

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

# INSIGHTS

November/December 2019

**NASPL** LITTLE ROCK, AR  
*This is*  
**2019 WINNING!**

## A WINNING CONFERENCE IN LITTLE ROCK

Full Recap Including  
Award Winners and Photos

**PLUS!**

**NASPL HOLIDAY  
TICKET CATALOG**

.....  
**FY19 SALES REPORT**

.....  
**TEXAS LOTTERY  
IN-LANE INITIATIVES**





# FROM THE NASPL PRESIDENT

A few weeks ago I had the opportunity to attend a lottery industry conference in Austin, Texas. During dinner one night, I sat around the table with several fellow directors enjoying some great Mexican food. Throughout the conversation, we all commented on the incredible amount of innovation within the industry right now.

Each of us was working on something new and exciting within our lottery, while simultaneously taking a new look at our core business to see what we could do better. I've only been in the business for 10 years, and been a lottery director for eight, but I can't remember another time in the industry when there were so many new innovations happening at the same time.

From the implementation of sports betting in many states, to the various in-lane innovations, to instant ticket growth, renewed interest from big box retailers, and new ideas regarding the disruption of our retail environment, excitement in the industry is at an all-time high.

I can't recall another time when I've had so many vendors, both big and small, trying to get face time with me to pitch their own new ideas. And with the multistate games experiencing a hopefully brief downturn, I am hopeful that some of these innovations can be quickly implemented in Arkansas to help us steady the ship.

In some ways, the lottery world is changing faster than we can keep up, but at the same time our core business is more important than ever, as we try to maximize performance to squeeze the most sales and profit out of our products, to make up for any losses that we are experiencing due to the multistate games.

If you haven't had the opportunity to attend some of these industry conferences, or speak with some of these new vendors, I would encourage you to do so. The world is changing fast, and there are so many new ideas out there that have great potential. And nothing moves quickly in the lottery industry, so the sooner you start the better.

Based on the past few months, I don't see anything slowing down. So hold on to your hats, get a little rest during the holidays, and get ready for a crazy 2020. As we say in the South, "Hold my beer and watch this."

Happy holidays.

**Bishop Woosley**  
Director, Arkansas Scholarship Lottery  
NASPL President



## NASPL STAFF

- David B. Gale** *Executive Director*
- Thomas Tulloch** *Director of Administration*
- Andrew White** *VP of Operations*
- Tamika Ligon** *Director of Program Planning*
- John Koenig** *Graphic Designer*
- Natalie Ross Norris** *Accounting*
- Patricia McQueen** *Editor*
- Jake Coy** *Vendor Relations*
- Paul Corey** *I.T. / Software Development*
- Lori Rugle** *Responsible Gambling*
- Mackenzie Whitacre** *Communications Coordinator*

## NASPL EXECUTIVE COMMITTEE

- Bishop Woosley** *President*
- Angela Wong** *First Vice President*
- Sarah Taylor** *Second Vice President*
- Gretchen Corbin** *Treasurer*
- Cindy Polzin** *Secretary*
- Charlie McIntyre** *Immediate Past President*
- Kevin Gass** *Pres. Interprovincial Lotteries*
- Gordon Medenica** *Region I Director*
- Tom Delacenserie** *Region II Director*
- Brian Rockey** *Region III Director*
- Barry Pack** *Region IV Director*

# INSIGHTS

### Circulation:

Insights ISSN 1528-123X,  
November/December 2019,  
Volume No. Nineteen, Issue Six.  
Published bi-monthly by NASPL  
(North American Association  
of State and Provincial Lotteries)

7470 Auburn Road, LL1  
Concord, OH 44077

© 2019 All rights reserved.

### NASPL Email:

info@nasplhq.org

### Web Sites:

www.naspl.org / www.nasplmatrix.org  
P. 440.361.7962  
F. 440.867.2327



# Intralot Orion

**The next-generation Sports Betting platform  
for a truly connected player experience.**

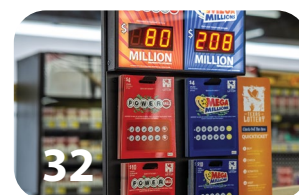
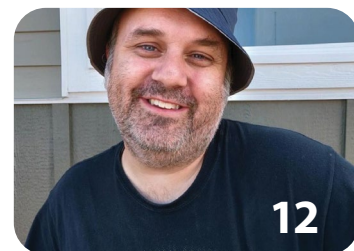
INTRALOT presents Orion, its most advanced, feature-rich and versatile Sports Betting platform. A true omni-channel solution designed to empower the modern operator with cost-efficient and fast go-to-market capabilities.

[intralot.com](http://intralot.com)

Certified by WLA for its Responsible Gaming program, INTRALOT is committed to the principles of responsible gaming incorporating them at its best-in-class product solutions and global operations.

**intralot**

## IN THIS ISSUE



**6**  
**Up Front**  
Industry news and updates.

**12**  
**Making A Difference:**  
**JonMichael Rasmus**  
*Draw Supervisor*  
Wisconsin Lottery

**18**  
**Research Corner**  
**NGAgging Lotteries:**  
**NCPG Flagship Research**  
**About Gambling Attitudes**  
By Keith Whyte and Don Feeney

**22**  
**Balancing Revenue Growth**  
**and Responsibility**  
By Lori Rugle

**26**  
**The Slowly Expanding**  
**Territory of Lottery Games**  
By Stephen Wade, Principal, Lottery  
Management Consulting, LLC

**32**  
**Inside the Texas Lottery's**  
**In-Lane Initiatives**  
This fall, the biggest retail  
development in lottery history  
was set in motion in Texas.  
By Patricia McQueen

**38**  
**A Winning Conference**  
**in Little Rock**  
NASPL's signature annual event  
brought a big crowd to Arkansas, where  
the state was celebrating its tenth year  
in the lottery business.  
By Patricia McQueen

**44**  
**On the Show Floor**  
By Patricia McQueen

**46**  
**Winning With Walmart**  
By Patricia McQueen

**48**  
**NASPL 2019 Photo Recap**

**62**  
**NASPL 2019 Award Winners**

**64**  
**NASPL Holiday Instant**  
**Ticket Catalog**

**100**  
**An Interesting Year**  
Another \$1.5 billion jackpot helped  
lotteries reach new heights again  
in fiscal 2019, but a combination  
of developments – and reporting  
challenges – made for some  
interesting results.  
By Patricia McQueen

**114**  
**Double Match**  
Mentorship offers multiple ways  
to win at developing the next  
generation of industry leaders.

**118**  
**Innovation Through Tradition**  
Transforming a traditional  
bar game into a lottery game.  
By Scott Hoss, Director of Products  
for INTRALOT Inc.

**120**  
**Monitor Games:**  
**Racetrax™ Is Fun You Can Bet On**  
In Maryland, Racetrax is a high-  
performing virtual sports monitor  
game.



# Go Digital. Drive Results.

100+ Digital Customers | \$16+ Billion in Digital Wagers\*

IGT PlayDigital™ can get the job done for your lottery today. From retail solutions like PlaySpot™ and full-on digital gaming with PlayLottery to the latest opportunities in sports betting, our solutions drive performance by delivering true convenience and exciting content. It's time to accelerate your growth with digital.

Contact your IGT representative today to learn more.

\*2018-2019 YTD IGT RGS Digital Wagers Only

© 2019 IGT Global Solutions Corporation. The trademarks used herein are owned by IGT or its affiliates, may not be used without permission, and where indicated with a ®, are registered in the U.S. IGT is committed to socially responsible gaming. Our business solutions empower customers to choose parameters and practices that become the foundation of their Responsible Gaming programs. Images are representative only.





# Need a Random “Above Reproach” Outcome? Call Your Lottery!

By Van Denton, North Carolina Education Lottery

If you’re in need of a result that is fairly and randomly produced, who would you call? Why, your state lottery of course.

This past September, that’s exactly what North Carolina legislators did when they needed random numbers drawn to ensure a fair choice as they drew new political maps for the state.

When the call came in, our lottery replied: “Sure we know a bit about producing random numbers. Glad to help.”

A draw team was created consisting of Joe Cosgriff, Director of Security, Jorge Alfonso, Security Operations Manager, and Hayden Bauguess, Director of Government Affairs. They crated up a promotional draw machine, just like the one being used that month for a Double Draw promotion for Carolina Pick 3. They

secured a sealed ball set. And then they headed to the N.C. Senate.

There, the draw machine was rolled out and set up. Five balls got placed in the chamber. The five balls corresponded with one of five possible political base maps needed to start drawing eight new legislative districts. Eight quick drawings occurred. The show was over. Two days later, a team went back to do the same for the N.C. House of Representatives.

The drawings gave us a great platform to demonstrate to the public the integrity behind our drawings. They learned how a draw machine works and how the balls used in drawings routinely are inspected and weighed.

Live-streamed on the internet, the drawings became a top news story of the week. They even produced a parody

account on Twitter, @LotteryOverlord.

Legislators said they wanted to take politics out of the redrawing of the political maps so they turned to the lottery to ensure random results. One legislator told the media that the lottery was called because the results would be seen as “above reproach.”

Have draw machines been used like this before? Not in North Carolina.

But it turns out that back in March 2015, the Arizona Lottery got a call for help in producing random results. There, Arizona election officials used one of the lottery’s ball machines to decide the order in which each candidate’s name appeared on the ballot in the presidential primary.

“Above reproach.” That’s a nice compliment for the lottery industry. ■

# Multiply the Fun

What happens when you combine two of the greatest instant game themes in the market today? You get our MONOPOLY™ Multiplier Family. The #1 licensed lottery game brand in the world just got exponentially better.



The MONOPOLY name and logo, the distinctive design of the game board, the four corner squares, the MR. MONOPOLY name and character, as well as each of the distinctive elements of the board and playing pieces are trademarks of Hasbro for its property trading game and game equipment. © 1935, 2019 Hasbro. All Rights Reserved. Licensed by Hasbro.

10X is a trademark of the Multi-State Lottery Association and is used under license.

© 2019 Scientific Games Corporation. All Rights Reserved.



# Kentucky's Chip Polston Receives Gleason Award for Responsible Gambling Leadership

**C**hip Polston, Senior Vice President of Communications, Public Relations and Social Responsibility for the Kentucky Lottery Corporation, is the second juried recipient of the Arch L. Gleason Award for Responsible Gambling Leadership, awarded by the Kentucky Council on Problem Gambling.

The Gleason Award was created by KYCPG to recognize someone not only for his or her commitment to responsible gambling, but also for the ability to successfully manage a gaming enterprise in a socially responsible manner. Winners of this award embody the concept of profitably operating a gambling company while also incorporating responsible gambling principles across all aspects of the business.

This year's recipient, Chip Polston, has been with the Kentucky Lottery for over 25 years. He has worn many hats during his tenure, but one of his most rewarding accomplishments was creating the first responsible gambling standards for the U.S. lottery industry.

"It was a great honor when I was asked to write the first responsible gambling standards for the industry," said Polston. "I'd felt for some time this was something our industry would really be able to use. Standards provide a roadmap. They let everyone know what best practices they should be following and if they've missed something when designing their program. Beyond that, it shows folks outside of our industry the commitment we have to doing the right thing."

Polston also facilitated creation of the lottery industry's first responsible gambling verification program by the National Council on Problem Gambling and the North American Association of State and Provincial Lotteries, and served six years as the North American representative on the World Lottery Association's Responsible Gaming



"Beyond the fact that it's always meaningful to get recognition at a level like this, having it named after Arch takes it to a whole different level."

Workgroup. Polston currently serves as a member of the NCPG Board of Directors as well.

Recently, when Kentucky launched internet lottery sales in 2016, Polston helped ensure the platform included responsible gambling measures, which have since been cited as a best practices model. He has also played an important role in advising numerous other lotteries on how to best offer internet sales in the most responsible way.

This esteemed award holds a special meaning for Polston.

"Beyond the fact that it's always meaningful to get recognition at a level like this, having it named after Arch takes it to a whole different level," he said. "I thought the world of Arch. He was a mentor and a good friend, and I saw firsthand how dedicated he was to the cause of responsible gambling. Having recognition that ties back to him is tremendously significant to me."

As the 23-year President and CEO of the Kentucky Lottery Corporation, Arch Gleason was one of the first lottery directors in North America to recognize the need to help players experiencing gambling problems. During his time with the lottery, he championed many initiatives for the cause through NASPL. He also worked to establish the KYCPG, the state's NCPG affiliate. Gleason passed away in July 2016.

Gleason's crowning achievement in the field was his work to establish the World Lottery Association's responsible gaming certification program during his term as the group's president. This became the first ever responsible gambling program implemented on a global basis, taking the cause into corners of the world that had never previously addressed the issue.

Thanks to dedicated professionals like Gleason and Polston, the lottery industry has made great strides in its responsible gambling initiatives. But there is always more work to do.

"Since the early part of my career, to me the holy grail – not only in Kentucky, but for the entire industry – is retailer training," said Polston. "That's a tough nut to crack on so many levels. I was really proud of the work we were able to do on the first video training series that NASPL provided to the membership. I believe it'll be key in getting retailers up to speed on what they need to do. How we make it effective and how we deliver it are the two things we need to come together to figure out." ■



# Outstanding Games. Retail Excellence. Digital Innovation.



**POLLARD**  
banknote limited

# A Look Inside the Asia Pacific Lottery Association Ltd.



**A**s the regional association representing lotteries in North America, NASPL wraps up recognition of its four sister organizations around the world with an update from APLA Limited, which represents the lotteries of the Asia Pacific region.

The idea of a regional lottery body in the Asia Pacific region was conceived not long after the World Lottery Association was formed in 1999. At that time the other four continents each had a regional body, but not the Asia Pacific area. During the Glasgow World Conference in 2000, the Asia Pacific Lottery Association (the Association) was formed. After just one year, it gained 17 members, from Australia, New Zealand, China, Hong Kong, Japan, Korea, Malaysia, Singapore and Thailand.

Its objectives were to advance the goals and collective interests of members, promote cooperation and professional exchange of experience and information, convene conferences and meeting groups, and provide a platform to discuss lottery issues. The Association held its first events in 2002, featuring a sports seminar in Korea, a retailers' management seminar in Perth and a study trip to China. Its membership base and the range of activities offered have grown over the years.

At the Annual General Meeting held on Oct. 11, 2018, members voted unanimously to dissolve the Association and to form Asia Pacific Lottery Association Limited (APLA), a public company limited by guarantee (CLG), incorporated in Singapore. Today APLA has 21 Full Members from 12 countries in the Asia Pacific region. Another 21 vendors and suppliers are Associate Members.

APLA's affairs are run by an Executive Committee consisting of members drawn from different countries. The Committee is led by APLA Chairman

Sue van der Merwe, Managing Director, Lotteries and Keno, of Tabcorp Holding Ltd., and Vice Chairman Chris Lyman, Chief Executive Officer of Lotto New Zealand. Other members are Yokichi Yokoyama, President, Japan Lottery Association; Richard Cheung, Executive Director, Betting and International Business Development, Hong Kong Jockey Club; Kapil Khanna, Chief Mentor of Future Gaming and Hotel Services Pvt. Ltd. of India; and Lam Chee Weng, Chief Executive Officer of Singapore Pools. The regional body is supported by an Executive Director, John Teo, and Jo McLennan, Assistant to the Chairman.

APLA presently holds two major events a year: a seminar organized jointly with WLA and an annual regional conference which features an Annual General Meeting of members (similar to annual assemblies in other regional bodies). These events are rotated among different cities in the Asia Pacific region and are very popular with members. They serve as an excellent platform for sharing amongst members, as well as learning from prominent speakers from Asia and beyond.

These events have been staged in destinations such as Beijing, Tokyo, New Delhi, Seoul, Hong Kong, Sydney, Penang, Brisbane and Auckland. Other cities like Siem Reap, Chiangmai, Manila, Kuching and Danang have also hosted APLA events. The most recent event, themed "CX - Unlock the Exceptional," was the annual regional conference Oct. 14-18, 2019, in Brisbane, Australia. This will be followed by an APLA/WLA Seminar to be organized by the Hong Kong Jockey Club, held in the Greater Bay Area of southern China in April 2020.

To provide opportunities for newer lotteries in the region, an initiative known as the Emerging Lotteries Scheme offers complimentary registration and financial assistance for staff of the

smaller emerging regional lotteries – like Vietnam, Sri Lanka and Bhutan – to participate in APLA events. Another initiative – the APLA Scholarship Program – invites promising young staff who have never attended an APLA event to the regional conference for their professional development. APLA also extends financial incentives to its members in the form of annual conference registration fee discounts.

Over the years, APLA has strongly supported WLA's programs and annual events. The 2002 WLA World Convention was held in Adelaide, while the 2010 Convention was staged in Brisbane. Singapore hosted the 2006 WLA Trade Show and Convention and the 2016 World Lottery Summit.

The Chairman of APLA is a member of the WLA Executive Committee. Another APLA Executive Committee member also serves on the WLA Executive Committee as an elected member. The WLA Security and Risk Management Committee is chaired by the head of an APLA member. The Hong Kong Jockey Club and Singapore Pools are among the founding members of the Global Lottery Monitoring System, while staff of APLA's members have served on the WLA Responsible Gaming Group and the WLA SCS Control Standards Committee as well. And several APLA Members have attained Level 4 Certification under the WLA Responsible Gaming Framework and the WLA Security Controls Standards certification.

On behalf of all our members, the APLA Chairman of the Board, Sue van der Merwe of Tabcorp, would like to offer her commitment for APLA's continued engagement with NASPL and other regional associations, to promote greater sharing of expertise between the various lottery organizations in different parts of the world. ■

# Bridging the gap between lottery and retail

The Abacus gateway connects consumers, retailers, vendors and lotteries, bridging the gaps between the different parties for frictionless ticket sales and gameplay, enabling lottery to be played everywhere.

## ABACUS and TOSHIBA - Working together to provide the gateway of choice connecting lotteries to the BIG BOX retailers



The Abacus and Toshiba lottery solution is easy to deploy, enabling retailers to sell lottery products through Toshiba POS systems. Combining Abacus's lottery experience and Toshiba's #1 grocery POS market share in North America, as well as a substantial presence in Europe, this is a game changing development in the lottery industry .



e : [info@lotteryeverywhere.com](mailto:info@lotteryeverywhere.com)  
w : [www.lotteryeverywhere.com](http://www.lotteryeverywhere.com)



# Making A Difference

## JonMichael Rasmus

*Drawing Supervisor*

**Wisconsin Lottery**



**L**ottery games are mostly about numbers. The mathematics define the games, but it takes a corresponding level of entertainment value to make them work in the eyes of the players. At the Wisconsin Lottery, JonMichael Rasmus knows that only too well. A mathematician by trade, he has relied on consumer research to learn how to take the math and turn it into lottery games that raise significant revenue for good causes.

“It is rare you find the employee who is both creative and analytical,”

said Wisconsin Lottery Director Cindy Polzin. “JonMichael fits both of the bills. His personality is magnetic, his knowledge is remarkable and his drive for success is exceptional. I find myself quite lucky to have him as a valued team member.”

A 20-year veteran at the Wisconsin Lottery, Rasmus was involved primarily in research for the first 18 years of that tenure. He helped create some of the Lottery’s games over the years, such as Money Roll, City Picks, Badger 5, 5 Card Cash and All or Nothing. In October

2017, he switched gears and became the drawing supervisor, and now oversees all drawings and the drawing staff 365 days a year.

With his experience in research and game design, he believes there is a lot of opportunity to expand on the price points for draw games, offering different kinds of games and experiences, with different risk and reward structures. With players hyper-focused on top prizes, Rasmus believes they are not overly sensitive to payout percentages and pricing as long as the

# WE'VE GOT 2 TICKETS TO *Paradise!*



**ATLANTIS**  
PARADISE ISLAND BAHAMAS

## MILLIONAIRES ISLAND

WIN TRIPS TO ATLANTIS PARADISE ISLAND  
AND A CHANCE TO WIN  
**\$1,000,000!**

Match any of Your Numbers to any of the Winning Numbers, win prize below that number. Get a "★" symbol, win that prize automatically!

WINNING NUMBERS

YOUR NUMBERS

\$	\$	\$	\$	\$
\$	\$	\$	\$	\$
\$	\$	\$	\$	\$
\$	\$	\$	\$	\$
\$	\$	\$	\$	\$

WIN UP TO \$1,000,000!

**ATLANTIS**  
PARADISE ISLAND BAHAMAS

## PARADISE PAYOUT

WIN A TRIP TO  
**Atlantis Paradise Island!**

WINNING NUMBERS

YOUR NUMBERS

\$	\$	\$	\$	\$
\$	\$	\$	\$	\$
\$	\$	\$	\$	\$
\$	\$	\$	\$	\$
\$	\$	\$	\$	\$

WIN UP TO **\$100,000!**

THE ATLANTIS  
LOGO AND  
IMAGES ARE THE  
REGISTERED  
TRADEMARKS OF  
ATLANTIS  
PARADISE ISLAND  
RESORT

# Making A Difference: JonMichael Rasmus

prizes are worthwhile. “We’re told over and over again that players don’t care about the odds, that they just want the big jackpots.” In that sense, increasing the ticket price allows jackpots to build faster, and that’s what drives sales. It still won’t be easy to drive the price points up, but one solution might be to gradually introduce players to the concept of paying more. Perhaps offer two plays for \$5, then down the road go to one play for \$5.



Outside the lottery realm, Rasmus co-authored with his wife Nichole the book “Madison Food: A History of Capital Cuisine,” an expansion of a blog project that took them to every restaurant in Wisconsin’s capital city. He has also co-created two board games (both with fellow Lottery employee John Sams): Double Feature is a movie trivia game and Those Pesky Garden Gnomes is a trick-taking card game. He enjoys solving cryptic crosswords, and has an almost obsessive knowledge of popular music.



As if he didn’t have enough to keep him busy, Rasmus is involved with two youth groups, working with partners such as Habitat for Humanity to serve



those in need both in Wisconsin and across the country.

He has a bachelor of science in mathematics, with minors in chemistry and theater, from the University of Wisconsin-Eau Claire.

### What made you choose the Wisconsin Lottery for your career?

I “lucked” into a Lottery job when my fiancée (now wife) had me move to Madison or Milwaukee so she could attend grad school. During finals week of my senior year, I applied for a job at the Lottery involving retailer research. I didn’t get that job, but they were using the same recruitment for two other positions and I was fortunate enough to get a job involving advertising and

point of sale research. It seemed like a good place to get my feet wet, and seemed like more fun than a lot of other kinds of number crunching.

### What did you find most enjoyable, and most challenging, when you were helping to design games?

I loved designing lotto games. The push and pull of the prize structure is as close to pure mathematics as anything one gets to do once school is done. But it’s not just about math. There’s the psychology – what is meaningful to a player? What kinds of prizes are going to catch their eye? How often do we need to have winners so that players feel that it is winnable? So yes, it is math, but it is also theater.

# 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.



How does your audience respond to the stimulus of the prizes?

One big challenge is trying to find differentiation within the industry's narrow range of lotto price points. Lotto games are fairly interchangeable from the consumer viewpoint, and it's hard to find games at similar price points that don't simply cannibalize each other. The single most successful thing I think we have done as an industry since the increased price point strategy on scratch games was the move to \$2 Powerball and Mega Millions, because the jackpot is what sells those products to the players. But even at \$2, that doesn't leave much room to design new games at \$1 – the big multi-state games should always have the highest price points.

### **Your new role at the Lottery took you in a different direction. Any thoughts on how lotteries conduct drawings?**

The hard part about drawings is that they occur on nights and weekends. Lottery staff is hard to support at these times and I feel that agencies are not giving enough help to ensure that their drawing staff is completely supported during these critical times. In terms of presentation of results, everything is run off the internet these days and I don't know how we can improve that experience for players other than keeping the website and app updated with accurate and timely information.

Our Lottery lost air time for drawings in 2002, and once that happened we no longer needed ball drawing machines when random number generators (RNGs) could provide truly random results that are harder to tamper with, and also have the benefit of being less costly. In my mind, RNGs are superior, but I do know that there is a significant cohort of our players who want to be able to see that a drawing is performed fairly and honestly, and they can't do that with an RNG. But our sales have increased year after year, so I think people have just grown accustomed to RNGs – they just don't even think about it the way that they used do.

### **Any thoughts about the importance of research for a lottery and how a lottery should spend its often limited research dollars?**

I worked in research for 18 years and it is of critical importance. Not only are research dollars limited, we can also become paralyzed by research and the limits of what research can tell us. For example, crossword scratch tickets opened up a new player base for many lotteries, but if they had done research on them beforehand with existing player groups, they may not have picked up on the full potential of the marketplace. So you really need to know your players, what drives them and what engages them.

One of the best ways to maximize the benefits of research on limited budgets is to be aware of your own biases. Don't try to guess what the research will show – let the research lead your thinking. The easiest thing in the world to say when a game isn't successful is that "the players don't like this game in our state." That way we don't have to consider our own possible errors in execution.

For example, back when a lot of lotteries were launching raffles, we followed suit. We thought a \$10 raffle with a \$1 million top prize would sell as well as it had in other states. But we only sold 70%. We tried it again. Still only 70%. We finally conducted some research to actually talk to players about what they wanted. We learned that they liked \$5 raffles with a smaller top prize. So that's what we've been doing for years now, and they always sell out. That means our product mix is now matching what our players expect, and we did that with research. But we started with a bunch of biases about "this is what our players will want" and they didn't want anything like that!

### **What are some highlights in your 20 years at the Wisconsin Lottery? Is there anything you wish that could be changed?**

I was very excited to co-lead our last system conversion project in May 2017; it was a massive undertaking and was very successful. I also love working with the people here. The employees themselves are the true

treasure of the Lottery. They work long and hard to make sure that players have great experiences, that retailers are fairly compensated, and that our beneficiaries see the return on their investment grow as much as possible in a responsible way. And we all try to have fun along the way. For example, in our various staff get-togethers and holiday parties I have designed trivia contests and led staff in games such as Wits and Wagers and the parlor game Werewolf. We've also gone caroling and gone to events with lottery players.

The things that could change for the better are the external processes that hold our employees back from making new products that our players want. There's language in the Wisconsin constitution that relates to us, especially in the area of what defines a lottery game. So we can't offer things like keno and online sales without a constitutional amendment; some of what we can and can't do with advertising is also built into that language. Everyone here works really hard and we're doing the best job we can, but we have these external forces to deal with.

### **Did you really visit every restaurant in Madison in alphabetical order?**

I really did. My wife had just finished grad school, and we realized we were always going to the same five restaurants, most of them fast-food places. She sat down with the city's dining guide and asked me to pick someplace new, but instead of randomly choosing a location I thought we should go to every restaurant in the city, and do it in alphabetical order. So that's what we did, from 2004 to 2012, and documented it all in a blog. We were contacted by a publisher who wanted us to write a history on Madison's food scene, so we built upon our experiences and added the histories of the restaurants. We probably knew more about them than anyone else, and were well suited to write the book. We still go out to eat in alphabetical order, but we have slowed down the blog posts – it's harder to find the time lately. But it still helps us decide where to eat next. ■





## The Lottery Digital Menu Board.

Precisely target players with **hyperlocalized dynamic content**. Beautifully **animate Instant Tickets**. Automatically advertise **jackpot values** with takeovers. **Drive incremental sales** at retail.

**Transform** the lottery retail experience. **Create impact** at strategic touchpoints. **Get results**.

carmanah  
signs

**STRATACACHE**

## NGAGing Lotteries: NCPG Flagship Research About Gambling Attitudes



By Keith Whyte and Don Feeney

**W**hen the Supreme Court decided to overturn the Professional and Amateur Sports Protection Act (PASPA) in May 2018, the National Council on Problem Gambling knew that a massive explosion of legalized sports betting would follow. We therefore developed the National Gambling Attitudes and Gambling Experiences (NGAGE) survey to create a baseline measuring the impacts of the expansion and develop an unprecedented perspective on gambling attitudes in the United States. The data will be a critical tool for advocates, industry and legislators as they consider state-by-state sports betting initiatives. The NGAGE survey provides the evidence to illuminate patterns of past behaviors as stakeholders consider possible future impacts.

The NGAGE study, executed by Ipsos, consisted of online surveys throughout the United States in both English and Spanish between November 8 – 29, 2018. The national sample contains 3,000 adult respondents, representative of U.S. demographics. Additional surveys were conducted to bring the number of participants up to 500 adults per state, plus 200 sports bettors, for a total of more than 28,000 responses. The study includes questions on gambling participation, emphasis on sports betting and fantasy sports betting, problematic behavior and positive play, as well as beliefs and opinions about problem gambling. Don Feeney – Gambling Policy Consultant for National Council on Problem Gambling, President of the Northstar Problem Gambling Alliance, and former NCPG Board Member and President – leads the NGAGE survey analysis and spoke at NASPL 2019 about the study.

A number of key findings have emerged from the data, including:

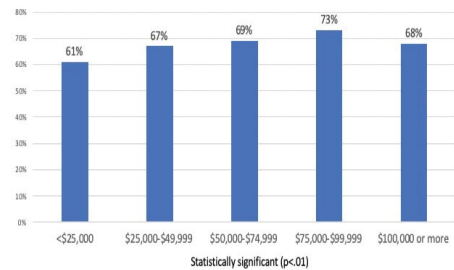
### 1. People in the United States like to gamble.

Almost three in four (73%) gambled on some activity in the year leading up to the survey. Only 12% say they have never gambled. Additionally, gambling is equally popular in every age, racial or ethnic, and socio-economic group. Even in the states where no gambling is legal, half or more of the adults report some past year gambling.

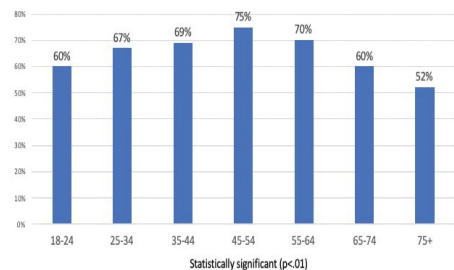
### 2. They bet on many things.

Four out of five gamblers bet on more than one activity, and 40 percent bet on five or more.

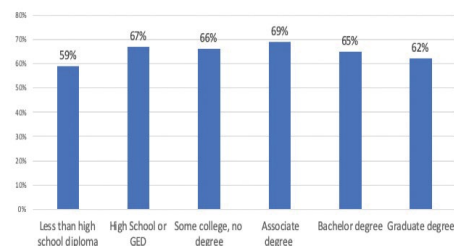
Past year lottery play by household income



Past year lottery play by age



Past year lottery play by educational attainment



# Engaging lottery players in a digital world.

Camelot Lottery Solutions change the game for communities.

We think for lotteries to grow responsibly, players need both a connection to the game, and a tie back to their communities. By making the lottery relevant to the modern player, we help lotteries drive new growth through player engagement. Because we win when lotteries and communities succeed.

Visit [camelotls.com](http://camelotls.com)



### 3. The lottery is by far the most popular form of gambling in the U.S.

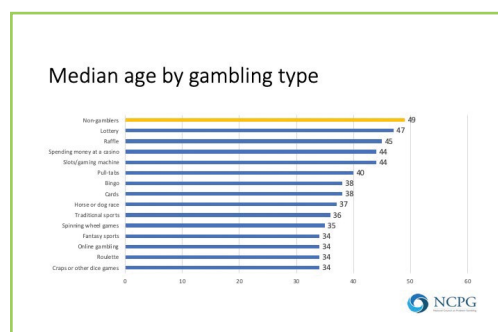
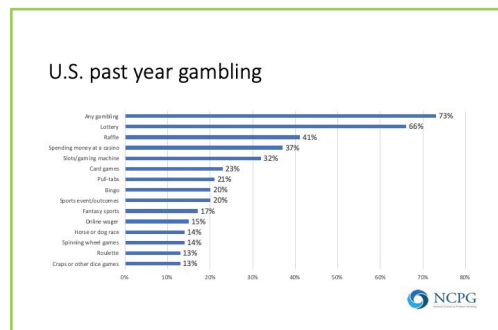
Two out of every three U.S. adults bought a lottery ticket during the survey year, more than twice as many as had played a slot machine, almost three times as had bet on a card game, more than three times as had bet on sports. Ninety percent of U.S. gamblers bought a lottery ticket. The lottery was the most popular game in 47 states, plus the District of Columbia, a number that includes three states that at the time of the survey did not have a lottery.

### 4. Most gamblers bet without any problems, but a significant minority report some potentially problematic play.

While NGAGE was not intended to be a problem gambling prevalence study, we did ask about four key indicators of unsafe gambling behavior. While 69% of U.S. gamblers experienced none of the four problems, the remaining 31% reported at least one potentially problematic behavior, with 8% answering “yes” to all four. Specifically, 27% reported needing to gamble more for the same feeling of excitement, 19% said they had felt restless or irritable when they tried to cut down on their gambling, 17% had lied to hide their gambling, and 12% said that they had relied on others to pay debts or bills as a result of gambling. We must emphasize that answering “yes” to one or more of these questions is not by itself indicative of a gambling disorder, any more than an occasional overindulgence indicates alcoholism. It does, however, point to a need for greater awareness of the risks associated with gambling.

### 5. Problematic play is more common among young adults.

Half of gamblers under the age of 35 reported one or more of the problematic play indicators, compared to only 10% of those aged 65 or older. More alarmingly, one in five gamblers between the ages of 18 and 24 reported doing at least one of the four problematic activities many times. In addition, young adults were far less



likely to demonstrate “positive play” beliefs. For example, while more than three in four adults over the age of 55 strongly agreed that “I should only gamble when I have money to cover my bills and living expenses,” that number drops to 57% for those between 18 and 24. Only 27% of those same young adults strongly agreed that “gambling is not a good way to make money.”

### 6. Sports bettors appear to be at the greatest risk.

Compared to gamblers as a whole, sports gamblers were at least twice as likely to answer “many times” to each of the four problematic play indicators, as well as being far less likely to endorse positive play behaviors.

### 7. Americans misunderstand problem gambling.

Large numbers continue to believe that gambling disorders result from moral weakness (52%), a lack of willpower (79%), or being around people who gamble a lot (81%). These beliefs may well contribute to a reluctance to seek treatment for gambling problems or to encourage others to do so.

The National Gambling Attitudes and Gambling Experiences study also looked at various aspects of lottery play. NGAGE found that 56% of U.S. adults played “draw games such as Powerball or Mega Millions” once a year or more, while the same number (though not necessarily the same individuals) played instant games. Fewer (37%) reported playing daily numbers or keno-style games. Importantly, it also found that lottery play showed little correlation to household income, educational attainment, or racial or ethnic origin. While the lottery did have the highest median age of all forms of gambling (the average lottery player was 47 years old), lottery play was hardly unknown among young adults, with 60% of 18-to 24-year-olds and 67% of 25-to 34 year-olds reporting past year lottery play.

NGAGE provides the most comprehensive picture of U.S. attitudes on gambling to date. The research shows that approximately one-third of gamblers report occasional signs of problematic play. Younger gamblers (18 to 24) are at particular risk. The high level of lottery participation means that lotteries are a very important vehicle for responsible gambling messaging since so many people play the lottery. NGAGE may provide the keys to better understanding the complex and dynamic interplay of factors that shape gambling behavior.

More information, including information on ordering detailed reports for each state, may be found at [www.ncpgsurvey.org](http://www.ncpgsurvey.org). ■



## GLI Audited

Fully tested and certified to the strictest security standards



## Built 100% Natively in Swift 5

Designed and built in-house



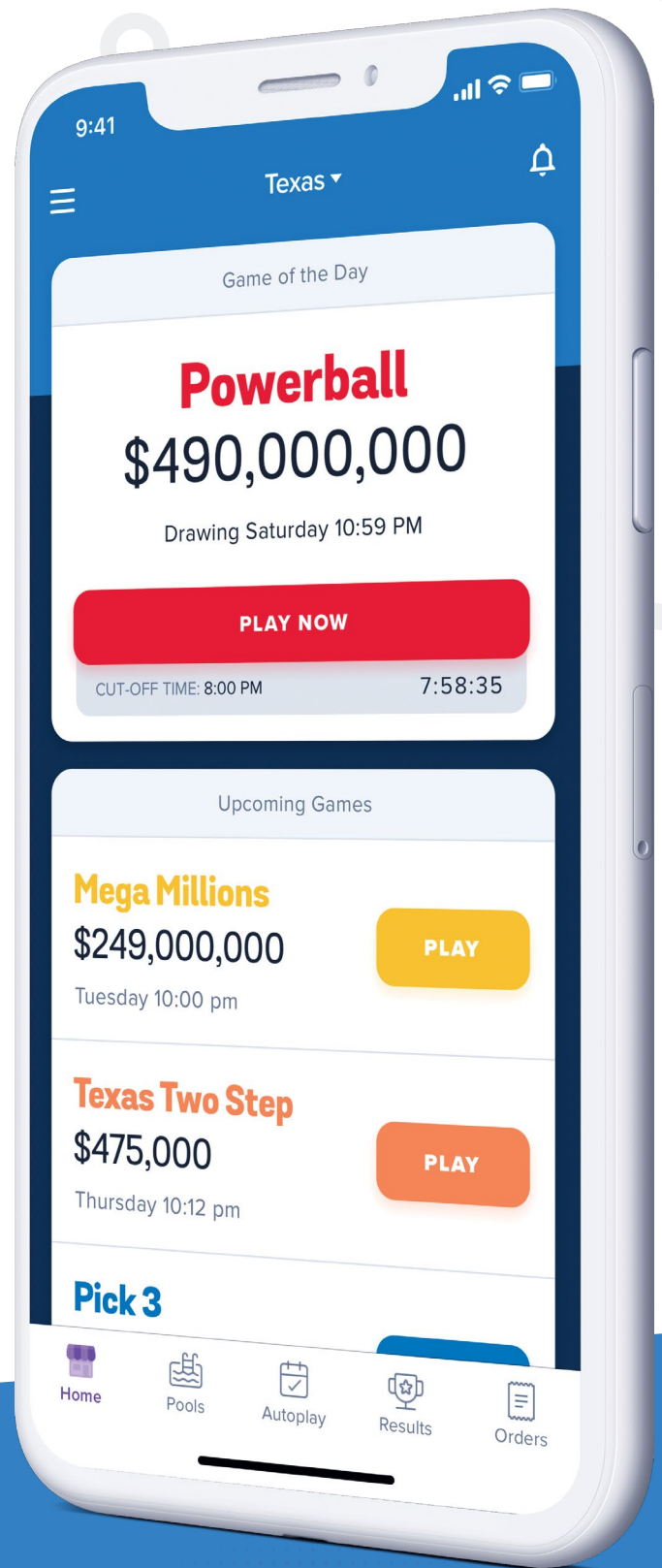
## 2019 NCPG Award Winner

Recognized for "Best Corporate Social Responsibility Program"



## Pools & Autoplay Features

New ways to play



# Jackpocket



# Balancing Revenue Growth and Responsibility



**Lori Rugle**

*Responsible Gambling Specialist*  
NASPL

I am writing this article with mixed feelings as it will be the last one I do for *Insights*. First of all let me express my deep appreciation for NASPL for giving me the opportunity to “stretch” into the field of responsible gambling and to get to know so many dedicated individuals in the lottery industry. While I have been an advocate for ongoing dialogue between problem gambling stakeholders and those in the gambling industry throughout my career, the past two years have been a great chance for me to deepen my appreciation of how honest, respectful dialogue benefits everyone. It is truly only through these conversations that we can learn, gain wisdom and move forward.

In preparation for writing this article, I looked back on my first appearance in *Insights*. One of the comments I made in that first interview was that I was excited about the opportunity to learn a lot about RG and lotteries. I had no idea how true that would be. Trying to keep up with the rapid pace of change in the past two years has at times been overwhelming. The explosion of sports betting throughout the country has proceeded at an unprecedented pace. Considering the implications of this newly legalized form of gambling for responsible gambling practices has been challenging to say the least and will continue to be

so. Many states that have already passed legislation authorizing sports betting in their jurisdictions have been vague or silent on responsible gambling regulations or requirements, so the challenge for developing appropriate and adequate responsible gambling strategies for this form of gambling remains.

**“The explosion of sports betting throughout the country has proceeded at an unprecedented pace.”**

As we seek to develop such new strategies, we run into the lack of research and evidence-based practices to help us know what responsible gambling practices work best and for which individuals. The limited research that has been conducted has mostly been outside the United States, primarily in Australia, the United Kingdom the European Union and Canada. While this

research conducted outside the U.S. can provide some useful guidance, we really don’t know if their findings of effective RG strategies will be completely applicable to our culture and demographics. This lack of U.S.-based responsible gambling research points to the huge gap in federal funding for problem and responsible gambling in general.

There is currently zero federal funding for the treatment, prevention or research of problem gambling in the United States. While many states as well as state lotteries have stepped forward to fill in this gap by providing treatment and prevention funding for problem gambling and also funding for responsible gambling initiatives, the lack of federal funding contributes to the lack of a national database on the demographics of gambling behaviors and gambling harms as well as the development and dissemination of evidence-based practices for responsible gambling, for public awareness and for best prevention and treatment practices. There is a great opportunity for lotteries to step into the vacuum created by the lack of federal funding.

Recently the Hoosier Lottery has partnered with the National Center for Responsible Gambling to fund a research grant, looking for proposals that target:



# Find inspiration inside and out.

**LEADING THE JOURNEY.  
INSPIRING THE FUTURE.**

The upcoming World Lottery Summit 2020 is set to take place in the breathtaking, forward-thinking, eye-opening city of Vancouver, Canada. A perfect location to learn, grow, engage and connect as an industry and discover what's on the horizon for the future. With the ocean, forests and coastal mountains close at hand, you'll wake up every day refreshed and ready to be inspired.

We hope to see you there!

Save the date: Oct 26-30, 2020



- Examining strategies that promote the responsible gaming principles of positive play, harm minimization, and treatment referral for lottery players.
- Identifying the positive or negative factors that influence behaviors and beliefs among lottery players who may be at risk for problem gambling.
- Determining innovative methods to reach and connect lottery players with educational resources or treatment providers.
- Understanding the role technology plays in the promotion of positive play attributes or treatment of problem gambling among lottery players.

This is a great example of creative partnering, demonstrating how lotteries can spearhead and support the development of evidenced-based responsible gambling practices to better understand the needs and risks of our players and citizens.

### Beyond a Revenue Focus

At this year's National Council on Problem Gambling conference, I had the opportunity to be on a panel on responsible gambling. As part of my presentation on future directions for responsible gambling, I remembered the old movie (original version of course), "Miracle on 34th Street." I found a YouTube clip of the scene where Santa Claus, working for Macy's, refers a mother to another store to find the toy her child just asked for for Christmas. The next part of the scene involves Santa's two supervisors being called into Mr. Macy's office. It seems as if they will be fired, but Mr. Macy points to stacks of letters from grateful parents and commends them on this great advertising "scheme" and announces that Macy's will now be known as the "store with a heart."

I think this is a perfect metaphor for lotteries. It is also in line with a growing movement among U.S. business to become benefit corporations. For those of you who know me at all, you know I am not a business person, but I recently learned about benefit corporations – defined as a traditional corporation with modified obligations committing it to higher standards of purpose, accountability and transparency:

**“...to continue growing our responsible gambling edge, we need to advocate for the explicit inclusion in every lottery’s mission to reduce and prevent the health risks of gambling as equally important with that of revenue generation.”**

#### 1. Purpose

Benefit corporations commit to creating public benefit and sustainable value in addition to generating profit. This sustainability is an integral part of their value proposition.

#### 2. Accountability

Benefit corporations are committed to considering the company's impact on society and the environment in order to create long-term sustainable value for all stakeholders.

#### 3. Transparency

Benefit corporations are required to report, in most states annually and using a third party standard, showing their progress towards achieving social and environmental impact to their shareholders and in most cases the wider public.

While traditional corporations are expected to have "maximize profit" as a primary objective, it is often apparent that there is a conflict between long-term value for all stakeholders, including shareholders, and short-term profits. Benefit corporations reject this short-sighted approach. They are required to view the interests of all stakeholders in decision making, including employees, customers and others in their communities. This gives them the flexibility to consider profits not as their only evaluative focus, but as just one of many outcomes on which to evaluate their success.

To me this sounded a lot like lotteries. Lotteries are tasked with raising revenue for their jurisdictions, but also must attend to the welfare of all their citizens. The practice of responsible

gambling is key to assuring that lotteries consider not just maximization of profit, but also the sustainability of their products and games, the reduction of gambling related harms and the well being of all citizens in their jurisdictions.

A recent article by Mariano Choliz, titled "Ethical Gambling: A Necessary New Point of View of Gambling in Public Health Policies," challenges us to think and plan beyond current responsible gambling policies and practices. It defines the purpose of ethical gambling as creating "the necessary conditions that permit gambling as an economic activity, but with the primary objective of prevention of potential health risks." This perspective challenges us to make the health and well being of all our citizens, particularly those who may be at risk for or experiencing gambling problems, as at least a co-equal (if not primary) mission with revenue generation. Having had the opportunity to review many lottery mission statements it is clear that the overarching mission of lotteries is the generation of revenue for their jurisdictions. That is understandable and all of us who would rather not have our taxes raised are stakeholders in this. However, to continue growing our responsible gambling edge, we need to advocate for the explicit inclusion in every lottery's mission to reduce and prevent the health risks of gambling as equally important with that of revenue generation. I know, that is a stretch. But in this, my last article for *Insights*, I thought I would go for the miracle.

My thanks to NASPL and all those who work so diligently for the success and integrity of the lottery industry. ■



WHAT'S  
YOUR  
20/20  
VISION?



iLottery 360°:  
"An innovative &  
comprehensive  
approach."

NEOPOLLARD.COM



Building on our best moments.

Drop us a line at [info@neopollard.com](mailto:info@neopollard.com) to get key iLottery insights!

# THE SLOWLY EXPANDING TERRITORY OF LOTTERY GAMES

## IF IT'S A LOTTERY GAME, HOW NEW CAN IT BE?

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



For those of us who work in the lottery business, anything we can legally sell might be a “lottery game,” and we might want to explore anything that is permitted for us. But in talking to players, it becomes clear that they know what a “lottery game” is. Mostly, it’s about matching numbers. Maybe the game designers can come up with something very different. If they do, then the marketers among us have the opportunity to create a new category in the minds of consumers. In this article, I explore some recent developments that challenge our established categories.

The lottery insider’s way of looking at games is where I start. In June of 2016, I wrote in this space about a system for thinking about the similarities and differences among the games being sold by lotteries in North America – that is, a system for classifying them. That classification is based on how a winning wager is identified. As in biology (my original field), the whole array of forms can be represented by a “tree” structure, whose multiple branches separate at decision points (nodes) based on the answers to key questions. To understand the position of a particular game in the whole array, we answer the key questions as we proceed from the common starting point.

I found that our lottery draw game tree has just three big branches, and a little one. I named the big branches by their most familiar fruit: Lotto, Numbers and Keno. The big branches all answered “yes” to the first key question: “Is the win determined by matching, or not matching, symbols chosen by the player and the lottery?” The little branch, corresponding to “no,” had no particularly

familiar lottery-game fruit when I first looked. However, I think it may develop in an interesting way.

For the games on the big branches, the simple description arising from my classification scheme tells us everything we need to know to understand the probability of every possible outcome of the game. This is not so for the games of the little branch, and this is why I think there is much potential for development there.

The first question that differentiates among the well-known games is: “Do the player and the lottery choose the same number of symbols?” For Keno, the answer is “no.” In Keno, the lottery chooses a greater number of symbols than the player. This fact in turn leads to the most important property of Keno – the frequent occurrence of outcomes with a middling number of matches. This allows Keno, uniquely among the familiar lottery draw games, to deliver a play experience with lots of low-level wins or near-wins. This sort of play experience supports more intense and prolonged engagement with the game, which is why Keno is most successful in its rapid-draw form.

The traditional form of Keno implemented in most North American lotteries involves a lottery choice (draw) of 20 numbers from a field of 80, while the player may choose (pick) as many as 10 numbers or as few as one. Fields of other sizes, and draws and picks of different sizes, can produce variations on the traditional game. In all these cases, all the symbols are drawn without replacement from a single field.

Given this understanding of Keno, describing a game as Keno 4/20/80,

where 4 is the size of the player pick, 20 is the size of the lottery draw, and 80 is the size of the field, tells someone who understands the math all that is needed to calculate the probabilities of the five possible outcomes, i.e. matching 0, 1, 2, 3 or 4 of the lottery’s drawn numbers. The same would be true for Keno 4/6/36, to specify a game that has some interesting properties, but has not been implemented anywhere so far as I know.

In 2016, I felt that the Keno branch was complete with this sort of specification. However, there is an add-on to daily numbers games that involves the lottery drawing more numbers than the player picks. I will return to this development after dealing with the remaining major branches, Lotto and Numbers.

## THE LOTTO AND NUMBERS BRANCHES

The big branches called Lotto and Numbers are differentiated by the question: “Is more than one symbol chosen from any field?” Note that the “any” implies there may be multiple fields, each with a player pick and a lottery draw. In Lotto games, more than one symbol is chosen from some field. In fact, in the original form of Lotto, Lotto 6/49, all six numbers are chosen from a single field comprising numbers 1 through 49. The field is depleted as each number is chosen; there can be no duplicates. In Numbers games, only one symbol is chosen from each field.



# VIRTUAL BASKETBALL IS HERE.

Head to head **action**

**Lottery Game**  
Attracts new players

**Ultra-realistic**  
graphics and animations

[inseinc.com](http://inseinc.com)

[inspiredsales@inseinc.com](mailto:inspiredsales@inseinc.com)



Venue



Online



Interactive



**VIRTUAL BASKETBALL**

**INSPIRED**  
ESSENTIAL ENTERTAINMENT

If multiple symbols are involved, each is chosen from a separate field. This creates the possibility that symbols may repeat. The common Pick 3 game can be represented as Numbers 10, 10, 10, where the field size is all that needs to be specified; it is understood from the definition that both the player and the lottery choose one symbol from each field.

The original Lotto 6/49 specifies top-prize odds of about one in 14 million, and it has been used to play for top prizes upward of one million times the cost of the wager. Note that whether the top prize is set or rolling, and whether it is advertised as a lump sum of cash or as an annuity, it has no impact on the probability of winning it. Neither does the cost of the wager, unless it buys multiple “picks” for the player. All games that answer to the description Lotto 6/49 thus have fundamental similarities in the play experience they deliver.

Many variations of Lotto games have been developed. Many U.S. lotteries have a Lotto where five numbers are chosen from a single field, producing easier top prize odds that are suitable for more frequently paying a prize smaller than one million times the wager. Four-number Lotto is also played, for prizes of several thousand times the wager.

The biggest multi-state games are Lottos with two fields, with five numbers chosen from a big field and one number chosen from a smaller field. It is relatively easy to match a number from the smaller field, and doing so is defined as the lowest-level win. Consequently, a steady player will occasionally have a ticket that wins a prize, even while the odds of winning the top prize are around 300 million to one.

In principle, we could have Lotto games with more than two fields. Likewise, we could have Numbers games with a field size other than ten. For instance, I have proposed a “Rock, Paper, Scissors” game that is essentially a Numbers game with field size three, played over six rounds (Numbers 3, 3, 3, 3, 3, 3). The math of this game produces a fair number of near-wins, as in Keno.

## NUMBERS EXTENSION

To return to the example of a daily numbers game add-on, most recently launched by the Texas Lottery as Fireball, in which the lottery draws one more number than the player picks; winning is

# TELLING PLAYERS ABOUT LOTTERY GAMES IS ALREADY A CHALLENGE, AND IT WILL BECOME INCREASINGLY IMPORTANT AS WE INNOVATE AWAY FROM THE OLD ESTABLISHED GAMES.

still based on the match between the player’s pick and the lottery’s draw, but the lottery’s draw is now complicated. In the Pick 3 game, the extra draw number (Fireball, or similar names in other jurisdictions) can be substituted in each of the three draw positions, providing four different chances to win on a straight bet. The game is presented as an extra-cost option to the traditional Pick 3 game, and so the win in traditional Pick 3 style pays the same as always. A single win involving the Fireball is more likely and pays correspondingly less. If the player’s pick uses the same digit twice or three times, the possibility to construct two or three Fireball wins arises, with smaller likelihood. The prize table needed to describe all these outcomes is much more complicated than one that describes the base game. The Fireball option is also offered for the Daily 4 game, with corresponding intricacy.

The Fireball option could be understood as a new Numbers sub-branch in the Keno line. As such, it invites us to expand our thinking – for instance, why should the lottery draw only one extra number? Why should a win on the base game pay differently? If the mechanics of scoring become too unhandy, maybe players don’t care – after all, the ticket either validates

for a prize, or it doesn’t. We know that Numbers players on the whole prefer not to use quick-picks, but we don’t know how they would respond to more opportunities to win on their favorite numbers. And if the winning experience is very different, perhaps we could all agree that it is a different game.

The systematic notation described here is useful in discussions among lottery professionals studying variations on the familiar games. It is not useful for describing games to potential players. Telling players about lottery games is already a challenge, and it will become increasingly important as we innovate away from the old established games. If we introduce something truly different, is it wise to call it a “lottery game” at all? Although printed instant games account for most of the sales and about half of the profit across North American lotteries, many players identify the varieties of Lotto and Numbers as lottery games and scratch-off tickets as something else. The Massachusetts Lottery website embraces and applies these folk categories, and that may be more effective for communication than trying to teach a broader concept of “lottery game” including both draw and instant games. But innovations are arriving that will bend or break the folk categories.

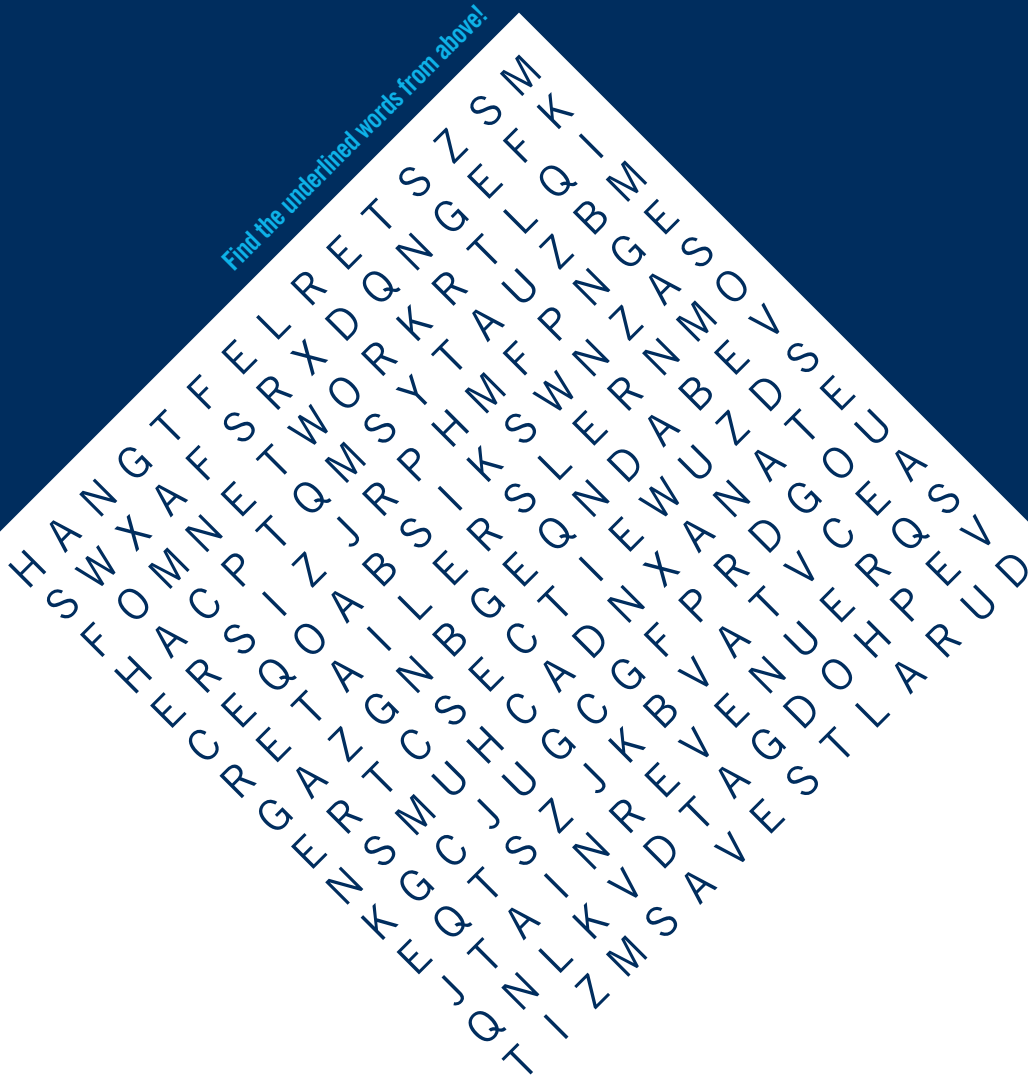
## ANOTHER VARIATION

An increasingly successful product that bends or breaks categories is the terminal-generated instant game. In this type of game, a dedicated lottery terminal (whether clerk-operated or self-service) communicates with a remote server that hosts a file of outcomes. The server distributes outcomes from the file to the requesting terminal, and to any number of similar terminals. The server manages the depletion or maintenance (as the case may be) of the file of outcomes. The terminal represents the result to the player by printing a ticket on lottery paper stock. The outcome can be revealed in a huge number of ways. Some of these printed reveals are like those used on scratch tickets, some resemble spinning-reel slot machines, some resemble Bingo, and some even resemble Lotto draws.

In terms of the folk categories, this looks like a “lottery” (draw) game because it is printed on the same paper by the same printer. What gets printed

# More Than a Game

For 25 years, we've honed our products to address the unique needs of social establishments. Creating a successful lottery product for these retailers requires more than a game. Meeting retailer needs — to easily operate and control inventory, retain patrons, and increase length of stay — addresses lottery needs, helping to expand their retailer network and drive incremental revenue.



# IF PLAYERS CALL OUR NEW OFFERINGS SOMETHING DIFFERENT, THAT IS A WIN FOR US.

may look more like a scratch game, or like something else altogether. Maybe most salient is that there is no waiting for a drawing. Calling it “Fast Play” or “Instaplay” consistently may result in players recognizing a third category of game, neither “lottery” nor “scratch.” This perception may be strengthened if the printed ticket has some flash and character of its own. Even though the ticket represents only a single outcome distributed in a chance way by the server, the reveal may include many lines of output, any of which may code for a prize of some value. The player may perceive that these are extra chances to win. It is probably immaterial whether players understand that there was only ever one chance involved, so long as the lottery avoids misleading by calling these ways, not chances, to win.

A potentially very significant innovation comes out of the effort to make the main lottery draw games easier to purchase in those multi-lane retail checkouts that many of us see every week. The drive to integrate lottery purchases into the retail point-of-sale (POS) process aims away from printers and paper whose sole purpose is to print lottery tickets. Among the solutions being tried is a printed paper scratch-off ticket that bears one or more player “picks” concealed beneath the latex. This item becomes a wager for the next drawing in the big game only when it is paid for and processed through the store’s usual POS. This approach has many advantages that I will not even try to list here, but consider: It’s a scratch ticket, for a lottery (draw) game. What do we call that, players?

## THE SMALL BRANCH

Matching numbers is the key element of the folk category of lottery games, as well as the first question of my systematic classification. Where the answer to “Is the win determined by matching, or not matching, symbols chosen by the player and the lottery?” is “no,” we turn onto the small branch. Game innovations that move away from matching numbers thus have the opportunity to appear as something completely different. This may be advantageous in addressing audiences who would say, “My grandparents play lottery games, not me.” The familiar

game of Bingo is “sort of different” in that it uses matching of numbers, but with a card that defines a geometric relationship among the player’s numbers; scoring involves matching numbers in a straight line. Bingo is legally not a lottery draw game in most jurisdictions, though many instant games reveal the outcome of a wager in a Bingo format. A lottery draw game with a smaller geometric format, based on a 3x3 (Tic-Tac-Toe) grid, is sold in Oregon (Lucky Lines) and Connecticut (Lucky Links). Like Bingo, this game is “sort of different” in that while it requires the player’s picked numbers to match the lottery’s draw, the position of the player’s numbers on the 3x3 grid determines whether these matches define a win. The game pays increasing prizes for increasing numbers of straight lines, defined by the position of matching numbers. This game plays a minor role in the game portfolio in the states where it is sold.

It is possible to define draw games that provide the necessary elements of chance and a variety of outcomes, purely on the basis of arranging all of a small set of symbols in a geometric pattern. I recently described one simple game of this type, based on an arrangement of nine Scrabble tiles, in this space (January/February 2019). Others have shown that this sort of game has potential to support prizes as big as any currently offered in the world. Given the small set of symbols required, this may represent a pathway to get away not only from matching numbers, but from numbers altogether. No such games have yet been offered by lotteries, so far as I know. Would they be perceived as different from “lottery games like my grandparents played?” And would that be an advantage?

The visual appeal of well-merchandized scratch tickets has certainly helped deliver success to lotteries. The creation of “pattern” games may extend this success, especially if the patterns are equally suited to display on the small screen of a mobile device and on printed merchandise. It is conceivable that “make the pattern” games may some day be just as important as “match the numbers” games.

In summary, I think it is important that lottery professionals be aware of, but not particularly respectful of, the folk category of “lottery games.” We can offer more. If players call our new offerings something different, that is a win for us. ■

# The best lottery experiences are Powered by Jumbo

A world class digital platform, purpose-built for lotteries, customised to you. Regardless of your size, resources, or goals, the Powered by Jumbo platform equips your organisation with everything it needs for sustainable, exponential growth.



Powered by **JUMBO**

[jumbointeractive.com](http://jumbointeractive.com)  
[poweredbyjumbo.com](http://poweredbyjumbo.com)  
[partners@poweredbyjumbo.com](mailto:partners@poweredbyjumbo.com)



**POWERBALL**  
Estimated Annuitized Jackpot  
\$ **880**  
**MILLION**

**MEGA MILLIONS**  
Estimated Annuitized Jackpot  
\$ **200**  
**MILLION**

\$4  
2 PLAYS  
CHOOSE OPTION  
QUICKTICKET™  
LOTTERY  
**POWERBALL**  
\$200,000,000 not valid until activation or expiration. This is your official Texas Lottery™ ticket. Scratch to reveal your Quick Pick numbers.  
A B C D E  
023

\$4  
2 PLAYS  
CHOOSE OPTION  
QUICKTICKET™  
LOTTERY  
**MEGA MILLIONS**  
\$200,000,000 not valid until activation or expiration. This is your official Texas Lottery™ ticket. Scratch to reveal your Quick Pick numbers.  
A B C D E  
023

**TEXAS LOTTERY**  
Check Out The New  
**QUICKTICKET™**  
1 BUY QUICKTICKET for nice, available drawings.  
2 CHECK receipt to confirm QUICKTICKET activation.  
3 SCRATCH to reveal your Quick Pick numbers.  
4 VISIT [tlottery.org](http://tlottery.org) to confirm your draw date and get results information.  
LW07 0718

\$10  
5 PLAYS  
CHOOSE OPTION  
QUICKTICKET™  
LOTTERY  
**POWERBALL**  
\$200,000,000 not valid until activation or expiration. This is your official Texas Lottery™ ticket. Scratch to reveal your Quick Pick numbers.  
A B C D E  
035

\$10  
5 PLAYS  
CHOOSE OPTION  
QUICKTICKET™  
LOTTERY  
**MEGA MILLIONS**  
\$200,000,000 not valid until activation or expiration. This is your official Texas Lottery™ ticket. Scratch to reveal your Quick Pick numbers.  
A B C D E  
035





# Inside the Texas Lottery's In-Lane Initiatives

This fall, the biggest retail development in lottery history was set in motion in Texas.

**By Patricia McQueen**

**W**hen Texas does something, it's big. So at a time when in-lane lottery initiatives are making progress in several states, it's no surprise that the Texas Lottery is going about it in a big way – with not one, but two significant programs – QUICKTICKET and the receipt ticket. With these projects, it's not a stretch to think that Texas is poised to set the stage for industry retail expansion across the country.

Leading the current charge alongside the Texas Lottery are gift card and payments giant InComm and retail giant Dollar General, plus leading Texas grocery chain H-E-B. Discussions are ongoing with other major chains, along with gift card and payments giant Blackhawk Network. Between them, InComm and Blackhawk have relationships with the vast majority of the nation's retailers.

What is driving the interest by these companies? "Retail is being pressured on all sides," explained Ryan Mindell, Lottery Operations Director for the Texas Lottery. Low unemployment and high pay rates by companies like Amazon are making difficult labor markets, and online sales with delivery or with store pickup impacts bricks and mortar locations. "It's a tough market all around, so retailers are looking for more profit centers. They see lottery as something that has general interest, and that's very appealing."

For their part, InComm and Blackhawk also see lottery as a new profit center. They have developed the gift card industry and have hard-



earned space for those cards at retail, but they still need to create interesting and innovative products. And the reality is that the vast majority of gift card sales come during holiday season. Lottery cards have the potential to bring interest throughout the year, especially during times of peak jackpots. “QUICKTICKET may not be the next iTunes gift card, but it’s something new that will help them diversify their portfolio,” noted Mindell.

Lotteries are also widely acceptable products serving a broad population base. Plenty of research indicates that more than two-thirds of American adults have played lottery games in the past year. For example, the recent NGAGE study by the National Council on Problem Gambling found this number to be 66% (see page 18), and other studies have reported similar results. Lottery approval rates are typically even higher. So it’s no surprise that lottery is indeed an area eyed by retailers who have never before sold the products. Just look at Walmart’s embrace of lottery vending machines (see page 46).

And all that is good for lotteries. A key long-term goal of Mindell and Texas Lottery Executive Director Gary Grief is growing the retailer base, and the Dollar General project alone will add over 1,500 new retailers for the Lottery. “That’s more growth than we’ve had in our retailer base in the last 20 years combined,” said Mindell.

If successful, this retailer base growth could spread to lotteries across the country. Dollar General has 16,000 stores across the nation, and by next year will have stores in 46 states. And while dollar stores may have a reputation for attracting a certain type of customer, the fact is that Dollar General is committed to making its communities a better place with its motto “Serving Others.”

“Dollar General is one of the fastest-growing retailers in the country, and they are revamping their stores,” explained Mindell. “In Texas, their stores are not just in one type of neighborhood – they are appealing to a wider, more diverse customer base than ever before.” He noted that as big as Texas is, in some remote counties Dollar Generals essentially serve as general stores, offering a wide variety of products in areas that often don’t have the same retail density as other markets. Crystal Ghassemi, a spokeswoman for Dollar General, recently noted that Dollar General is patronized by a wide range of customers. “There’s a whole host of Texans we serve every day,” she said.

### The Development Path

QUICKTICKET and the receipt ticket utilize two different levels of integration, and making it all possible is the work on the NASPL standard API, a project driven by the association’s retail modernization

committee over the past few years. While QUICKTICKET is built on the integration between the InComm and IGT Texas systems, the receipt ticket is a direct integration between that IGT Texas system and the initial retailer H-E-B. Both utilize the NASPL API, but “without IGT’s commitment to deploying both technical solutions, Texas would not have achieved its in-lane goals,” said Mindell.

It was just this past March when Texas amended its contract with IGT Texas to reflect the modern reality of the NASPL API and all the potential in-lane solutions in the market today, he added. Top of mind was developing a pure API solution directly with a retailer, one that printed lottery tickets on plain paper at the registers in multi-lane stores. Along with that was a parallel effort that would require less work by the retailers, taking advantage of the existing relationships between retailers and InComm and Blackhawk.

“The timing of that contract amendment was very fortuitous, because that was when InComm decided to acquire Linq3,” a company that had already laid groundwork for in-lane lottery products. “That really crystalized InComm’s motivation and momentum to make this happen.”

Texas learned very quickly that InComm’s relationship with its retail partners is different than lotteries have traditionally had with their own retailers.

"We went to the InComm Partner Alliance, where they match their retail partners such as Dollar General, CVS and Walgreens, with their brand partners like Apple, Amazon and Google," said Mindell. "That we were invited in was kind of like a recommendation for a job interview – retailers looked at us in a very different light at those meetings, and there was a very positive reception from most of them. InComm and Blackhawk are able to leverage the relationships with their retailers and get the results that we haven't been able to get on our own."

Those relationships ultimately led to the development of QUICKTICKET in Texas, modeled after a similar product that was introduced in Ontario, and Dollar General emerged as the retailer most interested in going down this path first. The goal was a launch date this fall – very quick action in an industry perhaps known for slow caution.

At the same time, IGT Texas was working with H-E-B, a large Texas-based grocery retailer that had been interested in a plain-paper lottery ticket for some time. Once the IGT contract was amended, both IGT and H-E-B started

ramping up their efforts to make the receipt ticket a reality, although there was no target launch date.

As spring turned to summer, the InComm/IGT integration was complete by last June, while H-E-B continued to work on their integration of the plain paper solution. By early fall, it was time to focus on the Lottery's back-end systems and how they would accommodate the new products, especially QUICKTICKET – accounting, reporting and all the other internal systems that had to be updated.

While the H-E-B project required significant coordination with the retailer's software development and technical teams, QUICKTICKET had even more parts to the whole that needed addressing. Even after the work integrating InComm was done, there was still the need to finalize the look and feel of the product, get the tickets printed by Pollard Banknote, order the jackpot signs from Carmanah Signs, and then get the final approval from Dollar General for the actual deployment. "There are many more moving pieces on the development side than lotteries are usually used to with their typical product introductions,"

explained Mindell. "Sometimes just communication is a challenge, to make sure the right people know everything they need to know. In fact, the communication challenges have been beyond everything I've ever experienced. It's been fascinating."

### Live!

But as is often the case, challenges lead the way to opportunities, and by November, Texas was starting to see the fruits of everyone's labor.

The last step before going live is always the final testing phase. "For our typical new products, we can set up a very reliable test environment to test the lottery gaming system," noted Mindell. "But we can't do that on a Dollar General retail terminal, and while we have a test environment with H-E-B, it's not what we are used to."

So special live tests for both products were done on October 15, at one store for each product. Those two successful tests allowed for a November launch.

QUICKTICKET launched the week of November 4, with three Dollar General



stores going live in Austin for a pilot test, complete with product and jackpot signs. Any residual issues or bugs were addressed, and the product was rolled out in over 1,250 stores starting the week of November 11. Deployment in that many stores took a few weeks, and the remaining Dollar Generals were expected to launch in early December. That final group has different layout challenges in-store, and they won't have the jackpot signs to start, so additional merchandising and signage will be put in place.

"The biggest challenge, besides low jackpot values, is going to be customer awareness," said Mindell. "We are going into more than 1,500 stores that have never sold lottery in Texas." That's why merchandising and jackpot signs are going to be a major factor in QUICKTICKET's success, aside from the obvious impact of jackpot levels.

H-E-B's receipt ticket program will be limited initially to allow the retailer to exhaustively test the technology and provide its scalability. After that, H-E-B will start a broader rollout. At this writing, H-E-B was continuing to work out the last few technical issues, so continued deployment was not yet scheduled. Mindell hoped it could be completed in time for Christmas, but a mid-December launch was the goal.

He is confident that by the end of the first quarter in 2020, lottery should be in at least one lane at all 300 H-E-B stores in Texas. "H-E-B has been such a strong supporter of lottery and the in-lane initiative in general, it is just a matter of when, not if. Innovation like this comes with its challenges and H-E-B's commitment to this project has been unwavering," said Mindell.

## Pros and Cons

QUICKTICKET and the receipt ticket are two different solutions for in-lane sales, and there are pros and cons for each. Some lotteries have chosen just one route; but that's obviously not the case in Texas. "We've taken the view that we want to be responsive to the retailer," said Mindell. "We are not going to take a product view yet – we are going to fully support both QUICKTICKET and the receipt ticket. Those are what the retailers we have were interested in."

QUICKTICKET has two primary advantages. From the consumer perspective, the tickets are basically self-merchandising. Players make an easy connection to lottery when they see the ticket, and the resemblance to a scratch ticket is very appealing. From the retailer perspective, there is very little work the

retailer needs to do to introduce the product – most of the integration comes through the InComm (or Blackhawk) system already in place with the retailers, which then connects to the lottery's central gaming system.

On the flip side, QUICKTICKET is limited in its initial format to \$4 and \$10 purchases, and the ticket doesn't indicate the draw date for which it is valid. Upon purchase, the ticket is simply entered into the next available drawing. Texas has developed several methods for a player to find out the draw date for a particular ticket. Most convenient is through its mobile app, as the ticket can be scanned directly for information about the draw date (or in the event the draw date has passed, it will return whether or not it is a winning ticket). But players can also enter the ticket code on the Lottery's website, or even call a toll-free number.

For the receipt ticket, the key advantages are flexibility on the part of the player and having a draw game ticket with a look and feel that lottery players know. Purchases can be made in any amount, and the draw date is printed on the ticket just like a traditional lottery ticket. For the retailer, it allows a more seamless business model between the lottery and the retailer. The downside, of course, is the amount of work that a retailer has to do with its own systems to accommodate the direct integration with the lottery's gaming system. "H-E-B had to do a lot of work on this, and it's a significant coding effort on their part. Not every retailer either has resources to do that or wants to spend resources in that way," added Mindell.

## More to Come

All this is just the tip of the iceberg, but lotteries have to learn to be flexible, and in more ways than just the technical deployment. Something as simple as licensing arrangements – the Texas Lottery has licensed both Dollar General and InComm for QUICKTICKET, for example. InComm is the financially responsible retail partner, while Dollar General is the retailer selling the actual tickets. "We had to spend significant time working through that model."

For any QUICKTICKET application, the deployment windows in big box retailers are typically April-May and October-November, when gift card stocks are refreshed. CVS could be the next big retailer to come on board with QUICKTICKET, with about 850 stores in Texas, but Mindell wants to make sure the Lottery keeps the 30 CVS stores that are currently in a pilot phase with a

traditional lottery terminal plus vending.

Other retailers will likely be interested in the receipt ticket model as well, and InComm and Blackhawk are both working on a receipt product that can be produced through their systems, minimizing the heavy lifting that a retailer would have to do to integrate to a lottery's gaming system.

Kroger, for example, a retailer known for being pro lottery, is looking for ways to enhance its lottery presence. A member of Blackhawk's network, Kroger is eyeing QUICKTICKET, but depending on how the H-E-B test goes, the company might want to offer the receipt ticket as well.

"That's one of the surprising things I learned at the InComm Partner Alliance – that QUICKTICKET and the receipt ticket are not mutually exclusive," said Mindell. "Stores can offer both, and leverage them in different ways." And while InComm and Blackhawk are strong competitors when it comes to their retail partners, they both believe it's in their best interests to share the gift card brands. Both are interested in selling QUICKTICKET.

Down the road, there may be other applications, like having lottery prizes put onto gift cards – so perhaps a \$50 lottery win could be transferred to a Dollar General gift card, or an Amazon gift card. Validation of winning tickets at the selling store are also on the agenda, as that isn't currently part of the QUICKTICKET program with Dollar General.

And then there's the potential of scratch tickets in-lane. "In Texas, 80% of our sales are scratch tickets, so the true sales boost must come from there," noted Mindell. "We're working on ideas to make that happen in this new in-lane world, but that's even further down the road."

For the current initiatives, while sales success is of course desired, that will be highly jackpot dependent. "I do believe that this is going to let us leverage the next billion dollar jackpot much more efficiently, because we are going to be offering so many more points of sale to help avoid some of those lines."

Ultimately, the Texas Lottery defines success by the expansion into new retail locations and in growing its valued retailer relationships, and letting the market respond. "The sky is the limit in what we can do with in-lane, it's just a matter of getting through all the logistical issues." Clearly those logistics haven't come easy, but Texas has embraced the challenge and is blazing a trail unlike any other. ■

# Win Big with In-Lane Innovations



At InComm, we connect lotteries to consumers in new and exciting ways. Through innovative point-of-sale activation (POSA) technology and our vast network of over 60,000 retail partners, we're making in-lane lottery sales and redemption a reality.

Contact us to learn more about how we're broadening lottery's reach through new and existing retailers, increasing lottery brand awareness and growing the player base.

Visit [InComm.com](http://InComm.com) to learn more.





# A Winning Conference in Little Rock

NASPL's signature annual event brought a big crowd to Arkansas, where the state was celebrating its tenth year in the lottery business.

**By Patricia McQueen**  
**Photos by Domagalski Photography**

**T**here couldn't have been any more appropriate theme to the 2019 NASPL Annual Conference than This is Winning, which just happens to be the tagline – and brand – of the conference host, the Arkansas Scholarship Lottery. Held in Little Rock in September, conference sessions explored a number of ways lotteries are winning – from new paths in retail to significant developments in the digital arena to innovation in a number of other areas.

Guiding attendees through the event were the Lottery's Director Bishop Woosley and Advertising and Marketing Director Donna Bragg, who served as emcee.





## General Sessions

There were six general sessions offered at NASPL '19, including two featuring keynote speakers.

First up was **Elise Mitchell**, Founder and Chairman of Mitchell Communications Group. In a presentation titled "Leading Through Change for the Win," she likened leadership to the motorcycling phrase "Looking through the turn" – you see the turn but don't lose sight of the goal. "This is such a great metaphor for business, to stay the course and end up where we want to be." These are times of change, with volatility, uncertainty, complexity and ambiguity. She encourages people to view change with vision, understanding, clarity, and agility. Change helps you develop new skills, innovate and create, and sharpen your competitive edge.

In a keynote presentation titled "Big Bets, Big Dreams," best-selling author **Ben Mezrich** talked about the famous M.I.T. students who formed a blackjack group and won millions in Las Vegas. His book about the group was adapted into the motion picture "21." He noted that he likes to play lottery when the jackpots get higher than \$500 million, "to be part of the fun."

A knowledgeable panel was assembled in a general session on **why diversity matters to your bottom line**. Moderated

by Louisiana Lottery President and Chief Executive Officer Rose Hudson, the group included Kevin Frazier, Senior Director of Culture, Diversity & Inclusion Division, at Walmart; Frank Scott Jr., Mayor of Little Rock; Esperanza Massana Crane, Marketing Director for the Arkansas Economic Development Commission; and Monica Kumar, Director of Diverse Social Networks for the Endeavor Foundation. They talked about how businesses with diverse leadership are more innovative and perform better financially, giving them a competitive edge. And in fact, it's not about solely diversity – diversity will happen no matter what. The big challenge is inclusivity!

Top-level **NASPL Associate Members** were again given the opportunity to talk about what they see are the most important factors that will affect lotteries in the near future. INTRALOT presented a video showcasing their people who shared their own thoughts about the future. IGT talked about new opportunities in retail and the potential of digitization. Scientific Games explored innovation and digital change, emphasizing that disruption needs to come from within as well as from outside forces. Pollard Banknote also talked about digital innovation and retail excellence, calling for the need to find new solutions to ongoing challenges.

When asked by Woosley where the greatest growth potential in the industry

lies, the answers were varied.

Scientific Games' Pat McHugh, Executive Vice President and Group Chief Executive, Lottery, believes there's a huge opportunity in the core business, even with the expansion of iLottery and sports betting. Jay Gendron, IGT's Chief Operating Officer, Lottery, is very optimistic on the future of instant tickets, particularly by changing the prize structures based on what players want. INTRALOT's Senior Director of Program Management Rebecca Swindle emphasized sports betting and Fast Play type games. Pollard's Co-Chief Executive Officer Doug Pollard says the biggest opportunity is to broaden the player base with all of the new initiatives, such as multi-lane stores and iLottery.

**Big retail chains** took the center stage in Little Rock, in more ways than one. Representatives from Kroger, Circle K and Walmart participated in a general session discussing retail initiatives and their thoughts on selling lottery. Between them, these chains have some 14,000 stores in the U.S., under their various brands. That is some serious retail power and potential for lottery, because they are all bullish on the industry.

Kroger, for example, is actively pursuing lottery as a new revenue driver, noted Jarrod Cummins, the company's Head of Gift and Prepaid Services, adding that until recently, Kroger had been under-valuing





lottery. Lottery is more attractive now because there's tremendous competitive pressure in retail, with not a lot of differentiation anymore solely on price and product.

Adam Spalding, Corporation Director of Operations, Region 6, for Circle K, noted that it's important for lotteries to help make it easier and faster to purchase lottery products. One example would be the ability to set up a purchase before actually going into the stores. Communication is also critical, and he said lotteries should be willing to tailor signage to exactly what the retailers want and need, including best-in-class digital options.

In this group, Walmart was the newcomer to lottery, and the company's path has been a deliberate one. It was critically important to them to have the right tools and structures in place to manage lottery, but now that it has made the leap, it is ready to go full speed ahead. Anne Johnson, Walmart's Director of Lottery and Automated Services, is also eager to work with lotteries to build best practices in customer communication, to build awareness of lottery in its stores. For more on Walmart's path to lottery, see the article on page 46 with details about the company's breakout session, **Onboarding With Walmart**.

Everyone was in agreement that lotteries need to provide more and more data, assist with customer communications, and provide promotional opportunities to grow sales. They are also looking for things like ticket-by-ticket activation and in-lane sales.





## WINNING NEW GAMES

Among the many awards bestowed at the conference each year are the **Buddy Roogow Innovation Awards** for the best new instant and draw games, and the two finalists in each category presented their products in another general session. For 2019, the Idaho Lottery took home both awards, with Canadian entries landing the runner-up spot in both categories.

Among instant games, the Idaho Lottery won for its 30th Anniversary family of games, offered at \$5, \$10 and \$30. They were designed in-house at the Lottery with imagery focusing on fun, parties and prizes. The tickets were part of the Lottery's 30th anniversary celebration in 2019, which culminated in setting a new Guinness World Record for the "largest gathering of people scratching scratch cards," on July 19, 2019. "We've gotten crazier with age," said Idaho Lottery Director Jeff Anderson.

Runner-up in the instant category was Ontario Lottery and Gaming with its \$5 Big Brother Canada scratch game. The game was an end result of OLG's goal of increasing strategic partnerships with companies around the province. It cleverly integrated

the lottery game with the number one television show in Canada, "Big Brother Canada." "Tickets flew off the shelves after being on the TV show," said OLG's Adam Caughill.

For the draw games category, the Idaho Lottery's Powerball Arcade took top honors. By using non-winning Powerball tickets, the promotional game addressed the big challenge that people just don't win enough in Powerball, explained Anderson. Developed by Milestone Entertainment, Powerball Arcade takes away the pain points of "not winning Powerball." Players scan their non-winning Powerball ticket to convert their numbers to vBalls to play games in the Arcade, where ultimately they can enter sweepstakes to win prizes. A key goal with the Arcade is to drive Powerball purchases when the jackpots are low.

Honorable mention again went to a Canadian product, this time to the Interprovincial Lottery Corp. for the relaunch of Lotto Max, the country's flagship game. The goals were to increase sales and profits and grow playership, benefitting all regions across Canada. Western Canada Lottery Corp's Adam Cortiula noted that extensive research found that players were open to game

changes, as long as those changes increased opportunities to win. A new creative platform that inspires Canadians to dream bigger, "Dream to the Max" was a successful partnership with Corus Entertainment.

## BREAKOUT SESSIONS

In addition to the general sessions, there were a number of breakout sessions focused on some of the hot topics in the industry. Powerpoints for many of these sessions are available on the NASPL Matrix.

One session talked about new games that bring innovation to players and help reach new customers. Leading the discussion was Tom Delacenserie, President and Chief Executive Officer of the Kentucky Lottery Corp. Perhaps the most innovative recent lottery product discussed was Win Place Show, from EquiLottery Games, which had a trial in Kentucky earlier this year ahead of a bigger launch in 2020. Representatives from IGT, INTRALOT and Scientific Games also participated in the panel.

Justin Arnold, Vice President of Commercial Platforms at 84.51°, shared how



leveraging retailer data can help companies better understand their customers. The goal is to build relationships between people and brands, diving deep into data to build technical platforms to personalize experiences for every customer. “For lotteries to experience exponential growth and differentiation, they need to have more touch points to reach customers with new channels and offerings along with new data sources through emerging technology and science,” he said. Everything has to be considered from the customer perspective, from the assortment of products offered to price optimization, relevant communications, meaningful promotions and better rewards.

In an afternoon breakout session, Robert Rippee, Director of the International Gaming Institute’s Hospitality Innovation Lab at the University of Nevada, Las Vegas, gave listeners a crash course on the exciting world of eSports. While we may view eSports as an emerging market, Rippee said, it’s actually an established, multimillion dollar market with a wide variety of games and a large, passionate fan base around the world. Similar to traditional sports, competitive gaming has its own network of players, teams, tournaments, sponsorships,

celebrity personalities, dedicated media, and impressive prize pools. And its cultural significance – as well as its audience – is continuing to grow. This, Rippee said, is why it’s important for lotteries to examine and understand the eSports strategy, to further engage a younger generation that values experiences, embraces risk, and wants their entertainment to be interactive and sharable.

Three lotteries with very successful players clubs provided insights into how their programs encourage player loyalty while providing valuable data about what drives lottery players. Participating were Frank Suarez, Deputy Executive Director of Brand Management and Communications of the North Carolina Education Lottery, Kristin Vuilcott, Draw Games Product Manager for the Missouri Lottery, and Teri Wood, Vice President Sales and Marketing for the Iowa Lottery Authority. Each of these programs was developed in a different way to serve the needs of the local market.

David Olive of Catalyst Partners gave a presentation on protecting lotteries and players from CyberFUDD – the fear, uncertainty, doubt and disruption triggered by cyber criminals. In addition to things like phishing and even insider threats,

he described the explosive increase in ransomware attacks targeting cities, government agencies and corporations. He noted that everything is based on trust, which can’t be earned – it has to be given. “You can build and rebuild trust,” he said, but it can’t be taken for granted. Olive advised lotteries to examine their continuous monitoring systems, to have a plan for recovery and to closely examine what any cyber insurance plans might cover.

Don Feeney, Policy Research Consultant for the National Council on Problem Gambling, presented the findings of the organization’s first NGAGE study, which was an in-depth survey of gambling attitudes across the country. He noted that because so many people play lottery games, providing responsible gambling messages through lotteries is the best way to reach the largest audience of consumers likely to gamble regardless of their product of choice. For more on the NGAGE study, see Research Corner beginning on page 18. ■

*Additional reporting by NASPL’s Mackenzie Whitacre and Arkansas Scholarship Lottery Campaign Coordinator Kara Lee Ford.*

*This is*  
**WINNING!**

**On the  
Show Floor**

One of the largest trade shows in NASPL history turned up in Little Rock, with 40 companies and organizations exhibiting in 2019. They included the big players of course – **IGT, INTRALOT, Scientific Games** and **Pollard Banknote**. Other long time lottery suppliers were there too, celebrating their partnerships with lotteries for the past few decades. New players were in the mix as well, companies young and old that see lottery as a growing market.

Show floor attendees could also visit the **Arkansas Scholarship Lottery's** trailer, sign up for the holiday lottery campaign with the **National Council on Problem Gambling**, and get a preview of what the **2020 World Lottery Summit** will be like in Vancouver next October.

Reflecting the interest in in-lane sales – in addition to the solutions offered by the big lottery vendors – were companies that facilitate that development such as **Abacus Solutions, Blackhawk Network** and **InComm**.

Presenting alternatives to direct mobile sales that still take advantage of consumers' dedication to mobile technology were **Jackpocket** and **Lazlo**. The latter has been in discussions with the Arizona Lottery for a possible product launch in conjunction with Circle K.

Sports-related products – again in addition to those offered by the big companies – were showcased by **Inspired Entertainment, Golden Race** and **EquiLottery Games**. The latter launched a test of its flagship





horse racing product last spring with the Kentucky Lottery; it is scheduled for a rollout in 2020. Other sports have been added to the company's portfolio of lottery games based on live sporting events.

**Alchemy3** had its usual innovative presence on the show floor, focusing on conversations about building player loyalty.

Lotteries will always depend on their retailers for the vast majority of sales, and the retail experience presented to the player can have significant impacts on lottery sales. That's a good thing for the companies that specialize in ticket dispensers, play stations, signage and menu boards. Companies such as **Carmanah Signs**, **CM Global**, **Fastrak Retail**, **Go Plastics**, **LD Plastics**, **Pro-Lite**, **Schafer Systems** and **Take-A-Ticket** have all looked to the future with respect to retail needs and provide plenty of choices for lotteries looking to take their retailers to the next level.

Other companies that serve the industry and who had booths to continue building their relationships with lottery executives were technology provider **Advantech**, **Delivery and Distribution Systems** and **Montenegro Paper**.

And of course the industry relies on companies like draw systems manufacturer **Smartplay**, audit and consulting firm **BerryDunn**, secure solutions provider **Szrek2Solutions**, and market research firm **Ipsos**, which all maintained their NASPL presence this year.

Nine companies were first-time exhibitors at NASPL in 2019. They included **Allover Media**, specializing in out-of-home advertising; **Aquimo**, which provides live event sports marketing experiences; retail display manufacturer **Blake Jarrett & Company**; **GSTV**, which reaches large audiences through advertising at gas pumps; innovative digital game and promotion provider **Milestone Entertainment**; **PBI Research Services**, which provides advanced data services and death audits; India-based **Skilrock Technologies**, a supplier of lottery technology solutions; and creative agencies **Tilt Creative + Production** and **Waymack and Crew**. ■

# Winning With Walmart

By Patricia McQueen



It was only fitting that the NASPL conference in Little Rock was Walmart's "coming out" party, so to speak. After all, the company calls Arkansas home, having been founded by Sam Walton in 1962 in Bentonville. And for the first time at a lottery industry conference, Anne Johnson, Director of Walmart's Automated Service Delivery Team, was on the public stage to tell their story.

"The opportunity to share Walmart's journey in the lottery business while in Little Rock was a privilege," said Johnson. "Having the time and support to provide the context of how we got to where we are today, and to share those learnings with our state partners in a candid and open forum, was awesome. My hope is that folks left the conference knowing a little more about what makes lottery at Walmart tick, and that we absolutely cannot and will not accomplish anything without the bonds of our amazing industry relationships. Together, we all win."

Walmart's initial foray into the lottery space was back in 2011, when the company's Neighborhood Markets started selling lottery in Florida. It was a big test for the retail giant, which knew it needed lottery to be competitive in the convenience/fuel space, but at the same time was wary of the product. "We didn't know what our customers would think, but since it has been very quiet on that front, we think they feel it was the right thing for us to do," said Johnson. "We knew we could bring efficiency to the space, and offer a better experience for the customer. Time is the new currency, so anything we could do to make it easier for them, we knew would put us on the right path."

That path, with experimentation ramping up over the years, has led to where Walmart stands with lottery as we move into 2020 – Supercenters in 23 states are offering lottery through vending machines designed specifically for the company. "They are helping us fulfill the idea of one-stop shopping for our customers."

As it dove further into lottery, Walmart learned a few key things that would drive its expansion into Supercenters. First, the over-the-counter sales model, like that used in the Neighborhood Markets, would not work at Supercenters. Next, it had to demonstrate the ability to handle the volume of business potentially generated by large jackpots, while at the same time confirming that the people who jump in only when the jackpots get really big still go to the convenience store down the street. "So we really didn't actually have to prove anything with regard to excessive foot traffic caused by lottery," said Johnson.

The biggest "ah-ha" moment, though, came when the original concept of just putting traditional lottery vending machines at the front of the Supercenters became a no-go with corporate officials. And because the stores were all being modified to have side-counter heights of 54", that became the need if lottery vending machines were going to fly. "It was going to be those lower-profile machines, or nothing."

So lottery industry vendors got to work – designing new machines to meet Walmart's height specifications. On the company's side, machine placement is near the self-service checkouts, where customers are used to doing things themselves.

Not surprisingly, Johnson fielded many

questions during the Little Rock conference. Many concerned the time frame involved in bringing Walmart into the lottery mix in a jurisdiction. That process has improved as all parties have learned from experience, but it could still be as much as a year from the time of the initial outreach to actual rollout in stores, depending on the details specific to each jurisdiction. That involves the signing of the contract (which typically takes about four months), to store selection, to preparing those stores with all the right infrastructure, to getting the vending machines manufactured, and finally, placing them in stores.

On the Walmart side, to make it all happen involves more than 30 different teams within the company. And as lotteries went through the process, there were a lot of things that needed to happen, on both sides of the equation. To dive deep into their experiences, representatives from the Arizona, Georgia, Missouri, Pennsylvania and Washington lotteries joined Johnson on the stage; Arizona and Pennsylvania were the pioneers in Supercenter installations.

Participating were Holly Gordon, Corporate Accounts Manager, Arizona Lottery; Staci Coombs, Deputy Director Corporate Sales, Pennsylvania Lottery; Bill James, Vice President Corporate Accounts and Innovation, Georgia Lottery; Bobby Frye, Corporate Account Manager, Washington's Lottery; and Matt Mosby and Mike Cavender, Sales Managers for the Missouri Lottery.

All agreed that there was a lot of pre-planning involved, and that it is very important early on to establish regular lines of communication with the stores that will be installing the machines. The early

# NASPL LITTLE ROCK, AR

## 2019 This is WINNING!



adopters, of course, helped those that came after. For Gordon, the hardest part was getting time in the stores for all the pre-site work – a critical part of the process. Coombs emphasized taking the time to do it right, and being realistic with the timetable to get past the initial excitement of working with Walmart. Establish timelines with plenty of built-in buffers, agreed Frye. Make sure you have the phone numbers of all store management personnel, emphasized James. And plan training sessions very carefully – Mosby and Cavender noted that more time was spent training the Walmart staffs than any other retailer the Missouri Lottery has ever worked with.

It has been a learning process, and what is learned helps improve the process going forward. “One thing we learned is if you keep doing things the same way and expect different results, that probably won’t happen,” said Johnson. She explained that while store management was learning about lottery and managing the vending machines, “we realized we weren’t connecting the dots with the stores – we weren’t telling them what to do at the store as it relates to Walmart practices. So we had to make sure they had a better understanding of the life cycle of a lottery ticket at Walmart.” That included something as basic as how to handle cash in the store’s point-of-sale system.

Of course, everyone in attendance at Little Rock wanted to know about sales. The consensus was that sales start slow and will build, especially as awareness increases. “It’s a very big store and a very small machine,” noted Frye. Some lotteries have successfully used ambassadors in the stores to help

customers learn of the machines and how to use them.

Going forward as the company continues its expansion with lottery, the keys will continue to be planning at the site level, further enhancing training programs, and better communication with store management. New initiatives for the machines themselves are also welcome, such as color-coded lights on top to signal problems, like low stocks, and setting the machines on timers to help with open and closing schedules. Other projects include designing the optimal ways to provide signage, to bring more life to lottery in the stores to address awareness.

Walmart is also open to any innovation that doesn’t require vending, like in-lane sales for draw games, but scratch tickets hold the most

potential in the company’s eyes, and any solution that doesn’t involve those tickets is potentially missing a big opportunity.

Johnson is excited about the future. “We still have a ton of room to move in this business. Lotteries can help us advance innovation in this space, so we can really change the game (no pun intended). We are building the relationships. Our story is about trying, keep trying, fail fast, advance the ball. Most fairy tales end with ‘the end’ – at Walmart it’s more of a ‘to be continued.’” ■





**NASPL 2019**

**Photo Recap**

Take a look back at the week of "This is Winning!" On the following pages you'll find photo highlights from NASPL 2019, including the Membership and Volunteer Dinner, the All Delegate Night at the Clinton Presidential Library, the NASPL Trade Show, General Sessions, Keynotes, Breakouts and more! Enjoy!

*Photos by Domagalski Photography*  
[www.domagalskiphotography.com](http://www.domagalskiphotography.com)







# NASPL LITTLE ROCK, AR 2019 *This is* WINNING!



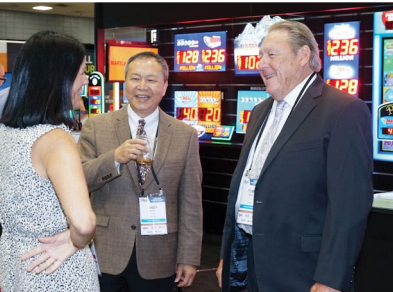
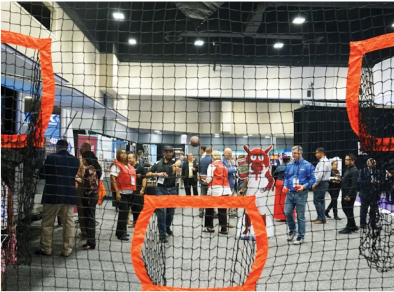




Photos by Domagalski Photography  
[www.domagalskiphotography.com](http://www.domagalskiphotography.com)









# NASPL

LITTLE ROCK, AR

2019 *This is* WINNING!















**NASPL** LITTLE ROCK, AR  
*This is*  
**2019 WINNING!**

# Award Winners

**TV Advertising - Instant Games**  
Interprovincial Lottery Corporation  
*FCB Toronto*  
**\$10 Ultra - Giant**

**TV Advertising - Daily Draw Games**  
New Jersey Lottery  
*PureRED*  
**Last Weekend**

**TV Advertising - Lotto/Spiel Games**  
Missouri Lottery  
*Barkley*  
**Wincouragement - Coach**

**TV Advertising - Corporate/Beneficiary**  
Missouri Lottery  
*Barkley*  
**Cause an Effect - Spelling Bee**

**TV Advertising - Keno Games**  
Georgia Lottery Corporation  
*BBDO*  
**Keno - Medieval Demo**

**TV Advertising - Coordinated Campaign**  
Washington's Lottery  
*Cole & Weber*  
**Let's Imagine Together Campaign**

**Radio Advertising - Instant Games**  
Louisiana Lottery Corporation  
*Louisiana Lottery Corporation*  
**Flash of Cash**

**Radio Advertising - Instant Games**  
Missouri Lottery  
*Barkley*  
**Turtleneck**

**Radio Advertising - Daily Draw Games**  
Georgia Lottery Corporation  
*BBDO*  
**Daily Draw - Winning**

**Radio Advertising - Lotto/Spiel Games**  
Loto-Québec  
*Lotto Max*  
Prince of the Desert

**Radio Advertising - Corporate/Beneficiary**  
Michigan Lottery  
*SMZ*  
**Our Tree**

**Radio Advertising - Keno Games**  
New Jersey Lottery  
*PureRED*  
**This Changes Everything**

**Radio Advertising - Keno Games**  
North Carolina Education Lottery  
*Mullen Lowe*  
**Keno - Live Broadcasting**

**Radio Advertising - Coordinated Campaign**  
Missouri Lottery  
*Barkley*  
**Gourmet Getaway Promotion -  
Language Lessons Campaign**

**Print Advertising - Retailer Signage/  
Merchandising**  
Loto-Québec  
*Voyage de pêche*  
**Fish**

**Print Advertising - Outdoor**  
Maryland Lottery & Gaming  
*GKV*  
**Maryland 7s Scratch-Offs**

**Print Advertising - Color or Black & White**  
Tennessee Education Lottery Corporation  
*The Buntin Group*  
**Black History Month**

**Print Advertising - Corporate/Beneficiary**  
Tennessee Education Lottery Corporation  
*The Buntin Group*  
**\$5 Billion Beneficiary**

**Print Advertising - Coordinated Print Campaign**  
Missouri Lottery  
*Barkley*  
**Happy Rails Summer Promotion**

**Special Category - Original Music for TV or Radio**  
Virginia Lottery  
*BMA*  
**MobilePlay**

**Special Category - Use of Humor (Radio)**  
Texas Lottery Commission  
*THIRD EAR*  
**Gem 7s - Pirate**

**Special Category - Use of Humor (TV)**  
Tennessee Education Lottery Corporation  
*The Buntin Group*  
**Hit Instant Games - Kung Fu**

**Special Category - Use of Cinematography**  
Georgia Lottery Corporation  
*BBDO*  
**Keno - Medieval Demo**

**Special Category - TV or Radio Spot Fitting  
No Other Category**

Arizona Lottery

*OH Partners*

Fantasy 5 - Live Your Million Dollar Fantasy

**Special Category - Corporate/Beneficiary  
Video**

Missouri Lottery

*Barkley*

Play It Forward - A Look Inside

**Special Category - TV Campaign Under  
\$25,000**

Idaho Lottery

*Mitchell+Palmer*

Broncos, Bengals & Vandals Campaign

**Corporate Communications - Employee/  
Player Newsletter**

Maryland Lottery & Gaming

*Maryland Lottery & Gaming*

Maryland Lottery & Gaming Gazette -  
June 2019

**Corporate Communications -  
Retailer Newsletter**

West Virginia Lottery

*West Virginia Lottery*

FY 2018 Progress Report

**Responsible Gambling Communications -  
Print**

Loto-Québec

*Loto-Québec*

Here We Card!

**Responsible Gambling Communications -  
Video**

Connecticut Lottery Corporation

*Connecticut Lottery/Decker*

Gambling Awareness Month -  
Use Your GameSense

**Responsible Gambling Communications -  
Video**

Oregon Lottery

*Brightwater*

Trilogy - Broken

**Responsible Gambling Communications -  
Radio**

South Carolina Education Lottery

*Chernoff Newman/Mad Monkey*

Past Due

**Responsible Gambling Communications -  
Electronic**

Ontario Lottery & Gaming Corporation

*FCB Toronto*

PlaySmart - Slots Education Module Videos

**Responsible Gambling - Coordinated  
Campaign**

Ohio Lottery

*Northlich*

Stop! - Get Help, Give Help

**Best New Media**

Loto-Québec

*Phobie*

Arachnophobia

**Multicultural Advertising**

Minnesota State Lottery

*Periscope*

Day of the Dead

**Hickey - Special Events Promotion**

Minnesota State Lottery

*Periscope*

Bold Deliveries

**Hickey - Audio/Visual Presentation**

Minnesota State Lottery

*Periscope*

Billion Dollar Premiere

**Hickey - Potpourri Promotion**

Washington's Lottery

*Cole & Weber*

Let's Imagine Together Campaign

**Hickey - Website**

Arizona Lottery

*Riester*

Arizona Lottery Website

**Best New Instant Game**

Idaho Lottery

*Idaho Lottery*

30th Anniversary - Family of Games

**Best New Draw Game**

Idaho Lottery

*Idaho Lottery*

Powerball Arcade



**BEST OF THE BATCH**  
Georgia Lottery Corporation  
*BBDO*  
Keno - Medieval Demo



# NASPL Holiday Ticket Catalog

It's that special time of year again for the *Insights* annual Holiday Ticket Catalog. This feature includes a gallery of holiday tickets from almost every North American lottery that offers instant games, as well as some general information including game type, price point, odds of winning and top prize. Be sure to check our March/April 2020 issue for a review of how these games performed in the market. Enjoy the creative works of our members.

NASPL wishes everyone a wonderful holiday season!







Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Fa-La-La	IGT	Find	\$1	3,120,000	1 in 4.36	\$500
Stocking Stuffer	IGT	Key Number Match	\$2	2,040,000	1 in 4.1	\$10,000
Jolly Holiday Crossword	Pollard	Crossword	\$3	2,040,000	1 in 3.59	\$20,000
Holiday 7	SG	Key Number Match	\$5	1,920,000	1 in 3.82	\$50,000
25 Days of Winning	Pollard	Find	\$10	1,440,000	1 in 3.17	\$100,000
Merry Multiplier	SG	Key Number Match	\$20	1,020,000	1 in 2.75	\$250,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Countdown	SG	Match 3	\$20	300,000	1 in 2.49	\$200,000



# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Naughty or Nice	Pollard	Match 3 Prize Amounts	\$1	1,500,000	1 in 3.30	\$10,000
Peppermint Payout	Pollard	Key Number Match	\$1	1,500,000	1 in 3.30	\$10,000
Unwrap the Cash	Pollard	Key Number Match	\$2	800,000	1 in 3.30	\$20,000
Jingle Paws	Pollard	3 Symbol Match	\$2	800,000	1 in 3.30	\$20,000
Stocking Stuffers	Pollard	Letter Match	\$3	750,000	1 in 3.50	\$50,000
Christmas Green	Pollard	Number Match	\$3	800,000	1 in 3.50	\$50,000
Merry Magic	Pollard	Key Number Match	\$5	750,000	1 in 3.30	\$100,000
Santa Slots x10	IGT	Slot/3 Symbol Match	\$5	750,000	1 in 3.30	\$100,000
Gifts Galore	Pollard	Key Number Match	\$10	500,000	1 in 3.08	\$250,000
Holiday Gift Pack	Pollard	Multi Game Gift Pack	\$20	375,000	1 in 2.00	\$150,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Reindeer Game	SG	Match 8	\$1	3,120,000	4.09	\$5,000
Snow Me the Money	SG	Key Number Match	\$2	2,400,000	4.05	\$10,000
Holiday Winning\$	SG	Key Number Match	\$3	720,000	3.31	\$30,000
Holiday Gold	SG	Key Number Match	\$5	1,200,000	3.71	\$100,000
\$250,000 Xword	SG	Crossword	\$10	360,000	3.29	\$250,000



YOUR EVERYWHERE  
STARTS HERE

Our dedicated people are here to help you get started today. Only GLI combines 30 years of leadership with proprietary testing methodologies, resulting in illuminating insights to help guide your journey, *everywhere and anywhere the future leads.*

**SEE WHERE IT ALL STARTS. CONTACT GLI TODAY.**



**GLI**<sup>®</sup>  
*Tested. Proven. Trusted.*

#globalperspective | [gaminglabs.com](http://gaminglabs.com) | [in](#) [tw](#) [fb](#) [ig](#)

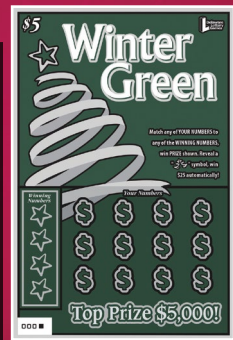
# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Happy Holidays	Pollard	Key Number Match	\$1	1,200,000	1 in 3.53	\$1,000
Holiday Cheer	Pollard	Key Number Match	\$2	1,000,000	1 in 3.64	\$10,000
Holiday Bonus	Pollard	Key Number Match	\$5	1,000,000	1 in 3.54	\$50,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Luck	IGT	Key Number Match	\$1	240,000	1 in 4.71	\$200
Peppermint Payout	Pollard	Key Number Match	\$2	160,000	1 in 4.14	\$4,000
Holiday Cash	Pollard	Key Number Match	\$5	180,000	1 in 3.53	\$25,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Surprise Payout	SG	Find	\$1	360,000	1 in 4.87	\$500
Holiday Fun!	SG	Find	\$2	210,000	1 in 4.58	\$1,000
Peng-Win!	SG	Find and Count Up	\$3	150,000	1 in 3.67	\$2,000
Winter Green	SG	Key Number Match	\$5	120,000	1 in 3.60	\$5,000

**P O W E R** BALL<sup>®</sup>  
a r c a d e



Engage Your Players

**MILESTONE**  
ENTERTAINMENT

Scott Jensen 310.866.3534  
[www.milestoneentertainment.com](http://www.milestoneentertainment.com)



# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
\$10,000 Holiday Luck	SG	Key Number Match	\$1	23,040,000	1 in 4.88	\$10,000
\$50,000 Holiday Luck	SG	Key Number Match	\$2	18,000,000	1 in 4.41	\$50,000
\$1,000,000 Holiday Luck	SG	Key Number Match	\$5	13,440,000	1 in 4.07	\$1,000,000
\$2,000,000 Holiday Luck	SG	Key Number Match	\$10	9,360,000	1 in 3.39	\$2,000,000
\$5,000,000 Luck	SG	Key Number Match	\$20	8,160,000*	1 in 2.97	\$5,000,000

\*Quantity of holiday pulse. Total quantity of 22,080,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Festive \$50's	SG	Key Number Match	\$1	8,640,000	1 in 4.66	\$5,000
Merry Double Match	SG	Key Number Match	\$2	7,200,000	1 in 4.01	\$30,000
Holiday Riches	SG	Key Number Match/ Slots/Find	\$3	3,600,000	1 in 3.74	\$150,000
More Jingle	SG	Key Number Match	\$5	5,760,000	1 in 3.78	\$250,000
Jingle Jumbo Bucks	SG	Key Number Match	\$10	5,760,000	1 in 3.28	\$750,000
100X the Money Special Holiday Edition	SG	Key Number Match	\$20	1,680,000	1 in 3.19	\$1,500,000



# ENGAGE WITH LOTTERY PLAYERS IN THE PURCHASE MINDSET, STEPS AWAY FROM THE C-STORE



Reaching 1 in 3 American adults monthly, GSTV engages 93 million unique viewers monthly in 200+ DMAs with full sight, sound, and motion video across tens of thousands of fuel retailers – with higher ad recall than TV (+81%) and digital video (+44%).

1 IN 3

GSTV VIEWERS WILL BUY  
A LOTTERY TICKET TODAY

68%

OF VIEWERS WILL HEAD  
INTO THE C-STORE TODAY

+39%

REPORTED LOTTERY  
TICKET PURCHASES

(2018 ad effectiveness study for lotto client)

NICK YACOBUCCI

313.580.0600  
NICK.YACOBUCCI@GSTV.COM

VISIT [GSTV.COM/LOTTERY](https://www.gstv.com/lottery)



GSTV IS A PROUD MEMBER OF NASPL

Source: Audience Insights Study, July 2018; NACS, April 2018; Lieberman Research, Custom Client Study, February 2018. Reported actual purchase increase is of any of the brand's lottery tickets among those who recalled the ads. GSTV Nielsen & Liebermann Ad Effectiveness Studies, (2006 - 2018), average ad recall = 49% (142 studies, 34,637 respondents). Nielsen TV Brand Effect = 27% [TV ad recall for 700 brands]. Digital: Digital Ad Recall = 34%

# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Cash	IGT	Key Number Match	\$1	6,000,000	1 in 4.64	\$1,000
Jingle all the Way	IGT	Key Number Match	\$2	3,480,000	1 in 4.48	\$10,000
Holly Jolly Bingo	IGT	Bingo	\$3	2,880,000	1 in 3.89	\$50,000
Peppermint Payout	IGT	Key Number Match	\$5	3,480,000	1 in 3.68	\$100,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Naughty or Nice	IGT	Key Symbol Match	\$1	840,000	1 in 3.74	\$500
Merry Moose Multiplier	IGT	Key Number Match	\$2	480,000	1 in 3.56	\$10,000
Frosty Fun Cashword	IGT	Crossword	\$3	600,000	1 in 3.41	\$30,000
Candy Cane Cash	Pollard	Key Number Match	\$5	420,000	1 in 3.23	\$50,000
Christmas Evergreen	Pollard	Key Number Match	\$5	420,000	1 in 3.19	\$1,000
Sugar Plum Payout	IGT	Key Number Match	\$20	220,000	1 in 3.25	\$200,000





The Unsurpassed Standard for Custom Plastics

# IT'S ALL ABOUT FAMILY FUN.

Customization that enhances your lottery offerings!



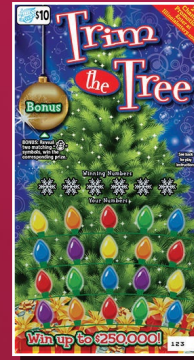
## GET IN TOUCH

shay.wahl@ssi-ia.com  
teresa.immel@ssi-ia.com

641-742-3266  
www.ssi-ia.com

1000 Flag Road  
Adair, IA 50002

# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Snow Me The Money	SG	Symbol Match	\$1	11,520,000	1 in 4.37	\$500
Jingle Bucks	SG	Symbol Match	\$2	4,560,000	1 in 4.05	\$20,000
Merry Money	SG	Symbol Match	\$5	4,800,000	1 in 3.7	\$100,000
Trim The Tree	SG	Key Number Match	\$10	2,040,000	1 in 2.97	\$250,000
Holiday Countdown	SG	Symbol Match	\$20	1,800,000	1 in 2.72	\$1,000,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday \$100s	IGT	Find Symbol	\$1	1,798,800	1 in 3.79	\$100
Reindeer Riches	SG	Match 3	\$1	1,886,100	1 in 4.35	\$1,000
Holiday Cash Drop	Pollard	Key Number Match	\$2	960,000	1 in 3.62	\$5,000
Naughty/Nice	Pollard	Did I Win	\$2	1,320,000	1 in 3.91	\$10,000
Nutmacker Bingo	Pollard	Bingo	\$2	1,456,500	1 in 3.34	\$25,000
Peppermint Payout	IGT	Extended Play	\$3	1,158,200	1 in 3.43	\$30,000
\$30,000 Holiday Crossword	Pollard	Crossword	\$3	2,040,000	1 in 3.52	\$30,000
Holiday Bucks	SG	Find Symbol	\$5	961,020	1 in 3.49	\$50,000
\$50,000 Holiday Crossword	Pollard	Crossword	\$5	1,557,060	1 in 3.51	\$50,000
Holiday Dazzle	Pollard	Key Number Match	\$10	881,790	1 in 2.80	\$100,000
\$100,000 Happy Holidays Crossword	Pollard	Crossword	\$10	881,790	1 in 3.30	\$100,000

# confidence GAINED

## The risks are expansive, but so are the rewards.

With over 20 years of experience working with state lotteries and their systems providers, BerryDunn delivers the objective insight necessary to ensure the integrity and security of successful operations.

Our lottery industry experts offer expansive IT systems knowledge and subject matter expertise in security, compliance, and regulatory standards—helping clients confidently navigate security assessments and regulatory reviews.

Gain confidence with an experienced partner by your side. Connect with us at the NASPL Annual Conference, visit [berrydunn.com](http://berrydunn.com), or call 800.432.7202.

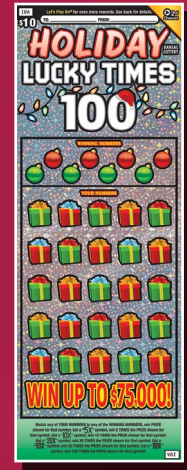
*"Our first SOC 2 with BerryDunn was easily the best audit experience we've ever had. Throughout the entire process we sensed that the BerryDunn team was truly acting as our partner. They dug down into the details of our policies and procedures to uncover every aspect that needed improvement. And, they empowered our staff with knowledge and best practice recommendations for the future. In the end, we're a better company for working with BerryDunn."*

Alan Neveu, CTO and Co-Founder, CERTIFY, INC.



**PROVEN EXPERIENCE:** We are proud to be the only Certified Public Accounting firm represented as Associate Members of NASPL and have worked closely with over half of the U.S. state lotteries and their service vendors over the past five years.

# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Lucky Times 10	Pollard	Key Number Match	\$1	1,800,000	1 in 3.18	\$1,000
Holiday Lucky Times 20	Pollard	Key Number Match	\$2	900,000	1 in 3.2	\$10,000
Holiday Lucky Times 50	Pollard	Key Number Match	\$5	450,000	1 in 3	\$25,000
Holiday Lucky Times 100	Pollard	Key Number Match	\$10	300,000	1 in 2.53	\$75,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Cheer	SG	Key Number Match	\$1	5,280,000	1 in 4.88	\$5,000
Holiday Cheer	SG	Key Number Match	\$2	3,120,000	1 in 3.94	\$10,000
Holiday Cheer	SG	Key Number Match	\$5	3,000,000	1 in 3.52	\$50,000
Holiday Cheer	SG	Key Number Match	\$10	1,680,000	1 in 3.06	\$100,000



# Drive Your Lottery Sales with Take-A-Ticket

Eye-catching products  
Outstanding quality  
User friendly



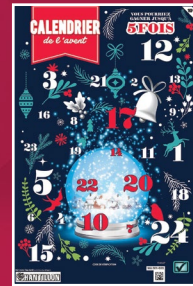
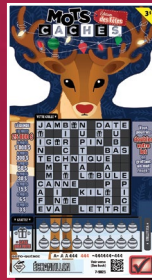
**TAT**  
TAKE-A-TICKET INC.  
ESTABLISHED 1985

130 NE Montgomery Street, Albany, OR  
800.253.4295 • [www.tatinc.com](http://www.tatinc.com) • Contact us: [info@tatinc.com](mailto:info@tatinc.com)

# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Regalo Perfecto (Perfect Gift)	SG	Symbol Match	\$2	600,000	1 in 3.97	\$10,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Étiquette-cadeau	Loto-Québec	Match 3	\$1	1,200,000	1 in 4.0	\$100
Cadeau surprise	Loto-Québec	Match 3	\$2	4,000,000	1 in 4.0	12 gifts
Mots cachés Édition des fêtes	Loto-Québec	Crossword	\$3	2,350,000	1 in 3.4	\$25,000
Bingo Édition des fêtes	Loto-Québec	Bingo	\$3	1,750,000	1 in 3.4	\$25,000
Calendrier de l'aveant	Loto-Québec	Pull Tab	\$10	800,000	1 in 2.0	\$1,000
Richesses des fêtes	Loto-Québec	Key Number Match	\$10	800,000	1 in 3.1	\$250,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Merry Money	SG	Match 3 with Doubler	\$1	1,920,000	1 in 4.85	\$4,000
Holiday Fun	SG	Find Symbol	\$2	960,000	1 in 4.6	\$12,000
Let It Snow	SG	Key Number Match	\$5	840,000	1 in 3.95	\$100,000

# TAKE CHARGE OF YOUR LOTTERY. ROLL WITH THE CREW.



We produce award-winning lottery and gaming content and have for years. Waymack And Crew knows the industry and understands the requirement to create content that produces RESULTS! Hit the jackpot with your creative and win big with Waymack And Crew.

Take a look at our work, and give us a call!

[WAYMACKANDCREW.COM/LOTTERY](http://WAYMACKANDCREW.COM/LOTTERY)



**WAYMACK  
AND CREW**

BENTONVILLE | CHICAGO  
LITTLE ROCK | WEST PALM BEACH

1-800-WAYMACK  
info@WaymackAndCrew.com  
**WAYMACKANDCREW.COM**



# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Santa Paws	SG	Key Number Match	\$1	1,680,000	1 in 4.5	\$250
Polar Doubler Payout	SG	Symbol Match	\$2	840,000	1 in 4.24	\$20,000
Frosty Fun Tripler	SG	Key Number Match with Tripler Symbol	\$2	840,000	1 in 4.35	\$20,000
Holiday Magic	SG	Key Number Match	\$5	840,000	1 in 3.7	\$100,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Snowflake Doubler	Pollard	Match 3	\$1	4,080,000	1 in 4.51	\$1,000
Stocking Stuffer	Pollard	Key Number Match	\$2	2,520,000	1 in 4.04	\$10,000
Peppermint Payout Multiplier	IGT	Number Match/Extended Play	\$3	2,160,000	1 in 3.99	\$30,000
Holiday Gold	Pollard	Key Number Match	\$5	3,120,000	1 in 3.8	\$50,000
Winter Cash Tripler	Pollard	Key Number Match	\$10	2,040,000	1 in 3.33	\$100,000



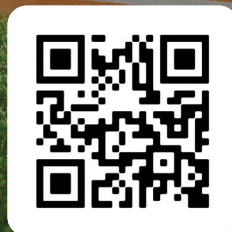


# America's Favorite Pastime Just Got Better.



AN **EQUILOTTERY/GAMES**™ PRODUCTION

For more information, visit [www.BaseballBuckslotto.com](http://www.BaseballBuckslotto.com)  
or send an email to [Baseball@EquiLottery.com](mailto:Baseball@EquiLottery.com).

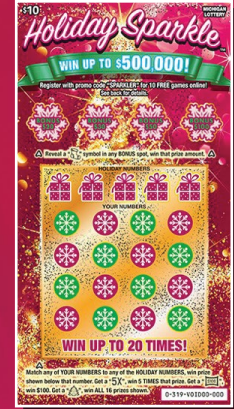


Major League Baseball trademarks and copyrights are used with permission of Major League Baseball. Visit [MLB.com](http://MLB.com).

# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
\$10,000 Winter Ice	SG	Key Number Match	\$1	7,056,000	1 in 4.83	\$10,000
\$100,000 Winter Ice	SG	Key Number Match	\$2	8,064,000	1 in 4.63	\$100,000
Frosty the Doughman	SG	Find/Reveal	\$2	5,040,000	1 in 4.62	\$100,000
\$1,000,000 Winter Ice	SG	Key Number Match	\$5	12,096,000	1 in 4.15	\$1,000,000
Merry Money Blowout	SG	Key Number Match	\$10	15,120,000	1 in 8.86	\$500



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Naughty or Nice	Pollard	Reveal Symbol	\$1	14,400,000	1 in 4.64	\$500
Candy Cane Tripler	Pollard	Key Number Match w/ Bonus Spots	\$2	9,300,000	1 in 4.34	\$30,000
20X Merry Multiplier	Pollard	Key Number Match w/ Bonus Spots	\$5	4,800,000	1 in 3.90	\$300,000
Holiday Sparkle	Pollard	Key Number Match w/ Bonus Spots	\$10	3,300,000	1 in 3.65	\$500,000

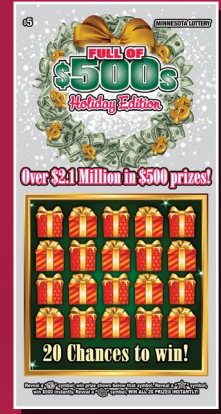
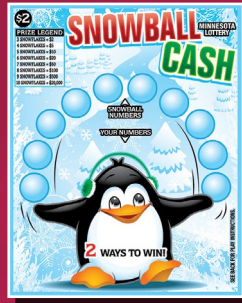


U L T I M A T E  
F R E E D O M



Freedom to entertain. Freedom to innovate. Freedom to grow. The Kambi Sportsbook provides the freedom to create unique wagering experiences tailored to your players. Whatever your business requirements, Kambi can help you realize your sports betting ambitions. Become the sportsbook you want to be and join the industry's ultimate sports betting network.

# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Naughty/Nice	Pollard	Find w/Doubler	\$1	3,600,000	1 in 3.72	\$2,000
Snowball Cash	Pollard	Key Number w/Find	\$2	2,400,000	1 in 3.9	\$20,000
Frosty Crossword	Pollard	Crossword	\$3	3,240,000	1 in 3.52	\$25,000
Full of \$500's Holiday Edition	Pollard	Find w/Doubler & Win All	\$5	3,000,000	1 in 3.98	\$500



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Happy Holidays Y'All!	IGT	Key Number Match	\$2.00	4,800,000	1 in 4.39	\$15,000



TICKET  
CONCEPTS  
EXPERIENTIAL  
PRIZE OPTIONS  
TICKET CALLLOUTS  
ADVERTISING CLAIMS  
LOGO DESIGNS  
MERCHANTIZE  
PRIZE  
OPTIONS  
GAME NAMES  
TAGLINES

**With our gamified testing tool,  
you can rapidly and reliably identify  
which concept or idea to pursue.**

Learn more about DUEL and Ipsos' Lottery & Gaming  
expertise at [www.ipsos.com/en-us/duel-lg](http://www.ipsos.com/en-us/duel-lg)

**Paul Lauzon**, Senior Vice President  
Lottery & Gaming Research

Direct: 587-952-4871  
[paul.lauzon@ipsos.com](mailto:paul.lauzon@ipsos.com)



# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Reindeer Riches	IGT	Key Number Match	\$1	9,120,000	1 in 4.62	\$2,500
Polar Payout	SG	Symbol Reveal	\$2	5,280,000	1 in 4.44	\$25,000
Snowglobe Cash	Pollard	Extended Play Number Match	\$3	3,720,000	1 in 3.82	\$50,000
Merry Money	SG	Key Number Match	\$5	3,120,000	1 in 3.60	\$100,000
12 Days of Christmas	SG	Symbol Reveal	\$10	1,680,000	1 in 3.27	\$200,000
Holiday Cash Bonus	SG	Key Number Match	\$20	840,000	1 in 3.00	\$300,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Cabin Fever	SG	Key Number Match	\$1	120,000	1 in 4.71	\$1,500
Happy Holidays	SG	Match 3	\$1	120,000	1 in 4.88	\$1,000
Secret Santa	SG	Key Number Match	\$2	140,000	1 in 4.2	\$12,000
Holiday Cash	SG	Key Number Match	\$5	150,000	1 in 3.76	\$70,000



## LIGHT UP THE LANES

# Generate more sales with brighter and more visible lottery signs

### EXCLUSIVE PRO-LITE FEATURES

**Illuminated Border** —  
*with static and animated effects*

**Day of Drawing Indicator**  
*showing the drawing day has proven to increase sales*

**Millions/Billions**  
*Pro-Lite exclusive, patented technology, essential for today's big drawings*

**Flashing Digits**  
*more attention equals more sales*



SEE THE FULL LINE OF IN-LANE SOLUTIONS  
AT [PRO-LITE.COM/LOTTERY](http://PRO-LITE.COM/LOTTERY)

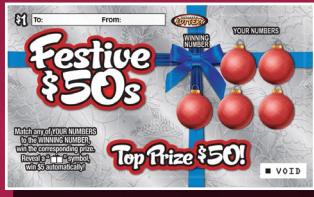


Over 100,000 lottery signs  
placed in North America



855-533-5225  
[pro-lite.com/lottery](http://pro-lite.com/lottery)

# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Festive \$50s	IGT	Key Number Match	\$1	768,000	1 in 3.84	\$50
Holiday Doubler	IGT	Key Number Match	\$2	360,000	1 in 3.64	\$200
Sparkling 7s	IGT	Slots / Key Number Match	\$5	306,000	1 in 3.64	\$30,000



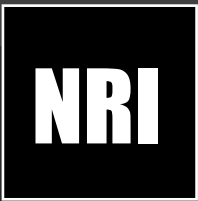
Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Santa Paws	SG	Find	\$1	1,131,600	1 in 4.72	\$500
Holiday Cheer	SG	Key Symbol Match	\$2	1,238,100	1 in 4.41	\$20,000
Holiday Lights	SG	Key Number Match	\$5	1,047,300	1 in 4.18	\$100,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Luck	SG	Key Number Match	\$1	5,040,000	1 in 4.23	\$2,000
Holiday Lucky Times 10	SG	Key Number Match	\$2	7,200,000	1 in 4.24	\$20,000
Holiday Lucky Bonus	SG	Key Number Match	\$5	3,600,000	1 in 4.27	\$200,000
Winter Wishes	SG	Key Number Match	\$10	3,600,000	1 in 3.87	\$500,000



# Welcome to the NASPL Matrix



NASPL Resource Index



Awards



Responsible Gambling



Insights



Lottery 101



Webinars



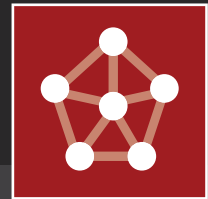
Presentations



Classifieds



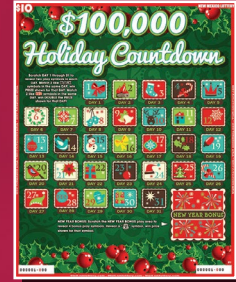
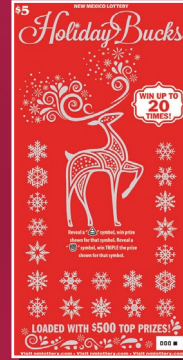
Whitepapers



API

Visit the NASPL Matrix Today  
[www.nasplmatrix.org](http://www.nasplmatrix.org)

# NASPL Holiday Ticket Catalog



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Fun!	SG	Tic-Tac-Toe	\$1	600,000	1 in 4.81	\$1,000
Holiday Cash	SG	Key Number Match	\$2	480,000	1 in 4.00	\$10,000
Holiday Bucks	SG	Find Symbol	\$5	360,000	1 in 3.64	\$500
\$100,000 Holiday Countdown	SG	Symbol Match	\$10	240,000	1 in 3.52	\$100,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Winner Green	IGT	Key Number Match	\$1	15,120,000	1 in 4.88	\$3,000
Tic Tac Snow	Pollard	Tic Tac Toe	\$3	8,400,000	1 in 4.33	\$60,000
Silver Bills / Red Riches	SG	Key Number Match	\$5	7,920,000	1 in 3.95	\$500,000
Holiday Lucky X50	SG	Match 2, Find, Key Number Match	\$10	5,040,000	1 in 3.53	\$1,000,000





Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
White Elephant	SG	Find	\$1	4,800,000	1 in 4.82	\$5,000
Holiday Cheer	SG	Key Number Match	\$2	4,080,000	1 in 4.36	\$20,000
Holiday Gifts	SG	Extended Play	\$3	2,400,000	1 in 4.07	\$75,000
Happy Holidays	SG	Key Number Match	\$5	3,600,000	1 in 3.99	\$150,000
\$50 or \$100 Holiday Edition	SG	Key Number Match	\$10	2,640,000	1 in 9.16	\$100

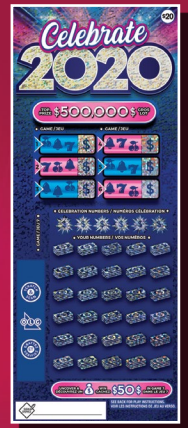
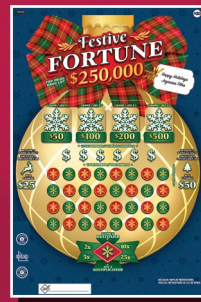


Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Cash	SG	Match 3	\$1	18,000,000	1 in 3.99	\$500
Holiday Multiplier	SG	Key Number Match	\$2	6,000,000	1 in 3.8	\$20,000
Twelve Elves HD	SG	Reveal Symbols Legend	\$3	5,000,000	1 in 3.73	\$50,000
Holiday Lucky Times 10	SG	Key Number Match with Bonus Multiplier Box	\$5	6,000,000	1 in 3.64	\$250,000
Happy Holidays	SG	Gigantix and Scratch My Back	\$10	5,000,000	1 in 3.3	\$500,000
Merry Millions	SG	Key Number Match/ Three Bonus Areas	\$20	3,000,000	1 in 3.03	\$1,000,000

# NASPL Holiday Ticket Catalog

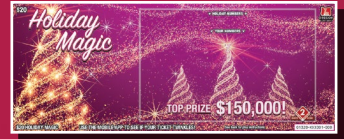


Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Cookie Dough	SG	Key Number Match	\$1	960,000	1 in 4.18	\$3,000
Ruby Red 7/ Emerald Green 7	SG	Reveal	\$2	840,000	1 in 3.25	\$15,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Stocking Stuffer	SG	Match to Win, Match 3	\$2	2,040,000	1 in 3.57	\$35,000
Peppermint Cash	Pollard	Symbol Match	\$3	3,108,000	1 in 3.44	\$75,000
Holiday Winnings	SG	Match to Win & Multipliers	\$5	2,856,000	1 in 3.53	\$100,000
Holiday Gift Pack	Pollard	Word Game, Pattern Game, Match All, Line Win, Match 3,	\$10	2,205,000	1 in 3.16	\$50,000
Festive Fortune	Pollard	Match 3	\$20	1,224,000	1 in 3.44	\$250,000
Celebrate 2020	Pollard	Symbol Match and Match to Win with an Instant Win	\$20	1,133,000	1 in 3.15	\$500,000





Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Happy Pawldays	Pollard	Match 3	\$1	2,120,000	1 in 4.14	\$1,500
Merry Multiplier	IGT	Key Symbol Match	\$2	960,000	1 in 3.83	\$10,000
Fa la la la Llama	SG	Key Number Match	\$5	560,000	1 in 3.75	\$50,000
Holiday Cash Drop	Pollard	Key Symbol Match	\$10	228,480	1 in 3.00	\$75,000
Holiday Magic	Pollard	Key Number Match	\$20	119,500	1 in 2.96	\$150,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Oh, What Fun	SG	Match 3 Symbols	\$1	13,800,000	1 in 4.79	\$5,000
Snowball Buck\$	SG	Instant Win, Win All	\$2	10,800,000	1 in 4.60	\$20,000
Jingle All the Way	SG	Match 3 Symbols, Instant Win	\$3	8,400,000	1 in 4.21	\$50,000
Holiday Cash Blowout	SG	Key Number Match, Instant Win, Win All, Bonus	\$5	12,600,000	1 in 4.27	\$100,000
Secret Santa	SG	Key Number Match, Instant Win, Win All	\$10	6,600,000	1 in 3.69	\$300,000
\$1 Million Merry & Bright	SG	Key Number Match, Instant Win, Multiplier, Win All	\$20	5,400,000	1 in 3.37	\$1,000,000

# NASPL Holiday Ticket Catalog

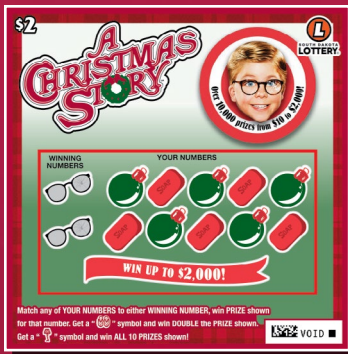


Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Sparkle	IGT	Key Number Match	\$1	1,000,000	1 in 4.56	\$2,000
Holiday Luck	IGT	Key Number Match	\$2	504,000	1 in 3.95	\$5,000
Jingle Jackpot	IGT	Key Number Match	\$5	486,000	1 in 3.61	\$35,000
Winner Wishes	IGT	Key Number Match	\$10	300,000	1 in 3.26	\$50,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Riches	SG	Match 3	\$1	1,680,000	1 in 4.59	\$5,000
Holiday Green	SG	Key Number Match	\$2	1,920,000	1 in 4.35	\$30,000





Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Naughty or Nice	Pollard	Symbol Reveal	\$1	600,000	1 in 4.95	\$500
A Christmas Story	Pollard	Key Number Match	\$2	300,000	1 in 4.45	\$2,000
Candy Cane Cashword	SG	Crossword	\$3	240,000	1 in 4.26	\$30,000
Snowflake 7's	Pollard	Key Number Match	\$5	180,000	1 in 3.95	\$50,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Holiday Luck	SG	Key Number Match	\$1	3,000,000	1 in 4.20	\$500
\$20,000 Holiday Cheer	SG	Key Number Match	\$2	2,880,000	1 in 4.14	\$20,000
Merry Money	SG	Key Number Match	\$5	1,440,000	1 in 3.81	\$100,000
Holiday Gifts	SG	Key Number Match	\$10	840,000	1 in 2.92	\$200,000



# NASPL Holiday Ticket Catalog

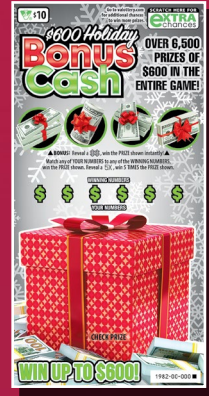
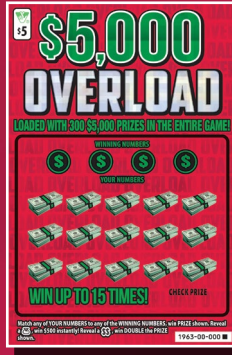


Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Frosty Fun	Pollard	Match 3	\$1	9,000,000	1 in 4.48	\$1,000
Holiday Cheer	Pollard	Match 5	\$2	7,200,000	1 in 4.08	\$30,000
Glimmering Gifts	SG	Coordinate Match 3	\$3	5,040,000	1 in 4.13	\$50,000
Merry Money	Pollard	Key Symbol Match with 2x and 5x	\$5	7,200,000	1 in 3.97	\$100,000
Winter Winnings	Pollard	Multiple Games	\$10	4,560,000	1 in 3.58	\$250,000

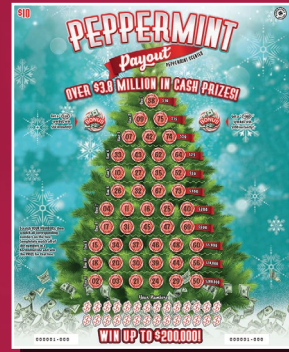


Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Stocking Stuffer	Pollard	Match 3, Match 2 with Bonus	\$1	550,000	1 in 1.26	\$100
Reindeer Riches	Pollard	Legend	\$2	400,000	1 in 4.22	\$2,000
Peng-Win Cashword	Pollard	Crossword	\$3	540,000	1 in 3.99	\$10,000
Moo\$eltoe	Pollard	Key Match	\$5	270,000	1 in 4.05	\$5,000
Happy Holidays	Pollard	Key Match	\$5	270,000	1 in 4.47	\$10,000
Snow Days	Pollard	Key Match, Reveal	\$10	294,000	1 in 3.34	\$30,000





Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Naughty or Nice	Pollard	Reveal	\$1	6,000,000	1 in 4.49	\$1,000
Holiday Ca\$h	Pollard	Key Number Match	\$2	3,840,000	1 in 4.47	\$20,000
\$5,000 Overload	Pollard	Key Number Match	\$5	4,080,000	1 in 4.39	\$5,000
7 Multiplier	Pollard	Key Number Match	\$5	4,080,000	1 in 3.89	\$77,777
\$600 Bonus Cash	Pollard	Key Number Match	\$10	1,920,000	1 in 3.33	\$600



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Jingle Bucks	SG	Find	\$1	1,800,000	1 in 3.91	\$5,000
Winter Winnings	SG	Key Number Match	\$5	1,260,000	1 in 3.38	\$50,000
Merry & Bright	SG	Find	\$5	1,260,000	1 in 3.38	\$50,000
Peppermint Payout	SG	Number Match	\$10	540,050	1 in 2.98	\$200,000



# NASPL Holiday Ticket Catalog

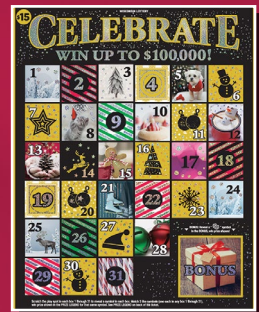


Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Stocking Surprise	Pollard	Instant Win Symbol	\$1	1,200,000	1 in 4.34	\$10,000
Silver Bells	Pollard	Match 2 prize	\$1	1,200,000	1 in 4.37	\$10,000
Snow Me The Money	Pollard	Match 3 Symbols	\$2	1,000,000	1 in 3.55	\$25,000
Peppermint Cash	Pollard	Number Match	\$3	750,000	1 in 2.67	\$50,000
Holiday Lucky Times 12	Pollard	Key Number Match	\$3	800,000	1 in 4.09	\$50,000
Christmas Crossword	Pollard	Crossword	\$4	900,000	1 in 3	\$75,000
Lucky Lines Multiplier	Pollard	Symbol Match	\$4	720,000	1 in 3	\$75,000
Christmas Fun Pack	Pollard	Various	\$5	750,000	1 in 3.45	\$100,000
National Lampoon's Christmas Vacation	Pollard	Key Number Match	\$5	750,000	1 in 3.11	\$100,000
Gifts Galore	Pollard	Key Number Match	\$10	600,000	1 in 3.08	\$250,000
Jingle All The Way	Pollard	Key Number Match	\$10	500,000	1 in 3.4	\$200,000
Player's Choice Mega Pack	Pollard	Various: Pouch with 12 Ticket Portions	\$20	750,000	1 in 1	\$1,000,000
24 Days To Celebrate	Pollard	Symbol Match, Match 3 Prize	\$30	500,000	1 in 2.99	\$300,000





Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Tic-Tac-Boo / Tic-Tac-Snow	IGT	Tic-Tac-Toe	\$1	1,440,000	1 in 4.81	\$500
Witch Please / Elfin Good Time	IGT	Key Number Match	\$2	1,200,000	1 in 4.66	\$2,500
Truck Or Treat / Haul-idays	IGT	Key Number Match	\$5	600,000	1 in 4.09	\$2,000



Game Name	Vendor	Game Type	Price Point	Quantity	Odds	Top Prize
Winter Cash	Pollard	Key Number Match	\$1	1,440,000	1 in 4.2	\$100
Peng-Win Crossword	Pollard	Crossword	\$3	1,200,000	1 in 3.5	\$30,000
Best Holiday Ever!	SG	Key Number Match	\$5	1,200,000	1 in 4.2	\$500
Holiday Magic	Pollard	Key Number Match	\$10	480,000	1 in 3.7	\$50,000
Celebrate	Pollard	Match 3	\$15	480,000	1 in 2.9	\$100,000



# AN INTERESTING YEAR

Another \$1.5 billion jackpot helped lotteries reach new heights again in fiscal 2019, but a combination of developments – and reporting challenges – made for some interesting results.

By Patricia McQueen

**R**ecords fell across North America once again this past fiscal year, driven in part by yet another \$1.5 billion jackpot. But there is so much more to the story.

A new high of \$83.0 billion in sales of traditional lottery products was generated in fiscal 2019 by the 45 American lotteries covered in this report, up 6.9% over the previous year. Adding in net revenues from the casino gaming activities, and now sports betting, operated by some lotteries, total sales were more than \$91.3 billion, an increase of 6.7%.

Those sales translated to record revenues to beneficiaries – education, economic development, the environment, cities and towns, senior citizens and more. U.S. lotteries transferred a total of \$25.1 billion to those beneficiaries in fiscal 2019, up 7.0% from the year before. One nice benefit to strong growth in either of the two big jackpot games is that these products return relatively more to the bottom line than do many other lottery products with higher prize payout percentages.

It used to be that these numbers were fairly straightforward, even though there have always been nuances in how different lotteries define “sales” – they may or may not include instant tickets given as prizes, for example. In recent years, however, with the development of new product categories such as instant games sold through online and mobile channels, and now sports betting in the U.S., there are much more material differences in how these products are reported. These are addressed in the sections below.

A new reporting challenge surfaced in Canada for fiscal 2019, as Loto-Québec complied with new financial standards and converted sales to net revenue (gross gaming revenue, or GGR) for all products, not just for video lotteries and casino operations (which have historically been reported as GGR, or “win,” across the gaming industry). That makes summarizing Canadian-wide sales impossible.

So, while traditional lottery sales in Canada were C\$8.8 billion in fiscal 2018, we have to remove Loto-Quebec from the comparative totals. For fiscal 2019, traditional lottery sales for all provinces except Quebec were almost C\$7.7 billion; the comparable number for fiscal 2018 was C\$6.9 billion, an impressive gain of 10.4%. All Canadian lotteries, including Quebec, delivered C\$3.56 billion to their beneficiaries for lottery operations (including VLTs in Quebec and Atlantic Canada) in fiscal 2019, an increase of 7.9%.

As always we advise that due to differences in accounting methodologies and other factors, the amounts transferred don’t always move in lock step with sales or even the net income a lottery generates in a given year, so year-to-year comparisons in transfers are often less meaningful and may be misleading.

Canada’s lotteries end their year on March 31, while in the United States most years end June 30; the exceptions are New York (March 31), Texas (August 31), and Michigan and the District of Columbia (September 30). The year end can impact how these lotteries compare to their peers if the timing of a big jackpot pushes sales into different years.

## Topping \$10 Billion in New York

Sales were up in every American and Canadian lottery in fiscal 2019, a remarkable achievement. The New York Lottery became the first American lottery to surpass \$10 billion in sales, growing by 3.2% to reach almost \$10.3 billion in revenues – \$8.2 billion in traditional game sales (up 3.4%) plus nearly \$2.1 billion in net revenue (up 2.3%) from electronic gaming machines. That revenue generated \$3.47 billion in returns to education in the state.

Two states surged past the \$7 billion mark in traditional game sales for the first time. The California Lottery holds second place at \$7.4 billion with a 6.1% increase, while the Florida Lottery's 6.7% growth brought it to more than \$7.1 billion in sales. California's return to education surpassed \$1.8 billion (up 8.6%), while Florida sent more than \$1.9 billion (up 9.6%) to its education programs.

The Texas Lottery produced a very impressive 11.1% gain in sales – the largest percentage increase among \$5-billion-plus lotteries – to hold its spot in fourth, with almost \$6.3 billion in sales returning more than \$1.6 billion to its beneficiaries – primarily education but also veterans programs. That was an even more impressive 12.8% increase in funds transferred.

In the Bay State, the Massachusetts Lottery brought in just shy of \$5.5 billion in sales, a 4.0% increase. That generated \$1.1 billion in profits (up 10.7%), distributed primarily to cities and towns throughout the state.

Among all lotteries, it's not surprising that the Wyoming Lottery had the largest percentage increase in sales, with its portfolio consisting only of draw games. While it posted a 76% gain in Mega Millions sales, above the industry average, there was also a 55% increase in Wyoming's Cowboy Draw lotto thanks to record jackpots in that game. All told, total sales in this small lottery state increased by 28.5%, with an even better gain in return to beneficiaries, which are the state's counties, cities and towns.

Based on the numbers shown in the accompanying charts, the Pennsylvania Lottery (+15.7%) appears to just edge the New Hampshire Lottery (+15.5%) for the second spot in terms of percentage increase in sales. But all is not as it seems. Both performances are impressive, and both are due in part to better-than-average

increases in Mega Millions, a full year of keno and the introduction of iLottery. But it's the reporting of iLottery that makes a difference. Uncovering the difference there (more on that later), gives the advantage to New Hampshire.

"Our success is a direct outcome of the hard work and dedication of the staff here, our retailers and our vendors," said New Hampshire Lottery Executive Director Charlie McIntyre. He noted that everyone worked tirelessly to get new products and new initiatives launched in the state, such as keno, iLottery and now sports betting. "Ultimately, we're here to raise money for good causes, and our success directly impacts education funding in New Hampshire."

Six other lotteries reported double-digit increases in traditional sales: South Carolina (+13.2%), West Virginia (+13.0%), North Dakota (+12.9%), Texas (+11.1%), Colorado (+11.1%) and Delaware (+11.0%).

## The Games

On the surface, the \$1.5 billion Mega Millions jackpot in fiscal 2019 didn't have the same impact as the similar-sized record Powerball jackpot in fiscal 2016. That year, combined sales of the two games were up 36.3% from fiscal 2015, whereas combined sales in fiscal 2019 were up 23.6%. But you have to look deeper. Three years ago, lotteries were following a relatively down year in fiscal 2015, so the industry's first billion-dollar jackpot drove double-digit games in 25 lotteries in fiscal 2016.

In fiscal 2019, that number was down to "just" nine lotteries achieving such lofty performance compared to the prior year. Part of the explanation is that fiscal 2018 was a record-setting year for many lotteries – due to some degree to the price change in Mega Millions in October 2017 (from \$1 to \$2), so it was tougher to improve on already outstanding performance.

Mega Millions provided an almost \$2.1 billion boost in sales during fiscal 2019, and with increases in some in-state lotto games almost balancing out a small decline in Powerball sales, that was pretty much the financial story of the lotto game category.

But the details show that in-state lotto games are still capable of providing strong growth, either due to jackpot rolls or to game changes including add-on options. Outside the big four multi-state games (Powerball, Mega Millions, Lotto America and the duo of Lucky for Life and

**"Our success is a direct outcome of the hard work and dedication of the staff here, our retailers and our vendors."**

**Charlie McIntyre, New Hampshire Lottery**

Cash4Life), the remaining lotto games (in-state and small regional games) were up 3.1% overall in fiscal 2019, reversing several years of aggregate declines. Bright spots (greater than 15% growth) included games in Arizona, Arkansas, Connecticut, Idaho, Indiana, Kansas, Kentucky, Michigan, New Jersey, North Dakota, South Dakota, Washington, Wisconsin and Wyoming.

In total, lotto-style games were up \$2 billion (16.5%) to almost \$14.4 billion – a market share of 46.8% of total draw games and 17.3% of total traditional game sales.

Staying in the draw game category, daily numbers games have the next largest share of the category, bringing in 35.3% of draw game sales, or 13.1% of total traditional game sales. Offered from two to five digits, these games were up a combined total of 3.1% in fiscal 2019, with double-digit growth reported in North Carolina, Oregon and Virginia.

Monitor games continue to grow, with sales in 21 jurisdictions reaching a total of \$4.7 billion in fiscal 2019. With a first full year of keno in states such as New Hampshire, New Jersey, North Carolina and Pennsylvania, keno was up 7.0% to almost \$4.5 billion. The remaining sales in the category came from second (and even third) monitor games in six jurisdictions. The DC Lottery remains the only lottery where a second monitor game outsells keno.

Terminal-printed instant games such as Fast Play increased slightly in fiscal 2019, remaining the fourth-largest draw game category (behind lotto, daily numbers and monitor games) with \$560.5 million in sales.

Raffles remain very popular in a few jurisdictions, selling out regularly, but only

# United States Sales Summary

(Dollars in millions)

	FY18	FY19	Increase (Decrease)	Percent Change
Instants	\$49,412.2	\$52,053.0	\$2,640.8	5.3%
Pulltabs	193.1	226.0	32.9	17.0%
Powerball	5,034.8	4,921.0	(113.8)	-2.3%
Mega Millions	3,242.3	5,305.9	2,063.6	63.6%
Lotto America	79.7	73.8	(5.8)	-7.3%
For Life games *	475.0	459.2	(15.8)	-3.3%
All other lotto games	3,519.8	3,628.2	108.4	3.1%
Daily numbers (2-5 digits)	10,525.8	10,855.6	329.8	3.1%
Monitor games	4,393.3	4,711.9	318.6	7.3%
Daily keno	61.8	62.4	0.6	1.0%
Terminal-based instant games	551.4	560.5	9.1	1.6%
Raffles	63.0	37.5	(25.5)	-40.5%
Hybrid instant/draw games	40.3	34.1	(6.3)	-15.5%
All other games	106.9	120.1	13.2	12.4%
Total draw games	28,094.0	30,770.2	2,676.2	9.5%
<b>Total traditional games</b>	<b>77,699.3</b>	<b>83,049.2</b>	<b>5,349.8</b>	<b>6.9%</b>
Electronic gaming machines (net)	6,937.8	7,260.4	322.6	4.6%
Table games (net)	938.3	963.2	24.9	2.7%
Sports betting (net)	18.5	45.0	26.4	142.4%
<b>Grand total sales</b>	<b>\$85,594.0</b>	<b>\$91,317.7</b>	<b>\$5,723.8</b>	<b>6.7%</b>

\* Includes Lucky for Life, Cash4Life and Win for Life

nine lotteries offered them in fiscal 2019, down from 11 the previous year. So-called hybrid games, with an instant-win and draw component, have fallen out of favor in most of the few American jurisdictions where they are still offered, with total sales down more than 15%. Still, these games produced double-digit gains in both Kentucky and Maryland.

In total, draw games produced nearly \$30.8 billion in sales during the year, up 9.5%.

Turning to instant tickets, the dominant game category in the United States, sales surpassed \$52 billion, an increase of 5.3%.

Still, that was a slight decline in market share thanks to the increase in draw games due to Mega Millions and strong performance in daily numbers and monitor games.

It should be noted that for the purposes of this report, revenues from instant games sold through online or mobile channels are included in the instant category. Reporting of those “e-instants” varies by jurisdiction (more on that later), but they added a total of \$554.5 million to sales in the instant category as defined here.

Focusing only on paper instant tickets, California sells more of them than any

American lottery – almost \$5.2 billion in fiscal 2019, up 1.8%. Right behind was Florida with \$4.9 billion (up 6.1%) and Texas with \$4.8 billion (up 9.7%). Leading the way in percentage terms was the West Virginia Lottery, with a 16.5% increase, followed closely by Idaho at 16.0% and South Carolina at 15.2%.

In West Virginia, there was a strategic effort to reduce the number of \$1, \$2 and \$3 games while increasing games at the \$5, \$10 and \$20 price points, explained Director John Myers. “That seems to be a better mix for us,” he said, adding that the success has carried into the current fiscal year. He sees

# Canada Sales Summary

(Canadian dollars in millions; excluding Quebec)

	FY18	FY19	Increase (Decrease)	Percent Change
Instants	\$2,159.9	\$2,252.2	\$92.4	4.3%
Pulltabs	154.4	141.1	(13.3)	-8.6%
Lotto 6/49	1,119.6	1,157.2	37.7	3.4%
Lotto Max	1,310.8	1,838.2	527.4	40.2%
For Life games	135.3	126.2	(9.1)	-6.7%
All other lotto games	282.4	271.0	(11.4)	-4.0%
Daily numbers (2-4 digits)	185.7	192.0	6.4	3.4%
Spiel games	478.8	548.7	69.9	14.6%
Sports betting	475.8	480.6	4.8	1.0%
Club Keno	312.7	321.0	8.3	2.7%
Daily keno	99.1	97.9	(1.2)	-1.2%
Hybrid instant/draw games	169.7	164.9	(4.8)	-2.8%
All other games	63.4	75.6	12.2	19.3%
Total draw games	4,633.1	5,273.3	\$640.2	13.8%
<b>Total traditional games</b>	<b>6,947.3</b>	<b>7,666.6</b>	<b>719.3</b>	<b>10.4%</b>
Electronic gaming machines (net)	446.9	428.2	(18.7)	-4.2%
Table games (net)	2.0	2.0	(0.0)	-0.2%
<b>Grand total sales</b>	<b>\$7,396.2</b>	<b>\$8,096.8</b>	<b>\$700.6</b>	<b>9.5%</b>

Note: These figures do not include Quebec, which has changed to reporting all games on a net basis (gross gaming revenue); net figures are not comparable.

the benefit in offering higher priced games with their accompanying higher top prizes. "As we have seen with Powerball and Mega Millions, as the jackpot grows, so does play – you get a different customer in the games as the jackpot gets up past certain amounts." That applies to instant games as well. "Somebody is willing to play for a \$100,000 prize who wasn't willing to play for [a smaller prize]."

Other initiatives driving growth in the state include pulsing games with different scenes and adding game families – nothing new to the industry but new to West Virginia. Also helping is an increase in the number of self-service terminals that gets lottery into new types of locations.

## Lotto Max Drives Canada

For fiscal 2019, we are only able to review sales for four of the country's five lotteries, as Loto-Québec has begun reporting only GGR for all products as noted earlier. Sales and GGR are not comparable, so the accompanying charts for Canada are therefore split into two – the first four lotteries (covering 11 provinces and territories) with sales and Loto-Québec with GGR.

But no matter how you report it, all of Canada's lotteries had a banner year in fiscal 2019. Leading the way in percentage terms was Western Canada Lottery Corp.,

which manages the games in five provinces and territories. Combined, sales were nearly C\$1.5 billion, up 13.2%. WCLC tends to do better compared to other jurisdictions when it comes to big jackpot rolls, and fiscal 2019 was no exception.

The country's largest lottery also managed double-digit growth, as Ontario Lottery and Gaming posted a 10.3% increase to land at almost C\$4.2 billion in sales. Right behind was the British Columbia Lottery Corp., with a 9.5% increase to nearly C\$1.3 billion. On the East coast, Atlantic Lottery's four member provinces generated C\$760 million in traditional lottery sales, up 7.2%.

Together, these four lotteries reported

## Still in its relative infancy, online lottery sales in the United States continue to grow rapidly.

almost C\$7.7 billion in sales of traditional lottery products for the year, up 10.4%.

Canada's flagship game Lotto Max had an outstanding year in fiscal 2019 due to a number of large jackpots. With sales up 40% across the reporting provinces, the game had a market share of 24% during the year, up from 18.9% the previous year.

Loto-Québec's GGR on the traditional lottery side was reported as C\$955.7 million in fiscal 2019, up 8.7% from the comparable value the previous year. Like with the other Canadian lotteries, Lotto Max led the way, up 30.6%, with Quebec's own Quebec Max doing even better, up 34.5%.

### Online Sales

Still in its relative infancy, online lottery sales in the United States continue to grow rapidly. During fiscal 2019, 13 lotteries offered online and/or mobile wagering options for at least one product category, including two with those options only for the new category of sports betting.

Five offer entertaining, interactive instant games online: Georgia, Kentucky, Michigan, New Hampshire and Pennsylvania. All those except Pennsylvania also currently allow the purchase

of selected draw games online; draw games will eventually be added to that state's online portfolio as well.

Players in Illinois and North Carolina may purchase selected draw games online, while the North Dakota Lottery offers its entire portfolio of draw games through its digital channels. New York and Virginia allow online subscription purchases for selected draw games. And for several years, the Delaware Lottery has offered online casino games through its racetrack partners.

Joining this group in fiscal 2019 for sports betting only were the Rhode Island and West Virginia lotteries, which both offer bets via online and mobile channels.

While the number of lotteries offering online sales is gradually increasing – and sports betting will be an avenue to online and mobile sales for some – there is a challenge when comparing results. Draw games purchased through digital channels are usually reported as actual sales, just like sales through retail channels.

It's a different story when it comes to the five lotteries offering e-instant games. Georgia, Kentucky and Pennsylvania report gross play, while Michigan and New Hampshire report only gross gaming revenue. The differences can be quite dramatic, depending on payouts, play action and available games.

However a lottery accounts for online and mobile sales, these figures are included in the appropriate categories in the accompanying charts. As noted earlier, because Pennsylvania reports gross play and New Hampshire reports only GGR, Pennsylvania's fiscal 2019 results indicate a total sales increase of 15.7% (all retail and digital channels combined) thanks to gross play of \$381,464,634 on e-instants. If that was adjusted to GGR, the Lottery's overall sales increase would still be very strong, but not into double digits. Conversely, if New Hampshire reported gross play, its results would be even more impressive than the reported 15.5%. That's why New Hampshire gets the nod for the highest percentage increase in sales after Wyoming's special-circumstance 28.5%, as noted earlier.

Here's a rundown of online sales in order of launch (for single-draw sales):

- **Illinois (March 2012)** – Powerball, Mega Millions and Lotto for online single-draw purchases and subscriptions, plus subscription-only sales for Lucky Day Lotto, Pick 3 and

Pick 4. Total digital sales for fiscal 2019 were \$57.7 million, an increase of 32% over the prior year.

- **Georgia (November 2012)** – Fantasy 5, Keno, Mega Millions and Powerball are available, plus e-instant games. For fiscal 2019, total digital sales of \$82.1 million (a 63% increase) were split about 50-50 between instant games and the available draw games.
- **Delaware (November 2013)** – Online sales of casino games were \$3.2 million in fiscal 2019, an increase of 45%.
- **North Dakota (July 2014)** – All five of the Lottery's draw games are available; total digital sales in fiscal 2019 were \$1.6 million, an increase of more than 51%.
- **Michigan (August 2014)** – Fantasy 5, Lotto 47, Mega Millions and Powerball are available, plus e-instants. After adjusting for promotions, total digital sales (using GGR for e-instants, as noted) were \$146.5 million in fiscal 2019, an increase of almost 29%.
- **Kentucky (April 2016)** – Powerball, Mega Millions, Keno, Lucky for Life and Cash Ball 225 are offered, plus e-instants. Total digital sales in fiscal 2019 were almost \$26.8 million, up 82%.
- **North Carolina (June 2016)** – Powerball, Mega Millions, Lucky for Life and Cash 5 are available. Total sales in fiscal 2019 were almost \$13.8 million, up 101%.
- **Pennsylvania (May 2018)** – Only e-instants are currently available, although selected draw games will ultimately join the online mix. As noted, gross play in fiscal 2019 was \$381.5 million; GGR after promotions was \$45.6 million.
- **New Hampshire (September 2018)** – Powerball, Mega Millions and e-instants are currently offered through digital channels. Fiscal 2019 GGR for e-instants was \$4.5 million; sales for the two draw games were \$2.2 million.



- **The Virginia and New York lotteries** continue to offer subscriptions through an online system, but have thus far stopped short of single draw sales. Virginia's subscription sales were almost \$13.9 million in fiscal 2019; available games are Mega Millions, Powerball and Cash4Life. New York offers subscriptions for Lotto, Mega Millions and Cash4Life.

## Enter Sports Betting

The year 2018 marked an important milestone in the American gaming industry with the Professional and Amateur Sports Protection Act declared unconstitutional in May, opening the floodgates for sports betting in this country. The Delaware Lottery was the first to launch full-scale sports betting at its racetrack casinos in early June 2018, having already offered football parlay wagering for years. Lotteries in West Virginia and Rhode Island followed suit during fiscal 2019, both ultimately adding online and mobile options to play at their existing casino locations.

Oregon became the first American lottery to launch sports betting only through digital channels when it did so in October; this activity will be reported for the first time in fiscal 2020.

Due to the very different nature of live sports betting, including volatility and high payouts, revenues for the purposes of this report represent GGR and are grouped with other GGR-based products (electronic gaming machines and table games). Delaware's previous parlay wagering has been restated to GGR in order to provide a proper comparison with prior years. It should be noted that the Pennsylvania Lottery offers virtual sports games at retail, but that product is not included in the "live sports" column in the accompanying charts.

In total, live sports betting generated \$45.0 million in GGR in the three operating states in fiscal 2019.

## Casino Gaming

As always, revenue from casino gaming is included for eight American lotteries in this analysis; the numbers reported are GGR from electronic gaming machines (video lottery terminals or slot machines) and table games, where offered. A ninth lottery, Kansas, owns casinos in its

jurisdiction but farms out their operation; as the model is somewhat different, its gaming revenues are not included here.

For the first time in years, Rhode Island's gaming revenues led the industry in terms of percentage growth – with GGR up 8.6% on EGMs and 12.1% on table games. While newer markets (Maryland and Ohio) are still strong, they are slowing down. That helped Rhode Island top these categories, with its move to a new casino (Tiverton replacing the old Newport Grand, where table games were not allowed) that significantly increased GGR in both product lines at Tiverton and Twin River, the state's other casino.

In Canada, both Loto-Québec and Atlantic Lottery reported declines in net VLT revenues. Quebec's VLTs were down marginally, while the four Atlantic provinces recorded a combined 4.2% decrease in net revenues. Again for the purposes of this report, casino operations in British Columbia, Ontario and Quebec are not included, even though a single entity runs both lottery and gaming in each of these provinces. Also excluded are VLTs operated by other entities in Alberta, Manitoba and Saskatchewan.

## That's a Wrap

What fiscal 2020 holds in store is anyone's guess. For Canada, changes in Lotto Max went into effect last May (after the close of their fiscal year on March 31). A second weekly drawing, an increase in the maximum jackpot size and additional prize levels all are designed to help the jackpots grow bigger, and faster, yet these impacts are coming after the remarkable 40% increase seen in the game in fiscal 2019.

In the United States, fiscal 2020, at least through the end of November, hasn't seen super-sized jackpots in either of the two big national games, and year-to-date sales reflect that. Absent a good jackpot run or two in the next few months, sales could come up short when the curtain comes down on the year. It's the nature of the games.

Sports betting will drive additional revenue for some lotteries, but the amounts will vary depending on the way it is set up in each jurisdiction. That revenue is welcome regardless of the amount, because it means more money for a lottery's beneficiaries. "Everything helps," said West Virginia's Myers. "That's what it boils down to." ■

**Sports betting will drive additional revenue for some lotteries, but the amounts will vary depending on the way it is set up in each jurisdiction.**

# Fiscal 2019 Lottery Sales and Revenues - United States

	Instants	Pulltabs	Daily Numbers Games			
			2-digit	3-digit	4-digit	5-digit
Arizona	\$750,278,323	\$9,913,704		\$12,276,022		
Arkansas	407,825,514			7,677,432	\$4,430,762	
California	5,170,791,532			153,193,035	30,741,998	
Colorado	443,409,967			12,902,998		
Connecticut	736,443,000			126,713,000	122,984,000	
Delaware	79,809,999			27,460,494	23,723,475	
D.C.	52,335,075		\$539,849	38,554,475	51,757,219	\$22,475,381
Florida	4,937,779,000		20,860,000	380,331,000	253,424,000	54,648,000
Georgia	3,260,505,416			518,412,711	302,537,444	8,090,120
Idaho	170,464,207	48,649,018		2,477,919		
Illinois	1,856,802,519			274,621,360	250,949,407	
Indiana	974,885,000			39,185,000	37,864,000	
Iowa	250,642,094	10,876,606		7,871,469	4,292,190	
Kansas	158,315,528	7,310,315		7,090,765		
Kentucky	686,567,000			149,860,000	44,573,000	
Louisiana	225,573,998			54,755,738	50,261,424	
Maine	224,635,254			5,394,851	4,337,305	
Maryland	822,077,372			245,626,551	312,177,226	
Massachusetts	3,673,903,000	602,000		325,375,000		*
Michigan	1,765,626,834	33,613,075		395,930,643	493,922,675	
Minnesota	435,268,778			18,444,086		
Missouri	914,449,548	114,051,149		83,909,758	55,065,977	
Montana	19,330,788					
Nebraska	104,298,281			5,830,309		
New Hampshire	254,990,057			5,439,771	4,814,505	
New Jersey	1,864,790,213			410,551,895	259,073,849	
New Mexico	74,941,000			5,477,000	1,060,000	
New York	4,226,735,000			911,900,000	955,450,000	
North Carolina	1,908,862,000			352,111,000	161,555,000	
North Dakota						
Ohio	1,663,031,137			354,024,242	216,872,046	44,495,967
Oklahoma	135,965,126			5,741,114		
Oregon	131,236,973				1,765,534	
Pennsylvania	3,371,157,379		5,738,457	269,180,879	225,297,578	46,470,053
Rhode Island	102,914,666			22,988,120		*
South Carolina	1,450,410,830			217,628,427	103,724,119	
South Dakota	32,290,474					
Tennessee	1,448,878,726			67,310,077	40,724,405	
Texas	4,845,586,519			259,074,427	121,129,176	
Vermont	107,044,867			1,207,390	1,206,567	
Virginia	1,222,320,262			329,229,522	326,360,467	
Washington	523,857,598			19,502,841	14,667,248	
West Virginia	115,596,133			7,936,802	4,639,723	
Wisconsin**	450,364,292	978,975		23,574,880	14,117,009	
Wyoming						
<b>Total U.S.</b>	<b>\$52,052,991,279</b>	<b>\$225,994,842</b>	<b>\$27,138,306</b>	<b>\$6,156,773,002</b>	<b>\$4,495,499,326</b>	<b>\$176,179,520</b>

**General notes:**

All figures should be considered preliminary and unaudited. Lotto games include all lotto-style games other than those specifically identified. Add-on games are generally included with the host game sales; exceptions are if a game is available on several base games, then it is included in the "other" category. Internet sales where applicable are included in the relevant game categories. Revenues to beneficiaries may reflect either actual fiscal year transfers or net income available for distribution; includes revenue from gaming operations where applicable and any dedicated revenues provided to problem gambling funds.

**Specific notes:**

\* Massachusetts and Rhode Island do not separate sales of 3- and 4-digit daily numbers games \*\* Wisconsin transfers to beneficiary include \$40 million received from the state's General Fund and passed through.

# Fiscal 2019 Lottery Sales and Revenues - United States

	Lotto	Powerball	Mega Millions	Lotto America	For Life games
Arizona	\$72,432,048	\$111,184,626	\$102,951,884		
Arkansas	9,303,843	34,162,016	33,552,661		\$3,211,636
California	429,787,753	521,128,315	736,261,393		
Colorado	47,648,374	86,147,274	72,719,920		16,951,078
Connecticut	66,200,000	81,446,000	72,634,000		18,872,000
Delaware	4,514,384	25,229,105	20,707,521	\$3,367,629	2,910,662
D.C.		9,783,491	9,563,054		2,118,260
Florida	556,544,000	459,392,000	416,963,000		50,337,000
Georgia	111,405,367	148,294,159	199,089,964		9,738,182
Idaho	3,677,500	30,257,158	23,530,337	2,755,083	3,244,654
Illinois	223,289,524	158,590,962	213,338,883		
Indiana	78,726,000	96,237,000	77,727,000		4,614,000
Iowa		54,833,068	36,322,749	8,753,137	5,427,678
Kansas	22,687,840	35,707,327	28,997,959	6,567,708	5,655,846
Kentucky	13,286,000	73,517,000	63,140,000		7,506,000
Louisiana	32,612,621	90,567,612	70,196,035		
Maine	12,890,587	22,350,828	16,300,415	1,980,196	3,713,174
Maryland	48,574,659	114,078,139	137,707,762		12,389,773
Massachusetts	108,939,000	133,704,000	158,782,000		25,208,000
Michigan	131,125,924	143,474,996	191,541,469		14,217,729
Minnesota	29,536,988	67,958,771	48,906,509	11,760,246	6,940,632
Missouri	53,619,541	97,546,934	81,815,046		8,240,962
Montana	7,576,975	12,517,369	9,441,718	2,422,771	2,696,624
Nebraska	17,715,827	35,773,123	24,436,028		4,128,422
New Hampshire	12,195,760	37,617,011	31,610,758		5,606,632
New Jersey	233,214,793	236,347,614	285,337,321		37,053,102
New Mexico	7,294,000	26,926,000	22,540,000	4,463,000	
New York	311,562,000	389,777,000	480,144,000		87,911,000
North Carolina	73,283,000	158,737,000	142,093,000		20,493,000
North Dakota	5,235,610	12,768,704	11,189,777	2,689,458	3,469,442
Ohio	83,514,319	143,290,465	192,729,786		20,437,036
Oklahoma	3,992,688	44,431,391	39,759,254	7,226,840	4,576,550
Oregon	36,418,393	49,829,088	50,210,700		3,766,700
Pennsylvania	271,917,360	260,487,788	229,530,094		16,682,432
Rhode Island	3,898,948	27,218,295	20,229,951		4,958,714
South Carolina	23,515,177	92,938,601	80,149,250		12,575,829
South Dakota	3,852,857	13,090,890	8,760,593	2,397,078	2,607,014
Tennessee	17,067,553	109,010,760	93,420,871	14,112,087	8,245,760
Texas	243,758,109	342,553,073	407,539,863		
Vermont	4,969,702	9,368,681	8,033,711		1,776,046
Virginia	47,003,661	125,460,795	166,953,172		18,174,238
Washington	78,080,192	69,415,253	91,876,435		
West Virginia	4,831,831	33,340,489	24,482,131	5,351,712	
Wisconsin**	65,449,953	84,787,240	63,318,683		
Wyoming	15,035,373	9,737,381	9,340,414		2,733,992
<b>Total U.S.</b>	<b>\$3,628,186,033</b>	<b>\$4,921,014,792</b>	<b>\$5,305,877,071</b>	<b>\$73,846,945</b>	<b>\$459,189,799</b>

**General notes:**

All figures should be considered preliminary and unaudited. Lotto games include all lotto-style games other than those specifically identified. Add-on games are generally included with the host game sales; exceptions are if a game is available on several base games, then it is included in the "other" category. Internet sales where applicable are included in the relevant game categories. Revenues to beneficiaries may reflect either actual fiscal year transfers or net income available for distribution; includes revenue from gaming operations where applicable and any dedicated revenues provided to problem gambling funds.

**Specific notes:**

\* Massachusetts and Rhode Island do not separate sales of 3- and 4-digit daily numbers games \*\* Wisconsin transfers to beneficiary include \$40 million received from the state's General Fund and passed through.

# Fiscal 2019 Lottery Sales and Revenues - United States

	..... Monitor Games .....			Raffles	Terminal-based Instant games	Hybrid lotto/ Instant-win
	Daily Keno	Keno	Others			
Arizona					\$17,753,412	
Arkansas					15,329,643	
California		\$313,779,077				
Colorado						
Connecticut		102,923,000				
Delaware		8,594,476				
D.C.		6,605,485	\$8,889,000		10,440,957	
Florida					20,958,000	
Georgia		201,793,551			6,664,960	\$4,016,680
Idaho				\$2,857,060		
Illinois						
Indiana	\$17,200,000				14,404,000	
Iowa					11,876,560	
Kansas		13,157,552	5,791,350	4,000,000		
Kentucky		84,251,000				6,878,000
Louisiana						
Maine					6,598,860	1,250,226
Maryland		286,865,920	211,192,515			6,218,582
Massachusetts		1,054,948,000	8,906,000			
Michigan	8,776,366	617,273,943			81,570,062	7,087,482
Minnesota				6,998,880	10,995,363	
Missouri		57,329,788				
Montana				3,000,000	4,045,876	
Nebraska						
New Hampshire		26,959,048			5,132,955	
New Jersey		129,310,123			22,787,910	3,879,377
New Mexico					860,000	
New York	30,553,000	814,078,000				
North Carolina		42,491,000				
North Dakota						
Ohio		453,857,457	16,948,057		171,563,504	
Oklahoma						454
Oregon		102,665,467		2,307,370		
Pennsylvania		44,485,120		10,000,000	103,261,400	
Rhode Island		79,843,410	1,214,353			
South Carolina						
South Dakota						
Tennessee		13,834,522				
Texas						
Vermont					5,645,006	
Virginia				7,500,000	50,562,452	
Washington	5,878,371					
West Virginia		3,917,999				
Wisconsin**				766,241		4,737,235
Wyoming				85,000		
<b>Total U.S.</b>	<b>\$62,407,737</b>	<b>\$4,458,963,938</b>	<b>\$252,941,275</b>	<b>\$37,514,551</b>	<b>\$560,450,920</b>	<b>\$34,068,036</b>

**General notes:**

All figures should be considered preliminary and unaudited. Lotto games include all lotto-style games other than those specifically identified. Add-on games are generally included with the host game sales; exceptions are if a game is available on several base games, then it is included in the "other" category. Internet sales where applicable are included in the relevant game categories. Revenues to beneficiaries may reflect either actual fiscal year transfers or net income available for distribution; includes revenue from gaming operations where applicable and any dedicated revenues provided to problem gambling funds.

**Specific notes:**

\* Massachusetts and Rhode Island do not separate sales of 3- and 4-digit daily numbers games \*\* Wisconsin transfers to beneficiary include \$40 million received from the state's General Fund and passed through.

# Fiscal 2019 Lottery Sales and Revenues - United States

	..... Traditional Games .....			..... Gross Gaming Revenue .....		
	Other	Total Sales	% Change	EGMs	Table Games	Live Sports Betting
Arizona		\$1,076,790,019	9.7%			
Arkansas		515,493,507	3.2%			
California	\$32,367,213	7,388,050,316	6.1%			
Colorado		679,779,611	11.1%			
Connecticut	5,696,000	1,333,911,000	5.2%			
Delaware		196,317,745	11.0%	\$370,565,394	\$56,611,092	\$26,156,699
D.C.		213,062,244	1.3%			
Florida		7,151,236,000	6.7%			
Georgia	5,459,968	4,776,008,522	3.9%			
Idaho		287,912,936	8.6%			
Illinois		2,977,592,655	1.7%			
Indiana	6,914,000	1,347,756,000	6.1%			
Iowa		390,895,551	5.4%			
Kansas		295,282,190	9.8%			
Kentucky	77,000	1,129,655,000	8.4%			
Louisiana		523,967,428	6.7%			
Maine		299,451,696	1.8%			
Maryland		2,196,908,499	7.5%	1,125,214,916	635,193,662	
Massachusetts		5,490,367,000	4.0%			
Michigan		3,884,161,198	8.6%			
Minnesota		636,810,253	6.8%			
Missouri		1,466,028,703	4.7%			
Montana	232,415	61,264,536	8.2%			
Nebraska		192,181,990	4.8%			
New Hampshire		384,366,497	15.5%			
New Jersey		3,482,346,197	5.5%			
New Mexico	70,000	143,631,000	7.2%			
New York		8,208,110,000	3.4%	2,082,440,000		
North Carolina		2,859,625,000	9.8%			
North Dakota		35,352,991	12.9%			
Ohio		3,360,764,014	6.3%	1,058,638,754		
Oklahoma		241,693,417	9.3%			
Oregon	1,850,874	380,051,099	3.2%	966,474,906		
Pennsylvania	30,584,772	4,884,793,312	15.7%			
Rhode Island	9,307	263,275,764	1.9%	522,754,625	163,442,908	6,867,769
South Carolina		1,980,942,233	13.2%			
South Dakota		62,998,906	8.3%	230,233,469		
Tennessee		1,812,604,761	4.4%			
Texas	31,837,484	6,251,478,651	11.1%			
Vermont		139,251,970	5.2%			
Virginia		2,293,564,569	7.2%			
Washington		803,277,937	9.4%			
West Virginia		200,096,820	13.0%	904,071,500	107,958,651	11,934,030
Wisconsin**	5,038,266	713,132,773	6.9%			
Wyoming		36,932,160	28.5%			
<b>Total U.S.</b>	<b>\$120,137,299</b>	<b>\$83,049,174,669</b>	<b>6.9%</b>	<b>\$7,260,393,564</b>	<b>\$963,206,313</b>	<b>\$44,958,498</b>

**General notes:**

All figures should be considered preliminary and unaudited. Lotto games include all lotto-style games other than those specifically identified. Add-on games are generally included with the host game sales; exceptions are if a game is available on several base games, then it is included in the "other" category. Internet sales where applicable are included in the relevant game categories. Revenues to beneficiaries may reflect either actual fiscal year transfers or net income available for distribution; includes revenue from gaming operations where applicable and any dedicated revenues provided to problem gambling funds.

**Specific notes:**

\* Massachusetts and Rhode Island do not separate sales of 3- and 4-digit daily numbers games \*\* Wisconsin transfers to beneficiary include \$40 million received from the state's General Fund and passed through.

# Fiscal 2019 Lottery Sales and Revenues - United States

	Total FY19 Lottery Sales	Total FY18 Lottery Sales	% Change	FY19 Prizes Traditional Games	FY19 Total Transfers to Beneficiaries
Arizona	\$1,076,790,019	\$981,377,844	9.7%	\$706,491,066	\$230,361,078
Arkansas	515,493,507	499,707,976	3.2%	349,877,142	98,411,747
California	7,388,050,316	6,965,792,113	6.1%	4,715,592,673	1,847,063,359
Colorado	679,779,611	611,993,333	11.1%	417,383,824	166,461,160
Connecticut	1,333,911,000	1,267,591,283	5.2%	822,900,000	372,300,000
Delaware	649,650,930	605,935,752	7.2%	111,888,637	215,555,482
D.C.	213,062,244	210,259,000	1.3%	123,375,295	44,500,000
Florida	7,151,236,000	6,700,811,000	6.7%	4,628,743,000	1,927,000,000
Georgia	4,776,008,522	4,597,782,858	3.9%	2,876,421,053	1,207,768,766
Idaho	287,912,936	265,084,594	8.6%	190,047,371	60,000,000
Illinois	2,977,592,655	2,928,423,481	1.7%	1,907,209,654	735,513,905
Indiana	1,347,756,000	1,270,066,000	6.1%	859,997,715	312,223,309
Iowa	390,895,551	370,956,887	5.4%	241,987,604	92,864,965
Kansas	295,282,190	268,948,805	9.8%	172,676,708	74,909,328
Kentucky	1,129,655,000	1,042,512,000	8.4%	724,812,000	283,611,000
Louisiana	523,967,428	490,975,098	6.7%	285,330,406	184,318,132
Maine	299,451,696	294,133,693	1.8%	197,931,908	63,201,732
Maryland	3,957,317,077	3,721,760,747	6.3%	1,362,156,494	1,201,675,757
Massachusetts	5,490,367,000	5,276,898,000	4.0%	3,987,258,000	1,104,220,000
Michigan	3,884,161,198	3,578,066,599	8.6%	2,364,658,271	1,071,639,555
Minnesota	636,810,253	596,477,568	6.8%	395,592,006	153,194,906
Missouri	1,466,028,703	1,400,216,223	4.7%	1,015,091,352	346,717,413
Montana	61,264,536	56,603,242	8.2%	34,500,000	12,200,000
Nebraska	192,181,990	183,368,092	4.8%	112,456,626	46,567,592
New Hampshire	384,366,497	332,752,026	15.5%	240,811,893	105,605,565
New Jersey	3,482,346,197	3,299,702,751	5.5%	2,082,096,409	1,105,000,000
New Mexico	143,631,000	134,029,109	7.2%	77,040,000	43,110,000
New York	10,290,550,000	9,973,519,000	3.2%	4,920,620,000	3,474,041,000
North Carolina	2,859,625,000	2,605,313,020	9.8%	1,845,287,000	710,195,000
North Dakota	35,352,991	31,307,328	12.9%	18,240,852	9,342,500
Ohio	4,419,402,768	4,147,410,933	6.6%	2,139,812,251	1,153,932,000
Oklahoma	241,693,417	221,110,396	9.3%	141,324,235	67,554,285
Oregon	1,346,526,005	1,302,334,662	3.4%	234,967,509	730,143,179
Pennsylvania	4,884,793,312	4,221,381,197	15.7%	3,259,126,431	1,143,225,749
Rhode Island	956,341,066	885,573,219	8.0%	165,267,328	397,320,920
South Carolina	1,980,942,233	1,750,162,686	13.2%	1,312,062,049	488,091,540
South Dakota	293,232,375	278,806,227	5.2%	37,394,266	129,754,207
Tennessee	1,812,604,761	1,735,914,958	4.4%	1,083,571,756	447,185,000
Texas	6,251,478,651	5,626,846,887	11.1%	4,056,494,096	1,636,590,465
Vermont	139,251,970	132,420,000	5.2%	90,671,039	29,095,062
Virginia	2,293,564,569	2,139,819,735	7.2%	1,401,704,199	649,703,969
Washington	803,277,937	733,938,492	9.4%	490,355,040	215,782,133
West Virginia	1,224,061,001	1,159,759,357	5.5%	120,716,967	495,141,920
Wisconsin**	713,132,773	667,392,420	6.9%	431,945,848	235,275,988
Wyoming	36,932,160	28,746,140	28.5%	19,807,574	6,619,646
<b>Total U.S.</b>	<b>\$91,317,733,045</b>	<b>\$85,593,982,731</b>	<b>6.7%</b>	<b>\$52,773,695,547</b>	<b>\$25,124,989,314</b>

**General notes:**

All figures should be considered preliminary and unaudited. Lotto games include all lotto-style games other than those specifically identified. Add-on games are generally included with the host game sales; exceptions are if a game is available on several base games, then it is included in the "other" category. Internet sales where applicable are included in the relevant game categories. Revenues to beneficiaries may reflect either actual fiscal year transfers or net income available for distribution; includes revenue from gaming operations where applicable and any dedicated revenues provided to problem gambling funds.

**Specific notes:**

\* Massachusetts and Rhode Island do not separate sales of 3- and 4-digit daily numbers games \*\* Wisconsin transfers to beneficiary include \$40 million received from the state's General Fund and passed through.

# Fiscal 2019 Lottery Sales and Revenues - Canada

	..... Daily Numbers .....				
	Instants	Pulltabs	2-digit	3-digit	4-digit
<b>Sales, Prizes and Proceeds</b>					
British Columbia	\$283,141,974	\$24,503,319			
Ontario	1,408,978,800		\$22,139,223	\$71,382,144	\$73,230,758
Alberta	187,530,251		951,749	12,713,328	3,034,409
Manitoba	68,123,508		324,358	4,845,251	882,910
NW Territories	8,418,718		22,736	91,839	56,677
Saskatchewan	51,791,879		151,691	1,853,859	295,777
Yukon	3,570,287		8,082	49,412	12,235
WCLC Total	319,434,643		1,458,616	19,553,689	4,282,008
New Brunswick	63,954,963	16,197,259			
Newf. & Lab.	86,604,377	73,182,707			
Nova Scotia	77,178,347	20,766,925			
Prince Edward Island	12,931,823	6,410,805			
Atlantic Lottery Total	240,669,510	116,557,695			
<b>Canada (Excluding Québec)</b>	<b>\$2,252,224,927</b>	<b>\$141,061,014</b>	<b>\$23,597,839</b>	<b>\$90,935,833</b>	<b>\$77,512,766</b>

<b>Gross Gaming Revenue and Proceeds*</b>		
Québec	\$172,329,000	\$24,113,000

	Lotto	Lotto Max	Lotto 6/49	For Life	Spiel
	<b>Sales, Prizes and Proceeds</b>				
British Columbia	\$34,797,656	\$280,680,432	\$176,782,994	\$22,557,463	\$76,704,602
Ontario	139,401,723	969,037,927	643,940,368	58,891,537	254,333,607
Alberta	46,891,694	317,263,800	164,404,262	25,099,612	99,156,854
Manitoba	8,482,564	70,649,662	39,205,928	3,906,005	23,068,455
NW Territories	510,672	4,941,470	2,252,633	334,280	1,285,670
Saskatchewan	10,609,859	72,578,719	38,325,798	4,745,240	24,492,069
Yukon	436,229	2,683,168	1,514,339	253,831	947,109
WCLC Total	66,931,018	468,116,819	245,702,960	34,338,968	148,950,157
New Brunswick	9,456,038	31,565,775	26,989,422	3,618,405	20,414,064
Newf. & Lab.	8,202,230	42,096,785	25,769,281	2,912,607	22,290,504
Nova Scotia	10,553,290	41,578,775	33,547,832	3,512,043	22,767,661
Prince Edward Island	1,691,991	5,149,500	4,510,257	363,549	3,222,090
Atlantic Lottery Total	29,903,550	120,390,835	90,816,791	10,406,604	68,694,320
<b>Canada (Excluding Québec)</b>	<b>\$271,033,947</b>	<b>\$1,838,226,013</b>	<b>\$1,157,243,113</b>	<b>\$126,194,572</b>	<b>\$548,682,686</b>

<b>Gross Gaming Revenue and Proceeds*</b>					
Québec	\$60,477,000	\$222,792,000	\$166,049,000	\$37,769,000	\$85,564,000

Notes:  
All figures in Canadian dollars. Internet sales, where applicable, may be listed in "other" or in the specific game categories, depending on the types of games and the individual lottery. Atlantic Lottery net proceeds for PEI include revenues from operations at the racetrack entertainment centers and from the harness racing industry.

\* Québec changed reporting on all games to a net basis (gross gaming revenue) in FY19.

## Fiscal 2019 Lottery Sales and Revenues - Canada

	Hybrid	Club Keno	Daily Keno	Sports	Other
<b>Sales, Prizes and Proceeds</b>					
British Columbia	\$5,998,619	\$306,592,918		\$42,372,739	\$31,887,072
Ontario	115,743,742		\$86,683,249	302,614,961	21,150,124
Alberta	22,133,713	8,222,924		58,824,749	
Manitoba	5,659,632	2,021,755		22,369,703	
NW Territories	693,743	374,398		1,031,251	
Saskatchewan	4,984,803	2,753,142		13,416,334	
Yukon	298,087	1,001,386		413,130	
WCLC Total	33,769,978	14,373,605		96,055,167	
New Brunswick	2,784,804		3,208,033	10,706,236	5,334,948
Newf. & Lab.	2,682,875		2,535,545	8,245,969	8,574,958
Nova Scotia	3,488,824		4,784,984	18,234,060	7,551,982
Prince Edward Island	399,250		667,705	2,401,734	1,074,608
Atlantic Lottery Total	9,355,753		11,196,267	39,588,000	22,536,495
<b>Canada (Excluding Québec)</b>	<b>\$164,868,092</b>	<b>\$320,966,523</b>	<b>\$97,879,516</b>	<b>\$480,630,867</b>	<b>\$75,573,691</b>

<b>Gross Gaming Revenue and Proceeds*</b>					
Québec	\$12,818,000		\$69,326,000	\$31,060,000	\$73,440,000

	..... Traditional Games .....		..... Gross Gaming Revenue .....	
	Total Sales/GGR*	% Change	EGMs	Table Games
<b>Sales, Prizes and Proceeds</b>				
British Columbia	\$1,286,019,788	9.5%		
Ontario	4,167,528,163	10.3%		
Alberta	946,227,345	13.2%		
Manitoba	249,539,731	11.3%		
NW Territories	20,014,087	13.6%		
Saskatchewan	225,999,170	15.1%		
Yukon	11,187,295	13.5%		
WCLC Total	1,452,967,628	13.2%		
New Brunswick	194,229,946	6.8%	136,586,375	
Newf. & Lab.	283,097,839	6.7%	129,415,375	
Nova Scotia	243,964,723	8.3%	129,764,232	
Prince Edward Island	38,823,312	6.6%	32,431,164	\$2,021,304
Atlantic Lottery Total	760,115,819	7.2%	428,197,146	2,021,304
<b>Canada (Excluding Québec)</b>	<b>\$7,666,631,398</b>	<b>10.4%</b>	<b>\$428,197,146</b>	<b>\$2,021,304</b>

<b>Gross Gaming Revenue and Proceeds*</b>				
Québec	\$955,737,000	8.7%	\$960,372,000	

**Notes:**

All figures in Canadian dollars. Internet sales, where applicable, may be listed in "other" or in the specific game categories, depending on the types of games and the individual lottery. Atlantic Lottery net proceeds for PEI include revenues from operations at the racetrack entertainment centers and from the harness racing industry.

\* Quebec changed reporting on all games to a net basis (gross gaming revenue) in FY19.



# Fiscal 2019 Lottery Sales and Revenues - Canada

	Total FY19 Lottery Sales/GGR*	Total FY18 Lottery Sales/GGR*	% Change	FY19 Prizes Traditional Games	FY19 Proceeds to Beneficiaries
<b>Sales, Prizes and Proceeds</b>					
British Columbia	\$1,286,019,788	\$1,174,915,557	9.5%	\$727,900,287	\$306,032,515
Ontario	4,167,528,163	3,779,737,679	10.3%	2,331,311,000	1,171,796,000
Alberta	946,227,345	835,730,966	13.2%	483,713,903	340,779,468
Manitoba	249,539,731	224,137,984	11.3%	130,686,114	69,397,927
NW Territories	20,014,087	17,612,358	13.6%	11,062,052	6,543,327
Saskatchewan	225,999,170	196,294,192	15.1%	116,419,060	73,794,706
Yukon	11,187,295	9,852,924	13.5%	6,057,216	3,687,651
WCLC Total	1,452,967,628	1,283,628,424	13.2%	747,938,345	494,203,079
New Brunswick	330,816,321	319,962,798	3.4%		130,009,000
Newf. & Lab.	412,513,214	405,367,546	1.8%		135,393,000
Nova Scotia	373,728,955	361,432,519	3.4%		138,572,000
Prince Edward Island	73,275,780	71,167,951	3.0%		18,251,000
Atlantic Lottery Total	1,190,334,269	1,157,930,814	2.8%	435,698,673	422,225,000
<b>Canada (Excluding Québec)</b>	<b>\$8,096,849,848</b>	<b>\$7,396,212,474</b>	<b>9.5%</b>	<b>\$4,242,848,305</b>	<b>\$2,394,256,594</b>
<b>Gross Gaming Revenue and Proceeds*</b>					
Québec	\$1,916,109,000	\$1,842,172,000	4.0%	n/a	\$1,165,134,000

**Notes:**

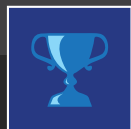
All figures in Canadian dollars. Internet sales, where applicable, may be listed in "other" or in the specific game categories, depending on the types of games and the individual lottery. Atlantic Lottery net proceeds for PEI include revenues from operations at the racetrack entertainment centers and from the harness racing industry.

\* Québec changed reporting on all games to a net basis (gross gaming revenue) in FY19.

## Welcome to the NASPL Matrix



NASPL Resource Index



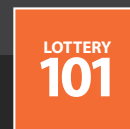
Awards



Responsible Gambling



Insights



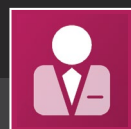
Lottery 101



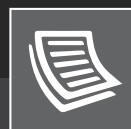
Webinars



Presentations



Classifieds



Whitepapers



API

Visit the NASPL Matrix Today  
[www.nasplmatrix.org](http://www.nasplmatrix.org)

To log in to the NASPL Matrix please contact NASPL Headquarters at [info@nasplhq.org](mailto:info@nasplhq.org) or call 440.361.7962



# Double Match

Mentorship offers multiple ways to win at developing the next generation of industry leaders.

**A**nyone who has enjoyed a mentoring relationship can attest to the personal and professional benefits, which are often long-lasting. Beyond individual development, mentorship is credited with increasing workplace engagement and job satisfaction, supporting succession planning as well as diversity and inclusion, promoting a learning culture, breaking down departmental silos, and reducing turnover.

Renato Ascoli, IGT CEO North America, instituted a mentoring program for senior leaders on his team to help develop the next generation of leaders at IGT. Ascoli notes that the program is intentional in matching mentors and mentees, "to provide opportunities for all our people to be well-prepared to anticipate the changing needs of the players we serve and deliver player-driven solutions."

One of the challenges for mentees can be finding a mentor who's willing to go on the journey with them and listen to their experiences and unique challenges, which may be very different from the mentor's. IGT's structured program not only helps to match participants, it also defines specific goals, accountability and follow-up over an established period. Individuals bring their time and commitment to the relationship, and a software platform aids in tracking and managing the program.

"It isn't only up to senior leaders to be mentors," says IGT's Wendy Montgomery, Senior Vice President Global Brand, Marketing, and Communications. As a mentor and one of the executive sponsors of WIN, IGT's Women's Inclusion Network, she observes, "Anyone can be a mentor to the next generation. It goes beyond paths to senior management and extends to increasing individuals' capabilities, navigating new responsibilities, and stepping into expanded accountability." As participants in the program have experienced, mentorship offers multiple wins.

**Jay Gendron, Chief Operating Officer Lottery – Mentor to Account Development Manager Nikki Orcutt, and Dan Rouette, Senior Director, Head of Business Proposals**

**We often hear about the benefits of mentorship programs from the perspective of the mentee. What benefit have you received as a first-time mentor?**

**Gendron:** In my 25 years at IGT, I benefited from having several mentors, many of whom were women who opened doors for me, connected me to opportunities, and gave me candid feedback. I bring those positive experiences to my role as mentor. Being a good mentor requires me to listen and listen again to understand, affirm, and validate my mentees' needs and aspirations. I know I have grown as a leader as a result.

**What would you say to colleagues who say they don't have the bandwidth to become a mentor?**

**Gendron:** Capacity is a real issue, but it's our collective responsibility to develop, sponsor, coach and challenge more junior colleagues. I'm also speaking directly to men in senior roles. We must mentor more women to support their growth and ascension into higher ranks of leadership. It's one of the many ways we can contribute to gender equality in an organization. To encourage participation, our industry can support initiatives like WILL (Women's Initiative in Lottery Leadership), and others can consider starting up their own mentorship programs.



Jay Gendron (left) with Dan Rouette

### What did you hope to gain for your own development from a mentorship with Jay?

**Orcutt:** Since becoming a working mother nearly 13 years ago, I've always approached my own development from two important decision points – what's best for my daughters and what's best for my career – understanding that these two worlds may not always be perfectly aligned. I hoped to better understand the personal expectations of a leader at IGT from someone who was already in a senior leadership position, as they are not only responsible for defining the future of the organization but would likely be instrumental in developing the vision for me personally. I really wanted to understand the potential cost associated with opportunity and better understand someone else's journey, so that I could make my own path a little easier. However, people should not seek out mentorship because they assume it's a one-way relationship or a guarantee for anything. And my mentors quickly learned that I would hold them accountable to the same things they expected of me.

### What advice would you give to others who are thinking about seeking out a mentor?

**Orcutt:** If you are trying to decide if seeking out a mentor is worth it, do it. If you're struggling to find a mentor, ask. I encourage you to seek out mentors across genders. While it may seem ideal for a woman to be more supportive or understanding of another woman's potential limitations, challenges, and development, and a man to better understand the male point of view, it's more important that your path be developed not using the same lens. There is value in learning from and engaging people who, on first glance, may not be like you. Seek out a mentor who is willing to invest time in you. Keep in mind that every person is not the "perfect" person for you, and that's okay.

### Why is mentorship important for leadership development?

**Rouette:** It's a unique way to gain insight from people who once sat in your chair – and who have experience getting to the chair they're sitting in now. It goes beyond what you might learn from reading

a book or taking a class. Many personal anecdotes, lessons, stories and other nuggets of tremendously useful information really can only be gleaned through a mentor relationship. There is a personal side to leadership development that can't be learned or provided through any other means.

### What types of activities were involved?

**Rouette:** There are various elements of business and decision-making that you aren't always privy to in your day-to-day job. Being invited to participate in a range of higher-level executive strategy and pricing meetings helped me gain a better understanding of how we strategize and approach various business opportunities and operational considerations.



Melissa Pursley (left)  
with Wendy Montgomery

## Wendy Montgomery, Senior Vice President Global Brand, Marketing, and Communications – Mentor to Melissa Pursley, Chief Operating Officer and General Manager, IGT Indiana

### What did you hope to gain for your own development from a mentorship?

**Pursley:** I identified a few key areas that were most relevant and timely. They included support in navigating through a recent promotion from within my longstanding peer group, broadening my industry knowledge and organizational exposure, and assisting as I moved from a product and marketing leadership role to full P&L ownership and accountability.

While mentorship is important, I also believe that sponsorship is equally critical for an organization to succeed in retaining and attracting diverse talent. By “sponsorship” I mean, who in the room is speaking up for you in conversations about succession, managing a unique project, or filling a gap for the organization? People tend to hire and promote those who look like them or have similar backgrounds, and when an organization is led and managed by a homogenous group, it’s difficult for those with a different background to break through. So, while I absolutely support mentorship, I also believe sponsorship is critical.

### What advice would you give to others who are thinking about seeking out a mentor?

**Pursley:** I have found value in working with a mentor who experienced a similar career path to mine in terms of business discipline. We speak a similar language and have had some of the same challenges. Other advice would be to pick two or three macro areas that you want to focus on for the relationship and identify your objectives for each conversation. What do you want to share? What wins are you experiencing and what do you need guidance with? Then determine if your mentor can also become your sponsor or your advocate when you’re not in the room. Can they help guide your career within your organization?

### Is there anything in your own background that was particularly relevant to your mentorship with Melissa?

**Montgomery:** I think our mentoring relationship was mutually beneficial because, as luck would have it, we were both going through a promotion and role change, so we were able to share real-time

experiences and coach each other. Having been in Melissa’s position at Ontario Lottery and Gaming Corporation – moving from the VP Marketing role to taking over the business leadership of the Lottery, and having colleagues who used to be your peers now reporting to you – I was also able to share my experiences and lessons-learned to help smooth that transition.

### Why do you think it’s important for the industry to support formal mentorship programs?

**Montgomery:** In terms of developing women in leadership, mentoring is a key tool, as there are often less opportunities for women to connect and support each other’s journey. I think all companies should support formal mentorship programs as a valuable component of any career development program. At IGT specifically, as part of our Diversity and Inclusion initiatives and leadership development programs, we’re investing time and resources so that we reflect a global player base and can continue to best support customers, players, our own people and our industry. ■



# Let Your Players Choose Fun!

Four million passengers choose fun with Carnival® Cruise Lines each year. Our new Carnival instant games offer your players the chance to win once-in-a-lifetime vacations to the hottest travel spots on ships built to deliver immersive, adrenaline-fueled cruising experiences.

Once aboard, players enjoy everything from world-class entertainment and fitness options to five-star dining experiences, and so much more. Go ahead and **CHOOSE FUN** for your players with Carnival and IGT.



## Innovation Through Tradition

Transforming a traditional bar game into a lottery game.

by Scott Hoss, Director of Products for INTRALOT Inc.

**L**otteries and lottery suppliers have always tried to find the best, newest, most innovative way to develop games that work under the definitions of a “lottery game.” By launching a successful lottery game, the lottery manages to maximize returns for the states’ earmarked good causes. There are many strategies that have been used in generating ideas for lottery games. Sometimes, a new innovative game is developed and a new brand is created. In other cases, existing games or brands are used to create a game that can be played under the rules of a lottery or lotteries. There are both successes and failures with each approach.

When we are trying to create a lottery game from an existing game, in this specific case a game that is traditionally played in bars and taverns, what are the best practices to ensure success of the new lottery game?

I will give two examples of games that have been successfully implemented by different lotteries using the same set of decision-making criteria to successfully launch a game – one that had an existing brand and game play – as a lottery game. In both cases the most important factor is to identify the best game to consider making into a lottery game. The first criteria in identifying a game is ensuring that the game is local to the jurisdiction. Choosing a game that is already well known ensures that you will, at minimum, have the interest of the local customer base to encourage trial of the lottery’s version of the game. Once the game is chosen, it is important to stay as true to the original as possible using the exact name, if available for use, to mimic the game play as closely as possible.

The subject of this article is bar games, so let’s look at a couple of examples.

### Montana Lottery Shake-A-Day®

The first example of a successful implementation of a bar game as a lottery product is the Montana Lottery’s Treasure Play Shake-A-Day game (terminal generated

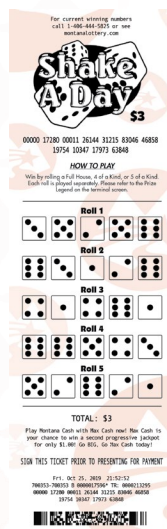
instant game). Shake-A-Day is a game played in nearly every bar and tavern in Montana. Patrons pay \$1 to roll five dice two times with a chance to win the pickle jar jackpot full of money accumulated from unsuccessful players. For most versions, you win by rolling five-of-a-kind for the jackpot, four-of-a-kind for a second-place prize, and a full house for a third-place prize. The game is cultural in Montana and has existed for generations.

The lottery version was designed with the same way to win as the bar version. The lottery game stayed true to the Shake-A-Day game by keeping the name, play style and three prize levels. Matching five-of-a-kind wins the progressive jackpot prize, matching four-of-a-kind wins \$50 and matching a full house wins \$3 or break even for the cost of the ticket. The game is played only on self-service terminals located in licensed lottery retailer bar/tavern locations but has had a great impact on sales for the Montana Lottery.

The first time the game’s jackpot climbed over \$10,000, the Shake-A-Day game outsold scratch tickets across the entire state on the day the jackpot was hit, even when it was only offered in 300 locations on self-service terminals! Shake-A-Day and the other games included in the Montana Lottery’s Treasure Play product offering account for roughly 8% of total lottery sales.

### Ohio Lottery Queen of Hearts

The second example is an EZPLAY® Touch and Win digital game called Queen of Hearts, recently launched by the Ohio Lottery and played on self-service vending terminals. Queen of Hearts is based on an extremely popular game administered by individual bars/taverns as well as veteran and fraternal clubs in Ohio, and also in



other states. The bar game is a traditional raffle where players buy a raffle ticket with a chance to win the ability to select from a standard deck of cards in hopes of picking the queen of hearts from the deck of facedown cards displayed on the board. Once a card is selected it is removed from the board. The excitement grows, along with the jackpot, with each successive weekly raffle drawing until the queen of hearts is drawn.

The more weeks that pass without the queen being revealed, the higher the jackpot grows and the odds of winning increase. The Ohio Lottery game has a match three symbol mechanic to allow the player to select from a deck of digital cards with the goal of selecting the queen of hearts. The player

that selects the queen of hearts wins the progressive jackpot. In the first weeks since the launch of the game, it has become the best-selling game in the product line. Again, we see a trend of best practices. A familiar brand name and a familiar game applied very closely to a lottery game with successful results.

Brand names make a big difference, but only when applied in the right way. Consider local popular bar games when brainstorming your next product launch and then stay the course in following best practices to get your next big success. ■





# Intralot Orion

**The next-generation Sports Betting platform  
for a truly connected player experience.**

INTRALOT presents Orion, its most advanced, feature-rich and versatile Sports Betting platform. A true omni-channel solution designed to empower the modern operator with cost-efficient and fast go-to-market capabilities.

[intralot.com](http://intralot.com)

Certified by WLA for its Responsible Gaming program, INTRALOT is committed to the principles of responsible gaming incorporating them at its best-in-class product solutions and global operations.

**intralot**



# Monitor Games: Racetrax™ is Fun You Can Bet On

In Maryland, Racetrax is a high-performing virtual sports monitor game.



**M**onitor games – like Keno, horse racing and Bingo – now represent 15% of total draw sales in the U.S., ranking third in percentage contribution for the total draw category. That’s actually incredible, when you consider only about half of U.S. lotteries offer monitor games.

But few lottery products can compete with the high-frequency play, win experience and excitement monitor games offer. With frequent and attractive prizes, the games are delivered via fast-action video animation on a digital TV screen. Drawings take place every three to five minutes.

Leslie Badger, VP Lottery Content for Scientific Games, explains, “Monitor games in general are a more compelling value

proposition for many players because you can play and potentially win many times a day with good odds and compelling prizes. You don’t have to wait several hours or even days to find out if you won.”

Monitor games thrive in both retail stores and social establishments, and have helped expand lottery game entertainment into bars and restaurants. In fact, monitor games in bars and restaurants are often the best performing as players have the opportunity to play a game while socializing with friends, eating a meal, or just enjoying a bit of downtime.

The Maryland Lottery has been at the forefront of innovation and growth of monitor games in the global industry for many years. In fact, many of their innovations have been implemented

by other lotteries around the world. The Maryland Lottery has a long list of monitor game industry-firsts that have contributed an additional \$4.6 billion in sales with initiatives like dual multipliers, shorter draw times, graphic refreshes and increased availability of the games.

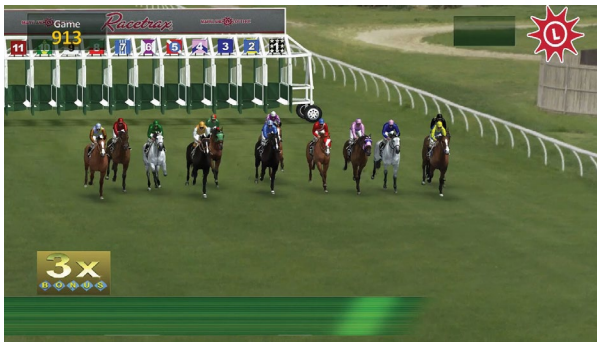
“Monitor games were the catalyst that allowed lotteries to expand into entirely new environments,” says Gordon Medenica, Director of Maryland Lottery and Gaming. “Restaurants realized that offering Keno and Racetrax made perfect sense because those games are so effective at keeping people engaged. And, of course, they quickly became popular with players because they provide instant wins with larger payouts than draw games.”

Although the game itself originated in China more than 3,000 years ago, Keno as a modern-day lottery product was the very first monitor game and it is perennially the highest performing. Launched in 1990, Keno grew in popularity and is now available in 22 states.

Newer to the scene, Racetrax is an exciting virtual sport monitor game featuring horse racing that can help lotteries build draw game sales. Simulating the real life sport of horse racing, Racetrax is a Tabcorp product solely licensed in the U.S. by Scientific Games. In addition to Maryland, Racetrax is also sold by the Kansas Lottery.

But something interesting with Racetrax is taking place in Maryland. While Keno sales have been up 3.4% since April 2019 following the launch of all-new game graphics, Racetrax sales are still very strong, accounting for nearly 75% of the amount





that is sold on Maryland Lottery's Keno game and representing 10% of the Lottery's total sales. Overall, the monitor category accounts for almost a quarter of Maryland Lottery total sales.

Equally interesting, the Lottery's Racetrax game is Scientific Games' highest performing non-Keno monitor game in the U.S., and it even generates more sales than Maryland's base Keno game.

"Racetrax graphics in particular make the typical draw results 'reveal' more immersive for players because it really looks and feels like a real horse race," says Badger. "This is why we categorize Racetrax as a virtual sports product within the monitor game category."

While the Maryland Lottery initially supported Keno with a robust advertising campaign, it has relied largely on word-of-mouth and social media to promote Racetrax.

"The popularity of the Racetrax game with our players has far exceeded expectations," shares Medenica, who has led the Maryland Lottery to become one of the top 10 performing lotteries in the U.S. (total per capita sales). "But the appeal of Racetrax is also similar to the appeal of Pick 3, and not just as a horse racing product."

The Maryland Lottery launched Racetrax in August 2006, and has grown retail sales from \$75 million that first year to over \$200 million in fiscal year 2019. The game experienced only one slightly down year

in fiscal year 2015, which occurred in the midst of one of Maryland's largest casinos opening in Baltimore City.

"We are extremely pleased with the growth Racetrax has experienced," says Medenica.

The excitement of Racetrax is hard to beat, particularly for sports enthusiasts. A different animated horse race is shown on-screen every three-to-four minutes. Twelve horses race against one another, each horse with a unique number and a fixed probability of winning. Some horses are more likely to win than others are, and the prize associated with each horse depends upon its odds of winning. A horse with long odds of winning, for example, will have a higher prize associated with it than a horse with short odds of winning.

Racetrax players can place their bets on multiple races, from one race up to 20 races. Whether a novice or an expert, players can place bets in a number of ways, including:

- **Win or Show** – choose a single horse to "win" (1st place) or "show" (1st, 2nd or 3rd place)
- **Exacta** – choose two horses to finish 1st and 2nd in the exact order
- **Quinella** – choose two horses to finish 1st and 2nd in any order

Using a play slip, or in some cases a mobile device, players select a bet type: the horse or horses for each position required

by the bet type, and their bet amount. The minimum bet is \$1 but can be as high as \$120 depending on the bet type.

For even more action, players can double their base wager for a chance to multiply their prize. The multiplier is drawn before the race and could range from 2x to 10x, with varying odds.

Play excitement aside, monitor games like Racetrax don't exist in a silo within a lottery's product portfolio. There is interplay between instant products and monitor games. In Maryland for example, studies show that 75% of instant game players also play Keno.

"If the relationship between products is not considered, returns to a state's beneficiaries will not be maximized," shares Badger. "As you can see by Maryland's story, monitor games like Racetrax that are a ton of fun to play are earning an important place in the draw product portfolio. To drive growth, and ultimately profits for lottery beneficiaries, our recommendation is to use all of the research available to ensure your draw portfolio is evolving and continues to offer excitement to players."

In Maryland, it looks like the Lottery's bet on Racetrax has more than paid off. ■

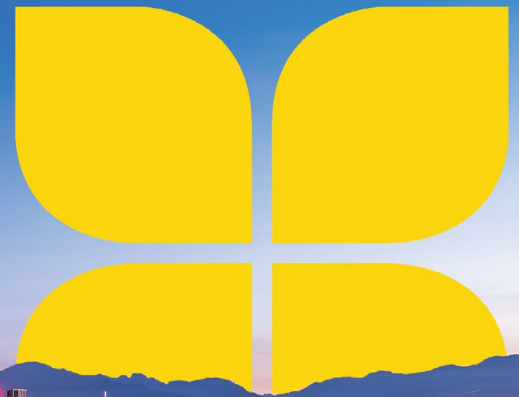
*Racetrax™ Tabcorp International Pty Ltd. Used Under License. All Rights Reserved.*

© 2019 Scientific Games Corporation. All Rights Reserved.



**WORLD LOTTERY  
SUMMIT 2020  
VANCOUVER**

**Save the date:  
OCT 26-30, 2020**



## **2019 CALENDAR**

**December 2019**  
*NCPG/McGill University RG Lottery  
Holiday Campaign*

## **2020 CALENDAR**

**March 2020**  
*NCPG Problem Gambling Awareness  
Month*

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

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

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

**October 26-30, 2020**  
*World Lottery Summit 2020*  
Vancouver, BC  
*Hosted by the British Columbia  
Lottery Corp.*

**December 2020**  
*NCPG/McGill University RG Lottery  
Holiday Campaign*

## **2021 CALENDAR**

**March 2021**  
*NCPG Problem Gambling Awareness  
Month*

**April 26-29, 2021**  
*NASPL Lottery Leadership*  
Hyatt Regency Cleveland Arcade  
Cleveland, OH  
*Hosted by the Ohio Lottery*

**December 2019**  
*NCPG/McGill University RG Lottery Holiday  
Campaign*



# BECOME A NASPL ASSOCIATE MEMBER!

“An Associate Membership is a way for your organization to be ‘at the table’ to hear about the key issues affecting our Industry and how we can better service and grow our industry.”

For More Information Contact:

**Jake Coy**  
Vendor Relations  
jcoy@nasplhq.org  
440.361.7962  
www.naspl.org

# Lottery Insider

[lotteryinsider.com](http://lotteryinsider.com)

The Daily News Service  
Lottery & Gaming Professionals  
Log Onto Everyday



Classifieds • Daily News • Events Calender • Feature Articles • Internet Gaming • Links  
Lottery Guide • Lottery Scams • Multistate Games • Patents • Products • Search  
Statistics • Vendor Directory • Video Lottery • Weekly Editions • Whos Who  
Wireless Gaming • Casino News • Sports Betting

**NASPL Members Covered By Corporate Subscription**

Make Us Your Homepage Today  
[www.lotteryinsider.com](http://www.lotteryinsider.com)

# PARTNER UP



## Scientific Games' Enhanced Partnership

Built on the foundation of our ground-breaking CSP program, *Scientific Games' Enhanced Partnership* touches on every aspect of your instant game business, from product solutions to advanced logistics to retail optimization to digital engagement.

