

My parents often said, "The problem is not the problem: the problem is your attitude about the problem." They were right. Your attitude about your job, an initiative or a setback will likely determine whether or not you succeed. Very few times in your life will you have a plan go off without a problem arising. One of my all-time favorite quotes comes from the boxer Mike Tyson, who said, "Everyone has a plan until they get punched in the mouth." Truer words have never been spoken. Every task or setback is just an opportunity in disguise. Embrace it.

### 3. Do the Work

The best way to earn the respect of your co-workers is to do the work. In my experience, the most effective leaders are those who have taken on the tough tasks and earned the respect of their staff through being in the trenches and fighting the fights. You can't just show up and expect to be respected. You will only get that respect by doing the work.

### 4. Be Relentless

Another sports quote – Babe Ruth (or Muhammad Ali) once said, "You can't beat someone who won't quit." Never settle for less than you want and always challenge the logic that something can't be done.

### 5. Be Uncomfortable

Nothing great was ever accomplished by someone in their comfort zone. Do something often that scares the crap out of you. Getting out of your comfort zone will likely result in new ideas and a different perspective. Challenging yourself and your beliefs will benefit you as you climb the corporate ladder.

### 6. Do the Right Thing

The most important advice my parents gave me was that I would never regret doing the right thing. In your career, you will be faced with decisions that are tough, and some that may impact you negatively, depending on which choice you make. Do not let your career be defined by making a poor decision

### 7. Have Fun

We are in the fun business. If you are not having fun, you are doing it wrong. I promised myself that if I ever got to write one of these columns, I would sneak in a Townes Van Zandt lyric. This one sums up my journey so far: "Everything is not enough. And nothing is too much to bear. Where you been is good and gone. All you keep is the getting there."

It really is about the journey, folks. Have fun. Stop and smell the roses every now and again. Enjoy it while it happens.

So, there it is. Bishop Woosley Leadership 101. Take what you want, leave the rest. We all have our methods. Look around and watch the lottery directors in action. They all took a different path and all have some pretty fascinating stories on how they got here. You may just find a lesson that you can use some day.



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# Raise the Bar on Sales

Social spaces may not always have the staff to sell lottery, but that doesn't mean they don't have potential players.

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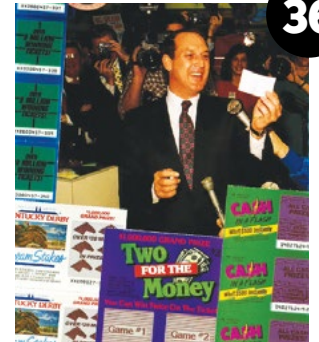
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# A Look Inside The European State Lotteries and Toto Association



As the regional association representing lotteries in North America, NASPL continues to recognize its four sister organizations around the world. In this issue, we welcome an update from EL, which represents state-owned and state-licensed lotteries in Europe.

## The European State Lotteries and Toto Association (EL)

The European Lotteries (EL) is the leading European association for state-owned and state-licensed lotteries. Based in Lausanne and Brussels, EL promotes (and successfully defends) the model of lotteries for the benefit of society, offers a platform to share best-practices and delivers various services to its members.

## Values-Based Approach

EL and its members' identity are defined by core values that are shared by all the members of The European Lotteries. EL believes in the overall benefit of (state-) licensed lotteries for society as a guiding principle to organize and to run a public lottery or other games of chance. EL wants to attract potential players to safe, legal offers in their respective countries. EL takes into account (and are limited by) the individual and societal cost of those legal operations, whether that be lotteries or gambling products. This differentiates EL members clearly from gambling operators whose primary focus is on the benefits for their shareholders.

This leads to three core EL lottery values:

- **RESPONSIBILITY** – EL and its members believe in a high level of consumer protection and responsible gaming and give these priority over other interests. This is a key differentiator of how lotteries and other activities of EL members are operated in comparison to gambling operators or illegal operators. It includes a very clear commitment to maintain corporate social responsibility at the heart of the activities of EL members.
- **SOCIETY/SUSTAINABILITY** – The values are based on the idea that social and public order concerns prevail. This does not preclude profit generation but always acknowledges that lotteries and other activities of EL Members are run in society's best interest. Adhering to individual countries' regulatory frameworks, EL and its members strive to maintain the best balance between social costs and lottery profits.
- **INTEGRITY** – Over and above EU and national laws, EL members truly "walk the talk" and operate strict standards (e.g. EL and WLA Security Standards) to provide secure and fair operations and to manage the risks of fraud and other forms of crime. The sports betting business by EL members is operated living up the highest integrity standards.

## Services EL Offers for Its Members

The aims and objectives of the Association are to advance the collective interests of its members including enhancing their capabilities and know-how. EL offers experience, expertise and best

### Responsibility

- Responsible Gaming Certification
- CSR guidelines

### Society

- Broad stakeholder engagement with beneficiaries and the community at large

### Integrity

- Sports Betting Code of Conduct
- GLMS
- Security Standards (in cooperation with WLA)
- Other integrity and operational standards

practices in the fields of gaming and gambling – especially lotteries – and thereby drives the innovation in this field.

- **PROMOTING MEMBERS' INTERESTS** with institutions like the EU and any other government or intergovernmental institutions based in Europe. Also regarding sports (integrity) associations, people with disabilities and cultural associations.
- **PROVIDING FORUMS FOR EXCHANGE OF EXPERIENCE AND CHANNEL NETWORKING AND LOBBYING ACTIVITIES** – This includes, for example, explaining the framework, architecture and design of a (lottery) role model and its related games, and sharing and inspiring best practices across the entire EL community.
- **SUPPORT AND COOPERATE** – Offers support and cooperation with the various stakeholders in the lotteries and gambling sector, in particular national authorities and organizations involved in studying and preventing illegal offerings, addiction and underage gambling, and also with the charity, sports and public bodies that benefit from the good causes raised by EL members.
- **ESTABLISHING BEST PRACTICE STANDARDS AND COOPERATION FORUMS** – Establishes industry standards and forums, especially in the areas of CSR, security and sports betting integrity, to support the achievement of the integrity and responsibility principles. ■

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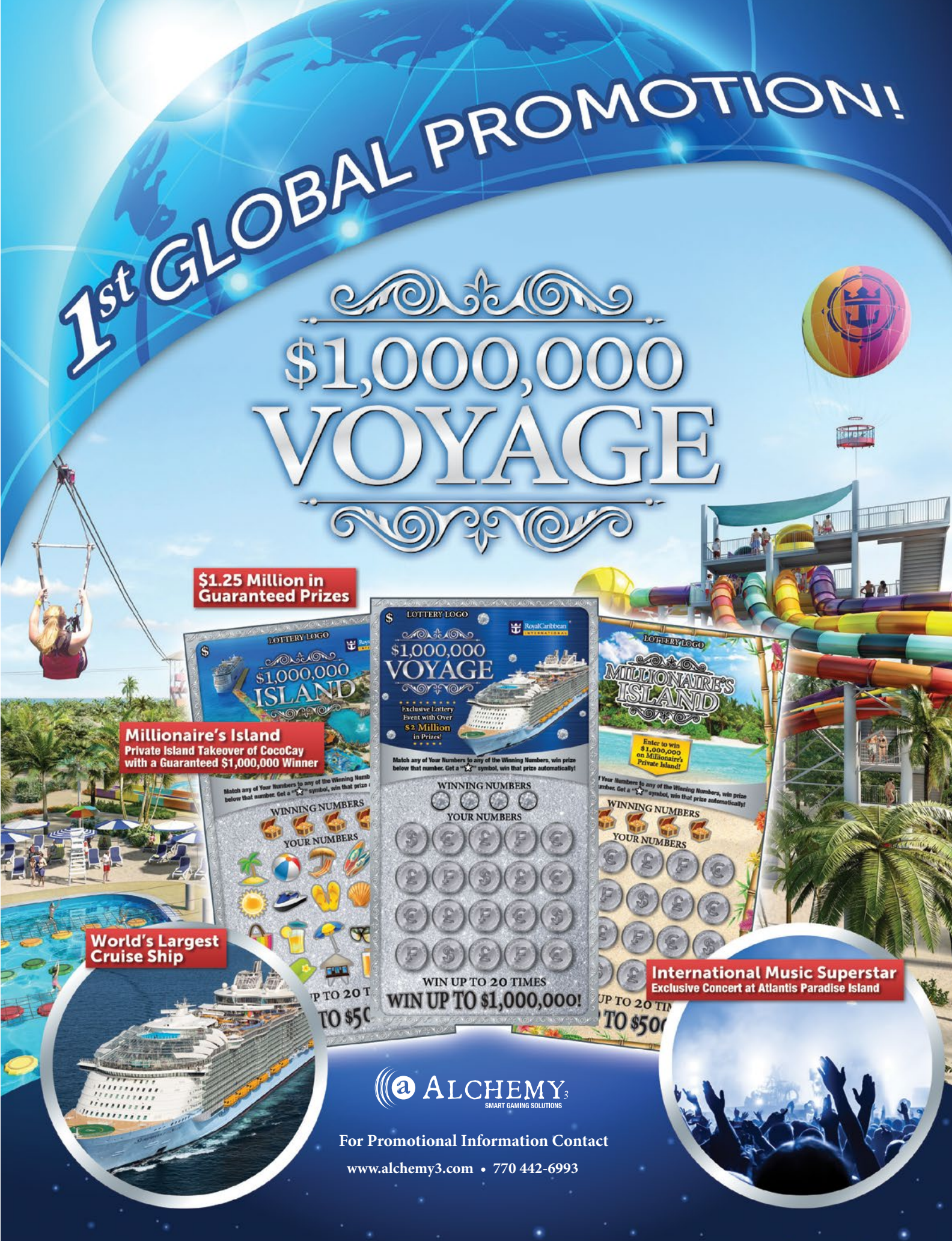
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# Honoring School Heroes in North Carolina

By Van Denton, North Carolina Education Lottery

The North Carolina Education Lottery's new N.C. School Heroes program spotlights the great work of thousands of teachers, educators and school workers across North Carolina and, along the way, helps North Carolinians see how lottery proceeds benefit the state.

Launched on February 18, School Heroes represents NCEL's second major integrated advertising and marketing program designed to raise awareness of where lottery money goes. It builds on the success of the 2017 Proud Moments program, which collected from parents and educators their proudest memories from their school days. The new program recognizes and honors those who help students achieve their dreams with awards of \$10,000 each to ten School Heroes and \$10,000 to each of their schools.

There are three primary goals of the program:

- Raise awareness of the impact that the money raised by the Lottery has in the state.
- Increase positive brand perceptions of the Lottery.
- Celebrate public school employees who do heroic work with our students.

NCEL Executive Director Mark Michalko said the inspiration for School Heroes came from the insight that all types of school employees, including support staff whose positions are funded by the Lottery, can play important roles in the success of students. "Every school has their heroes," said Michalko. "Every day they're helping our students achieve their dreams. We created a way for North Carolinians to say, in a big collective way, thanks for all of what those heroes do."

Both School Heroes and Proud Moments came from a realization that messaging built on numbers of projects funded or dollars raised was not achieving

NCEL's goals. The Lottery needed a more emotional and relevant way to tell its story. Proud Moments highlighted the education dreams of those the Lottery serves. School Heroes spotlights unsung heroes who help make those dreams come true.



The promotion started with a statewide advertising campaign that featured principals, cafeteria workers, teachers and a custodian all getting their school ready to open for the day. The ad closes with a message that reads: "Every day, we raise \$1.8 million for those who stop at nothing to impact everything."

As the ad campaign hit the airwaves, a microsite, ncschoolheroes.com, was established to showcase stories of School Heroes making a difference in their communities. For six weeks, the website allowed people to post a story about

their School Hero and then vote on the ones they felt most deserving. A geo-location feature served up to each visitor information on how money raised by the lottery supports education in the visitor's own community.

Media and social media initiatives helped spread the news about School Heroes. In conjunction with the media campaigns, a grassroots initiative tapped education and civic groups to share School Heroes news via emails, newsletters, school websites and social media channels, and toolkits were provided to make the news easy to share.

Nominations and voting were scheduled to end on March 31, after which an awards panel will review the top 200 vote-getters and select the 10 winners. The promotion then officially closes and NCEL officials will travel across the state to award "Big Checks" to the School Heroes and their schools.

The Lottery chose to use its advertising and marketing funds to support this program, including marketing funds to cover the prizes. Additional marketing, using the stories, videos and images from the heroes and their schools, in media, social media and digital campaigns will increase awareness of NCEL's benefits and its brand.

The reaction to the program has been astounding. With less than two weeks to go until the end of the six-week campaign, more than 5,600 nominations had been received and thousands of people were voting and campaigning for their School Hero every day. The education community has embraced this program like none other in NCEL's history.

"It's important for the mission of the Lottery that North Carolinians can see and understand how lottery money is used," said Michalko. "The School Heroes campaign helps to get that information to the public. Along the way, we get to spotlight the work of a lot of good people in our schools." ■

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# Lotteries Play Important Role in PGAM

By Patricia McQueen



Since 2003, March has been designated as Problem Gambling Awareness Month (PGAM) by the National Council on Problem Gambling (NCPG). The month-long campaign is designed to achieve three goals: to increase public awareness of problem gambling; to increase the availability of prevention, treatment and recovery services; and to encourage healthcare providers to screen clients for problem gambling. It's a grassroots effort that brings together a wide range of stakeholders – public health organizations, advocacy groups and gambling operators – who work collaboratively to let people know that hope and help exist. The theme of the 2019 campaign is “Awareness + Action,” and lotteries, in their role as gambling operators, play a critically important role in spreading the word.

“Lotteries reach so many people and have such a broad public awareness, that their messages are a great way to reach people with gambling problems, even those who don’t play the lottery,” said NCPG Executive Director Keith Whyte. “We really value and appreciate that broad distribution of awareness messages.”

He added that while data from NCPG’s NGAGE national surveys show that lottery play isn’t usually the primary cause of gambling problems, most problem gamblers do also play the lottery or are at least exposed to the games. “That’s a big reason why there is so much value to lottery messaging. Public awareness is one of the things that lotteries do very well; there are some wonderfully talented lottery communications professionals and we really enjoy seeing the innovative ways they come up with to reach people with responsible gambling messages.”

This year’s PGAM is particularly important in the wake of last year’s Supreme Court decision that essentially paved the way for sports betting to expand throughout the country. “We’re in the middle of the largest expansion of gambling in our nation’s history, with almost 30 states looking at bills to legalize

sports betting,” explained Whyte. With the NCAA basketball tournament in March (no coincidence, as PGAM was established in March for that very reason), this is a perfect time to focus on sports gambling. “This is probably the best-supported PGAM that we have had yet.”

## Lottery Efforts

For most lotteries, participation in the campaign is predominantly through the use of social media, posting regularly throughout the month on Facebook and/or Twitter. In fact, part of the toolkit offered by NCPG is a document containing “31 Days of Tweets” so participants don’t even have to compose their own messaging if resources are thin.

Almost a third of lotteries this year placed the PGAM message prominently on their website home pages, either as part of a rotating slide show or as a permanent placement during the month. The Iowa Lottery even placed a PGAM video on its home page. Many lotteries also issue press releases about their participation in the campaign; a sample press release is provided in the NCPG PGAM toolkit.

Lotteries may also do things like add messages to draw tickets, in-store player displays, keno monitors and point of sale materials. Some lotteries place messages on their billboards throughout the month, or donate their ad space on those billboards for use by their local NCPG affiliates or similar groups. Still others offer refresher courses in responsible gambling to their retail partners or at the very least add PGAM messaging in their retailer communications during the month.

“It is gratifying that lotteries have embraced this month long effort to increase awareness of the harms and risks of problem gambling,” said NASPL’s resident responsible gambling expert Lori Rugle. She echoed Whyte in stating that lottery contributions through their media resources are invaluable to increase awareness. “These efforts have consistently led to the highest volume of

problem gambling helpline calls in state after state, and the partnerships between lotteries, problem gambling advocates and stakeholders work to make PGAM more impactful each year.

“This reminds us that collaboration works, improves results and most of all contributes to people getting help to reduce the harm of problem gambling in their individual lives, their families and in all of our communities. Let’s keep the momentum going and build on our PGAM collaborations and efforts throughout the year.” ■



In several states, there is an official proclamation by a governor or legislature, formally declaring March as Problem Gambling Awareness Month. Such proclamations are often used to announce upcoming events or celebrations, or as in this case, to increase public awareness of particular issues. This proclamation from New Jersey Governor Philip D. Murphy is an example of such a declaration.

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## Courtney Pringle-Carver

*Vice President of External Affairs, Atlantic Lottery*

**C**ourtney Pringle-Carver knows how to solve problems and overcome challenges. Recognizing the power of advocacy early on, as a young person she took it upon herself to lobby members of her community to assemble and donate supplies to remove hate speech graffiti from a building in her city's downtown. All these years later, she's still a staunch believer in making the world – at least her corner of it – a better place by meeting challenges head-on. "What I've learned is that with tenacity and resolve, most problems can be solved in increments." In the business of lottery, that often means developing strong partnerships with government shareholders and other stakeholders, which requires consistent and open dialogue, mutual trust, and willingness to collaborate toward a shared purpose.

"Courtney has proven herself to be an adept and successful leader across her broad professional portfolio and her efforts on behalf of her community," said Atlantic Lottery President and Chief Executive Officer Brent Scrimshaw. "At Atlantic Lottery she has mastered the art and science of navigating the complex regulatory relationships with four provincial shareholders, leading the company's proactive communications program, and building a strong and progressive corporate brand. All the while, Courtney is a widely respected community leader supporting a host of charities and has been recognized for that by her country, province and city."

She joined the Lottery in September 2008 after having provided the Corporation with communications and issues management counsel for two years as a consultant. Her recently expanded role as Vice President of External Affairs includes oversight of the teams responsible for shareholder and stakeholder relations, regulatory affairs, information management, privacy, corporate communications, corporate reputation, social media and corporate brand.

Pringle-Carver demonstrates a determination to find solutions to complex issues, a trait which has been beneficial when working closely with the four

provincial governments that make up Atlantic Lottery's shareholders. "I consider myself a knowledge broker. I work with the team here to identify as-of-yet unseen issues and bring them forward to our shareholders, so that they can shape a policy environment that supports their priorities and our business alike." A success on this front was the establishment of an annual "Ministers Summit" where the four Ministers responsible for Atlantic Lottery come together to talk about corporate performance and identify the opportunities and challenges facing the enterprise and, more broadly, the industry.

Her philosophy now also includes laughing – every day. After the sudden loss of her father two years ago, she became determined to really enjoy life, because "there is so much outside of our control but finding humor in the best and worst moments is not." She has applied that to both her personal and professional life, and to her AL team as well. "We get through our hardest days by being slightly irreverent." She's a fan of the Ray Dalio book

"Principles," and summarizes succinctly the principle which most resonates with her: work with people you want to spend your life with.

Her overriding desire to make a difference in her community led her to seek elected office last year in New Brunswick's provincial election. While she was narrowly defeated in that attempt to serve as a Member of the Legislative Assembly, she maintains the experience was one of the most formative of her career. "More and more, the principles that hold true for good business and good government overlap. Transparency, responsiveness and sound fiscal management are the cornerstones. Working for a Crown Corporation, you live that intersect each day."

Outside of her work at the Lottery, Pringle-Carver has chaired fundraisers for the Canadian Cancer Society raising more than \$200,000, as well as the New Brunswick Adoption Foundation, raising more than \$80,000. She has served on numerous other boards and committees, having been an active volunteer for nearly





25 years. In recognition of her commitment to public service, she has received a Canada 150 award and a YWCA Woman of Distinction award for Outstanding Mentorship.

A firm believer in the power of good government, she follows world events closely and is an avid reader, preferring books on history, politics and business. She tries to impart her values to her eight-year-old son, a budding entrepreneur who even at his young age is focused on growing his margins and giving back to others. She considers herself quite lucky to complete the family with her husband, himself an entrepreneur, someone who shares her interest in business and social policy.

Pringle-Carver studied communications at Concordia University and has undertaken executive education programs in risk communication and negotiation through the Harvard School of Public Health and Harvard Law School, respectively. She will complete her Master's in Public Administration through Dalhousie University this year.

#### **What is the most important function of "external affairs" for AL?**

A lot of people looking in on our industry probably think a lottery's sole focus is generating revenue. That is critically

important. In the case of provincial and state lotteries, it's a revenue stream that governments use to fund vital programs and services. But the space in which we operate can be complex, with a range of stakeholders that require attention. That's where external affairs comes in.

External affairs incorporates the areas of our operations central to allowing Atlantic Lottery to deliver its mandate. Essentially, ours is the segment of the organization that ensures Atlantic Canadians remain confident in Atlantic Lottery's transparency and commitment to corporate responsibility – recognizing that it is through these markers that Atlantic Lottery will maintain its social license and strengthen its competitive position.

#### **What differences are there among your four provinces that result in practical or operational considerations in each?**

The four Atlantic Provinces share more in common than they have in differences, which is why the region and its people are so closely connected. That said, Atlantic Lottery exists in a space where, at any given time, the operational landscape can shift as a result of what is happening in the provinces. This year, for instance, there are expected to be elections in two of the provinces and there is a new administration

in another. Some economies are expected to realize higher economic growth than others. Demographics are changing. These are all factors that guide policy and decision-making in the provinces, which ultimately filters down to shape our practices.

There is, admittedly, a challenge in working within different regulatory frameworks. We want to ensure operations can challenge a growing field of unregulated competition, but recognize our products and initiatives have to meet where the four sets of rules intersect. While this often precludes a "one size fits all" approach, we enjoy positive, collaborative relationships with our shareholder provinces because they know we actively consider, and respect, those unique requirements in our every decision.

#### **What are the biggest challenges for AL from your perspective?**

We know from working in this highly competitive, rapidly evolving industry that decision making must be informed in its development but agile in its approach. It's the approach that has sometimes tested us, since plans must first maneuver four separate regulatory frameworks. I would say though, that we have really refined our processes as an organization to be better

able to meet that challenge.

People are increasingly online, so offering gaming products in that space is optimal. At this point, however, Atlantic Canadians can only find such options on unregulated offshore sites. It's something we watch closely, because the unregulated providers are not mandated to return 100 percent of the profit back to our region or offer the same level of player protection. Being granted a mandate to move into this realm would allow us to shift the existing offshore player base over to our responsible and regulated environment – and return that profit to the four provincial governments.

All in all, we face many of the challenges you would expect of a regulated gaming provider. We must continue to demonstrate we are being fiscally and socially responsible in all our decisions. In Atlantic Lottery's case, that includes support of festivals, exhibitions and events that celebrate the unique culture within each community and region. When stakeholders and shareholders alike see Atlantic Lottery as a visible contributor to causes and events that matter to the region, our corporate reputation is solidified, which remains critical to our ability to succeed.

**AL is often on the cutting edge of development in a number of areas. Lotteries are often followers, not leaders, so how does AL maintain that pride of innovation?**

I think we started with a shift in our corporate culture. Atlantic Lottery wanted to be an innovative company, not just



*Courtney and her team*

a company with an innovation team, although we have a very talented group that spearheads that effort. That meant going to employees to collaborate on a set of operating principles that encourage them, across all operations, to bring forward any ideas they had for improving our processes. This isn't just an approach for new products, it's for anything from customer care to supply chain management

to finance. We firmly believe that even by considering if there is a way of "thinking differently," we lay the groundwork.

**What do you enjoy most about your job? Is there anything you wish could be done differently if conditions permitted?**

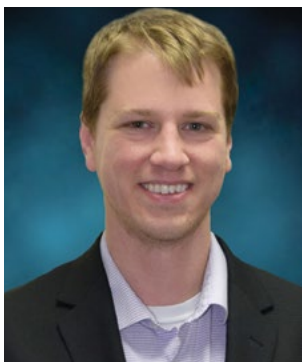
Not a day goes by where I don't reflect on how fortunate I am to be in a role where I feel challenged and fulfilled every day. I know people are supposed to say that in this type of discussion, but it could not be more true. Each day brings something new, and I thrive on solving problems. I have a strong team who are determined, smart and never take themselves too seriously. I learn from them every day.

I've been with Atlantic Lottery for a decade now. I truly am proud of the contribution we make to Atlantic Canada. That includes the direct return to the provinces to fund important programs and services, revenue to businesses who offer our products, the hundreds of employees we employ directly, and our significant contribution to charitable causes and festivals and events that matter to our region.

I would say in my ideal world, we would be able to operate on a level playing field through direct competition with the offshore competition, but in the regulated and responsible way we currently operate. I believe we will get there. ■



# Instant Success with Player Research



By Wade LaRoche,  
Public Affairs Manager,  
South Dakota Lottery

**T**he South Dakota Lottery recently enjoyed a record-setting year in instant ticket sales, and the new pinnacle was no accident.

In fiscal year 2018, South Dakota's instant ticket sales reached an unprecedented \$30,181,754, which was a 15.8 percent increase compared to the previous year. This mark has proven to be no fluke, as the Lottery is currently ahead of fiscal year 2018's pace by 11.67 percent.

In order to achieve this success, the South Dakota Lottery received an assist from its most valued stakeholders—the players. The Lottery partnered with its ad agency, Lawrence & Schiller, to survey players across the state in order to gauge their perception of instant tickets and the South Dakota Lottery as a whole.

The Lottery and Lawrence & Schiller initially

partnered for general opinions from players through its brand perception survey. The goal of the research was to determine how players feel about lottery and how that perception could become more positive.

The research began in 2015, and led to the Lottery's "Good Fun" campaign, which highlighted how Lottery revenues support important state initiatives and beneficiaries, including education. The study circled back in 2017 with 1,075 South Dakotans voicing their opinions.

Those opinions were generally positive, as 65 percent had a favorable perception of the Lottery, while just 12 percent were negative. The 65 percent rate was an increase from 2015's 37 percent tally. Perhaps most importantly, 2015's 45 percent neutral perception figure was decreased to just 21 percent in 2017—with

# Lottery doesn't always make it on the shopping list



Nearly half of lottery purchases are unplanned, which makes being seen critical to being top of mind. Our integration with big box retailers and 91% of grocery make us the gateway to new players. Our access to high-traffic areas like checklane and gift card racks allow you to connect better with your players and increase sales to infrequent and casual players.



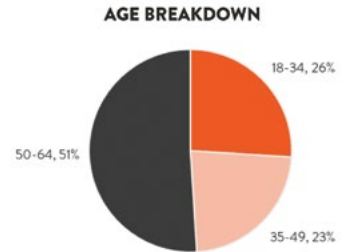
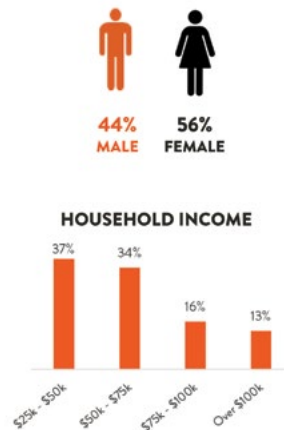
many of those respondents swaying to a favorable opinion.

We believe the Good Fun campaign had a dramatic effect on our improved perception. In fact, 69 percent of those who had a favorable opinion of the Lottery recalled seeing a Good Fun advertisement.

In addition to general perceptions of the Lottery, the study also touched on specifics such as advertising, the South Dakota Lottery's Players Club, and more.

The brand perception survey was just a part of an effective partnership with our players, as we also surveyed them specifically on scratch tickets. With the aid of Lawrence & Schiller, the Lottery gained

## DEMOGRAPHICS



valuable opinions through six qualitative focus groups throughout the state. These focus groups featured a mix of Players Club members and non-Players Club members, consisting of about 20 participants in each group. The sessions also included representation from various age and income levels to ensure that all of our players were represented.

Players provided invaluable input during the sessions, as they specified how

they learn about new tickets, what will prompt them to purchase a new ticket, and why they buy scratch tickets in general. An example of our findings was that the first impression of the ticket design and ability to win are key factors for players when they decide to buy a new ticket.

We also gave players a chance to provide feedback on new ticket options, as we provided mockups of new tickets. These potential tickets showcased new features such as different sizes of tickets, new play styles, graphics and more.

For example, when shown a ticket with larger dimensions, many players noted a positive first impression. One player noted, "I'd be kind of intrigued by it... I'd be like, 'Whoa I've never seen a scratch ticket that big, I should buy that.'" However, once players had the opportunity to play the ticket, they said that they likely wouldn't purchase it again because of how boring they thought it was. The play experience was a major factor in this. Another example is a ticket that had a bonus chance to win on the back of it. Players liked that extra chance, and were also intrigued with the \$5 price point.

In addition to the focus groups, players provided input through online and mail-in surveys in order to gather as much feedback as possible. The brand perception study even included follow-up phone calls to gather more specific information.

### Implementing Findings

Thanks to the valuable opinions of its players, the South Dakota Lottery aimed to provide an updated look to its instant ticket lineup through its Fresh Friday initiative.

Fresh Fridays occurred the first Friday

of each month throughout the fiscal year, with the end result being the introduction of 28 new instant tickets. These new tickets used our players' feedback to incorporate new play styles, unique ticket layouts and more – all conformed to the prize and price ranges that they prefer.

Once Fresh Fridays began, our players didn't have to search far for information on these new games. Retailers throughout the state received new point of sale merchandise in order to showcase the new games. Players were also able to find information about their new opportunities to win by simply viewing their Facebook and Twitter timelines.

The South Dakota Lottery also unveiled a new resource to get the word out about new games. With the launch of its mobile app, the Lottery had a new way to engage its players, providing information on lotto jackpots, promotions, new games and more.

For our instant ticket players, the mobile app provides the convenience of a ticket scanner to quickly see if they had a winning ticket. If their ticket isn't a winner, players can also enter their non-winning tickets into our Players Club's second chance drawing with just the tap of a button. Certain tickets also added a new element to the app, as exciting opportunities such as interactive companion games have been featured.

With improved technology and the continued assistance from our players, the South Dakota Lottery hopes its recent success is just the beginning. We will continue to test the waters on new play styles with our players, while the continued evolution of our app will give our players new ways to win and enjoy "Good Fun." ■

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# LORI RUGLE INTERVIEW



NASPL's Responsible Gambling Specialist Lori Rugle sat down with *Insights* Contributor Mackenzie Whitacre to discuss the benefits and limitations of voluntary self-exclusion programs, and what the lottery industry can do to improve these programs.

## What are voluntary self-exclusion (VSE) programs?

VSE programs have evolved from informal banning practices used by casinos to exclude problematic or disruptive customers. Currently VSE programs have become among the most common forms of harm reduction used by the gambling industry. While they are most common in casinos and among online gambling providers, they are beginning to be employed by traditional lotteries as well.

Self-exclusion agreements have historically been industry driven. However, an increasing number of jurisdictions worldwide are or have included requirements in legislation and/or regulations for the provision of VSE programs. These actions are based on increasing social and community concern about problem gambling, and gambling availability in general. (S. M. Gainsbury's 2014 "Review of self-exclusion from gambling venues as an intervention for problem gambling.")

VSE programs are designed to limit access to gambling opportunities and to stop or limit participation. Self-exclusion agreements place responsibility on the individual for compliance. Participants risk removal from venues and/or denial of services for "breaches" and can possibly be legally charged with trespass. Consequences for violating exclusion agreements may also include forfeiture of any winnings, fines, community service and/or the need to appear in court.

Most VSE programs provide the individual with a range of timeframes for exclusion, from six months to irrevocable lifetime bans.

## Why are self-exclusion programs an important responsible gaming strategy?

One of the key features of any addictive behavior, including problem gambling, is loss of control. This means that some individuals – for a variety of risk factors including neuro-biological, genetic, learned, and environmental – have difficulty staying within pre-set limits regarding their gambling behavior. While self-exclusion programs are not meant to be an absolutely fail-safe way to keep someone from gambling, they can help strengthen an individual's personal commitment to abstain from gambling as well as provide an external incentive for not gambling.

## What evidence is there that VSE programs are effective?

Despite the fact that VSE programs have been utilized worldwide, there has been only limited research and evaluation of their effectiveness (perhaps as a result of the lack of funding allocated for this purpose). However, while the research is not extensive, it does consistently report that VSE programs have significant benefits for those who enroll.

The benefits that have been reported include:

- Decreases in financial expenditures;
- Improved financial circumstances;
- Decreases in gambling frequency and time spent gambling;
- Reduction in problem gambling severity and negative consequences of gambling; and
- Reduction in psychological problems, including depression and anxiety.

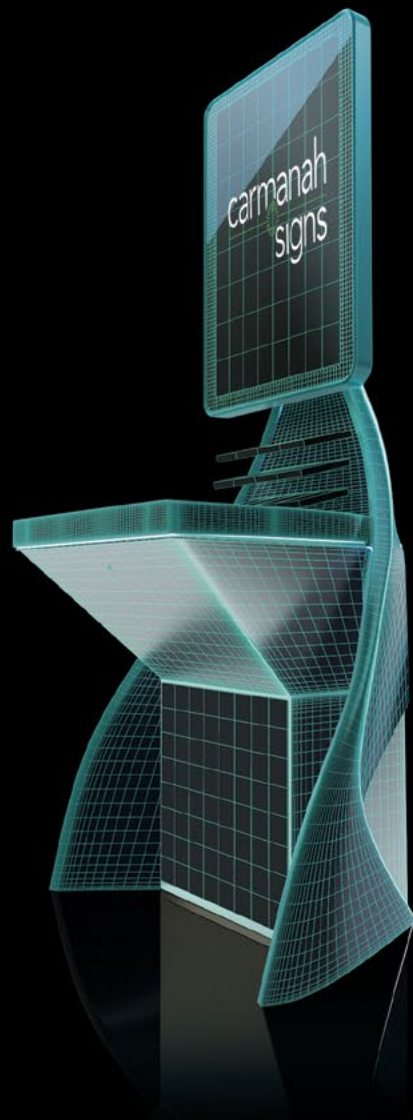
## What are the limitations of VSE programs?

As can be seen with the data obtained from a recent NASPL survey, which is consistent with worldwide reports, the majority of problem gamblers do not sign up for these programs. In many jurisdictions, quite low numbers are utilizing these programs. This speaks to the need to understand and remove barriers to enrolling in VSE programs.

Additionally, while the limited research indicates positive impacts of VSE programs, there is no clear indication of the magnitude of the causal link between VSE programs and benefits to enrollees. For example, a person's willingness to acknowledge and take action to address their gambling problem is likely to precede their enrollment in a VSE program. It may be this willingness and awareness that contributes to improved outcomes. There is certainly a need for further evaluation and research in this area. However, it should be stated that if VSE programs serve to reinforce a person's commitment to change their gambling behaviors and reduce gambling related harms, this in and of itself is an important program feature.

VSE programs are at least partially dependent on the ability of gambling operators and retailers to accurately identify program





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...A PERSON'S WILLINGNESS TO ACKNOWLEDGE AND TAKE ACTION TO ADDRESS THEIR GAMBLING PROBLEM IS LIKELY TO PRECEDE THEIR ENROLLMENT IN A VSE PROGRAM.

participants. Actual practice as well as the research find that this a limiting aspect of effectiveness of VSE programs. Most programs primarily detect individuals in violation of their VSE agreement when they have won an amount of money that requires showing personal identification that is compared to a list of VSE enrollees. Evaluations of VSE programs, including self-reports of enrollees, indicate that violations of the VSE agreement are common and largely go undetected. This reality often runs counter to expectations of self-excluded customers, family members, counselors, the media and regulatory bodies.

Another limitation of VSE programs is the extent to which they fail to cover gambling available at venues not included in the VSE agreement. Research (and practice) has shown that it is common for VSE participants to gamble at venues and/or participate in forms of gambling to which the VSE agreement does not apply.

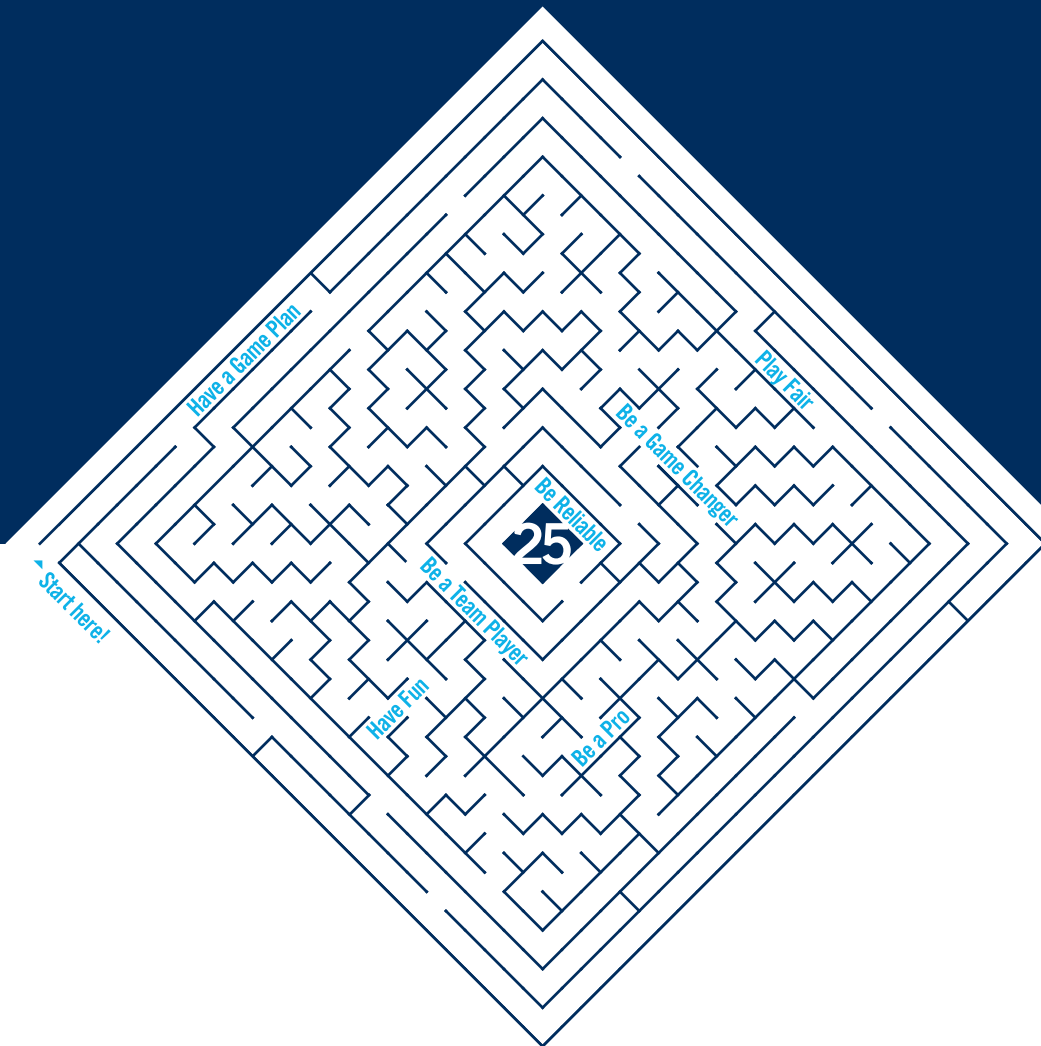
#### What recommendations would you make for VSE programs?

To any groups looking to implement or improve a VSE program, I would suggest:

1. Increase public awareness through promotion and advertising to increase utilization. Clear, accessible information should be available at gambling venues and points of sale of gambling products, in the general community, at health and behavioral health care agencies, legal offices, financial institutions and social service agencies.
2. Allow for enrollment in VSE programs at a wide range of locations, including gambling locations, counseling offices and online. Specifically, options for enrolling outside of traditional gambling venues need to be made available; offer enrollment at lottery administrative offices, other government offices and health care agencies, for example. Agreements should be able to be enacted by treatment providers, social service professionals and other suitable financial and legal professionals. Online options using webcams for photo identification should be available as well.
3. Destigmatize the VSE process. The enrollment process should be conducted in a respectful manner, in a private setting. If done at a gambling location, it should be as welcoming as signing up for a casino host.
4. Keep it simple. The process should be relatively quick and easy. The language of the agreement should be clear without a lot of technical or legal jargon.
5. Programs must offer a range of time periods for exclusion. Some current research specific to online forms of gambling suggests that even relatively brief (one week) timeout periods can have a beneficial impact. However, for land-based forms of gambling a minimum of six months has generally been suggested.
6. There should be "one stop shopping;" the ability to self-exclude from any and/or all forms of gambling available in a jurisdiction should be available at every location where an individual can enroll in a VSE program. At one time, in one place, an individual should be able to exclude from every casino and/or every form of gambling which he or she chooses.
7. VSE participants should be removed from all gambling operator mailing lists and should not receive incentives during their self-exclusion period.
8. Resources for additional help in controlling or stopping gambling behaviors should be provided at time of enrollment
9. Operators should take active steps to identify and remove self-excluded individuals. Clearly, this is easier done at some venues (casinos) than others (lottery retailers).
10. Operators should have an effective training program for all staff and enhanced training for staff involved in administering or enforcing the VSE program.
11. A reinstatement process should occur before self-excluded individuals are permitted to re-engage in gambling activities and re-enter venues.
12. VSE programs should be monitored and evaluated to ensure that programs are effective and have no unintended harmful consequences, and are in compliance with regulations and/or required procedures.

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## NASPL VSE Survey

Twenty-five lotteries responded to a recent NASPL survey requesting information on lottery self-exclusion programs. While this was just an informal survey conducted in response to one of our members asking for guidance on this issue, some interesting information was shared. Of the 25 lotteries responding, 12 reported that they have no lottery SEP, two reported that they have an SEP for venues with video lottery terminals only, and 11 reported SEPs for online or traditional lottery products. Of those 11, based on the information we received, most (seven) include only online and mobile forms of lottery play in their SEP, and a lonely four include traditional lottery games through prize redemption processes.

For those lotteries that include traditional lottery games in their SEP, the exclusion is generally stated in terms of a prohibition from receiving any payment of prizes (generally over the amount required for tax reporting) at lottery prize centers or regional offices. This wording reflects the reality of the challenge of enforcing any broader exclusion at retail outlets. Other features of lottery SEPs include removal from any lists to receive promotional and advertising materials, removal from loyalty programs, closing of online/mobile accounts, and a ban from purchasing lottery products online.

Lotteries offer a range of times for exclusion, from one week to lifetime. Only one lottery offers only a lifetime ban. One interesting piece of data is that the lottery with the broadest range of exclusion periods (one week; one, three or six months; one or two years; or lifetime) reported the largest number of participants during the past year, at 2,699. Indeed, this level of participation far exceeds that of any other lottery SEP program that was reported in this survey.

Findings and recommendations for lottery VSE programs include:

- The challenge of dealing with not being able to enforce self-exclusion contracts at the lottery's range of retail outlets is most generally managed by language that states the exclusion is from receiving prizes at centralized locations, rather than stating that the person is excluding from purchasing lottery tickets at retail outlets.
- A starting point for lotteries to initiate a VSE program is often with online and mobile forms of lottery play, which can be more practically monitored than retail locations.
- Survey responses are consistent with research data that suggests that short periods of exclusion, such as one week or one month, can be helpful and may certainly decrease obstacles to engagement with this responsible gambling tool.
- Having a common process for self-exclusion for both lottery and casino gambling is strongly recommended to remove barriers and make this a one-stop process.
- Remove language from VSE enrollment forms that requires individuals to state or acknowledge that they are a problem gambler. Individuals should be able to enroll without having to endorse any potentially stigmatizing label.
- Assure that advertising and promotion of VSE programs is prominent at all lottery locations, on all websites, and part of enrollment in online player programs; make sure the information is readily available and easy to understand.
- Allow for enrollment at a variety of in-person and online locations, including through helplines and treatment providers.

*-Lori Rugle*



VSE PROGRAMS SHOULD BE CONSIDERED A HELPFUL OFFERING EVEN IF IT IS ONE THAT HAS LIMITATIONS.

### What unique challenges do lotteries face and how they can improve their programs?

Lotteries, first of all – particularly as opposed to non-state operated casinos – often have legislative or regulatory restrictions on how their funding can be spent and perhaps even the types of RG activities in which they can engage.

Many lotteries have a range of gambling activities that they operate, including video lottery terminals (VLTs), online forms of lottery play, keno and traditional lottery games. It is certainly easier to implement VSE programs with some of these forms of gambling than others.

Traditional lottery games offered in retail venues like convenience stores or gas stations create a particular challenge in terms of detecting those who may violate their VSE agreement and training staff regarding VSE policies and procedures. In more restricted settings, such as casino environments, there are often security staff available to intervene if someone has violated their VSE agreement, and these specialized staff can be specifically trained in such interventions. However, with the rapid staff turnover of convenience stores it would not be possible to maintain staff who are trained to address this issue. The only realistic way that those engaging in traditional lottery games might be detected in violation of their VSE agreement would be if they need to go to a centralized administrative office to collect winnings. This detection limitation often contributes both to lotteries being reluctant to include their traditional games in any VSE process and for individuals to sign up for VSE for traditional lottery.

This does not mean that it isn't worth the effort for traditional lottery games to be included in VSE programs. Rather, VSE programs should be considered a helpful offering even if it is one that has limitations. ■

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# A NEW PERSPECTIVE ON LOTTERY GAMES

This perspective may be “new” in the sense of “newcomer.” I hope it is useful to those who are overly familiar with the games, as well as those new to the lottery industry.

**STEPHEN WADE, PRINCIPAL, LOTTERY MANAGEMENT CONSULTING, LLC.**



**O**ur trades and professions have specialized language. Words and ways of speaking are acquired along with experience in the trade; fluency in their use is part of (and can be mistaken for) proficiency. Sometimes, the specialized usage may be adopted in the culture at large, as a figure of speech. Our language shows the influence (however transient) of our trades.

Consider the expression “the project developed a head of steam.” This construction clearly evokes the early industrial revolution, a time before the adoption of the internal combustion engine, when boiling water to make superheated steam was a precondition to big movement. I speculate that few contemporary users of the phrase appreciate this, and instead using it to convey a notion of momentum – a property of things that are already moving. The “instant on” property of our contemporary systems makes waiting for a head of steam unreliable.

Just as “head of steam” dates to decades of the late 19th century, when steam power moved most transport, the language of the lottery trade clearly originates in one decade of the twentieth century, namely, the 1980s. At that time, “online” and “instant” unambiguously described the whole universe of lottery games. The terms persist in our lottery usage and documentation in their 1980s senses, while online at least has come to mean something completely different. This can be a cause of confusion, especially to those new to the industry or empowered

to regulate it. Further, I suggest that using these terms may reflect an unexamined attitude toward what they signify. My purpose here is to review, in two brief articles, the range of lottery games now available, how they have developed along with popular information technology, and where they might be headed in the near future.

## ONLINE IN THE 1980S

I distinctly remember making the transition from typewriter to word processor around 1980. Because I was a Ph.D. candidate, I had the privilege of using a teletype (the dumbest of dumb terminals) to communicate from my lab in Indianapolis to Indiana University’s mainframe computer in Bloomington, where the word processing software resided. I was such a terrible typist that this was a big advantage for me, except when a thunderstorm obliged the computing center to shut down all remote communications. Being online in 1980 meant being connected, by means of a terminal, a modem, a telephone and some wires, to a central computer where all the information and computing power for the whole university came together.

By 1990, the picture was different. My small private lab had its own microcomputers, each sufficient for and dedicated to our needs. I still used a modem and telephone line to connect to big remote resources, like the Library of Congress. Peer-to-peer networking among dispersed, independent microcomputers, and using these for communication and

commerce, did not become a “thing” until the mid-1990s. Throughout the 1980s, being online meant being among the “many” in a many-to-one system, and communicating with that central “one” according to its own conventions and forms.

## THE ONLINE LOTTERY

The signature game of the 20th century lottery was Lotto. In its classic form, Lotto (6/49) offers very long odds (about 1 in 13 million) at a very big prize (\$1 million or more). Only lottery organizations that could muster a large dollar volume of play could afford to risk paying the big prize, so being able to offer the game successfully depended on selling tickets at a certain scale. It was partly on this basis that state lotteries were created as monopolies.

The arrival of commercial computing in the last quarter of the century made it potentially practical to sell and administer Lotto over a big geographic area. This was an opportunity (and a challenge) that arrived at roughly the same time as the readiness of state legislatures to consider lotteries as sources of funding.



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As North American lotteries were established in the 1980s, the central “one” of a state lottery was the resource that kept track of all the wagers made in a big game like Lotto. The “many” were the lottery terminals, found where Lotto tickets were sold. Only by transacting with the central resource through one of these specialized terminals could a ticket for the Lotto game be issued. Playing the Lotto game thus depended on finding one of these terminals that was connected to the central computer.

Although the traditional Numbers game (1/10, 3x) was tenable on a smaller scale than Lotto, it was also transacted through these terminals. The fundamental business system priority of the 1980s lottery was administration of Lotto and Numbers games online.

Just as tree sap traps foraging insects, business-requirements documents capture issues of the moment. “Online games” became the name for the category of games that were to be implemented on the central system. And just as tree sap fossilizes to amber, preserving ancient insects, business-requirements documents, passed from one generation to another, preserve old nomenclature. Thus we find ourselves using the term online games, in the sense that was current four decades ago.

The online games have other distinguishing features that could be used to name the category. Most significantly, the outcome of every wager is determined by a drawing – that is, by the act of the lottery choosing symbols from a defined set, in a defined way. This continues unchanged, even while the meaning of online changes. A better name for this important category is draw games.

## THE NOT-ONLINE LOTTERY

What lottery games could be sold and played in the 1980s, even if the central system was unavailable? Games that do not depend on a drawing. How can we tell whether a ticket of this game is a winner, if there is no drawing? The ticket is a manufactured product that is determined to be a winner or not, when it is created. The value of the ticket is concealed from all who handle it. A player can reveal the value at any time after it is purchased.

The most salient feature of this kind of game is the fact that every ticket already has its final value when it is created. Winning or losing is just a matter of buying a winning or losing item, from among many that look the same. Another way to look at this key feature is to say that since the value is already predetermined, that value can be revealed instantly whenever the purchaser gets control of the ticket. The instant games category is complementary to draw games; the term instant presents predetermination as a user benefit.

I will discuss instant games in another

article. What follows here deals with draw games, and the way evolving information technology affects the practice of selling draw games, particularly with regard to security, integrity and sociality.

## SECURITY

The lottery ticket, printed on paper, is always proof of a transaction. Sometimes it is a bearer instrument worth money. Winning tickets can be worth enough money to motivate counterfeiters. Consequently, lottery systems have developed features to defeat counterfeiters.

Among the most basic anti-counterfeiting measures, lotteries have required that tickets be printed on special lottery-issued paper, by special lottery-issued printers.

Having all wagers registered and uniquely identified on a central computing system was a big security benefit delivered in the 1980s. This made it (in principle) impossible for a “winning” ticket to be constructed that did not correspond to a wager duly registered, before the drawing, in the system. The opportunity for counterfeiting was thus reduced to producing a fake ticket with all the features of a genuine ticket. Among these features was a unique identifier assigned to the wager by the central system, and printed in legible form on the ticket issued to the player. To guard against a fake ticket that duplicated all the information on the genuine ticket, lotteries relied on the security provided by the special-issue paper and printer.

For a retailer, the presence of a special lottery printer is evidence of a level of trust from the lottery. However, the benefit of this endorsement is weighed against the inconvenience of having special-purpose hardware and supplies at the point of sale. As the point of sale has become a focus of efforts to improve the efficiency of retail operation, the special lottery requirements have been regarded as more of a burden. Consequently, lotteries have re-examined their reliance on special hardware and supplies. Only recently, authorities have agreed that security against counterfeiting can be maintained without relying on special-issue paper and single-purpose printers.

As more lotteries adopt internet-based transactions (iLottery), the digital record becomes the definitive proof of the transaction. The physical ticket may be eliminated altogether. However, the lack of a physical bearer instrument may create new issues regarding ownership of a winning wager. Account-based wagering may rub hard against the custom of anonymous lottery play. To the degree that players like anonymity, there may be demand to retain the old paper tickets, or to provide digital solutions that preserve anonymity.



# 2019 EVENTS



## D.C. Conference

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WASHINGTON, D.C.



## Lottery INNOVATION Exchange

June 25-27, 2019

MONTRÉAL, QUÉBEC



## Austin Conference

November 18-21, 2019

AUSTIN, TEXAS



# GAMES THAT CAN DRAW PEOPLE TOGETHER INVOKE COMPLEX SOCIAL DYNAMICS (INCLUDING PEER EXPECTATIONS, AND WHAT IS CURRENTLY CALLED FEAR OF MISSING OUT).

Also, to the degree that players enjoy the physical reality of paper tickets and paper money, the old-school printed ticket works very well. And doesn't the willingness of our current players to transact with us exclusively in cash suggest that they do like handling these things?

## INTEGRITY

Lotteries need the confidence of players that the tickets they buy all have the same likelihood to win, however small that likelihood may be. Draw games invite the player to choose any combination of symbols allowed within the rules of the game.

The lottery drawing that determines outcomes is in principle a public event. The fact that every one of a multitude of players witnesses the same draw outcome supports public confidence. If players believe that the lottery draw conforms to the rules of the game, they have every reason to accept the outcome.

Measures taken to thwart any potential bias, such as weighing little balls that represent each number, contribute to a view-worthy spectacle. Lottery drawings once drew large viewing audiences on television. Viewer taste has changed, however, and in the 21st century most lottery drawings are done by lottery personnel using random number generators, rather than ball sets, and witnessed by contracted auditors rather than by a television audience.

The reliance on software and live auditors to ensure integrity of lottery drawings has been thwarted by corrupt insiders. Following the 2016 conviction of Eddie Tipton, formerly Director of Security for the Multi-State Lottery Association, for multiple felonies, lotteries have examined their practices, and in some cases changed their procedures. There has not been a general movement to revert to physical ball drawings. Rather, lotteries aim to increase preventative measures around drawing software, and improve the auditability of the process to detect irregularities.

## SOCIALITY

Although security and integrity are often discussed, the sociality of draw games may be an unfamiliar concept. By sociality, I mean the capacity of a game to draw people together. Games that can draw people together invoke complex social dynamics (including peer expectations, and what is currently called Fear of Missing Out). These social dynamics support continued play, and are consequently good for lottery business.

When draw games were first introduced, they had high sociality – large numbers of people tuned in to watch the spectacle of the live drawings on television. The same games now have low sociality. What has been lost is more than entertainment value – one person can be entertained, or not. What has been lost includes the shared experience – the awareness that all around the state (or country), people were seeing the same spectacle in the same instant, and so in some way participating in it. This mass participation (even as a passive viewer) was once shared with televised sports. Spectator sports continue to thrive on sociality, inspiring countless conversations every week, based on the assumption that we have all viewed the same spectacle. But contemporary lottery does not make good television.

In the 21st century, though, sociality does not depend on broadcast television. Lottery games may be able to recover sociality, if they can draw people together where they spend their time – namely, online in the modern sense. In the old-school lottery game, the lottery drawing was a “one” spectacle viewed by the “many” – the players – each of whom, generally, was playing independently of the others.

Is it possible to structure new-school lottery games that invite cooperative or competitive play? I believe that this is an area of great promise.

Consider how Jackpocket, a kind of lottery concierge or courier service, is leveraging modern communications standards to enable pooled play of old-school draw games on a massive scale. Once subscribed to the service, players can effortlessly join pools administered by Jackpocket and comprising thousands of wagers. This could support a sense of cooperative play. It could enable instant reporting of success at the pool level, instead of just at the individual wager level. And if there are multiple pools, these are potentially competitors. Cooperation and competition on a grand scale could draw players together, even for a last-century lotto game.

If a concierge service can accomplish this, it may pay lotteries to think more deeply about how a game could be built to thrive on sociality in the current century. Building opportunities for cooperation and competition into the structure of the game is key.

## SUMMARY

Draw games are live performances, where the lottery has the opportunity to build trust by following its own rules. This live aspect distinguishes draw games from instant games. The lottery drawing is both a point of vulnerability (with regard to integrity) and an opportunity to build sociality. Lotteries could make draw game transactions much more convenient by fitting in with changing practices at retail. Still, players may appreciate having a physical ticket to symbolize their stake in the lottery's next drawing. ■

## LOTTERIES COULD MAKE DRAW GAME TRANSACTIONS MUCH MORE CONVENIENT BY FITTING IN WITH CHANGING PRACTICES AT RETAIL.

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# Kentucky Pride

The Kentucky Lottery is celebrating its 30th anniversary with a year-long birthday party.

**By Patricia McQueen**

# “Sales and marketing tends to be the front porch of the house, but there’s an awful lot behind it.”

- Tom Delacenserie

**O**n April 4, 1989, the Kentucky Lottery opened for business. Then-Governor Wallace Wilkinson handed \$3 to the clerk at Thornton’s gas station on Preston Highway in Louisville and bought the first two tickets. Neither of his tickets proved to be winners, but Kentuckians have been winning ever since.

In 30 years, the Lottery has generated more than \$20 billion in sales, players have won more than \$12 billion in prizes, retailers have earned \$1.25 billion in commissions, and good causes in the Commonwealth have received more than \$5.3 billion from lottery profits. In the early years, revenues were allocated primarily to the General Fund, but since 1999, most profits are used to fund college scholarship and grant programs.

“I knew Kentucky had a long, proud history when I accepted the position,” said Tom Delacenserie, who was named President and Chief Executive Officer in May 2017. “Certainly a lot of that was due to my predecessor Arch” [the late Arch Gleason, who had been at the Lottery’s helm for 23 years].

Delacenserie hit the ground running in Kentucky, applying some of the things he had learned as head of the successful Florida Lottery. “I looked at the organization and saw that for the most part, these were very talented and experienced people. I saw some opportunities in the sales and marketing area, and that’s what we have focused on.”

He started by establishing a five year plan for the Lottery as a way to make sure every employee – not just the sales and marketing staff – understands that everything they do ultimately has an impact on sales and therefore profits. “Sales and marketing tends to be the front porch of the house, but there’s an awful lot behind it.” That five year plan is reviewed every quarter. “It’s a living document” that helps guide change as things work or don’t work, as the case may be.

The next major thing Delacenserie accomplished was outsourcing the Lottery’s instant ticket warehousing and distribution services. “Everything was done in-house in terms of packing and shipping scratch-off tickets; we even did the telemarketing.” One of his goals is to increase the Lottery’s annual instant sales from about \$600 million to \$1 billion, and he didn’t think that could be done using existing procedures and facilities.

After exploring options with industry vendors, Kentucky chose a cooperative services agreement with Scientific Games. “The goal was really to improve distribution and the inventory penetration,



*The Governor buys the first tickets.*

making sure we had the right games at the right time in the right amounts and in the right place,” said Delacenserie. So far so good – year-to-date instant sales are currently running seven percent ahead of last year. “Before the year is over, I think we’ll build on that.”

Other operational changes he has made include reorganizing the sales structure to add a senior staff member whose primary goal is to be out in the field, working closely with regional managers and sales reps. By improving the interaction between top management and field staff, “We are making sure that our message is clear from the top down and that it’s being executed properly at the field level.” An additional staff member was also added to corporate accounts, which Delacenserie considers to be a growth area that will receive increasing focus.

The Lottery has also made considerable investment in IT over the past two years, improving data analysis capability and installing a new accounting system. So while the focus of change has been primarily on sales, that hasn’t been the only area in which improvements have been made – and there is always one common goal. “Whether we are helping our customers and making it easier for them to understand the billing process, or providing more data with new IT capabilities, it all leads to increased sales and transfers to our beneficiaries.”

That said, lotteries are all about games and entertainment, and Delacenserie is making some unusual moves along those lines.



# Kentucky Lottery At a Glance

	Retail Sales	iLottery*	Total Sales	Total Prizes	Net to Education
FY2018	\$1,027,807,000	\$14,705,000	\$1,042,512,000	\$657,362,000	\$266,417,000
FY2017	993,894,000	6,607,000	1,000,501,000	628,831,000	248,571,000
FY2016	996,798,000	521,000	997,319,000	620,570,000	253,044,000
FY2015	899,122,000		899,122,000	556,276,000	236,101,000
FY2014	858,859,000		858,859,000	523,784,000	226,127,000

## Current games:

**Instant tickets:** About 35 new games per year; \$1, \$2, \$3, \$5, \$10, \$20, \$25 and \$30

**Terminal games:** Powerball, Mega Millions, Cash Ball 225, 5 Card Cash, Lucky for Life, Quick Bucks, Pick 3, Pick 4

**Monitor game:** Keno

**iLottery games:** Instant Play games: \$0.50, \$1, \$2, \$3, \$5 and \$10; Draw games: Powerball, Mega Millions, Cash Ball 225, Lucky for Life and Keno

\* iLottery began in April 2016; sales figures represent total play for both instant play and draw games

## Vital statistics:

Number of employees: 144

Number of licensed retailers: 3,250

Number of keno monitors deployed: Approximately 1,400



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just by doing something simple like adding self-service keno terminals. “We can increase our keno penetration in bars and taverns and social establishments,” trade styles that are a natural for the game but where keno hasn’t made much inroads in Kentucky due to the labor-intensive sales process. With the self-service terminals becoming available this summer, “This is all going to be basically new business and a whole new area of growth for us.”

While strengthening keno by reaching new venues is important, Delacenserie is also stepping out of most lotteries’ comfort zones by trying completely new products for the lottery industry.

Most intriguing is EquiLottery Games’ Win Place Show, a game tied to live horse racing. It’s fitting that the Kentucky Lottery is the first to try it – after all, the Lottery started 30 years ago with a ticket whose big winner depended on the horse that won that year’s Kentucky Derby, plus the fact that horse racing is in every Kentuckian’s blood.

The game was scheduled to launch as a 90-day pilot on March 31; 45 locations around Louisville, Lexington and Northern Kentucky are participating. The selected locations are reflective of the Lottery’s entire retail base – they include independent stores and corporate account locations, and low-volume, mid-volume and high-volume stores. With such a limited

## Spirit of Innovation

One of his goals is to have a stronger focus on in-state draw games – while games like Powerball and Mega Millions are an important part of the product mix, he thinks the Lottery’s brand will benefit with more

attention given to Kentucky’s own games.

“Keno is a perfect example – the consumers of Kentucky seem to like it,” he said, noting that keno sales in Kentucky last year were greater than that of Powerball. That said, there’s still a world of potential in the game, and in reaching new customers,

pilot, there won't be any real advertising of the game, but there will be point of sale materials in each location.

EquiLottery also provides an app with Win Place Show that enables players to watch the races, check for any winnings and find the nearest retailer that sells the game.

To add even more local interest, Win Place Show will include races from historic Keeneland when that Lexington track runs its spring meet from April 4 through 26. Track officials hope the lottery game will bring new fans to the sport of horse racing and create a new revenue stream for the industry.

Another new game is Quick Bucks, which launched in Kentucky in February. Developed by Arizona Gaming Designs, the base \$1 Quick Bucks game "has a relatively small top prize by lottery standards, \$50,000, but there are a lot of lower tier winners. It has an interesting concept called a Wheel Bet where for \$5, the player is guaranteed a win of at least a \$2," explained Delacenserie.

Kentucky is the first lottery to offer both of these new games. "That's part of my philosophy. I think newness is important to the consumer. Sometimes lotteries tend to put the same draw games out there and just leave them, but the consumer is looking for something else. So it's worth giving these things a try. We'll make sure that we support them and give them every opportunity to succeed."

While the market ultimately has to decide, he's fairly confident given the results of research into both products. "I don't believe in having people from our building alone determine what the



customer is going to like, because nine out of 10 times we'll be wrong." While he doesn't rely solely on focus group testing, when that is combined with online surveys and other research, "you generally come up with some pretty good concepts." He noted that retailers were included as the Lottery tested both games, and gave very positive feedback as well.

### Added Jackpot Awareness

When it comes to the big national jackpot games, the Kentucky Lottery has an interesting "quick strike" strategy as the jackpots grow – strategies able to be implemented on short notice. Once a jackpot hits \$300 million, a lot of things start happening in the stores, beginning with sales reps putting high jackpot signage

in stores at the registers. The Lottery's communications team, led by Senior Vice President of Communications, Public Relations and Social Responsibility Chip Polston, has worked with local media in advance to arrange for different messaging at high jackpot levels, so that also kicks in at that point.

The Lottery's own messaging "changes very significantly when we get into these high jackpots," said Polston. "At that point we have two messages that we push. One is that it just takes one ticket to win, and we remind people of the odds involved. The other is caution about scams – we always get calls from players during these big jackpot runs, telling us about people trying to scam them out of money. So our messaging shifts, and I think it gets us some nice credibility."

Perhaps the most unusual aspect of the strategy, however, is the use of free coupons that are used at these jackpot levels. Even at \$300 or \$400 million, it gets harder and harder to attract media attention. Perhaps as a result, many consumers don't even realize jackpots are high. "This is a trap that we've fallen into in the industry," said Delacenserie. "We live and breathe this, so when that jackpot gets up to \$400, \$500 or even \$600 million, we think everybody knows it. But I would challenge you – if you walked out on the street and asked 10 people 'do you know what the Powerball jackpot is today?' at that level, eight or nine would have no idea."

Kentucky's coupon strategy addresses that awareness, and has been tremendously successful. Twice last October, the media was told the Lottery would be giving away coupons for a free ticket – first at the \$548 million mark for Mega Millions, then again less than two weeks later when Powerball surpassed \$600 million. "We start our ticket



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*People lined up for hours to get a free ticket, and could even have their picture taken with a big check!*

giveaways when the jackpots reach half a billion dollars,” said Polston. At each of the designated locations, there would be 100 or 200 coupons for a free ticket. “You wonder if anybody’s going to show up just for a \$2 ticket, but in every location we went, people started lining up three hours ahead of time. It was just amazing – the energy and the enthusiasm in the crowd was absolutely terrific.”

During one of the promotions, the top-rated radio show in Louisville did a three-hour live remote from a Kroger store, talking about the big jackpot and the free coupons. “We had media coming down from Cincinnati to cover the event,” said Delacenserie. “It was very effective.”

That’s an understatement. “We were able to delineate that investment very, very clearly,” added Polston. During the two coupon events last fall, the Lottery gave away about \$1,800 in free tickets, and in return got \$73,501 worth of media value and 141 television and radio stories that were seen by almost three million people. “To get that kind of return from the media made it well worth it,” said Delacenserie. “When the top-rated radio talk show does three hours of his show from a Kroger talking about the Powerball jackpot... you just can’t buy that. And Kroger loved it!”

## Online Developments

Those big jackpots helped boost not only retail sales of Powerball and Mega Millions, but online sales as well. It has been three years since Kentucky launched an iLottery program, starting the option in April 2016 with instant games and selected draw games. Keno was added last year. “It’s still a relatively small percent of our total business, but it has a tremendous growth rate,” noted Delacenserie.

For example, in the first full year (fiscal 2017), online sales were \$6.6 million; that number grew to \$14.7 million in fiscal 2018 – up 122 percent. Based on performance to date in fiscal 2019, iLottery sales are estimated to be up by more than 60 percent this year. While Keno has been a very strong performer in its first full year of sales, the \$1.5 billion Mega Millions jackpot last October didn’t hurt. Jackpot runs like that always bring in an influx of new iLottery players, noted Lauren Walker, the Lottery’s Director, Interactive Content & Customer Service.

During that run, “our new registrations and new players jumped incredibly compared to average,” she said. Those new players often try other games while they are there, “so other games also see

the lift across the platform as a whole.” She added that not all the new players will keep playing regularly once the jackpot run is over, but at least they sampled other games in the process.

At this writing, more than 40 instant play games were available, with new games added monthly. Five draw games are offered online: Powerball, Mega Millions, Lucky for Life, Cash Ball 225 and Keno. To date in fiscal 2019, instant play games account for about 63.4 percent of online sales, Keno is about 17.7 percent, and other draw games combined make up the remaining 18.9 percent.

Some vital statistics about iLottery in Kentucky:

- More than 55,000 Kentuckians have played online games.
- The majority of online players are between ages 26 and 55. The average age of online players is a little younger than at retail, and compared to retail, a larger share of play comes from that 26-55 age range online. Draw games skew male and slightly older; instant play games currently skew female at 59 percent.



- About 40 percent of online sales comes via the Lottery's mobile app, 35 percent from desktop browsers and 25 percent from the mobile website. Desktop play comes more from older players; those age 18-35 prefer the mobile app or mobile web.
- About 20 percent only play instant play games; a little more than 50 percent play only draw games, the remainder play both types of games.
- Based on self-reporting, 53 percent of online players say they play exclusively online, and 49 percent of online players have a college education, higher than the Lottery's overall player base.

Since its launch, the Lottery has gradually built up awareness and advertising of iLottery, especially now that it has been firmly established and retailers have been shown that there is no adverse effect on their business. For example, the lottery's commercials now have a line at the end "also available online," and that message is also on billboards. The next phase will be something like "Play It Your Way," showing players options from convenience stores to vending machines to playing online.

Delacenserie has encouraged experimentation on the online platform, noting that some things will work and other things won't. He hopes families will work with instant play games as well as they do with scratch tickets, for example. The key is to find what works and build from there.

While online play does typically attract a younger consumer than traditional retail lottery play, there are still plenty of online players into their 50s as well. They are important, because they are most likely to have more disposable income with which to play lottery games. "I think that's a cautionary tale for the industry," said Delacenserie. "While everybody is chasing younger consumers, that younger consumer is probably the least likely to have disposable income. So you cannot lose sight of your core players, because they have the money. You want to bring that younger consumer along, so that when they DO have money, they are familiar with lottery. That's really the goal," as opposed to trying to attract more play from younger adults who don't have that disposable income.

### A Year Long Birthday Party

To kick off the Lottery's 30th anniversary year, a new logo was introduced in January, one that identifies more with Kentucky

than the previous logo. "The former logo served us well, but we want to make sure that the next 30 years are as good as the first 30. I wanted something that was a little bit more identifiable with Kentucky," a logo that anyone, from around the state to around the country, would instantly know represented Kentucky.

Once again, focus group testing was done to determine which of three potential logos would be chosen – first employees were given the opportunity to sound off, then consumers. There was one hands-down winner in all the testing, with positive comments including how it reflected "Kentucky pride." Not surprisingly, the new logo incorporates a horse, given that the heart and soul of Kentucky revolves around its Thoroughbred breeding industry.

That process done and the logo implemented, there are 30th anniversary events and activities scheduled throughout the year. From the Lottery's first \$30 ticket, Break Fort Knox, to a re-enactment of the first tickets sold, to special promotions honoring 30-year retailers, to local celebrity endorsements – it's an ongoing celebration. This summer Delacenserie will embark on a grass roots tour, telling the Lottery's story to various clubs and civic organizations around the state. "We're going to have some fun with it and try to get as much publicity as we can."

Lottery employees have not been forgotten, as there will be a celebration just for them with special attention to the 12 employees who have been with the Lottery for all of its 30 years. One of those 12 will receive a very special honor – the role as "Thunderator" for Louisville's Thunder Over Louisville, the largest annual fireworks show in North America; it kicks off the Kentucky Derby Festival each year.

The Thunderator turns the key that starts the fireworks, and for many years the Lottery has given away that role to a lucky lottery player as part of a promotional package. This year, however, it was decided to let a 30-year employee have the honor; a drawing will be held among the 12 eligible employees to determine the Thunderator. "We wanted to recognize our 30 year employees," said Polston. "It's a great way to share not only our general 30-year anniversary messaging, but to give some attention to some of our employees who have been here since day one."

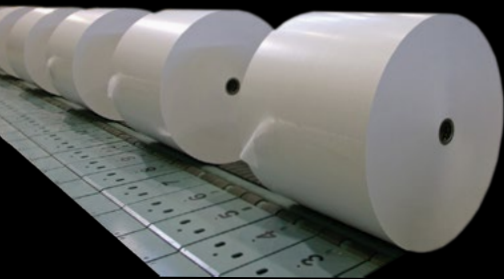
Honoring employees, celebrating retailers and engaging players are all part of the way forward. "We have a number of initiatives in place to ensure we keep growing," said Delacenserie. "I definitely think our best years are ahead of us." ■

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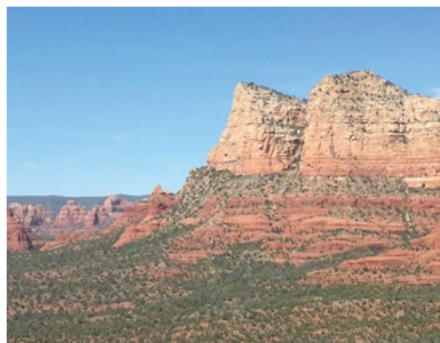
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# IT'S THAT TIME OF YEAR AGAIN

NASPL's annual conference season begins in April with a focus on leadership, growth and development.

By Mackenzie Whitacre



**S**ome of NASPL's main objectives are to provide educational opportunities for lottery industry employees and present a channel for professional and industry research and development. To help achieve these goals and continue to drive the industry forward, NASPL conducts four unique and exciting events throughout each year, all providing exclusive learning and networking opportunities for those in attendance.

This year, the 2019 conference season kicks off in April with the Lottery Leadership Institute, to be held in Cleveland, Ohio, from April 15-18, hosted by the Ohio Lottery. This program, designed for industry leaders at all levels, provides the tools and training

needed to build confidence, develop skills and improve leadership qualities.

Summertime brings with it the Professional Development Seminar, NASPL's fastest-growing educational event. Hosted by the Arizona State Lottery, this year's conference will take place in Phoenix from July 22-25. As always, PDS promises to be an excellent opportunity for lottery professionals in all fields to come together for working meetings and networking connections.

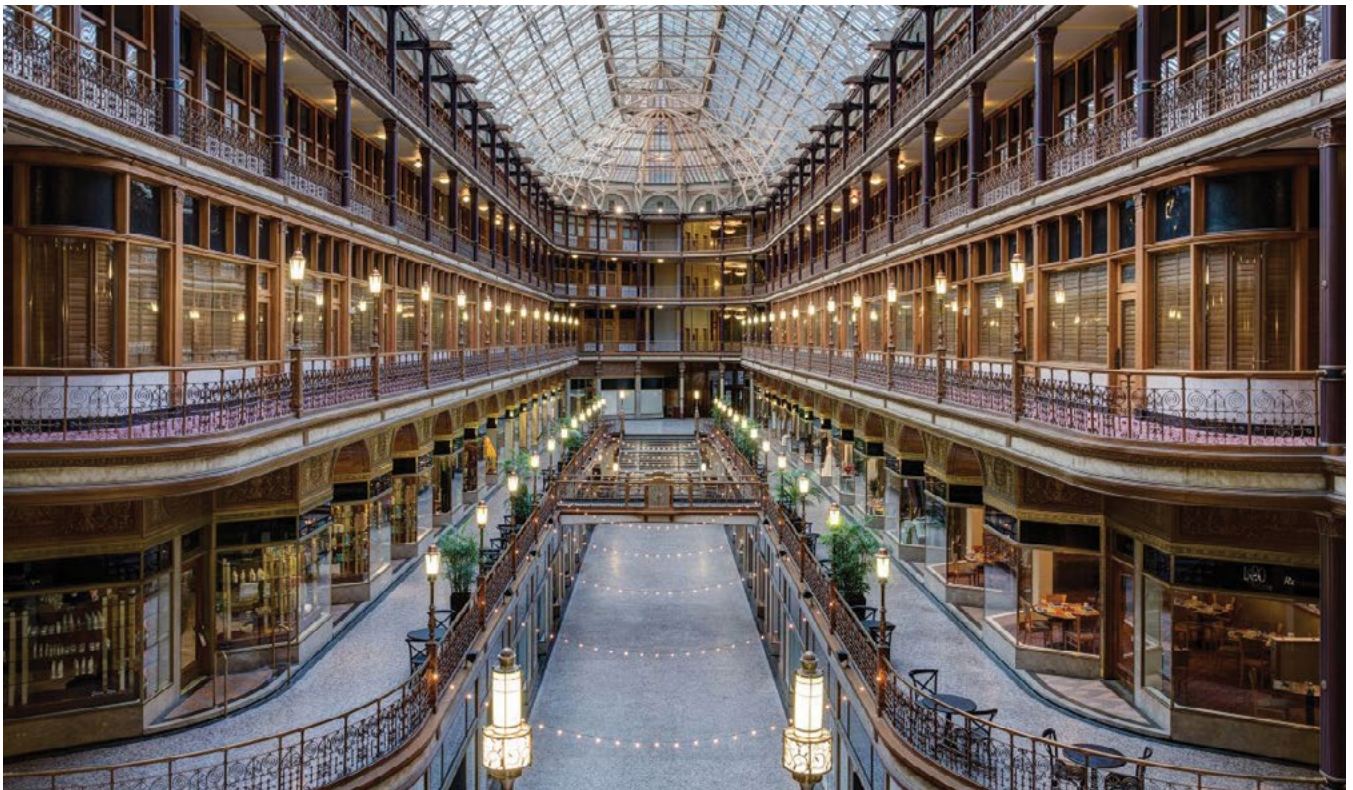
In the fall, NASPL's annual conference and trade show is the industry's principle senior-level event. Lottery and vendor executives from around the world will gather this year in Little Rock, Ark., from September 17-20

for this must-attend program, hosted by the Arkansas Scholarship Lottery.

In addition to these three conferences – each open all members of the industry – NASPL also holds a fourth exclusive, annual event. This program, known simply as the Directors Meeting, brings together lottery chief executives for an in-depth discussion of industry issues and the future direction of NASPL. The Directors Meeting also offers an opportunity for high-level associate members to interact directly with lottery CEOs on the topics of their own choosing. This year's program will be held in Williamsburg, Va., from June 17-20, hosted by the Virginia Lottery.

# LOTTERY LEADERSHIP

[www.naspllotteryleadership.com](http://www.naspllotteryleadership.com)



NASPL's **Lottery Leadership Institute** is a unique conference focused on industry education, improved leadership practice principles, effective communication, emotional intelligence and more. A record number of attendees are expected to gather this year in Cleveland to participate in informational lectures and discussions, teambuilding exercises and other interactive sessions comprehensively designed to create better leaders.

As in previous years, the conference will open with an introduction to the lottery business – many LLI attendees are often new to their positions or focused on their specific roles without a big-picture appreciation of what it takes to run an \$80 billion industry.

Day one will also include presentations from Erica Merritt, Organizational Culture and Leadership Development Strategist and Founder of Equius Group, LLC, and Lori Rugle, Assistant Professor of Psychiatry at University of Maryland and NASPL Responsible Gambling Specialist. Merritt, a first-time presenter at LLI, will examine the importance of cultivating an environment of diversity and inclusion, while Rugle will discuss responsible gambling initiatives within our industry.

Over the remaining days, participants will attend panels and informational sessions hosted by vendor and lottery leaders. These presentations will focus on important industry topics and objectives, like future innovations, attracting new players and

the expanding forms of gaming. Day three will also feature a panel on Women in Lottery Leadership, headlined by some of the industry's most influential female executives.

This year NASPL also welcomes back LLI favorites John Rodgers, a Dale Carnegie Executive Coach, and Kay Potetz, Management Consultant and Owner of Dr. Kay Potetz & Associates. Rodgers will spend the day taking participants through the acclaimed Dale Carnegie leadership training program, focusing on areas such as creating a winning culture, inspiring others and developing personal leadership. Potetz will discuss the art of personal mastery and how clarifying and deepening your personal vision can help make you a better leader.

## PROFESSIONAL DEVELOPMENT SEMINAR

[www.nasplprofesionaldevelopment.com](http://www.nasplprofesionaldevelopment.com)



In July, NASPL's **Professional Development Seminar** travels to sunny Phoenix, Ariz., for three days packed with informative general sessions and hands-on workshops for all the major lottery disciplines – accounting, audit, information technology, legal, product managers, public relations, research, sales and marketing, and security.

The theme of this year's conference is "Beyond the Horizon" – an appropriate motif for the Grand Canyon State. Attendees will learn about new and upcoming technologies, processes and changing dynamics from knowledgeable industry leaders and other professionals. This one-of-a-kind program offers ongoing professional training, learning and

networking opportunities for various key job disciplines within a lottery organization. The small-group format this event is known for encourages engagement and candid discussion among peers, making PDS the ideal platform for information sharing and problem solving.

While the schedule is still being developed at this writing, this year's breakout session topics already include:

- Augmented and virtual realities;
- Responsible gaming;
- Fraud detection, prevention and response;
- Effective auditing;
- Expanding the player base;
- Promotional advertising; and
- Case studies.

# ANNUAL CONFERENCE

[www.naspl19.com](http://www.naspl19.com)

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In 2018, the Arkansas Scholarship Lottery unveiled their new slogan, “THIS IS WINNING.” Those three words embody what the lottery industry is all about, whether we’re talking big jackpot winners, positive economic impact, retailer incentives, or the worthy causes lotteries support. It’s all WINNING. This year, that new slogan will also serve as the theme for NASPL’s biggest event – the **annual conference and trade show**, to be held in Little Rock, Ark.

NASPL and the Arkansas Scholarship Lottery are putting together an exciting curriculum to help attendees recognize and improve winning opportunities across all industry sectors. The conference will include inspiring keynote speakers – like

**Elise Mitchell**, Founder and Chairman of one of the top 10 fastest-growing public relations firms worldwide and current Chief Executive Officer of the globally renowned Dentsu Aegis Public Relations Network. Panel presentations – featuring lottery directors, vendors, retailers and more – will spark conversations and generate new ideas. And smaller-scale, in-depth breakout sessions will provide a closer look at the industry’s most relevant topics, from sports betting to security.

And make sure to pack some loose-fitting clothes. Little Rock was named one of “15 Southern Cities All Food Lovers Should Visit Now” by *Food and Wine* and *Southern Living* magazines. So prepare to gain a few pounds while you’re in town!



**Stay tuned for more information on all of NASPL’s upcoming events!**



# HOLIDAY CHEER

Lotteries continue to count on the holiday season for strong sales.

— By Patricia McQueen —





**L**otteries rely heavily on the holiday season to generate sales and profits – for most lotteries, the weeks leading up to the year-end holidays are by far their best sales weeks of the year.

For the holiday 2018 season, lotteries in the United States and Canada released 233 individual holiday games, up by six games from the previous year; these figures include winter-themed seasonal products in some jurisdictions. Western Canada Lottery Corp. (WCLC), long an industry leader in offering the most variety to its holiday consumers, upped the ante again, producing 14 games this past season, three more than the previous year. The Iowa Lottery and British Columbia Lottery Corp. continued their programs to lead the rest of the industry with 11 and 10 games, respectively.

Across price points, some games were dropped, some added, as lotteries tweaked their product mix. The final result was that there were a total of 53 \$1 holiday games, 50 \$2 games and 48 \$5 games on the market. Thirty of the 48 lotteries with instant products offered \$10 games (34 \$10 games in total), and 27 lotteries included \$3 tickets in their holiday or seasonal portfolio (30 games in total). Only WCLC offers a \$4 game during the holidays, and it launched two at this price point.

At the higher end, Wisconsin remains the only lottery offering a \$15 game; its oversized ticket is quite popular each year. Twelve lotteries offered one \$20 game each. There were two \$30 games – Tennessee’s winter-pulsed Jumbo Bucks and WCLC’s 24 Days to Celebrate. At the very high end, Atlantic Lottery included a \$50 Classic Celebration pack in its holiday releases, and while it wasn’t actually a holiday or winter-themed collection, it was the only AL

product given promotional support during the season.

Family games utilizing the same holiday theme and common design at several price points were offered in Connecticut (Holiday Ca\$h, Holiday Luck, Holiday Wishes), Florida (Holiday Bonus), Kansas (Winter Ca\$h), Kentucky (Holiday Gold), Louisiana (Holiday Red, Holiday Green, Holiday Gold) and Massachusetts (Holiday Cheer). These lotteries love the impact of families and the ease in which advertising and promotional opportunities come together with a common theme across multiple tickets.

Holiday gift packs remain popular throughout Canada as a staple in most Canadian lotteries’ holiday portfolio, but have yet to be embraced in the U.S. Only WCLC continues to offer a multiple-ticket gift pack that includes at least one winning experience in each pack.

Second chance drawings are often a component of a lottery’s holiday promotions; many are designed to extend the season by offering a final drawing well into January. In most cases the drawings are entered solely with holiday instant ticket purchases, but as you’ll find on the following pages, some lotteries include other games as an additional means of entry.

Speaking of other games, this year we asked for the first time what other lottery products are included in holiday promotions and activities. You’ll find some interesting insights about how some lotteries expand the holiday celebration with raffles, ticket offers and other promotions during the season.

Read on to learn what innovative and fun things lotteries came up with for holiday 2018. You just might find the next great idea for YOUR lottery!



# 'TIS THE SEASON

The November/December issue of *Insights* featured a gallery of holiday tickets from all North American Lotteries. In this regular follow-up feature, we asked them to wrap up their experiences during the holiday season – highlighting their game and promotional efforts and sharing what they learned during holiday 2018 as they plan for holiday 2019. Their edited responses follow, as compiled by Patricia McQueen in mid February.

## ARIZONA LOTTERY

Arizona's holiday lineup included six games: one each at \$1, \$2, \$3, \$5, \$10 and \$20.

### Most successful game(s):

Of the six holiday games offered this year, four of them outperformed the previous year's games. The \$2 and \$3 price points increased by 36 percent and 15 percent, respectively, over the previous year.

### Launch and end dates:

Our holiday games were launched on October 2. Historically after Christmas, distribution and sales of holiday games significantly decline, and our strategy has been to transition those games out of the market when the January games are launched. We have a 1:1 game replacement strategy. This year, our holiday games ended in the middle of January.

### General holiday strategies:

We typically offer holiday games at the \$1 to \$10 price points. Last year, four of the six holiday games ran out of inventory early and we adjusted the quantities this season to ensure we did not run out. FY18 was the first year we offered a \$20 holiday game. While it performed well, due to our limited \$20 facings and timing, it became a challenge for us to launch a regular-sized \$20 holiday game this year. We did introduce an oversized \$20 advent calendar style game; however, because of its limited distribution, it did not perform at the same

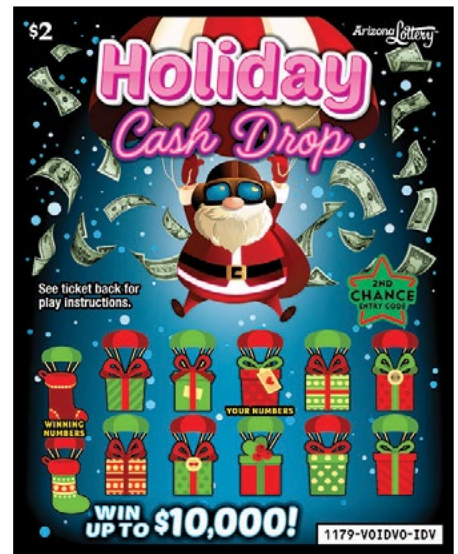
levels as last year's \$20 holiday game, but the results were not unexpected. We also launched a new \$20 game in December, White Ice 7s, which has a winter look and feel but could be sold past the holiday window. Like last year, we had a second chance holiday promotion this year which was more visible on the holiday tickets and much more successful. In last year's promotion, there were around 18,000 participants; this year's promotion had over 83,000 entrants. That's an increase of over 350 percent!

### Other holiday games, promotions or activities:

We held our first ever Virtual Holiday Party Giveaway, live-streamed on Facebook. Our spokesperson, Windfall Willie, and his sidekick Derek hosted a variety show with local celebrity guests for giveaways, holiday games, charitable giving and a grand prize of \$1,000. This event was extremely successful, with more than 15,000 unique views. The Arizona Lottery donated \$1 for each of those views to one of our beneficiaries, Court Appointed Special Advocates of Arizona (CASA). During the live stream, we also helped to register CASA volunteers to help grow their base for 2019.

### Major lessons learned in 2018:

We will continue to offer holiday games at the \$1 to \$10 price points as well as a second chance promotion.



## ARKANSAS SCHOLARSHIP LOTTERY

Arkansas' holiday lineup included one game at \$1.

### Most successful game(s):

We launched one holiday ticket, BETTY BOOP, and it performed well.

### Launch and end dates:

We launched the game on November 6, and we ran out of inventory after seven weeks.

### General holiday strategies:

With little success selling out holiday tickets the past couple of years, we decided to launch a holiday \$1, tic tac toe ticket on a nostalgic licensed property. We created a special point of sale piece to promote the game. Our goal was to have the game 100 percent distributed before mid-January and have a fiscal index of 100 or higher, and both goals were exceeded.





## ATLANTIC LOTTERY

Atlantic's holiday lineup included three games: one each at \$3, \$10 and \$50.

### Most successful game(s):

Our most successful holiday ticket was \$10 Holiday Cash. Currently, all of our \$10 tickets are strong performing games and Holiday Cash was no exception. Holiday Cash was produced with other lotteries across Canada. The sell though of this game was over 95 percent. We also launched a \$3 extended play game called Holly Jolly (word games) which was also a strong performing game. It also achieved a high sell through of almost 95 percent. These were the only two holiday themed tickets.

### Launch and end dates:

We launched all of our holiday tickets in mid-October. We would normally remove them from market in early February.

### General holiday strategies:

This year, we reduced the number of holiday/winter launches. We only launched two holiday games as mentioned above. Typically, in past years, we launched \$3 and \$5 winter themed tickets in November and/ or December but we did not launch any

winter themed tickets this year. We did an analysis and felt that there was no merit to launching winter themed tickets. Year over year, winter themed games did not perform as well as other regular \$5 games. The issue with seasonal tickets, as we all know, is that once the season is over we need to pull the game.

We did launch a \$50 Classic Celebration pack, which was not holiday or winter themed; rather a celebration theme was used so that we could keep the ticket in market after the holidays. This \$50 pack replaced our traditional \$20 Holiday Mega Pack and had stronger sales than the previous \$20 Holiday Mega Pack. The \$50 Classic Celebration was actually the only ticket that was supported during the holidays – we had POS at retail and various incentives and promotions were carried out by our sales and key account teams.

### Major lessons learned in 2018:

We are going to continue launching the \$10 (national quick play) and \$3 (extended play) holiday tickets. Also, we will be launching a \$20 game instead of a \$50 ticket, as the \$50 pack will potentially still be in market.

## BRITISH COLUMBIA LOTTERY CORPORATION

British Columbia's holiday lineup included ten games: two each at \$1, \$2, \$3 and \$5 plus one each at \$10 and \$20.

### Most successful game(s):

At BCLC, we work hard to ensure that our players have an exceptional experience with our products at any time of the year. BCLC's \$10 Holiday Cash and \$20 Holiday Gift Pack have seen an increase in sales year over year, with 20 percent and seven percent growth, respectively, this past season, versus a similar offering the prior year. With better odds, higher and more top prizes and a premium look and feel, these offerings have become more appealing to players and to gift givers. In addition, we have also observed more than 20 percent growth on our \$2 tickets.

### Launch and end dates:

BCLC launches its holiday lineup in two waves. We launched five tickets (one \$20, one \$10, two \$5 and one \$3) on October

15, and the remaining five (one \$3, two \$2 and two \$1) on October 29. All tickets were in market until they were removed in the first week of 2019.

### General holiday strategies:

We work to offer a wide variety of games with a strong seasonal look and feel that resonates well with our players. For a better play experience, we also lower the odds for all holiday tickets and increase free ticket and free ticket plus cash prizing. We promote the holiday season with a media campaign that includes radio, out of home, print and digital promotions. We also leveraged digital signage and retail point of sale materials to promote our holiday campaign. Lastly, BCLC ran its Tech the Halls second chance contest, in which players can enter a code found at the bottom of their Scratch & Win ticket for a second chance to win cash, gift cards or a variety of tech toys.



# Keep your Games on Players' Minds

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### Other holiday games, promotions or activities:

BCLC created a premium holiday greeting card, free with the purchase of \$25 in Scratch & Win products at select locations. We also launched a ticket specific to Chinese New Year and offered free 'lucky' red envelopes at select locations with a \$20 purchase of lottery products. Each red envelope contained either a voucher

for free play in a B.C. casino or online at PlayNow.com, or a good fortune message.

### Major lessons learned in 2018:

Our players enjoy a wide variety of price points, themes and game styles and we're constantly evolving our approach to new tickets to ensure that our products continue to appeal to them. We also know that players are looking for added

incentives during the holiday season, so we offer better odds on holiday tickets, a second chance contest, key account promotions and more. As we look forward in 2019, we continue to work to keep things fresh, while still maintaining the nostalgic traditions our players have come to expect from BCLC during the holiday season.

## CALIFORNIA LOTTERY

California's holiday lineup included three games: one each at \$1, \$3 and \$10.

### Most successful game(s):

We had a record-breaking December! Total Scratchers sales for the week ending December 29 reached over \$113 million, which was the second highest Scratchers weekly sales total since October 1985. The perfect sales storm was created by the combination of launching the holiday games in mid-November, a fully integrated advertising campaign that began on Black Friday (November 23) and a mid-December launch of four games that included a popular Lunar New Year game, a \$1 Year of the Pig and a \$30 launch of CA Millions. There were games to please everyone.

### Launch and end dates:

We launched five games on November 14; two were holiday themes, one was a winter theme, and two were non-holiday wealth themes. Our product plan determines the order quantity and approximate time in market based on past performances of similar games. Launching five games allowed us to feature two that were considered as traditional holiday themed: The traditional \$1 gift tag game The Perfect Gift and the specialty \$10 game Holiday Sparkle were faced in market for approximately two months. The other three games were able to remain in market for up to five months.

### General holiday strategies:

This was our first time attempting a five-game launch during the season. In addition to the two holiday themed games mentioned above, we launched the \$3 winter-themed Winner Wonderland. It is our long-standing tradition that we offer a \$1 gift tag type game; this not only appeals to current players but encourages gift giving opportunities.



The Holiday Sparkle game was given the spotlight on our POS; it featured three unique color schemes and sparkled in retail locations because we utilized a proprietary Spectrum Scratch FX printing process. The holiday campaign kicked off on Black Friday and positioned Scratchers as a great giving opportunity and a fun way to spread holiday joy. TV commercials aired in six major television markets across our state. There was an eight-week holiday second chance promotion that gave our players another chance to win. The grand prize was offered at \$40,000 for those submitting non-winning holiday Scratchers between November 14 and January 9. Players learned about the promotion on the Lottery's website and mobile app.

### Major lessons learned in 2018:

We actually learned from holiday 2017 that an oversize ticket that could not vend was not received favorably by our players or retailers. In 2017, we had changed our strategy slightly to feature the oversized \$10 ticket Holiday Magic, which we launched

a month earlier than usual (October 23, 2017). Because the ticket was oversized and not able to vend in our ITVMs, the extra time allowed our sales reps and retailers to come up with creative ways to display the game. The following month (on November 11, 2017) we launched our traditional \$1 gift tag game Merry Money along with a winter themed \$3 game and a \$5 and \$10 game that were wealth themed. The 2018 \$10 game Holiday Sparkle was the size of our regular \$10 tickets, therefore it was able to vend in all of our dispensers and it paid off – its sales were much higher than sales of the 2017 oversize \$10 ticket.

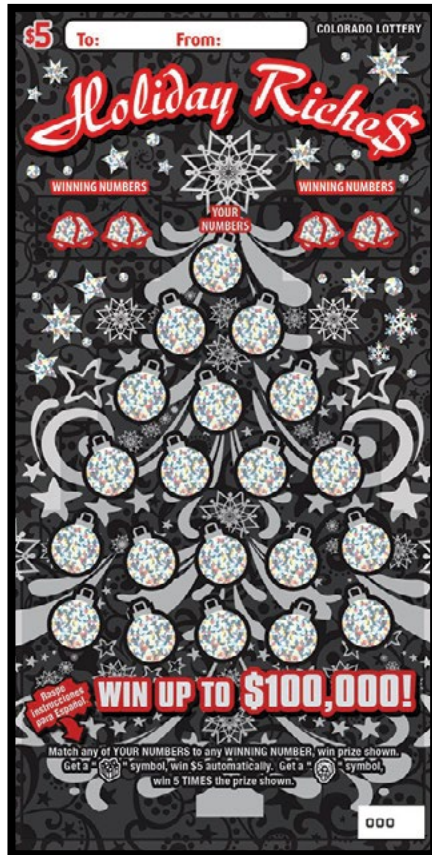
For the 2019 season we plan to launch holiday/winter themed games a month earlier (on October 21). They will include the traditional \$1 gift tag, a \$5 holiday/winter themed crossword, and a \$10 holiday themed special effects ticket. We also plan to take advantage of the year 2020 by launching a \$20 2020 celebratory ticket (subject to change).



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## COLORADO LOTTERY

Colorado's holiday lineup included four games: one each at \$1, \$2, \$3 and \$5.

### Most successful game(s):

Once again all of the holiday games offered by the Colorado Lottery sold out more than 90 percent of the available inventory. The \$5 Holiday Riche\$ performed the best, selling out 98.75 percent, and that was with \$500,000 in additional inventory this year compared to years past.

### Launch and end dates:

We like to launch holiday games towards the end of October. This season our holiday games launched on October 27 – one week later than the previous year (due to the way to calendar falls, we reset from last year's October 21 launch). Since we sell out of our holiday games prior to the end of the holiday season, we don't have to worry about pulling the games before they sell out.

### General holiday strategies:

The Colorado Lottery always places an emphasis on the holiday season as it has become our best sales period throughout the year. Once again we included games at the \$1, \$2, \$3 and \$5 price points. Every year, our goal is to sell out at least 90 percent of a game's inventory (combined, our holiday games sold 95.87 percent). As in years past, we supported the games with a full array of marketing efforts. These included, TV, radio, POS, outdoor billboards, internet advertising, social media advertising, game specific promotions, etc. Nothing significantly changed this year from last other than new creative for all assets.

### Major lessons learned in 2018:

Colorado is very pleased with the results and success our holiday lineup this year. If we do make changes, it might include adding another price point to the mix and/or increasing inventory.

## CONNECTICUT LOTTERY

Connecticut's holiday lineup included three games: one each at \$1, \$2 and \$5.

### Most successful game(s):

All of our holiday tickets were successful; however, the \$2 game Holiday Luck was the clear leader of the pack. At the 13-week mark, this game had an 86 percent sell through rate. Compare that to the corresponding game the previous year, which had a 68 percent sell through rate at the same point, and you can see why we're especially proud of this mid-level holiday game.

### Launch and end dates:

We find it works best for Connecticut players if we launch the holiday games at the end of October; it helps our players get into the holiday spirit a little sooner. We typically wait until the last top prize of each game is claimed or inventory is exhausted to remove games from the market.

### General holiday strategies:

We have found that our strategy of releasing games at the end of October has worked well for us over the past few years, so we continued with that for 2018 holiday games. There were three games in the holiday collection this year, and a theme across all three was Holiday, both in the names (Holiday Cash, Holiday Luck, and Holiday Wishes) and the designs (simple, clean looks, each featuring ornaments in the ticket artwork).

### Other holiday promotions or activities:

Each year our marketing department puts together a fantastic piece of POS that is used at retail: a lottery-ticket themed wreath that features all of the instant tickets available, with a strong emphasis on holiday games, but also featuring games that we would like to highlight that have a longer life span than the holiday tickets. This is a tradition that our retailers and players have come to look forward to, and is a tradition



that we're proud to carry on each holiday season.

### Major lessons learned in 2018:

We reaffirmed our commitment to providing fun, creative holiday games for our players. The \$1 price point continues to be a strong seller for us, with that ticket being an introduction to lottery for new players who receive them as gifts throughout the holiday season.



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## DC LOTTERY

DC's holiday lineup included three games: one each at \$1, \$2 and \$5.

### Most successful game(s):

Traditionally, we launch a \$1 and \$2 ticket for the holiday season, but this year we added a \$5 ticket called \$25,000 Holiday Bonus to our portfolio. Who doesn't love a bonus? This ticket helped boost our year-over-year holiday sales by bringing in an additional \$900,000!

### Launch and end dates:

We launched our holiday games on November 7 and we typically like for them to sell out by mid-to-late January.

### General holiday strategies:

Since holiday isn't our strongest season, we knew we had to do something different to increase sales this year. In addition to adding a \$5 price point, we devised a plan to have our holiday games work to support each other. All holiday instant games: \$1 Jingle Bills, \$2 Holiday Double Win, \$5 \$25,000 Holiday Bonus, AND one Fast Play ticket, \$1 Candy Cane Cash, were marketed together as this year's Holiday Bucks

Promotion. The games included a second chance opportunity and players had to enter each of the tickets in order to receive one qualifying entry for the chance to win weekly cash prizes of \$2,019. To make sure the tickets sold out by mid-January, we significantly reduced the quantity of the tickets and monitored the progress of sales each week. Since each of the games had to be purchased to qualify for the second chance offering, we saw an even distribution of activations week after week. The campaign was such a hit that we sold out a week earlier than expected and year over year holiday sales were up 141 percent.

### Major lessons learned in 2018:

We learned a lot this past holiday season. Cross-promoting Scratchers and Fast Play works well; it helped introduce a product line to a player would have never purchased the product before. Players don't mind having to purchase multiple tickets for one second chance entry. Finally, adding a \$5 ticket to the holiday mix works extremely well; core players appreciated the higher tier and saw the value of their spend.



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# Y



# Z



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## HOOSIER LOTTERY

Hoosier's holiday lineup included four games: one each at \$1, \$2, \$3 and \$5.

### Most successful game(s):

The most successful holiday offering was the \$3 Candy Cane Crossword Tripler Scratch-off, which exceeded sales expectations by 25 percent. It was the first \$3 holiday crossword offering launched since 2015 and we received great feedback from the players and sales reps alike. This was also the first time that we have significantly changed artwork for our \$3 crossword, so seeing a different twist on a long-time core offering helped to stimulate additional sales at that price point.

### Launch and end dates:

All holiday offerings were launched November 6, with the exception of \$3 Candy Cane Crossword Tripler which went into market October 2. They were all removed from the market at the end of December to coincide with the January Scratch-off launch.

### General holiday strategies:

We leveraged historical success by launching traditional holiday-themed artwork and focusing on a "loaded" prize level at each price point. Specifically, the \$1 Festive \$50s was loaded with \$50 prizes and \$2 Holiday \$100s was loaded with \$100 prizes. We



introduced \$3 Crossword offering as well as a \$5 Gold Series that featured the popular Scratch My Back play feature. Unique to this year's efforts, we broadened our 2nd Chance promotional opportunity to include all non-winning \$1 and \$2 Scratch-offs. We also utilized retailer insights during the holiday time frame to strengthen our marketing efforts. The holiday campaign

utilized a three-phased approach that drives awareness during the start of the shopping season. Two weeks before Christmas, we shifted communication to drive urgency leading up to the holiday. Across the entire campaign period, we drove loyalty of our app, especially amongst new and light players, where they could scan tickets to see if they won and enter their non-winning \$1 and \$2 Scratch-offs into the Game On! 2nd Chance promotion. The loyalty phase differed from previous years as the focus extended from the start of the holiday season through January, when we know 2nd Chance entries are strong.

### Other holiday games, promotions or activities:

In select marketing pieces we featured The Voice Scratch-off for its gift-giving potential as well as to highlight the upcoming 2nd Chance entry deadline.

### Major lessons learned in 2018:

From a product perspective we will continue to evaluate a \$3 limited-time holiday offering to connect with players looking for an extended play experience. We are continually reviewing product and marketing opportunities based on evolving insights and trends.



## IDAHO LOTTERY

Idaho's holiday lineup included five games: one each at \$1, \$2, \$3, \$5 and \$20.

### Most successful game(s):

We enjoyed a successful holiday campaign in 2018. All of our holiday games' sales were up over the previous year. Individually, the \$3 Jolly Holiday Crossword saw the biggest increase in overall sales while our \$20 Jackpot Frost realized the most in sales. Our \$5 Winter Green was scented with a winter green fragrance.

### Launch and end dates:

Our holiday games usually launch during the first week or two during October, and this year's games were no exception. Typically, we will leave games on the market until the last top prize is claimed or the game sells out. At press time, the \$20 game has claimed out, the \$2 and the \$3 games have sold out; the \$1 game is over 91 percent sold through and the \$5 game

is 88 percent sold through.

### General holiday strategies:

Every year we try to build a campaign around products that we believe will sell predominantly through the holiday season and maybe last a little while longer into the first quarter of the new calendar year.

This year, we offered a Holiday Bonus second chance opportunity for players who had non-winning holiday-themed tickets. Players could enter between October 9 and January 31 for a second chance to win one of five \$1,000 prizes. Entries were accepted through the Lottery's VIP Club website or via tele-entry. The goal was to encourage play, and eventually reach game end, by the end of January. To this end, the promotion proved very successful. By early February, the \$20, \$2 and \$3 games were all removed from the market due to claim-outs or sellouts with the remaining

two games close to selling out as well. In total, there were over 75,250 entries for this promotion.

**Other holiday games, promotions or activities:**

Each year, the Idaho Lottery offers its annual Idaho \$1,000,000 Raffle game with a limited number of tickets and a guaranteed top prize of a million dollars. This game offers its own multi-media campaign and, depending on sales, will work collaboratively with the holiday games commercial schedule to promote both

products. During the run of Raffle, we offer a series of in-store promotional campaigns where players win additional holiday scratch tickets for purchases of Raffle tickets. This cross-promotion is ideal for last minute stocking stuffers and shoppers.

**Major lessons learned in 2018:**

Offering the second chance Holiday Bonus consistently boosted sales throughout the entire campaign. This achieved the results we anticipated, selling out and ending games without the holiday lineup lingering into warmer weather and the

spring months. The other key take-away was our work with the Idaho Lottery's online research community through Vision Critical. Each of the games offered this year was tested with our community prior to production and going on sale. Not only did we have the opportunity to gain valuable insights into what would or may not appeal to our player base, those who participated in the community received the reward of selecting which games we offered and were treated to sneak previews that ramped up the excitement for purchasing when they went on sale.



**ILLINOIS LOTTERY**

Illinois' holiday lineup included seven games: two each at \$1 and \$2, plus one each at \$3, \$5 and \$20.

**Most successful game(s):**

The re-introduction of our \$3 Candy Cane Crossword was overall incremental to the holiday portfolio, while having some impact on the \$1 and \$2 games. It was still one of our strongest performers at \$3 over the past year.

**Launch and end dates:**

We launched our holiday games in October. Generally the games sold through by the end of January, but if inventory remains beyond that, we look to remove them by the end of February.

**General holiday strategies:**

Our primary messaging to players was built around the "gifting occasion," with our advertising speaking to making instants into a little something extra to share with friends and family. Our campaign ran over TV, radio, digital,

social and OOH, at similar levels to years past. In addition to adding back the \$3 price point, the one other change we made was not offering a second-chance promotion as we had the previous year. We still had our Willy Wonka second-chance promotion in market, and we wanted to devote our second-chance focus on that property through the fall instead of adding a holiday promotion.

**Major lessons learned in 2018:**

From a marketing standpoint, we saw strong initial responses to our more serious messaging and the focus on family and friends. This will be a learning in campaign development in the future. Generally, we have had success with holiday games we launch each year, such as Merry Millionaire (\$20) and Holiday Cash (\$1), but we have seen some erosion as we reintroduce these properties each year. Next year, there is an opportunity to bring a \$10 game into the fold, as well as add back a second chance opportunity of some sort.

**KENTUCKY LOTTERY**

Kentucky's holiday lineup included four games: one each at \$1, \$2, \$5 and \$10.

**Most successful game(s):**

This year we launched a holiday family at \$1, \$2, \$5 and \$10 price points. For the 11-week holiday window, October 27 through January 5, every game in the family saw double-digit growth over last year's family, so we consider the entire portfolio to have been successful.

Both the \$2 and \$5 games garnered a 15 percent year over year increase, followed by our \$10 at 12 percent; even our \$1 enjoyed an 11 percent uptick. Overall, we saw an increase of 13 percent.

**Launch and end dates:**

This year's launch occurred on October 27, which is the typical launch period for us. While we plan for a 15-week street life,

generally by the second full week of January returns start coming, so we begin the closing process at the end of January.

**General holiday strategies:**

This year's portfolio was Holiday Gold, featuring a strong traditional holiday look, and we differentiated price points by primary colors. When planning FY17, we made a strategic shift in the design of our holiday



games by moving to the family of games model to provide a more consistent look of all tickets, as well as to capitalize on the marketing efficiencies this model presents. That strategy worked very well for us so we carried that through to this year and will continue doing so moving forward. While we did not utilize a second chance promotion this year, we did challenge our sales team to place as many eight-game tower dispensers, specifically featuring holiday games only, as they could on the counter at the point of purchase. As always, our team loves a good competition so they went full throttle; the results speak for themselves. This incentive absolutely was a contributing factor in the growth we were able to achieve.

**Other holiday games, promotions or activities:**

In addition to promoting Scratch-offs this

year, we did feature our Holiday Gold iLottery instant play game on the end card of our TV spot. Additionally, we conducted a Jingle Bills second chance promotion in support of Powerball, and our website featured a one-stop holiday shop landing page, promoting all of our products as great gift ideas. We also continued to offer our popular holiday-themed downloadable “Scratch-wrap,” so Fun Club Members could print from their home computers and wrap up the tickets they purchased for gifts and stocking stuffers.

**Major lessons learned in 2018:**

We will definitely offer another holiday family as well as the point of purchase display towers with the goal of beating this year’s penetration. And once the theme is determined, we’ll start brainstorming to see what else we can do to outshine this year’s success.

**LOTO QUÉBEC**

Loto-Québec’s holiday lineup included five games: two at \$10, plus one each at \$2, \$3 and \$5.

**Most successful game(s):**

A product that truly stood out this year was Cadeau Surprise, a seasonal ticket that has been around for 33 years, and as such is difficult to tinker with. For 2018, a fir scent was given to the Christmas tree visual for an added playful touch. This addition drove a four percent increase in sales and garnered considerable attention in social media, helping us reach a new target audience not used to purchasing this type of product. Another tactic used to reach this audience was to broaden our prize offering to include products sought after by younger adults such as training watches and Google Home devices.

**Launch and end dates:**

Our holiday games were launched over a three-week period. The regular scratch tickets went to market at two-week intervals beginning in mid-October, before the launch of our special Célébration ticket during the first week in November. In early January, the tickets were gradually removed from sale with the exception of Cadeau Surprise, which stayed on the market through the end of February.

**General holiday strategies:**

Our main goal was to create a common thread that would bring all these products together. We chose to go with a traditional Christmas concept for all these products making use of Christmas trees, traditional holiday color schemes of red, green and gold, and classic elements like toy soldier nutcrackers.

**Other holiday games, promotions or activities:**

After setting up a pop-up store for two consecutive years in Montreal’s main Christmas market, Loto-Québec decided to reach out to a new clientele in two different metropolitan neighborhoods by proposing two new concepts: an igloo tent and an outdoor terrace. The igloo concept featured a touchscreen photo booth where participants created a personalized “ugly sweater” selfie to be shared on social media, while people were invited to compete in friendly “winter games” at the outdoor terrace concept. Both environments were created to be fun and entertaining, and \$20,000 worth of lottery products along with other holiday-themed merchandise were distributed as prizes. This initiative will likely continue to evolve over the coming years to include a mobile squad which would visit a number of Christmas markets throughout Québec during the months of November and December.

**Major lessons learned in 2018:**

We definitely plan on increasing the number of tickets printed to optimize distribution throughout the network. We also plan to review how we market our oversized tickets such as the advent calendar ticket and gift-tags ticket. We want to adapt our methods to the needs of young adults by surveying them about their consumer habits.



## LOUISIANA LOTTERY

Louisiana's holiday lineup included three games: one each at \$1, \$3 and \$5.

### Most successful game(s):

We marketed our holiday games as a family and consider all three games to have performed successfully, individually and as a family. They all sold over 95 percent by the first of January; in addition, they all indexed over 125. (Holiday Red indexed at 140, Holiday Green at 127 and Holiday Gold at 141.)

### Launch and end dates:

Our three holiday games launched October 26. They are intended to sell out by the end of December. If not, we remove them from distribution the first week of January.

### General holiday strategies:

Our holiday games typically do very well, so we do not alter strategy drastically from year to year. Last year, we sold out of the \$5 and \$2 games a bit early, so this year we upped their quantity which helped generate additional revenue. To promote the family of games, we hosted a three-week website promotion, inviting players to show how they celebrate the season with either red, green or gold items mirroring the ticket themes. The first week players sent in photos of red items; the second week green items were highlighted; and the third week gold décor was spotlighted. Nearly 300 entries came in from across the state and three participants were randomly chosen each week to receive a Holiday Colors Prize Package.

Our advertising support consisted primarily of radio, print and outdoor. In radio we ran :60 spots in all markets, as well as on Pandora and Spotify. Additionally, we ran a two-week radio call in promotion for 15 radio stations in the state, across all markets. In print we placed ads in various local publications, statewide magazines, as well as the New Orleans Saints Gameday ads in November. We also ran a front page "sticky note" advertisement in all major markets. In outdoor, we mixed in the Holiday Scratch-off creative with our permanent digital board messaging in several markets across the state. Promotionally, our sales teams held in-store promotions centered around our Holiday Scratch-off tickets and our holiday Powerball promotion.

### Other holiday games, promotions or activities:

In addition to our holiday family of scratch-offs, we ran a Powerball with Power Play promotion called Holiday Bonus. Players who purchased any Powerball with Power Play ticket from November 11 to December 15 received an additional trailer ticket featuring a unique raffle number that was entered into the next weekly cash drawing. Each Monday for five weeks, \$60,000 in prizes were given away for a total \$300,000. During each drawing one \$25,000 winning number, one \$10,000 winning number and 50 \$500 winning numbers were randomly drawn.

### Major lessons learned in 2018:

In the spring of 2018, the Lottery hosted a "Game Planning 101" session where a group



of Lottery employees spent a day learning about both the business and creative sides of the Lottery's six-month game planning process, from budgeting and prize structures to game concept and design to the printing process. During the workshop, staff were broken into teams and tasked with conceptualizing the Lottery's 2018 holiday games for further exploration and adaptation by the Lottery's game planning committee. Two sets of holiday games conceived by two teams were selected for mock up. Afterwards, the group had the opportunity to vote on which set would become the Lottery's 2018 holiday games, based on an evaluation of their appeal, marketability and appearance in the dispenser. The collaboration experience was so well received by participants (and the end result equally successful), that we intend to repeat the employee workshop for the design of our 2019 holiday games.

## MARYLAND LOTTERY

Maryland's holiday lineup included five games: one each at \$1, \$2, \$3, \$5 and \$10.

### Most successful game(s):

The \$10 \$100,000 Winter Winfall was our most successful holiday ticket in 2018. Because of its winter theme, its sales remained strong beyond the holidays. With an appealing cash theme and four bonus areas, it was well received by our core players, which really helped churn the game.

### Launch and end dates:

We launch our holiday tickets on the Monday of the last full week in October. Typically, we close holiday themed games when our second chance contest has ended, which is usually in the middle of January. Sales performance plays a role in the decision to

close these games, but we do make sure to close them before March.

### General holiday strategies:

We followed the same format as previous years. Our \$1 ticket, Holiday Pets, had a whimsical theme and featured images of dogs and cats and a To/From tag. Our \$2 Polar Bear Bucks was slightly more cash-focused, but also featured animals. Peppermint Payout, our \$3 ticket, was a non-traditional extended-play ticket that we launched with great success two years ago, so we decided to repeat the design with slight changes. Holiday Cash, our \$5 ticket, was a cash-themed ticket printed with Scratch FX. As already noted, Winter Winfall was a winter-themed ticket that appealed to core players. Typically, we launch more whimsical-themed tickets



at the lower price points and more cash-focused tickets with the higher price points. Our Cash and Dash second chance contest is tied to the holiday tickets, and is an annual promotion that is very popular with our players. It features a Warehouse Dash prize as well as cash prizes.

**Other holiday games, promotions or activities:**

We ran a Pick 3/Pick 4 promotion called Let it Snow that had printed point-of-sale materials and messaging on our LIM monitors in all retail locations. We also advertised our Old Bay scratch-off ticket with the holiday tickets because many Marylanders have a connection with the Old Bay brand, and we thought players may decide to give those tickets as gifts. In

addition, the Old Bay ticket had only had one top prize left, so even with limited inventory we felt the sales opportunity was bigger than the risk associated with our hard recall policy.

**Major lessons learned in 2018:**

The launch of our Maryland 7s game (in September, one month before the holiday tickets) may have negatively affected the sales of our \$5 Holiday Cash game. The ticket art for Maryland 7s includes the distinctive Maryland flag design, which is extremely popular with Marylanders. We previously had great success with a \$2 Maryland ticket that also utilized the flag design, so it was a concept we were eager to revisit.

## MASSACHUSETTS LOTTERY

Massachusetts' holiday lineup included four games: one each at \$1, \$2, \$5 and \$10.

**Most successful game(s):**

Holiday Cash Blowout, the sequel to our \$50, \$100 and \$500 Blowout ticket, was incredibly successful, eclipsing the \$10 million mark in weekly sales for nine consecutive weeks, peaking at over \$13.7 million the week of Christmas.

**Launch and end dates:**

Our games launched Tuesday, October 23, and they remain on the market until all grand prizes are claimed or there is no more inventory to sell.

**General holiday strategies:**

For the last several years, we had launched a family of tickets at four different price points (\$1, \$2, \$5, \$10), along with a seasonal \$2 extended play game. This year, our family consisted of three Holiday Cheer games at the \$1, \$2 and \$5 price points. We reduced the print quantities at each of these price points, while maintaining top prizes of \$10,000, \$100,000 and \$1,000,000, respectively. Holiday Cash Blowout was our \$10 holiday game.

For the second straight year, we ran a Second Chance Holiday Promotion in which anyone

enrolled in our VIP Club could enter their non-winning holiday tickets into a cash drawing for prizes from \$1,000 to \$10,000. The entry period commenced with the holiday launch and concluded in early January. Over the course of the promotion, we gained over 8,600 new VIP Club members and there were more than 10,000 downloads of our second chance mobile app that allows members to scan their tickets for entry. Over 3.1 million tickets were entered, 64 percent of which were entered using the app. Last year, 47 percent of the tickets were entered using the app. The 3.1 million tickets entered represent a 29 percent increase over last year's 2.4 million.

**Other holiday games, promotions or activities:**

We offered a discount on all Season Ticket purchases (Lucky for Life, Mass Cash, Mega Millions, Megabucks Doubler and Powerball) from November 18 through January 5. As an extra incentive, every Season Ticket bought or renewed during this discount period and registered by February 9 was entered into a drawing to win \$1,000. Twenty \$1,000 prize winners were selected.





## MICHIGAN LOTTERY

Michigan’s holiday lineup included four games: one each at \$1, \$2, \$5 and \$10.

### Most successful game(s):

We enjoyed double-digit overall growth across our holiday games, even though the \$1 price point was down six percent against the previous year’s \$1 holiday game. Our \$5 and \$10 games saw amazing growth, achieving 29 and 41 percent increases over the previous year.

### Launch and end dates:

We launched on October 30. We typically remove games in mid-to-late January. This season our \$5 game sold out on December 14, and the other three price points were removed from distribution on January 17.

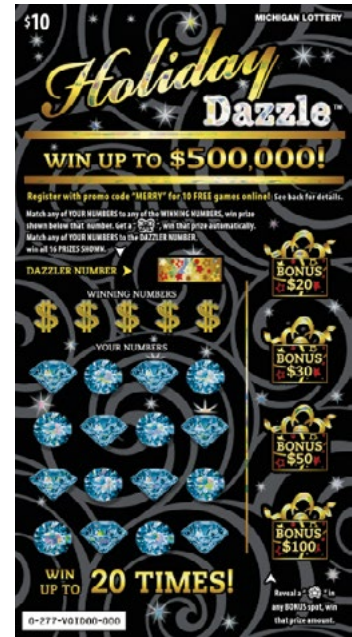
### General holiday strategies:

Overall our program was fairly static as far as number of games launched and time available in market from FY18 to FY19. Because of this, our goal this season was to launch well researched concepts that resonated to a high degree with our focus group and online participants, and have them outperform the previous year offerings – an obvious goal but one worth achieving. What we observed surpassed our expectations and budgeted projections. Across the four price points launched, our holiday sales were up 24 percent for the season, despite the \$1 game being down six

percent. As mentioned, our \$5 game was the only price point to sell out prior to Christmas, with the other three price points shipping greater than 70 percent of their delivered inventory to retail through the remainder of the holiday season. We see these ship rates as a point of validation for the research conducted on the concepts’ behalf. We also implemented a new ad campaign that leveraged supporting assets via traditional and digital channels. Finally, our sales reps are second to none and did an amazing job at retail this holiday season getting the product up for sale immediately at launch, achieving a first week statewide activation rate of 98 percent. That’s every participating retailer putting up for sale at least one pack of each holiday game during the games’ first four days on sale. The momentum just snowballed from there, pun intended.

### Other holiday games, promotions or activities:

Our digital team ran a holiday promotion through our digital channel that did not require instant ticket purchase. The focus of the promotion was to create awareness of both holiday retail instant and digital games. Some additional goals of the promotion were to create visibility and retention, and ultimately registrants and first time depositors for our digital channel. A concerted CRM campaign was employed to support the promotion’s goals.



### Major lessons learned in 2018:

We learned that we still have an opportunity to enhance our \$1 holiday offerings going forward, which we will explore during our holiday focus groups and online research being conducted this March and April. This research consistently helps us find the right combination of design and play value for each of our games.

## MISSOURI LOTTERY

Missouri’s holiday lineup included six games: one each at \$1, \$2, \$3, \$5, \$10 and \$20.

### Most successful game(s):

Our \$3 and \$10 games – Peppermint Payout and 25 Days of Winning, respectively – did very well this year. In fact, they were our highest-selling \$3 and \$10 holiday games to date. Both games offered a great amount of play value and extra appeal. Peppermint Payout was printed using scented ink and 25 Days of Winning was printed using foil paper. Peppermint Payout outsold last year’s \$3 game by 78 percent, while 25 Days of Winning outsold last year’s \$10 game by 30 percent. Overall, our total holiday Scratchers sales were 15.2 percent higher than last year, and were the highest total holiday game sales in Missouri Lottery history.

### Launch and end dates:

Our \$20 holiday game was launched on September 24, and the remaining holiday games were made available in mid-October. Retailers were instructed to replace holiday games during the first week of January, at which time we launched a new family series of Scratchers games.

### General holiday strategies:

We continued to offer variety within the holiday themed games, including an assortment of play actions and price points. We complemented the ticket line with an exciting holiday themed promotion that offered experiential prizes that most lottery players would not be able to create on their own. The Second Chance of a Lifetime: Gourmet Getaway promotion gave players a chance to win their choice of world-class culinary



trips to France, Italy or California. Since our holiday advertising has traditionally been successful, the ad strategy remained similar to what we've done in recent years. Our "Scratchers as Gifts" spot received TV, radio, OOH, web banners, streaming audio and video ad support. Similarly, the Gourmet Getaway second chance promotion was supported by radio, streaming audio, social, OOH and web banner advertising.

**Other holiday games, promotions or activities:**

Draw game tickets were also incorporated into our holiday second chance drawings. While our Gourmet Getaway promotion required players to enter the holiday themed

tickets on the Scratchers side, any draw game ticket printed and entered within the promotion dates was also eligible for the drawings. The newest Scratchers as Gifts campaign highlighted this year's holiday themed tickets in the advertising, but the overarching theme was that all Scratchers make great gifts.

**Major lessons learned in 2018:**

Players loved the variety of our holiday games. We'll continue to offer games with added play value and specialized printing techniques for extra appeal, as well as second chance promotions that serve to extend the holiday purchase.

**MONTANA LOTTERY**

Montana's holiday lineup included three games: two at \$1 and one at \$2.

**Most successful game(s):**

Our \$1 games completely sold out in record time. This seems to be a trend year over year for us even though we have increased print quantities.

**Launch and end dates:**

We launch holiday games in October. If it is a holiday specific game we remove them based on our EWS (effective weeks on sale) benchmarks, which vary by price point.

**General holiday strategies:**

Typical our holiday specific game themes are centric to holiday imagery such as gifts, game names, etc. Our sellout goal is 100 percent on \$1 games and less on higher price points. We always produce digital assets for advertising and not full campaigns such as TV and radio. We also had a mobile campaign that included the ads for the holiday tickets;



they were interactive ads with a scratch feature for people to scratch off the message. Last year we added a social media aspect to our holiday advertising and it did appear to have a positive impact on sales; we had not previously done ads on social media.

**Major lessons learned in 2018:**

We will increase print quantities on our \$1 games.

**NEBRASKA LOTTERY**

Nebraska's holiday lineup included three games: one each at \$1, \$3 and \$5.

**Most successful game(s):**

Our \$1 Merry Money Scratch game was the most successful because we were able to increase the print quantity at the \$1 price point as well as sell though the entire game. It also increased the distribution of winning experiences above the 5X threshold compared to prior year's \$1 game.

**Launch and end dates:**

We launched our holiday games on September 24 and typically remove them in February if they haven't closed.

**General holiday strategies:**

Our game strategy for 2018 was to

continue our history of strong sales by appealing to both core players and occasional players who purchase tickets during the holidays. We reduced the number of holiday games from five games at \$1, \$2, \$3, \$5, and \$10 in 2017 to three games at the \$1, \$3, and \$5 price points in 2018. Games were launched at a similar date compared to previous years. However, the holiday second chance contest was changed to offer weekly \$1,000 prizes leading up to Christmas and a \$12,000 Grand Prize drawn on January 23. A total of 71,449 entries were received, and approximately 17 percent of entrants joined the lottery's MVP Club at nelottery.com specifically to enter the promotion.



**Other holiday games, promotions or activities:**

POS for the holiday promotion and our gift giving campaign also feature lotto games.

**Major lessons learned in 2018:**

We learned that lower top prizes are effective at least at the \$1 price point. We may apply this strategy at other price points next season.

## NEW HAMPSHIRE LOTTERY

New Hampshire's holiday lineup included three games: one each at \$1, \$2 and \$5.

### Most successful game(s):

Our \$5 Holiday Lucky X10 was the most successful for a couple of reasons. One, it indexed over 160, the best \$5 holiday ticket in a few years. Two, it promoted (as did all of our holiday ticket this year) our "Light up the Lottery" house decorating contest, which engaged our players to submit photos of their decorated house. The winner's house will be featured on one of our holiday tickets in 2019!

### Launch and end dates:

We released the 2018 holiday games at the end of October, our normal time frame. We increased the print run a bit on all price points this year, as we decreased the number of holiday tickets (we went from four to three). With more than usual inventory on hand, we will likely offer some spring BOGO promotions at retail and then one more Christmas in July promotion to move them from market. If that does not shake out the last top prizes, then we will likely issue pull notices the beginning of July to make room for new holiday games in late October.

### General holiday strategies:

We deleted one \$1 price point (typically we have had two at \$1 and one each at \$2 and \$5) and increased the print run by about 250,000 for each ticket. We went SUPER traditional with the look and feel – equal opportunity for red and green, and a little dash of blue, with one of the three scenes for the \$1 ticket. We always have the goal

to have ample supply to get through the holiday, but hope to sell out soon after. We had enough to get through ... and then some. We have many extras on hand. Our biggest goal is to see record sales. We did that – YAY! The Light up the Lottery holiday house decorating contest was not second chance, but was social media driven. The winning house will be featured on one of our holiday tickets next year. The house is amazing and we will likely have multiple scenes featuring this beauty.

### Other holiday games, promotions or activities:

With our new iLottery games, we launched a holiday themed e-Instant, Holiday Cheer, at the end of November. It was a super popular game that will likely be pulled from the platform by the end of March. We also offered a 10 percent discount on subscriptions purchased at retail. This ran from Black Friday, November 23 through December 31. This is a great way to get foot traffic into the stores that sell subscriptions for Powerball, Mega Millions, Tri-State Megabucks and Lucky For Life. And we capped off the holiday season with a "Jingle All the Way" Tri-State Megabucks promotion where a Megabucks ticket purchase at retail resulted in random a \$25 cash award. This put more than \$30,000 back into the hands of players, running the week before the holiday. Retailers were also encouraged to suggest the sale of our \$25 scratch ticket, Granite State Millions.

### Major lessons learned in 2018:

We will likely decrease the print run a little.



We may introduce a \$10 ticket as we hear from our players that they would like one. Historically a \$10 holiday ticket does not perform well, but we may do pulsed books with a limited time holiday scene. And we will likely bring back the Light up the Lottery contest so we can highlight homes in our state and bring a local flair. We'd like to involve our players even more, so this spring we will launch a social media promotion that will further engage our players with the end result of selecting their images for one of our holiday tickets in 2019

## NEW JERSEY LOTTERY

New Jersey's holiday lineup included four games: one each at \$1, \$2, \$5 and \$10.

### Most successful game(s):

The \$10 \$1,000,000 Spectacular game was the most successful, delivering the greatest volume of sales during the holiday season through the end of December. The week ending December 29 achieved the fourth highest weekly Scratch-Offs game sales of more than \$41 million. This was driven by the highest single day – over \$8.2 million on December 24.

### Launch and end dates:

Three holiday themed games (\$1 Holiday Loose Change, \$2 Holiday Lucky Times 10 and \$5 Holiday Bucks) and a winter refresh of \$10 \$1,000,000 Spectacular launched on November 5. In New Jersey,

we end or remove games from distribution on a quarterly basis. The holiday games will be removed from the market beginning in April 2019. With a larger print run, the \$10 game will remain in the market to sell through its inventory. The \$1, \$2 and \$5 price points sold close to 90 percent of inventory as of the beginning of February.

### General holiday strategies:

The 2018 holiday Scratch-Offs strategy was reminiscent of the prior year by price point and theme. The goal was to achieve near sellout levels by the turn of the New Year. Being the core \$1 game within the portfolio, Loose Change was allocated to the launch with a holiday look and feel. \$2 Holiday Lucky Times 10 has been a perennial favorite and continues to achieve sellout goals year after year. With the \$10,000 Bonus game underperforming in 2017, the \$10 game was replaced by the popular \$1,000,000 Spectacular. As the holiday

period is the most important time of year, an all-encompassing advertising campaign supported the holiday Scratch-Offs games and promoted gift giving. The New Jersey Lottery's new Scratch-Offs Division added to the promotional support this year as well.

During the holiday season there were two second chance opportunities for players. The Lottery Bonus Zone Second Chance promotion gave an added value to players' non-winning tickets for a chance to win additional lottery Scratch-Offs and merchandise. Players entered a non-winning ticket from all four holiday price points, which equaled one entry. The Million Dollar Replay Second Chance promotion allowed for players to enter a non-winning ticket from the holiday Scratch-Offs launch, which resulted in four times the entry value.

**Other holiday games, promotions or activities:**

While additional lottery products were not inclusive of the holiday campaign, the draw game second chance website,

Collect 'N Win, was updated to a winter theme. Players entered their winning or non-winning \$1-plus draw game tickets into their account to collect symbols for a chance to win a prize. The symbols collected and Collect 'N Win logo were holiday themed as well.

**Major lessons learned in 2018:**

For the 2019 launch, each price point will keep a similar theme to holiday 2018 games because of their ability to sustain year over year record setting Scratch-Offs game sales. Because of the continued success of \$2 Holiday Lucky Times 10, there is an opportunity to apply the multiplier theme to the \$5 and \$10 price points as well. We will continue to leverage Lottery Bonus Zone and Million Dollar Replay second chance promotions during the holiday season because of their added appeal. New Jersey will continue to support the holiday games by promoting gift-giving during the holiday season.



**NEW MEXICO LOTTERY**

New Mexico's holiday lineup included five games: one each at \$1, \$2, \$3, \$5 and \$10.

**Most successful game(s):**

Our \$10 Holiday Countdown generated the highest holiday sales and highest return to our beneficiaries, as well as providing magical talking points for our holiday marketing campaign.

**Launch and end dates:**

Our holiday games launched October 2. Both the \$1 and \$2 games sold out; the \$3 and \$5 games are scheduled to be pulled at the end of March. The \$10 Holiday Countdown was pulled at the end of January and will be relaunched next Christmas.

**General holiday strategies:**

For the first time, we addressed the holiday games in October with a 'Sorry, Not Sorry' Hall-o-days TV spot. Then we changed gears and launched a new "My True Love Gave to Me" traditional media campaign to promote the

holiday games. We partnered with a TV station to produce :30 and :60 holiday promotional ads that aired in November and December, and created a Holiday Countdown how-to-play video that we posted and boosted on our Facebook page. Also on Facebook, we created a "7 Days of DIY Facebook Scratcher Gift Ideas." Players received 2X entries in our My Rewards player loyalty club with all holiday games in December.

**Other holiday games, promotions or activities:**

We launched Jingle Bucks Quicksters and offered a lottery promotion to retailers submitting a Lottery holiday display.

**Major lessons learned in 2018:**

We had too many price points and will eliminate the \$3 game next year. The \$10 Holiday Countdown is a big ticket (8 x 10) which means it requires a special dispenser, which only one third of our retailers support. Taking this into account, the game was successful.



## NORTH CAROLINA EDUCATION LOTTERY

North Carolina's holiday lineup included five games: one each at \$1, \$2, \$3, \$5 and \$10.

### Most successful game(s):

Our \$5 Holiday Cash game achieved the greatest success of our holiday tickets and became our best-selling \$5 holiday game ever. Thanks to the game's popularity with players and retailers, all tickets were distributed five weeks after launch. We attribute Holiday Cash's success to its unique clear, plastic ticket stock that made it stand out at retail for our players. The ticket came in three festive colors: red, green and blue. It had four top prizes of \$150,000 and more than \$11 million in total prizes. It was "clearly" a unique stocking stuffer.

### Launch and end dates:

We launch all of our holiday tickets on First Tuesday each November. We typically don't remove games unless they are still on sale into March.

### General holiday strategies:

We tried a couple of new strategies that are noteworthy and interesting to watch. As a bonus this year, all holiday tickets were eligible for entries into two second chance drawings. We conducted one second chance

drawing in December and a second at the end of January. Each drawing featured a top prize of \$50,000, five prizes of \$10,000, and 50 prizes of \$500. We found that the holiday season provides a great time to use second chance opportunities to build membership in Lucke-Rewards, our player loyalty program. The second new tactic involved the design of our \$1 scratch-off ticket, Happy Holidays. The ticket looked just like a gift tag and even had a hole punched in it so someone could attach it to another gift. Getting holiday games into the market at the right time and out of the market at the right time is tricky. This year, to avoid having games for sale long after the holiday season, we reduced quantities slightly on the higher price points. We wanted to sell out of the games by the end of January.

### Major lessons learned in 2018:

We will consider bringing back our clear ticket and will offer a second chance opportunity again with our holiday games. We also plan to get more creative with our higher price point prize structures, specifically the \$10 price point. Even with the short holiday season sales period, we want to make sure we offer games with attractive prizes.



## OHIO LOTTERY

Ohio's holiday lineup included eight games: two each at \$1, \$2 and \$5 plus one each at \$3 and \$10.

### Most successful game(s):

The \$1 Holiday Cash instant game is a perennial favorite. First launched in 1986, in recent years the game is released annually. Within the first 14 weeks of sales, 80 percent of the game was sold. Based on the number of tickets sold, Holiday Cash was the top selling holiday instant game this season. The \$10 Holiday Fun instant game, which debuted this year, was the top selling holiday instant game in terms of total sales, accounting for more than 25 percent of the eight holiday and holiday/winter themed instant games released this season.

### Launch and end dates:

Holiday instant games went on sale October 17. As long as games maintain weekly sales levels above set thresholds for closing games, they will remain on sale. Based on past

holiday instant sales, these games usually close out in April.

### General holiday strategies:

The holiday instant ticket sales season is especially important for Ohio Lottery retailers, with 18 percent of total instant ticket sales taking place during the last two months of the year. We maintained the format used in 2017 for the release of holiday and winter themed games in 2018, with a primary launch in October, followed by a second release of seasonal games in November. While holiday instant game sales were down slightly compared to the prior year, overall instant ticket sales rose 4.9 percent during the 14-week holiday period running October 17 to January 12. Five of our holiday games were released on October 17, one each at \$1, \$2, \$3, \$5 and \$10. On November 28, to keep the holiday instant ticket momentum going and to add variety to the mix of games, we released three more winter/holiday themed instants, one each at \$1, \$2 and \$5.

To support holiday instant game sales, the Ohio Lottery released an instant ticket coupon to one million Ohio households in early December. The coupon offer ran from December 3 to 15, providing a \$1, \$2, or \$5 discount off any Ohio Lottery instant game, or a \$500 instant prize. Instant ticket coupons typically perform well and the instant ticket coupon sent during the holidays was no exception. The coupon had a redemption rate of 15.8 percent.

**Other holiday games, promotions or activities:**

In a new twist this season, the Ohio Lottery brought the holiday spirit to the top-selling instant game and corresponding game show, Cash Explosion, offering the Holiday Cash Bash special airing December 22. Twelve contestants appeared on the Holiday Cash Bash, with one contestant taking home a \$250,000 top prize. Cash

Explosion hosted a Cash Bash Watch party with a number of show contestants on December 22 at JACK Thistledown Racino, where attendees could play “express” games to win cash and merchandise prizes. The event, which was open to the public, included dancing after the show.

We also provided a wide variety of holiday themed EZPLAY and touch screen games. Five traditional EZPLAY holiday games, ranging from \$1 to \$10, were released on November 18; these print-and-play games do especially well in the bar/ tavern environment. One holiday themed EZPLAY Touch & Win game, Snowman Surprise, was available from November 16 until January 18 at select bars and taverns with MP Touch & Win vending. Still another holiday game (Merry Merry Money) was available on our EZPLAY Tap terminals at fraternal organizations and

clubs from November 9 until January 11. Both forms of touch play games are sold in denominations ranging from \$0.25 to \$5.

**Major lessons learned in 2018:**

The \$1 Holiday Cash and \$5 Holiday Lucky Times 10 instant games continue to be popular with players. They have both become staples in our holiday lineup and we will continue to produce them for the holidays. We noticed increased contestant interest and anticipation for Cash Explosion’s Holiday Cash Bash because people are generally more excitable during the holiday season. Also, Cash Explosion fans who attended the Cash Bash Watch Party at JACK Thistledown Racino seemed to be appreciative and overall enthusiastic. Due to its positive reception, watch parties may be considered for future Cash Explosion show specials.

## OKLAHOMA LOTTERY

Oklahoma’s holiday lineup included two games: one each at \$1 and \$2.

**Most successful game(s):**

The \$1 game was fully distributed from the warehouse and the \$2 game had a lot of inventory left after the holidays, so we would probably say the \$1 game was more successful. However, we will need to wait until the game ends and all of the unsold inventory is returned to get a true sense of how both games performed.

**Launch and end dates:**

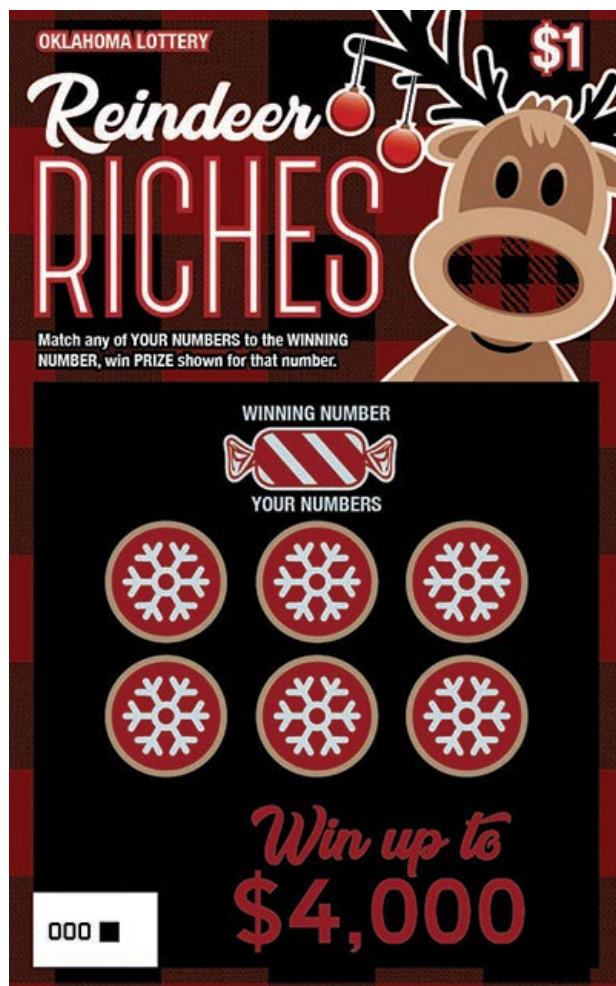
Both games launched on October 30. We typically turn off distribution from the warehouse in late January or early February unless the games continue to perform well, in which case we may keep them in market a little longer.

**General holiday strategies:**

Our strategy really did not change from last year. We had point of sale pieces in retail locations and we advertised them on our in-store digital marketing screens, but we really didn’t put much media or a second chance drawing behind them.

**Major lessons learned in 2018:**

It’s too early to tell at this writing; we will have to wait until the games end and all of the unsold inventory has been returned, but we may try something less whimsical next year with a longer shelf life and go back to winter themed games. Reindeer Riches fully distributed in the warehouse but we still had a lot of Snow Me the Money inventory left after the holidays.



## ONTARIO LOTTERY AND GAMING

Ontario's holiday lineup included six games: two at \$10 and one each at \$2, \$3, \$5 and \$20.

### Most successful game(s):

Overall, the entire holiday lineup was strong, but \$10 Holiday Cash (a national game), \$10 Gift Pack and \$2 Warm Winter Winnings performed strong against previous years and stood out amongst the others.

### Launch and end dates:

We typically launch the majority of our holiday themed games in early November and remove them from market the first week of January (if not sooner based on performance). We don't normally sell holiday games past the end of December, as consumer demand drops at this time, and retailer feedback is to offer fresh new games after the holidays. Five of our six games ended on January 4, including the \$2, \$3 and \$5 games that launched on November 5, the \$10 Gift Pack that launched November 12, and the national \$10 game that launched October 15. Our \$20 24 Days to Celebrate launched October 22 and ended December 28.

### General holiday strategies:

Our holiday ticket lineup consisted of a wide range of price points, from \$2 to \$20 with themes focused on the holiday season. This strategy has worked well for OLG, providing our customers with a wide range of prizing

and play options. The overall goal is to have the holiday tickets in and out of market in a two month period (approximately November to end of December). This past holiday instant ticket lineup was the same as the previous year and will remain the same (with the exception of the \$10 national ticket) for next year as well.

### Other holiday games, promotions or activities:

In some instances, OLG Gift Cards were featured alongside instant tickets through radio advertising and placement at selected retail locations.

### Major lessons learned in 2018:

We learned that our current lineup of games meets the needs of our players from a price point, prizing and play mechanic perspective, and therefore we will continue with a very similar offering for 2019 in terms of price point availability. We will continue to keep our holiday lineup fresh with different themes across the various price points to ensure customer engagement. We also received feedback from our customers telling us they'd like our \$20 offering to be more holiday themed (red and green colors, popular holiday/Christmas images, etc.), so we will incorporate this feedback into future offerings. Additionally, we will reduce the order quantity slightly for the \$20 Big Ticket in Fiscal 2020 to optimize inventory and sales.



## OREGON LOTTERY

Oregon's holiday lineup included five games: one each at \$1, \$2, \$5, \$10 and \$20.

### Most successful game(s):

We continue to see success in our \$5 ticket offerings. Our \$5 Holiday Cheer ticket sold out faster than the other holiday tickets in 2018, and our \$5 price point sold out first in 2017 as well.

### Launch and end dates:

Our holiday games launched on October 2 and were pulled from the market on January 31.

### General holiday strategies:

The holidays are the top selling period for Oregon Lottery Scratch-its. Many customers purchase these tickets as gifts for co-workers, friends and stocking stuffers for adult family members. As we have done with past holiday strategies, we focused on Scratch-its as a gift giving idea for Oregonians 18+. The overall strategy was to have

five games in the market at various price points to meet all customer needs.

We treat our holiday tickets as a family or featured set of games. As in past years, we hoped to increase our player bases by appealing to lapsed and non-players through gift giving and product sampling. This year we enhanced our "Surprise and Delight" program. We did fewer events but made the events bigger and promoted where our teams would be. We focused our events at retailers who had strong Scratch-it ticket sales. We used social media and notifications through our new Oregon Lottery mobile app, which helped to increase awareness and drive traffic to our promotional events.

Our overall marketing campaign was "Tis the Season of Gifting," which was a play on the "Night Before Christmas" story. It featured a red door campaign with the tickets pictured in the holiday

wreath or in front of the red door, each wrapped in a bow. TV media was used to support our efforts, and we provided various spots including a :15 responsible gambling spot. This spot mentioned 'Tis the Season for gifts giving; however, only for people over the age 18.' The POS campaign launched

on October 29 and included various point-of-sale printed materials. The materials remained placed through January.

We offer different play styles and features to appeal to a range of customers to keep our core players engaged over the holidays.

#### Major lessons learned in 2018:

Our \$20 annuity ticket was the second ticket to sell out for 2018. It continues to be a big contributor to sales at the holiday season. This was our first holiday season with a mobile app.

## PENNSYLVANIA LOTTERY

Pennsylvania's holiday lineup included six games: one each at \$1, \$2, \$3, \$5, \$10 and \$20

#### Most successful game(s):

We were very happy with all of the designs and themes of each of our six holiday themed games this season. As we have done in past years, we launched one game at each of our price points (except for \$30). The \$1 Reindeer Games was comprised of four different scenes, each with a different reindeer and name: Blitzen Bucks, Comet Cash, Dancer Dollars and Prancer Payout. All six games featured HD printing, and the \$20 Merry Millionaire had a special print element with gold Sparkle paper. Both Merry Millionaire and \$10 Money Tree well exceeded our expectations. Merry Millionaire brought in the most sales of our holiday themed games and generated the most profit. However, Money Tree out-performed previous \$10 holiday themed games. While you could make a case for either game, we would consider Merry Millionaire as our most successful game. It looked great and it sold even better! Sales for Merry Millionaire after 10 weeks were up 14 percent over the 2017 game. The six games as a whole were up 3.76 percent over the previous year.

#### Launch and end dates:

We launched our holiday themed games on October 23, which is the same time frame as previous years. We generally look at the period of holiday sales as nine weeks that end just around the New Year. In terms of closing games, we follow the same process for our holiday themed games that we do for all of our Scratch-Offs. We closely monitor the life cycle of each game and make a determination as to when to close each game based on many factors, including sales performance, upcoming game launches, number of games available at each price point, percentage of active stock at retail, and other factors. Typically, holiday-themed games sell very well in Pennsylvania and sales drop a little after the season and especially drop when the games are no

longer available to order. We monitor game performance every week after the holiday season and when it becomes apparent to close individual games, decisions are made using our normal game closure process.

#### General holiday strategies:

The core idea behind our strategy this year was the same as it was during the preceding years. We made decisions on themes and play styles based on research (focus groups and surveys) and our past knowledge of what works well in Pennsylvania and what does not. Every year we ensure the design of each game complements, rather than competes with, one another. With the games determined, we knew it was time to take our designs to the next level. Therefore, we featured HD printing (high definition play and prize symbols) on all of our holiday themed games and gold Sparkle paper on Merry Millionaire. We had our annual holiday second chance drawing, the Pennsylvania Lottery's Jingle All the Way Second Chance Drawing, which included the holiday Scratch-Offs, two holiday Fast Play games, and all of our draw games (except Millionaire Raffle). Each game category could be entered into its own drawing bucket for a chance to win up to \$100,000. Random entries could also award a 20X, 50X, or 100X entry multiplier. The second chance drawing was a big success, as players in Pennsylvania continue to gravitate strongly toward value-added products and opportunities for a second chance at winning prizes.

#### Other holiday games, promotions or activities:

As noted, we included holiday Fast Play games and most of our draw games in the Jingle All the Way drawing. We did this in 2017 with excellent results so the decision was made to include tickets from each major sales category for this holiday season. But the holiday spirit did not stop there this year. With the launch of Keno and iLottery, we were able to expand into these products as well. We created five different holiday themed Keno screens that were out during



the month of December and part of January. We also launched five holiday themed iLottery games this season, with the first two launching just after the Scratch-Offs on November 1; the remaining three then had staggered launches through the season. These games were still performing well for us through the end of February. The desktop version of our website even got a little festive makeover for the season.

#### Major lessons learned in 2018:

We learned that our players appreciate the special printing features, including special paper and high-definition prize and play symbols on our Scratch-Offs, so we are looking for ways to bring that back and possibly expand in 2019. This was the second year we have launched holiday themed Fast Play games, and it was even more evident that the seasonal games perform very well for this category. With that information, we have decided to launch three holiday Fast Play games next year, adding a \$2 game along with the \$5 and \$1 games. We will also be launching them earlier than we did last year, at the beginning of November instead of the beginning of December. With the success of the expansion of the holiday spirit across all product lines this past year, we will definitely be looking to bring that back again next year bigger and better than ever.



## RHODE ISLAND LOTTERY

Rhode Island's holiday lineup included four games: one each at \$1, \$2, \$5 and \$10.

### Most successful game(s):

We consider all of them successful because they all had a winter theme, which allowed sales to be strong beyond the holiday.

### Launch and end dates:

We launched them at the end of September, and we will not remove them because instead of a holiday theme, they all have a winter theme.

### General holiday strategies:

Our strategy was to give the feel of a holiday game but make the look more seasonal. For the advertising, we went with the theme 'Oh, what fun!' and kept the radio and television ads pretty generic, so we could use them after the holidays as well. We do a promotion each year at the mall, which does well. We chose to use a winter theme to extend the shelf life. We have run a holiday second chance promotion

over the years, with a drawing in December and again towards the end of January, for cash prizes of \$500, \$250 and \$100, totaling \$10,000. This year was no different, besides the fact that the number of entries a player received was based on the price point of the ticket entered.

### Other holiday games, promotions or activities:

We also sell holiday mugs with \$1 instant tickets, and greeting cards with \$10 or \$20 in instant tickets inside beginning on Black Friday, with a huge promotion at our headquarters that day. The event and those items are always very popular, and people look forward to it every year. We do reference the holidays a lot when posting about the jackpot games on social media.

### Major lessons learned in 2018:

We learned that replacing the holiday games with a winter theme gives them longevity, but we may try one price point using a holiday theme for the next holiday season.



## SOUTH CAROLINA EDUCATION LOTTERY

South Carolina's holiday lineup included two games: one each at \$1 and \$2.

### Most successful game(s):

We launched the \$1 Holiday Cheer (Tic Tac Toe) and a \$2 Holiday Spectacular (KNM + Find). Both games were successful in their own right, in regards to sell through and sales.

### Launch and end dates:

Our games launched on October 2. Our end of game procedures state that a game 'ends' 90 days after the top prize of a game is state to one. On the date a game goes down to zero top prizes, it is the last day that game may be sold.

### General holiday strategies:

We haven't changed our holiday ticket strategy much from years past. We launched a \$1 and \$2 game with lower order quantity and standard in store POS to support the launch. We did advertise Powerball and Mega Millions on our digital outdoor boards with a subtle holiday theme to remind people that other games do make great holiday gifts.

### Major lessons learned in 2018:

We did launch the holiday games a little earlier in the month of October. We will continue this strategy next year, in hopes that the tickets sell through and are not in the market much past the holiday season.

## TEXAS LOTTERY COMMISSION

Texas' holiday lineup included five games: one each at \$1, \$2, \$3, \$5 and \$10.

### Most successful game(s):

Holiday Greetings was a \$5 ticket designed and printed by Pollard Banknote. This game utilized the Scratch FX holographic treatment which made it really stand out in the dispensers. The game had a 12-week index of 137 and a top sales week of \$3,649,965.

### Launch and end dates:

During 2018, our holiday games launched in the month of November and will be removed according to our game close procedure, which evaluates several factors including sell-through of the game. Holiday games are not removed simply because the holiday season has ended.

### General holiday strategies:

The holiday strategy remained the same as previous years with Texas introducing \$1, \$2, \$3, \$5 and \$10 holiday games. There was an

advertising campaign which included digital video, social media, in-store point-of-sale, out of home and in-store ESMM animated slides.

### Other holiday games, promotions or activities:

We updated the look and feel of the draw game ESMM slides to a holiday theme.

### Major lessons learned in 2018:

This year most of our holiday games were enhanced using special print production treatments such as holographics. The sales for the games featuring the holographic treatment clearly indicate it had a positive impact and the Texas Lottery will look for similar product enhancements to include in 2019 holiday games. In addition, whimsical \$1 holiday games have delivered solid performance over the past couple of years including the 2018 \$1 game, Winter Cash. The Texas Lottery will continue with a \$1 whimsical holiday game in 2019 and may include a \$2 whimsical game as well.



## VERMONT LOTTERY

Vermont's holiday lineup included six games: two at \$5 and one each at \$1, \$2, \$3 and \$10.

### Most successful game(s):

They were all pretty even in sales, meeting expectations.

### Launch and end dates:

We launched our holiday specific tickets October 26. Our winter-themed tickets launched December 7. We don't normally pull until they've sold out or sales have diminished to the point they're just taking up space.

### General holiday strategies:

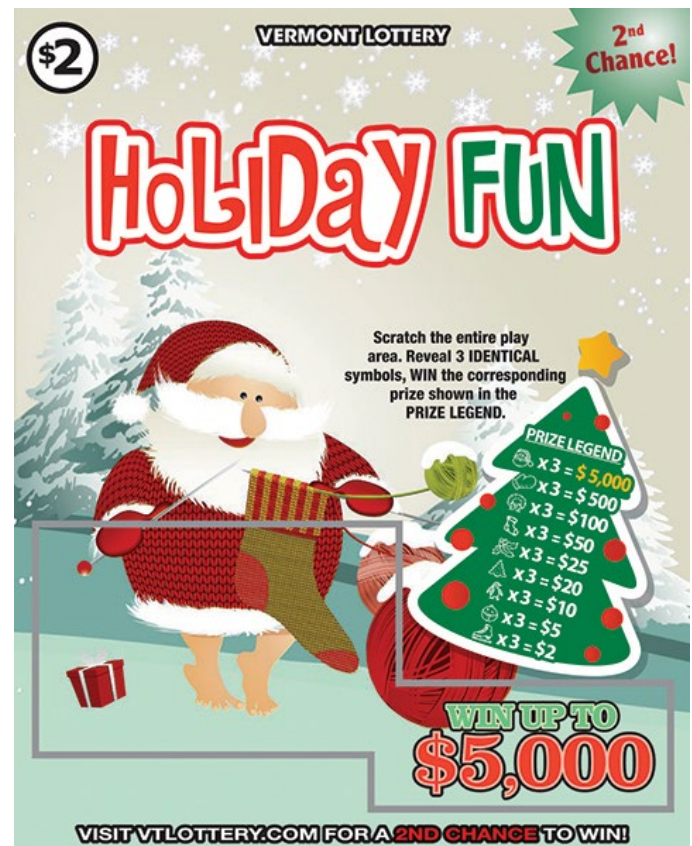
The only change we did this year was to add another \$5 holiday ticket.

### Other holiday games, promotions or activities:

We had a promotion called Holiday Hooray that included all draw games except for Fast Play. For a single ticket purchase of \$4 or more, a player had a chance to win \$15 instantly. The promo ran for ten days prior to Christmas – December 16-25.

### Major lessons learned in 2018:

We likely did better this past season with the holiday tickets than it appeared. Because they were competing with four additional non-holiday games compared to the previous year, their numbers/indexes were about the same. Take those four non-holiday tickets out of the mix, and the holiday tickets would have indexed higher.



## WESTERN CANADA LOTTERY CORPORATION

Western Canada's holiday lineup included 14 games: two each at \$1, \$2, \$3, \$4, \$5 and \$10, plus one each at \$20 and \$30.

### Most successful game(s):

Based on sales, the \$20 Player's Choice Mega Pack continues to be our strongest Christmas ticket. This year it was followed by 24 Days To Celebrate, which was a "large ticket (12 x 7.8 inches)" concept.

### Launch and end dates:

Player's Choice was the first ticket launched at the end of September with the remainder launched between the middle of October and the second week in November.

### General holiday strategies:

WCLC continued with a strategy of providing consumers with a wide choice of Christmas Scratch 'N Win product with multiple price points, themes and play styles to choose from. WCLC repeated a second chance draw component that has been in place on Christmas Scratch 'N win product for a number of years.

### Major lessons learned in 2018:

2018 was another good year for Scratch 'N Win Christmas Product and WCLC will repeat in a similar manner for next year.



## WISCONSIN LOTTERY

Wisconsin's holiday lineup included five games: one each at \$1, \$3, \$5, \$10 and \$15.

### Most successful game(s):

Our \$15 ticket continues to be a big seller, with great feedback from players and retailers. We were also surprised by how quickly our \$1 ticket sold, as it was much faster than we would have expected.

### Launch and end dates:

Our holiday tickets launch every year in mid-October. Because of conservative ticket quantities, we always have high demand and sell out of the tickets, so we have never had to remove them from the market.

### General holiday strategies:

Although we switch up the lower price points (we had a \$2 ticket last year but did not this year), we generally use a similar plan from year to year. This year, we had a \$1, \$3, \$5, \$10 and \$15, with all but the lowest price points being designated thematically from year to year. That is, the \$3 is always a Crossword, the \$5 is always a marquee game, the

\$10 is a premium ticket, and the \$15 is a calendar theme ticket. Our goal is to have the tickets mostly sold through at retail before the end of the calendar year, which we did, and with a low number of returns as well. Our advertising consisted of a dedicated TV spot for the \$15 ticket, which was well received, and a holiday-style musical spot (used on terrestrial and digital radio plus social media) for all of the games in general, which has become something of a holiday tradition.

### Other holiday games, promotions or activities:

We also offer a Holly Jolly Raffle game every year, which has always been a success, and 2018 was no different.

### Major lessons learned in 2018:

One of the most exciting tickets we offered was the \$10 Joy ticket, which was our first foray into HD games. Like the other holiday offerings, it was well received, and we did get feedback on how great it looked. It has definitely helped to cement the \$10 ticket as the classy, premium ticket of the holiday offerings, which is something we hope to continue to do.



FOCUS ON:  
ONLINE SALES



# American Lotteries Embrace Online Sales

In 2018, two more lotteries joined the ranks of those offering online sales in the United States, adding their experiences to a diverse group that now numbers eleven.

By Patricia McQueen

The paths taken may vary, but the end goal is always the same – to meet consumers where consumers want to be and to attract new players who may not be buying lottery products at retail. That is what drives lotteries to develop an online sales program for their players, if that option is allowed in their jurisdiction.

**W**hile every Canadian lottery offers products online, the American market has been slower to develop. Still, the numbers are increasing and there are now 11 American lotteries that offer their products online in some form. Nine offer players the ability to purchase single-draw tickets of draw games and/or instant win games:

**Illinois Lottery** – The American pioneer in single-draw lottery sales, Illinois launched online sales with Mega Millions and Lotto in March 2012; Powerball was added later. Those three games still make up the product mix for single-draw sales, but subscriptions may also be purchased online for Lucky Day Lotto, Pick 3 and Pick 4. The system was recently relaunched with a new website and mobile app under new private manager Camelot Illinois. Total online sales were \$27.6 million in fiscal 2018, an increase of almost 40 percent over the previous year.

**Georgia Lottery** – A November 2012 soft launch for its players club members started things for Georgia, first with Mega Millions, Powerball and Fantasy 5. Keno and instant play games (branded “Diggi Games”) were added later. Total online sales were \$50.4 million in fiscal 2018, an increase of more than 52 percent over the previous year.

**Delaware Lottery** – The lone American lottery to offer casino games online, Delaware’s racetrack gaming partners opened their websites for business beginning in November 2013. Total online net gaming revenues were just under \$2.2 million in fiscal 2018, down 19 percent from fiscal 2017 after strong growth its first few years.

**North Dakota Lottery** – One of three lotteries that actually started online sales with subscription-only options in 2005, North Dakota began offering single draw sales in July 2014. The Lottery’s entire product mix consists of only multi-state draw games; all are available online. Total online sales were just over \$1 million in fiscal 2018, up almost 19 percent from the previous year.

**Michigan Lottery** – After its very successful August 2014 launch of an online sales platform, Michigan has become an example for other lotteries. Initially only instant-win games were offered; in January 2015, Mega Millions, Powerball, Lotto 47 and Fantasy 5 were added. Total online revenues (net win from instant games and total sales for draw games) were almost \$114 million in fiscal 2018, up 24 percent from the previous year.

**Kentucky Lottery** – For its online launch in April 2016, instant play games and Powerball, Mega Millions and Cash Ball were offered in Kentucky. Lucky for Life and Keno were added later. Total online sales were \$14.7 million in fiscal 2018, up 123 percent from the previous year.

**North Carolina Education Lottery** – Online subscriptions were first made available in December 2013; the system expanded to single draw sales in June 2016. Powerball, Mega Millions and Cash 5 were available at launch; Lucky for Life was added later when the Lottery joined that game. Total online sales were \$6.8 million in fiscal 2018, up 112 percent from the previous year.

**Pennsylvania Lottery** – Another lottery launching online sales with only instant play games, Pennsylvania’s entertaining portfolio debuted in May 2018. Total online play from inception (May 22) through March 6 was \$234.8 million.

**New Hampshire Lottery** – The most recent member of this club began last September with instant play games plus Powerball and Mega Millions. Net gaming revenue for all games from September 4 through the end of February was a little over \$2.6 million.

Two additional lotteries offer online sales in the form of subscriptions only:

**Virginia Lottery** – The first to introduce online subscription sales when it added that option in August 2005 to a long-running subscription-by-mail service, Virginia requires a two-week subscription for online purchases of Mega Millions, Powerball and Cash4Life.

**New York Lottery** – Another lottery that added online purchases to an existing mail-in subscription service, New York began with Lotto in November 2005; Mega Millions and Cash4Life were added later. There is currently a two-week minimum subscription for online purchases of these games.

As indicated by the sales figures referenced above, the numbers are small, but growth rates are often incredible. There is a challenge in comparing results, because some lotteries report net revenues (sales minus prizes) while others provide total play, the equivalent of sales in the world of lottery retail reporting. For all participating, though, it’s not necessarily about the numbers, it’s about what those numbers represent – the ability to reach new customers, and to offer all players a convenient and entertaining way to play, at a time and location of their own choosing.

Everyone seems happy no matter where they are on the spectrum of experience, products or revenues. “We are thrilled with where we are,” said Pennsylvania Lottery Executive Director Drew Svitko. “We have had a really strong launch, and we feel great about the future of iLottery in Pennsylvania.”

## Pennsylvania’s Smashing Debut

The Pennsylvania Lottery is following in Michigan’s footsteps in the sense that it launched its iLottery platform with only a selection of entertaining instant play games – a completely new product line. By going that route, Svitko believes that the Lottery is doing its best to reach new customers, always the goal for sustainable lottery operations going forward.

Since its debut last May, iLottery has been a rousing success in Pennsylvania. Through March 6, the games have generated almost \$235 million in total play and more than \$30 million in gross gaming revenue. The Lottery estimates that success will translate this full fiscal year to about \$30 million in profit that will support older Pennsylvanians, the Lottery’s beneficiary.



There have been over 98,000 unique players enjoying the games online, and there is every indication that many of them are new to lottery play.

"We know that iLottery is attracting new players," said Stephanie Weyant Fidler, Deputy Executive Director, Marketing & Product Development. "About 40 percent of our iLottery players were not members of our very robust VIP Players Club prior to launch, so they are all new to us." She added that demographic data also support the belief that new players are coming in – iLottery players are skewing younger than traditional retail lottery players.

And the numbers keep growing. Online sales records are often falling as the months go by. In late February, another weekly record was set – over \$10.6 million in play, just missing the \$2 million mark on one of those days. "Those little wins along the way, as we keep beating daily and weekly records, are exciting," said Weyant. As of early March, there were 36 unique games on the platform; a new game is added about every two weeks. The current plan is to offer the big jackpot games – Powerball and Mega Millions – later this year.

Officials were quick to point out that the success is a result of hard work by the entire team involved in the process – not only the Lottery's own employees, but those of the vendors (Scientific Games and its late 2017 acquisition NYX Gaming, along with additional game provider Instant Win

**"If something is successful, we'll grab it and run; if not, we'll try something else."**

- Drew Svitko

Gaming) and other lotteries. "It's a very collaborative industry and we've had a lot of support to help us succeed," said Weyant, who cited the Michigan Lottery in particular for providing guidance. "Our success is good for the lottery industry."

That success also involves a willingness to experiment. "We have a 'launch and learn' philosophy," said Svitko. That means trying something new and then examining the results to see if the data supports the activity – from new games to new promotions. "If something is successful, we'll grab it and run; if not, we'll try something else," he explained.

While Pennsylvania's lottery retailers were initially concerned about negative impacts iLottery could have on their business, those impacts failed to materialize. That has been the case in virtually every jurisdiction that has added online lottery sales – traditional retail sales continue to grow after the introduction of iLottery. In Pennsylvania's case, the Lottery's retail sales in fiscal 2018 were \$4.2 billion. "That's 4.2 billion reasons to protect

that part of our business," said Svitko. "It is the bulk of our business, it is absolutely our most important channel, and it will continue to be that for a long, long time."

Weyant added that to date in fiscal 2019, retail sales are up about seven percent over the previous year; scratch ticket sales are up by more than 6.5 percent. "By investing in the traditional side, I think we have proven to retailers that we can have a successful iLottery launch while growing the traditional business at the same time," she said.

And the Lottery is working hard to integrate all parts of its business, finding ways to provide retailers with additional revenue and developing new strategies to drive players from online to retail and back again.

The revenue comes from several initiatives. One is a new retailer incentive program that pays a higher commission if retailers hit goals that match the Lottery's own growth goals, on the theory that everyone benefits from increasing total sales through all channels. Another



Some examples of Pennsylvania's online instant games.



program has already given retailers a specific reason to care about iLottery – an affiliate marketing program that includes a retailer component. For any player a retailer refers to the Lottery who becomes an iLottery player, the retailer receives a percentage of the profit that player generates on the platform for a full two years. About 300 retailers have signed up for the program; more than 80 of them are actively producing iLottery players and receiving revenue in return.

Retailers will soon have yet another chance to earn revenue from iLottery, through the sale of “Web Cash,” expected to launch in the coming months. Similar to the Michigan Lottery’s popular Online Game Card, it will provide retailers their standard commission for selling the product, which players can then use to fund their online accounts.

Driving business between retail and online channels is a big priority for the Lottery moving forward. It’s time to take those newly-acquired players and expand their horizons. Coupons will be a big part

of that effort – offering them something to redeem at retail for a certain dollar amount of iLottery play, for example. Cross-promotions are in the works as well. “I know retailers are going to see more and more examples of our commitment to drive more foot traffic in their stores as this year goes on,” said Svitko.

He was understandably very pleased when a major corporate account – which had fought the introduction of iLottery – recently acknowledged that they are now convinced of the Lottery’s retail commitment. “They realized they are making more money than ever now and are eager to find even more ways to do so.”

Meanwhile, the Lottery continues to try out new promotional offers, testing what works and doesn’t work in terms of player response. Diving deep into the data, it’s all about sending the right offer to the right person at the right time, noted Weyant. From something as simple as learning what subject lines are most likely to trigger open rates, “It’s constantly learning and refining

within iLottery. We are getting more and more sophisticated with our promotions and bonus offers.”

Payment options are also expanding. At launch, players could fund accounts with debit cards and ACH. Credit cards were added later, and in the works are other payment options such as the aforementioned Web Cash and things like PayPal and Sightline. All designed to make it easier for consumers and meeting their needs.

Through all its success, there was always one eye focused on social responsibility. Pennsylvania’s iLottery program was designed to incorporate internet gaming best practices as established by the National Council on Program Gambling, things like spend limits, time limits, cool off periods and self-exclusion. The Lottery will soon be pursuing the NCPG’s iCAP (Internet Compliance Assessment Program) certification.

Officials had a few words of advice for other lotteries, no matter how far down the online path they might be. First of all, it’s never too early to start laying the groundwork, to start establishing a community of players who will be receptive to online play. Then learn about the nuances of the entire process. “Surround yourself with a talented group of committed professionals, both at your lottery and on the supplier side,” said Svitko. “We were warned by Michigan about how different iLottery is,” added Weyant. “It requires you to think differently, to look at your internal processes, procedures and policies.”

For the first time, thanks to online sales lotteries have insights about all aspects of player behavior – from games they choose to how they respond to advertising and promotional offers. “Now we have so much data, we have to focus on what’s important, and we are still learning every day,” she said. “Compared to our traditional business, iLottery is faster and more responsive, and the potential is what makes it really exciting.”



## New Hampshire's Adventure

The most recent lottery to add online sales is also the country's oldest, New Hampshire, which began the modern lottery era in 1964. Fifty-four years later, a new chapter emerged when online instant play games were introduced, along with online sales of Powerball and Mega Millions, last September. That effort followed in short order the introduction of keno at venues throughout the state, taxing staff to the fullest. For a very unique inside look at the people behind the launch, and the work involved, see the story that begins on page 82.

As they started down this road, New Hampshire officials were impressed with what the Michigan Lottery had accomplished with its iLottery program. "We loved the ease of use and the user flow, and thought their game mix was fantastic," said Kelley-Jaye Cleland, the New Hampshire Lottery's Director of Sales and Product Development. After exploring options with other vendors, New Hampshire eventually settled on NeoPollard Interactive (NPI), which runs the Michigan

"We need to find new customers, to reach different demographics..."

- Kelley-Jaye Cleland

online program, to design the system.

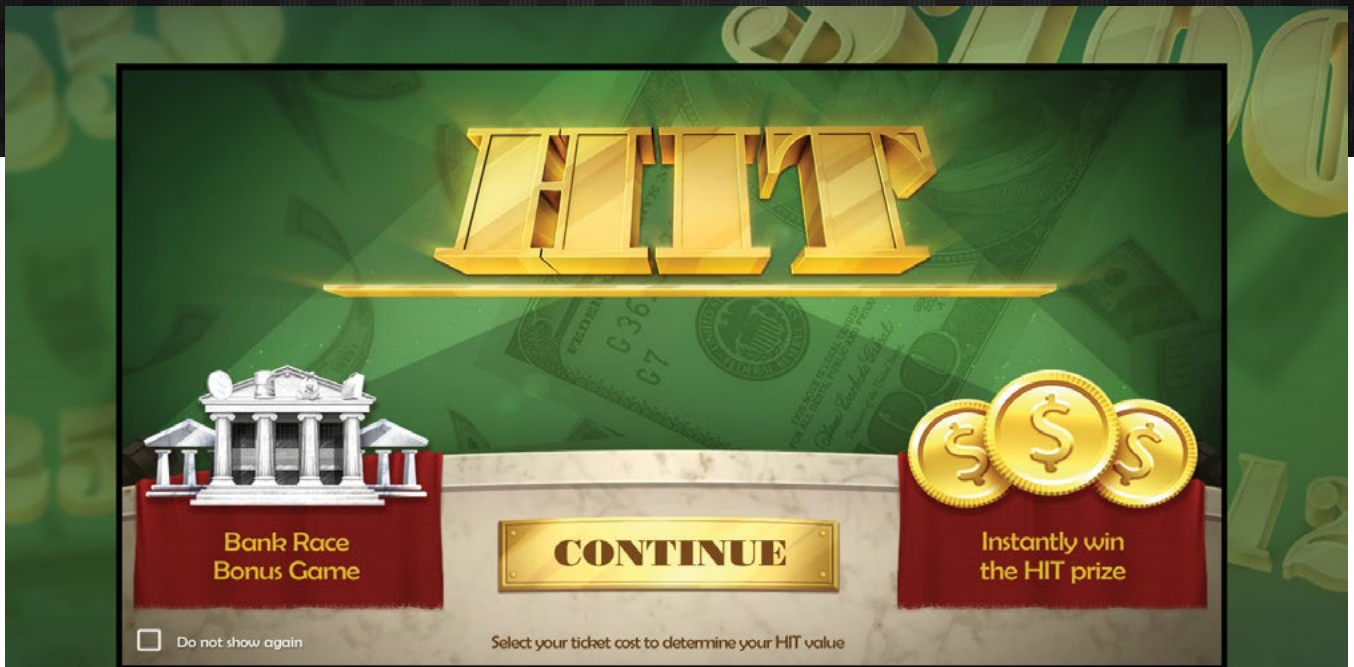
Initially the goal was to launch iLottery last summer, barely six months after keno was successfully introduced. It was quickly decided that "we needed to let the project determine the date, so we didn't kill our small staff," exclaimed Cleland. So in early January last year, the project was mapped out and the hope was to launch in September 2018. "NPI thought we could do it if we stayed on track. The team worked so well together that it all fell into place; I couldn't have wished for a better outcome and a better team."

There were some things the Lottery knew it wanted at launch. First was a game mix that included Powerball, Mega Millions and instant play games. The latter were critically important: "We need to find new customers, to reach different

demographics," said Cleland, and the amazing graphics provided by the NPI games would hopefully help accomplish that goal.

Next was to have some sort of program that would involve retailers. As in practically every other jurisdiction that has launched iLottery, retailers were fearful that it would take away their business. And as in every other jurisdiction, that fear has proven to be unfounded. Still, New Hampshire has always had very positive relationships with its retailers and the retailer associations in the state, so built into the iLottery program was a retail commission equal to 4.5 percent of all player deposits (5.5 percent for the first year of iLottery). The funds are allocated quarterly based on each retailer's share of scratch ticket sales. "The extra commission thanks retailers for their goodwill and for





“We are seeing that people, once they are in the system, are enjoying the experience.”

- Kelley-Jaye Cleland

the relationship we have had with them for so long.” At some point retailers will become more involved in iLottery, and the commission also helps build their familiarity with online sales in anticipation of new developments.

Responsible gambling measures were also in the mix, including daily, weekly and monthly deposit limits, plus various self-exclusion options.

The online launch came last September 4, with Powerball, Mega Millions and a selection of eight instant play games. New instant games have been added on a regular schedule; first at a rate of two games per month, then dialed back to one new game a month. That schedule is still a work in progress – like other lotteries that have gone down this road, there’s a lot of trial and error, to see what happens every step of the way. “We do something, measure it and determine what we can change to make it better.”

Like other lotteries, New Hampshire is overwhelmed with the data that suddenly becomes available with an iLottery launch. Every move can be evaluated, every communication can be assessed for its

impact on player behavior. “We have all this data on player habits that we don’t have with retail players, and we can use that to focus on customer relationship management.”

Payment options are currently debit cards, PayPal and ACH. First-time depositors receive five free instant play games, and assuming they opt in to receive promotions, registered players receive a regular series of offers. Cleland is particularly fond of bonus match offers rather than free instant play games. That means players aren’t limited to e-instants; they can use the bonus on the available draw games as well. “We’re trying to provide appealing options and doing a lot of things to keep players engaged; it allows us to understand what kind of players they are,” even though a full-scale examination and segmentation of the data has yet to be undertaken.

Through February, more than 33,000 potential players had registered for iLottery, more than half coming during October when the Mega Millions jackpot soared to \$1.5 billion and Powerball was also climbing. Thanks in big part to those jackpots, the Lottery is well ahead of key

*Some examples of New Hampshire’s online instant games.*

fiscal 2019 goals – 65 percent ahead of goals in terms of the number of first-time depositors, and 128 percent ahead of goals for total deposits. “It was pretty astounding to see those numbers and see it really working,” said Cleland.

She hopes to add other draw games, particularly some of the Tri-State games that are popular with local players. Retailers will also become more involved, perhaps through an Online Game Card similar to Michigan’s successful program. But any new initiatives will have to wait for the time being – resources are severely tested right now. That the Lottery managed to get keno and iLottery up and running without adding any additional personnel was an astounding achievement; adding more projects is just not something they can take on until new employees come on board. So for the time being, the focus is on learning and understanding everything about iLottery, examining the data and evaluating what happens with this promotion or that offer.

“We’re delighted with the numbers that we are seeing, and our average deposit per user continues to increase,” said Cleland. “We are seeing that people, once they are in the system, are enjoying the experience.” ■

FOCUS ON:  
ONLINE SALES



Carmela Nolin

# The Granite State Joins the 21st Century

An inside look at what it took for a small lottery to launch a big initiative.

By Carmela Nolin, New Hampshire Lottery



Leslie Witham



Shira Gershoni



(L-R) Katie Brown, Kelley-Jaye Cleland, Maura McCann

# “Sisters are doing it for themselves...”

Imagine New Hampshire Lottery Executive Director Charlie McIntyre singing this, suggesting it as the theme for this article. I confess I took offense to that. Not to this giant Irish male singing a women’s soul anthem; but that of course they do. Every day. And not just at New Hampshire Lottery, but in other lotteries, agencies and companies around the nation.

What makes this instance so special? I made this argument because I have been voting for female governors, senators and representatives for years as I found them to be the most qualified candidates. I’ve become blind to gender when it comes to talented professionals. However, in this industry, this “instance” – the launch of internet lottery in New Hampshire – was a tremendous undertaking, made all the more remarkable for meeting an aggressive launch date and taking us fully into the world of e-commerce. And it was developed, managed and executed by a team of women across three organizations, many disciplines, and a couple of time zones. Charlie was right, but don’t tell him I said so.

First, a little background: New Hampshire’s Legislature handed our agency not one, but three initiatives in the summer of 2017. That is more legislation than had been passed for Lottery in over 40 years. These new laws included regulation of Daily Fantasy Sports, Keno as a revenue source for kindergarten, and internet lottery. DFS was not a heavy lift, and was quickly taken on by our regulatory division.

Keno is a story in its own right: the bill was officially signed on July 12, 2017, and the product launched in about 50 locations on December 15 – a mere five months later. The Herculean effort to get it up and running in that unlikely time frame included developing the game’s software and testing it, testing it again, and testing it some more; designing Keno 603’s uniquely New Hampshire identity for everything from play slips to drink coasters; sourcing and branding the self-service kiosks; and finally recruiting locations and installing game systems around the state. Untold hours went into launch, and that doesn’t take into account evening visits by staff to city councils and town select boards for months and in all corners of New Hampshire. Keno’s sale has to be approved at annual municipal elections in a legislative device called the local option. It’s important to know this because the launch of iLottery was on the

heels, and in fact stepped on the toes, of Keno.

Back to that third initiative. Tucked neatly into House Bill 517 was the seemingly innocuous amendment to our governing statutes - Sale of Lottery Tickets; Internet Sales Added. That sentence would change the trajectory of the Lottery, propelling us into a completely different online presence; on par with some of our own favorite web-based services (think shopping on Amazon, or playing games like Candy Crush).

We knew that to get there, we would need to convert our website into an e-commerce model; integrate the third-party gaming platform; capitalize on New Hampshire Lottery’s existing customer loyalty program database to migrate players to the new product; and build

redesigning NH Lottery’s online presence to seamlessly blend the decade-old traditional site familiar to players with e-commerce interactive features, including a registration portal to play “e-instant” games and purchase draw-based ones like Powerball and Mega Millions. Shira led the overall integration of internet games product development with both the Lottery and GYK groups, and managed it from Tel Aviv.

I have worked alongside New Hampshire Lottery’s talented and hardworking professionals for a few years and know them to be the experts in their respective areas. But a broader view definitely reveals how unusual it is that the principals in this enormous undertaking are all women. In a candid conversation, the leads at NH Lottery and GYK talked about the unique experience and relationships

## Tucked neatly into House Bill 517 was the seemingly innocuous amendment to our governing statutes: **Sale of Lottery Tickets; Internet Sales Added.**

out new IT infrastructure to support the extended requirements of iLottery ICS. And it needed to happen in under a year. The first iLottery conversation with NeoPollard was on December 14, the day before the statewide launch of Keno. This was followed by a more structured discussion in January, 2018; and the project kickoff took place in late February. And meanwhile, we were still supporting and developing products for traditional retail channels and continuing to install Keno.

Those were what, how and when; that leaves who. Enter the women of New Hampshire Lottery: Katie Brown, Online Games Manager/Business Systems Analyst; Kelley-Jaye Cleland, Director of Sales and Product Development and New Hampshire Lottery’s project lead; and Maura McCann, Director of Marketing. This trio, still in the thick of Keno, meshed immediately with the teams at GYK Antler, the Lottery’s advertising firm, led by Technology and Innovation Director Leslie Witham; and internet gaming vendor NeoPollard Interactive (NPI), led by Director of Product Shira Gershoni. Leslie’s website development team was responsible for

forged over the course of development and launch. Shira lent her observations of the team and the experience of working together a few weeks later.

We jumped right in to discuss the role of women in the industry. Kelley-Jaye did not hesitate to point out that though women are in management and performing a wide variety of roles, lottery is very male-dominated at the top. Maura added that within her three decades at the agency, she’s seen some change in leadership, but not much. On the technology side, Katie agreed that while there have always been a lot of women at various levels, they haven’t been necessarily in management roles. Leslie echoed this, noting that the tech world is typically male-dominated both in what she’s experienced herself and observed in other vendors, so it was refreshing and unique that women were in leadership positions with this project.

Kelley-Jaye’s counterparts at NH Lottery’s gaming vendors are male with only one exception; and that one woman had to overcome cultural obstacles to ascend to upper management. She noted it seems like a recent development that

## ...it was refreshing and unique that women were in leadership positions with this project.

women who had been working behind the scenes are now garnering the accolades they deserve, and she thanked Charlie for highlighting this team's efforts and not taking the credit for iLottery's success; especially knowing how hard they all worked to get the product launched on an accelerated timeline. Leslie laughed and added, "Maybe this is a little feminist of me, but the doers and day-to-day decision makers were women all around the room, that's why it got done so... quickly." There may have been a very enthusiastic agreement to that observation, but I promise that no one actually said "Hell, yeah!"

The biggest challenge the NH Lottery team faced was balancing their usual responsibilities (and putting out the occasional fire) with iLottery product development. Days normally started much earlier than 8 a.m. and ended long after 4 p.m. When they did leave, everyone went home to take care of their families and domestic responsibilities, keep up with volunteer commitments, maybe not think about work, and occasionally sleep. Emails sent at 3:00 a.m. were not unusual. And on top of it all, Keno was still in the launch and recruitment phase: Staff were scheduled to attend town select board meetings several nights a month to inform municipalities and answer questions about the game.

Fast forward to January 2019, five months after the September 2018 iLottery launch: Can this team breathe yet? They all shook their heads, and Kelley-Jaye said they're not even close. In fact, she was recently reviewing plans for the iLottery retail voucher program and had a panic about the amount of work she knew it would be, not to mention the potential whiplash of a timeline that was just too aggressive. "We haven't figured out how to nurture what we have, I know that sounds like a very feminist term. We need to learn to take care of iLottery... we can't keep stuffing stuff in there. Baby is full!" There was laughter and agreement, and

a realization that the team of women were looking at the nascent product quite literally as an infant – one that needed to crawl before it could walk.

Leslie's enthusiasm was palpable when she shared that this team of women recognized during the project that they had true counterparts at each organization. The atmosphere, conversations, comments and feedback were very constructive and very collaborative. They built each other up across the organizations and encouraged each other. "The way we spoke to each other, the respect we gave each other, definitely helped showcase the leadership and helped give [us] the confidence to make decisions, and push the project as quickly and effectively as we did."

Kelley-Jaye agreed wholeheartedly that they collaborated completely. If a stream lead wasn't initially included in a conversation or thread, they would loop that person in to be sure they were fully informed and could provide input. There was no ego; only a goal to get the job done. I pointed out that there can sometimes be a tendency for, well, cattiness in some environments. Katie was quick to say that it just didn't exist here, and Kelley-Jaye emphatically agreed, adding it was a "get [stuff] done" environment.

Maura continued that thought, "I don't mean to say that women are prejudiced to be catty..." which was received with knowing laughter. "But it is something that people could use as an excuse. There is none of that in our group. There was excellent respect for others' opinions, too." Members of the team were perfectly fine holding each other accountable and pulling each other along to get things done. Everyone attested to feeling tremendous pressure to not let anyone else down. They also laughed and enjoyed each other's company along the way, and "swore a lot, our language got bad..." But they didn't get upset with or mad at each other, and they didn't hold grudges.

Kelley-Jaye recounted that they had just

come from a great experience working on Keno. It was the first big project she, Maura and Katie had worked on, and they worked really well together. Tasked with iLottery, they built on that team and connected with "rock stars" Leslie and Shira. Maura admitted that because of the success and fun they had with Keno, they were maybe a little naïve going into iLottery. Of course we can take on this, too!

Katie was the realist, a veteran of vendor software conversions and untold hours of testing and verification; she had a good idea of the heavy lifting that was coming. But she found it interesting that though her expertise is on the tech side, she never felt judged when asked to share her ideas in areas like the website, games and marketing. Her point of view (and choice of colors) was always well-received. She found the same to be the case when she had to teach others about the flow of technology. The sentiment was repeated around the table: The women remained open-minded and receptive, observed each other's strengths, and were willing to learn.

And they were more than willing – perhaps compelled – to get stuff done. The proverbial rolling up of sleeves was commonplace among all the players. As Shira added later, the willingness to learn other disciplines and be prepared was an enormous asset to the project. Leslie's team did their homework and were able to get the new website framework installed and working in 30 percent of the time it takes other shops to do it. Shira was amazed that there was a product in only three weeks in a process that typically takes two months. It was because they were all on board. Leslie and Shira worked very closely, and they had one mutual goal: to make NH Lottery happy and meet that deadline... To be talking in February about a summer launch is unheard of.

That preparation and hard work also paid off in time saved. When NPI came to a meeting, they were surprised that the NH Lottery was prepared to discuss, dig in and have constructive dialog. The NPI development team would schedule a two-day meeting and often be done a half day early. This level of discipline from all players was critical to turning a one-and-a-half year project around in just over seven months.

The progress was remarkable, as I watched the development take place from the sidelines. As a state agency, NH Lottery is lean in both staffing and resources. Under

“normal” operations, it works fine; under these circumstances, it meant that twice the work had to be done in one third the time (better minds than mine can figure out the math on that).

As Director of Sales and Product Development, it fell squarely on Kelley-Jaye to manage NH Lottery’s moving parts and keep the different subject streams on task. Maura noted that though the job had to get done, the respect everyone has for Kelley-Jaye made the team want to deliver. Kelley-Jaye, who is as generous as she is talented, replied that it was an easy team to lead. “The agency is really fortunate to have smart people at the table, with different groups comprised of the right people for the tasks they were assigned.” Even brand new Lottery senior managers in Finance and Compliance, who had other significant issues outside of product development to focus on, did a good job. She concluded

true, it was so much fun, it was so great! It actually was, it actually was!”

Katie and Kelley-Jaye complimented Shira as an outstanding team lead for NPi. She and her group were always well-prepared, well-educated in their product, and most importantly, didn’t talk at us, they educated us. It felt good working with them, they appreciated the efforts of the Lottery team and saw how hard-working and talented the folks at GYK are. Shira could speak in front of any group, prepare presentations in a snap, and had thorough knowledge of the product and expertise in unexpected areas, such as ADA requirements in website design. She took interest in promotions and loved to gather customer feedback. During her extended stays in New Hampshire, she would spend weekends testing iLottery’s geo-fencing along the state borders, and talking to retailers and lottery customers.

procurement (what, we don’t have a laptop with a webcam?!)

The agency went “tech-heavy” with collaboration software to share files, communicate by text across continents, collect testing data and track software bugs, contribute to project management milestones, and have online meetings. And, finally, the agency got its conference room webcam.

Kelley-Jaye reflected on the number of challenges and the tremendous amount and scope that she learned from this launch, including project management, building trust and relying on each other’s feedback. At this agency, every department had a role. “It was amazing to see the amount of involvement at Lottery... Charlie trusted us. That was big; he didn’t micro-manage this project at all. He allowed us to make big decisions, and if there was something we weren’t sure of, we ran it by him. That’s a big trust.”

At GYK, Leslie was encouraged to work directly with Lottery and make the decisions alongside us. It speaks to the leadership on both sides that they were empowered to do that. She also wanted to point out that within her development team, there’s a good mix of men and women, and the agency boasts a 50 percent female-male ratio throughout the organization.

Later, Shira and I talked about gender bias and stereotypes associated with different careers. When it came back to iLottery, I told her that I see a group of really hard-working, talented, passionate people. “Who happen to be women,” Shira finished. “And we happen to get along. And we’re so different – different from where we’re coming from, different in age, different in background. But that variety, that different flavor each of those people in the group brought into this project was the key to the success. We each had a different strength: technology, marketing, lottery. Each had their own perspective to build this product.”

As the conversation came to a close, the women got a little spirited. The good-natured ribbing of their counterparts will stay on the cutting room floor; but perhaps this sums up their experience: “The men were next to us, but not in front.”

I will attest that the swear factor has dropped considerably around the office. As Maura observed, “If we’d had a swear jar, we’d go on a cool vacation... or buy a laptop with a camera.” ■

“The agency is really fortunate to have smart people at the table, with different groups comprised of the right people for the tasks they were assigned.”

- Kelley-Jaye Cleland

by observing that NH Lottery has a lot of strengths; it’s largely a matter of learning how to best channel those talents.

I was curious about the interaction between all the disciplines working in different companies, technologies, cultures and time zones: Surely there must have been obstacles? Kelley-Jaye immediately pointed to NPi. Their development team was completely focused, gracious on how they approached things, and were willing to bend over backwards to make things happen. She has never worked with a company like that before. Shira returned those sentiments and was so impressed that the launch, which took place at 4 a.m. on September 4, was fully staffed by the stream leads. It didn’t feel like a customer and vendor, it was a team. She added that there was zero finger-pointing the entire time. When asked if it was a true collaboration, she laughed and said, “And it sounds like, ‘Oh, it was too good to be

She admitted that she is passionate about her work and likes a challenge, and with humility gave credit to her team in Israel. She wanted to make the process as easy as possible and recognized the work each person put in. It must also be said that on launch day, Shira found a local baker to create several dozen cupcakes topped with “NPi” and “NHL” for all the staff at Lottery.

Speaking about daily operations, Maura noted that we don’t exactly fit the model of a state agency. Many members of the staff break the mold of the 8 a.m. – 4 p.m. worker, putting in long hours and going above and beyond. “We don’t put our phones down, even if we’re out of the office.” They did learn a valuable skill from NPi to stay on task – if a meeting is scheduled for an hour, at 59 minutes it gets wrapped up to ensure folks are moving on to the next thing. But a definite effect of being a government agency is the general dearth of tools and issues around

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**May 13-16, 2019**

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George Washington University  
Washington, DC  
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**June 17-20, 2019**

*NASPL Directors Meeting & Dialogue*  
Kingsmill  
Williamsburg, VA  
Hosted by the Virginia Lottery

**July 19-20, 2019**

*NCPG National Conference on Gambling Addiction & Responsible Gaming*  
Sheraton Denver Downtown Hotel  
Denver, CO

**July 22-26, 2019**

*NASPL Professional Development Seminar*  
Arizona Grand  
Phoenix, AZ  
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**September 17-20, 2019**

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**December 2019**

*NCPG/McGill University RG Lottery Holiday Campaign*

## 2020 CALENDAR

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*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**

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