

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

INSIGHTS

September/October 2019

This is
WINNING!

**2019 PDS
REVIEW**

**ARKANSAS
SCHOLARSHIP
LOTTERY**

**ASSOCIATE
MEMBERS**

**NASPL 2019
AWARDS ENTRIES**

NASPL LITTLE ROCK, AR
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2019 WINNING!



FROM THE NASPL PRESIDENT



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INSIGHTS

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Concord, OH 44077

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NASPL Email:
info@nasplhq.org

Web Sites:
www.naspl.org / www.nasplmatrix.org
P. 440.361.7962
F. 440.867.2327

There's a great scene near the end of the movie "Shawshank Redemption," where one of the characters, Red, is sitting under a huge oak tree in a hayfield reading a note from his friend, Andy Dufresne. The note reads, "If you've come this far, I hope you'll come further." This week, I feel a little bit like Andy Dufresne. If you're reading this article, I hope you're in Little Rock. And I hope you're interested in exploring a little bit further.

Let's cover business first. One of the things we tried to do with this NASPL conference is of course focus on presentations and speakers you may find interesting – but with a little twist. I specifically wanted this conference to have a retailer-heavy flavor. Who better to hear from than our customers?

Here are a few sessions that are of particular interest to me.

On Wednesday, Justin Arnold, from the 84.5° data and marketing firm, will give a presentation on Leveraging Retailer Data to Better Understand Customers, providing a different take on data from the perspective of the retailer.

On Thursday, I am very excited about the retail panel discussion titled Partnering With Retailers for Powerful Results. Representatives from Walmart, Kroger, Circle K and E-Z Mart will give insights into how lotteries can partner with retail chains to achieve the best results.

Finally, we are extremely excited that Walmart has agreed to have a breakout session on Thursday afternoon. The focus of this session will be Onboarding With Walmart. This is especially timely given the huge expansion of lottery in the Supercenters that will be taking place this year.

Obviously, I'm also excited about our keynote speakers as well. Both Elise Mitchell and Ben Mezrich will provide some entertaining and interesting perspectives on success.

What else is there to look forward to? Well, there's plenty to look forward to in Little Rock. Where to start?...

Over the past 10 to 15 years the city has undergone a huge revitalization. We have the Rivermarket entertainment district, SOMA and East Village for activities and shopping within walking or scooter

distance. There are more than 11 craft breweries near the downtown area to try during your stay: Lost 40, Rebel Kettle, Diamond Beer, Vino's, Flyway, Core and many others. There's also Rock Town Distillery, an artisan craft distillery that creates spirits from locally grown corn, wheat and rye. Rock Town has won major international awards for its spirits, including being named the 2015 Micro Whiskey of the Year by Jim Murray's Whisky Bible.

Since you might need some food to keep all that down, you're in luck. We have an incredibly surprising culinary scene growing by leaps and bounds here – just like our waistlines. So very good and yet so very bad! There are too many fantastic award-winning restaurants to list. Just ask anyone for advice if you find a moment to venture out.

If you're interested in history or art, Little Rock has a great deal to offer as well. The downtown area is anchored by the Clinton Presidential Museum. And the history doesn't stop there. There's also the Little Rock Central High School National Historic Site Museum; the Esse Purse Museum (yes, I said purse museum), one of only four in the world examining the history of women through the design and contents of their handbags; the Museum of Discovery in the River Market; the USS Razorback Submarine Museum on the Arkansas River; and the Old State House Museum, right next to the conference location. Sadly, the stunning Arkansas Art Museum is currently being renovated, but Little Rock boasts an ample supply of outdoor sculpture.

But wait, there's more! The Arkansas River Trail provides more than 20 miles of biking and running trails up and down the Arkansas River and is right in front of the host hotel for the conference. Pinnacle Mountain State Park is just west of town too.

I could go on, but you get the point. If you need tips, look for me. I'll be the bald guy sitting under the big oak tree in the hayfield.

Bishop Woosley
Director, Arkansas Scholarship Lottery
NASPL President

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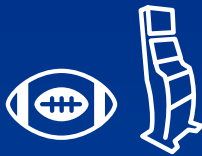
Retail Expansion

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IGT PlayDigital end-to-end
sports betting solution
Rhode Island Lottery



Turnkey Promotions

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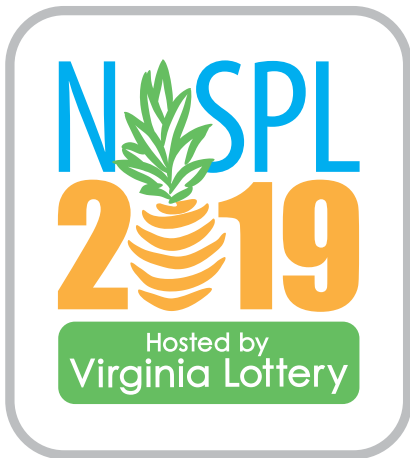
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Top Lottery Executives at the NASPL Annual Directors Meeting

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The NASPL 2019 Directors Meeting took place in historic Williamsburg, Va., in June. Hosted by the Virginia Lottery and its Executive Director Kevin Hall, the meeting included the Vendor Dialogue. At the Dialogue, NASPL's top-level associate members met with the executives in small groups conducive to sharing ideas and innovations.

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UPFRONT >>>>

and Provincial Lotteries (NASPL) in 2017 as the organization's Responsible Gambling Specialist.

"Receiving the Dr. Robert Custer Lifetime Achievement Award was a very humbling and emotional experience for me," said Rugle. "This is really an award for the whole field – for all those seeking recovery who shared their lives and stories with me and from whom I learned so much, for all of my other teachers and mentors, and for a whole family of colleagues who embraced me and continue to help me have a career that has given meaning and purpose to my life and made me a better person both personally and professionally. I am so very grateful for everyone in this field."

"We are thrilled that Lori has received this honor from NCPG," said NASPL Executive Director David Gale. "Her knowledge from a lifetime of service is indispensable to NASPL and she is a great resource for our members on all responsible gambling topics."

This year NCPG presented a total of 18 awards, recognizing the efforts of individuals, non-profit organizations and corporations in the areas of communications (public awareness, website, newsletter, and multi-cultural communications), advocacy, direct service, responsible gambling and corporate social responsibility. Recipients are selected based upon fulfillment of award criteria, efficacy and nomination endorsements.

"The NCPG Conference provides training and information for our diverse stakeholders, supporting our mission of increasing comprehensive resources and education on responsible gambling and problem gambling," said Keith Whyte, Executive Director of NCPG. "The National Problem Gambling Awards Ceremony demonstrates the importance and impact of leadership in recent work within these fields."

NASPL's Lori Rugle Honored With Lifetime Achievement Award From NCPG

At the 33rd National Conference on Gambling Addiction & Responsible Gambling, held in Denver in July by the National Council on Problem Gambling (NCPG), Dr. Lori Rugle was awarded the Dr. Robert Custer Lifetime Achievement Award. The most prestigious award bestowed by NCPG, the Custer is given to an individual for exceptional long-standing achievement in the direct provision of services to problem gamblers and their families. Anyone nominated must have a minimum of 20 years of documented work with direct impact.

Rugle is more than qualified in that regard, having served in clinical roles for more than 30 years, including most recently as the Program Director for the University of Maryland Center of Excellence on Problem Gambling. She still does occasional work for the Center as a Special Projects Coordinator. She joined the North American Association of State

Lottery industry organizations were among the NCPG award winners this year:

Connecticut Lottery
Corporate Newsletter Award

British Columbia Lottery Corp.
Best Website Award (GameSense.com)

IGT Indiana (Hoosier Lottery)
Holiday Lottery Campaign Award

Jackpocket
Annual Best Corporate Social Responsibility Program

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Itchin' to Scratch

The Mississippi Lottery Corp. will begin scratch-off sales before the end of the year.

By Mackenzie Whitacre

While 2019 marks the American lottery industry's 55th anniversary, with the first modern lottery created in New Hampshire in 1964, this year also brings a newcomer to the scene. For the first time since WyoLotto's launch in 2013, there's a new lottery in the U.S., with scratch-off sales in Mississippi set to begin Dec. 1.

After decades of debate, Mississippi lawmakers passed the Alyce G. Clarke Mississippi Lottery Law in the summer of 2018, making it the 46th U.S. state/district to approve a lottery. Neighboring Alabama will now be one of only five states without a lottery.

For the next ten years, funds from the Mississippi Lottery Corp. will help support infrastructure and educational needs, with the first \$80 million in proceeds going toward the state's transportation system. This comes after Governor Phil Bryant declared an emergency following a 2018 federal inspection report, ordering the Mississippi Department of Transportation to close more than 100 unsafe bridges. In all, nearly 500 bridges across Mississippi are inaccessible.

Any additional earnings will go to the state's Education Enhancement Fund.

Industry veteran Thomas Shaheen was selected to serve as the first President of the fledgling lottery. He previously helmed the North Carolina Education Lottery as Executive Director, from



its inception in 2005 until 2010. No stranger to lottery launches, he also worked with the Florida, Texas and Georgia lotteries during their start-up periods. Shaheen has also served as Chief Executive Officer of the New Mexico Lottery.

Shaheen and the rest of the MLC crew are jumping in with both feet, preparing for operations to begin before the end of the year. In June, the Lottery issued requests for companies to submit proposals for both the creation of a lottery gaming system and instant ticket services. And in July, the organization announced employment opportunities for a variety of positions, from procurement to sales to player services. They began seeking advertising and marketing services as well.

"Mississippians are ready," said Shaheen. "We are looking forward to providing them the opportunity to play lottery games for the first time in Mississippi, while focusing on our

mission – assisting with infrastructure and educational needs."

The MLC will kick off with scratch games, which will be primarily sold in convenience stores, gas stations, grocery stores and supermarkets. Licensed casinos in the state will also be eligible for sales. Retailer applications are being accepted at this time.

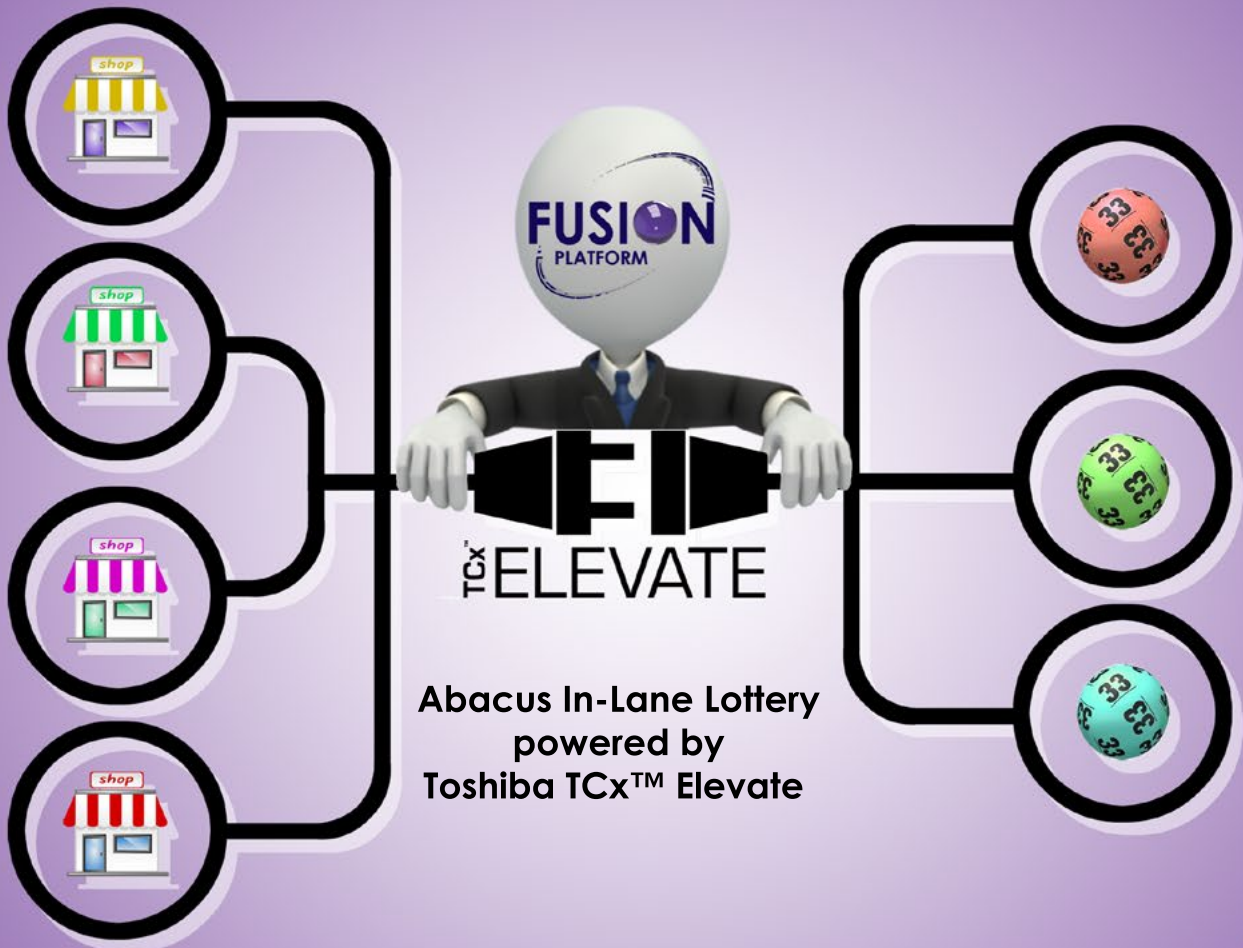
More exciting news for players in the Magnolia State: The Mississippi Lottery will soon introduce Powerball and Mega Millions games as well. Sales for both games are expected to begin in the first quarter of 2020.

"The anticipation is extremely high for both of these games in Mississippi," said Shaheen. "We receive calls every day wanting to know when Powerball and Mega Millions will go on sale."

Shaheen will join both the MUSL Board of Directors and the Powerball Product Group as a voting member when multistate game sales begin. ■



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*Source: RBR London, June 2018. RBR defines Grocery to include Supermarkets, Hypermarkets, Convenience Stores, and Drug Stores.

New Gambling, New Guidelines

State and provincial lotteries provide exciting entertainment options for their citizens, while the profits generated provide necessary funding for infrastructure, job creation, education and other great beneficiary programs. However, while most adults gamble responsibly without experiencing gambling-related problems, the lottery industry recognizes that gambling can be done to excess and cause harm to players and their families.

In 2014, in collaboration with the National Council on Problem Gambling and the North Carolina Education Lottery, NASPL worked to create comprehensive responsible gambling (RG) training materials for both lottery employees and retailers; the group effort culminated in the release of specialized training videos to be shared among the membership. From then on, NASPL has continued to grow and evolve its RG efforts and related training components to better serve the evolving industry.

On May 18, 2018, the U.S. Supreme Court overturned the Professional and Amateur Sports Protection Act, opening the floodgates for sports betting. A little over a year later, ten states are already operating legal, state-regulated sports betting. Several others have passed legislation and are pending launch. In light of these changes sweeping the nation, NASPL has updated its Guidelines for Responsible Gambling to include RG protocols specific to sports betting, as follows:

Sports Betting Guidelines for Responsible Gambling

With the recent Supreme Court decision in which the Court ruled that states have the right to regulate sports betting within their borders, many states stand ready to expand legalized gambling in their jurisdictions. NASPL, through its Guidelines for Responsible Gambling, promotes actions to minimize the potential harms that can be associated with gambling and believes such actions are an essential part of corporate social responsibility for its members. While the majority of adults can participate in gambling activities in a responsible manner without experiencing any difficulties related to their gambling, according to problem gambling experts approximately 1 to 2% of adults (2.5 to 5 million) are not able to control the urge to gamble, resulting in serious negative consequences across all aspects of their lives. Any expansion of gambling activities should clearly specify the inclusion of specific Responsible Gambling practices.

Legalizing sports betting will increase the availability and acceptability of this form of wagering and lead to more people participating in sports gambling. It will also increase the capacity of state gambling regulators and of the gambling industry to implement responsible gambling

practices. NASPL encourages the application of the NASPL Guidelines for Responsible Gambling to sports gambling programs in all jurisdictions. The NASPL guidelines are consistent with those established by the National Council on Problem Gambling.

NASPL encourages sports betting operators to implement responsible gambling programs that include the following:

- Comprehensive employee and retailer responsible gambling training.
- Harm minimization strategies including self-exclusion, ability to set limits on money spent betting, and specific requirements for the inclusion of help/prevention messages in external marketing.
- Adherence to responsible gambling advertising standards for sports gambling.
- Adherence to responsible gambling standards in the development of sports gambling programs.
- Effective policies and procedures to prohibit underage sports betting.
- Governance or independent oversight, if and when possible, to help enforce the regulations and requirements that have been enacted.
- Inclusion of stakeholders in the treatment, prevention and advocacy communities when and where possible, in development of advertising, marketing and channel expansion initiatives to assure that responsible gambling and harm mitigation perspectives are considered.
- Collaboration with stakeholders, when possible, in the respective jurisdiction to research the impacts of gambling expansion and/or new gambling introductions.
- Evaluations of public awareness, prevention and responsible gambling initiatives to establish effective and evidence-based programs.
- The establishment of a consistent minimum age for sports gambling and related fantasy games.



For more resources – including the complete NASPL Guidelines for Responsible Gambling, RG Toolkit, employee and retailer training, advertising examples and more – check out the NASPL Matrix.

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Making A Difference



Ryan Koppy

Sales and Marketing Manager

North Dakota Lottery

If you ever wanted to get a taste of virtually every part of a lottery's operation, spend some time with a very small lottery. Not only do you develop fast friendships throughout the organization, but you learn how to do just about everything. Just ask Ryan Koppy, Sales and Marketing Manager of the North Dakota Lottery, who has been happy to serve the citizens of North Dakota for almost nine years.

"Ryan is a valued team member and has proven to be a significant asset to the Lottery," said Director Randy Miller. "He has a demanding workload that calls for him to be under constant pressure with time critical duties and responsibilities. Yet he continues to demonstrate excellent work performance attributes day in and day out."

Koppy joined the Lottery in October 2010 as a Customer Service Specialist after beginning his professional career in private industry, working for Aaron's Sales and Lease, first as Sales Manager and then as General Manager. A friend had raved about working for the State of North Dakota, so Koppy thought about a career change. Although he didn't get the job he first applied for in 2010 – Sales and Marketing Manager – that position did open up again about 18 months after he started in customer service. "This time I got the job," he



explained. "I have been here ever since and love what I do!"

He has a lot to love, as the list of things Koppy is responsible for is extensive. A few highlights include developing, implementing and analyzing marketing strategies and campaigns; creating retailer newsletters and helping retailers improve sales; managing the Lottery's Players Club, website and social media presence; and fielding inquiries from the public, players, media and government stakeholders. On top of that, like most people who work for a small lottery, he assists with other day-to-day operations as necessary, from customer service and office coverage to validating tickets and writing checks.

"Cross-training is a necessity here," explained Koppy. "Everybody has their hands in a lot of things in order to fill in when someone is out."

With the Lottery under the banner of the North Dakota Office of Attorney General and its 13 divisions, Koppy is also sometimes called upon to create graphics, banners and posters for divisions like the Fire Marshal, Crime Lab and Consumer Protection and Antitrust.

It can all be stressful at times, but he works well under pressure. "I kind of look forward to it. There's always something new coming up!" He especially enjoys hearing stories from winners about what they are going to do with the money, or from players on social media who imagine the possibilities if they actually did win. "It's great being part of all that fun."

Koppy has a bachelor of business administration, with a major in marketing, from the University of North Dakota in Grand Forks. He spends his spare time with his wife Christan and two young daughters. "They love the outdoors, and are very talented young artists as well." An avid Detroit Red Wings fan, Koppy also loves playing hockey himself as a member of a local men's hockey league. He is also the 2007 North Dakota Disc Golf State Championships Intermediate Division Champion and enjoys throwing whenever he gets a chance.

Making A Difference: Ryan Koppy

What are the biggest challenges working for a lottery with only multi-state draw games?

I have always been a big proponent of the ACURA Customer Relationship model – Acquire, Cross-Sell, Up-Sell, Retain, Advocacy. The biggest challenge with only multistate draw games is retention. How do we retain players to keep them entertained, excited and coming back when jackpots are low and with a limited product portfolio? We are always on the lookout for new draw games to add but the options have been limited. Research has shown what players want is a game that is easy to play and easy to win. Without being able to add games on a consistent basis, like most lotteries can with instant games, we are always needing to be creative in maintaining excitement with players, even when the big wins are scarce.

An additional challenge is advocacy. We really run into this with winner anonymity. Player security has always been a top priority since the inception of the ND Lottery and the option for players to remain anonymous perpetuates this. But from a marketing standpoint, it's difficult to really promote excitement behind a big win with "Anonymous from" and no name or face to the win. That being said, many of our \$1,000,000+ anonymous winner awareness campaigns do flourish because people know, "Wow, if I won big, I could keep it to myself and no one would know!"



Without instant tickets we have to use other means to maintain a visual lottery presence at retail. It's all about providing good point of sale materials. We use 22x28 posters in permanently-placed holders, and we rely heavily on our retail LCD monitors, working hard to make the content very animated and eye-catching, updating the graphics to keep them fresh. Jackpot alert signs also help, since we are so dependent on jackpot runs. During promotions, we use specific strip signs and wobblers at retail. We don't use those in a non-promotional period, so when people see them, they know the Lottery is doing something special, and that helps get their attention.

Is there any advice you have for other lotteries who might spend most of their time and effort with instant games?

Give players what they want – to win! We design many of our instant win promotions around getting as many players, as our marketing budget allows, to win during the promotion.

The more times players hear "instant winner!" from the lottery terminals, the more excitement the promotion creates, and in the end more sales. We also focus our promotions on the games that "give back" to players in the form of wins on draw night. Lucky for Life and 2by2 are those types of games. Lucky for Life has an additional prize tier (Match 2+0) that most games do not offer, while 2by2 has the best odds to win any prize and great jackpot odds. Nothing feels better to a player than to win and these games have that feeling. I have always felt that 2by2 is the perfect entry-level game for new players and an easy to play/easy to win game for experienced players.

Not only are these two games great for standalone promotions, but they are excellent for cross-sell opportunities. We'll do cross-sell promotions with our big jackpot games (Powerball and Mega Millions), offering a free 2by2 or Lucky for Life ticket with a qualifying Powerball or Mega Millions purchase. It gets these smaller games' tickets into the hands

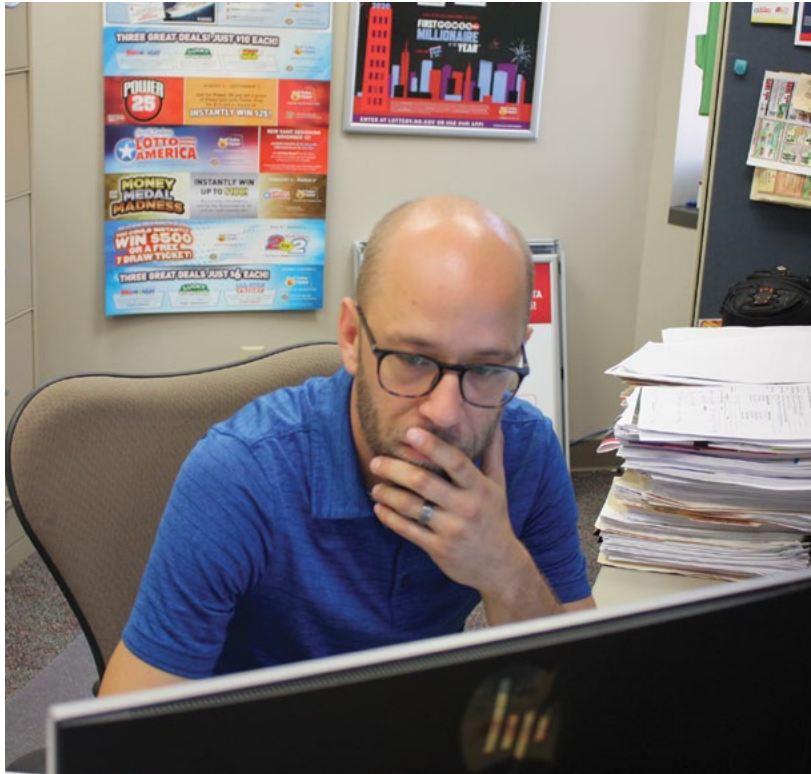
Lottery doesn't always make it on the shopping list



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.



Making A Difference: Ryan Koppy



of die-hard, big jackpot game players. If they win with that free ticket, it may entice them to try it again but with a larger purchase. After every promotion, we track residual sales for six weeks. Our goal is to retain a 10% increase in sales over the six weeks. Most times we hit that goal, or at a minimum we maintain a 5% increase, with the instant win promotions.

North Dakota is one of a growing number of lotteries with online sales. Has your relationship with retailers changed any because of that?

Not at all. We have only had a few retailers raise concerns with Pick & Click online play. We remind retailers that Pick & Click is an additional avenue for players to get their tickets and not a replacement for retailers. Pick & Click (formerly known as Subscriptions) offers players the option to purchase draws for a longer period of time, up to one year, which cannot be done at retail due to the draw limits there. In addition to this, Pick & Click can be utilized by players who don't want to miss a draw but tend to forget to buy a ticket, or who lose track of time on draw nights. Pick & Click also offers players the option to pick their favorite lottery retailer. When this option is selected, the chosen retailer still earns their 5% sales commission on the Pick & Click purchase, even though the purchase was made online and not in store. We do promote Pick

& Click at retail, but on a limited basis. We will add a slide or two on the LCD screens located in all ND Lottery retail locations, mainly as a reminder that the Pick & Click option is available; most Pick & Click campaigns are entirely digital.

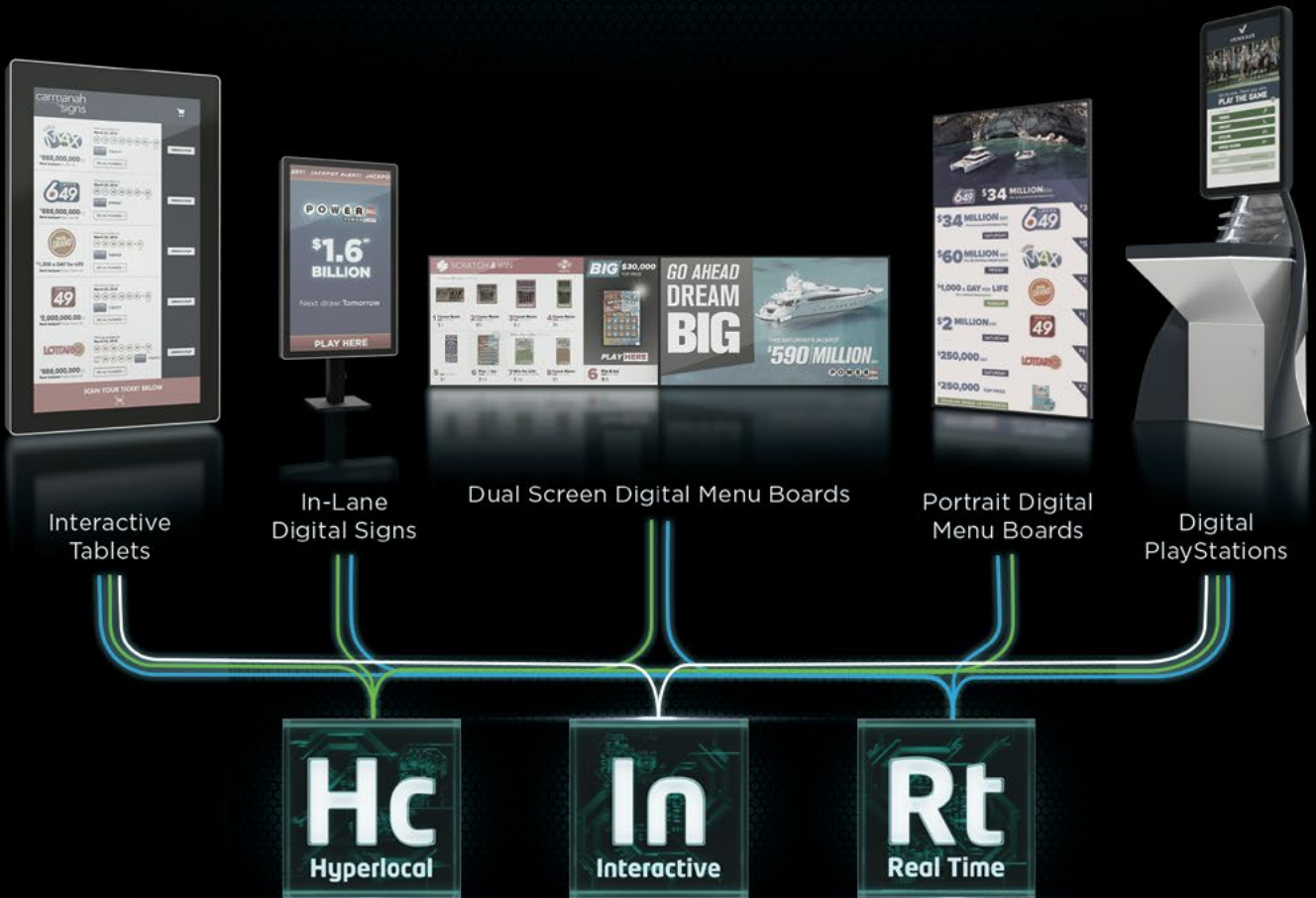
What stands out in your lottery career to date?

What I consider to be my biggest accomplishment has also provided the most fun – our 7-Draw Instant Win promotion for 2by2. We've run this promotion every fiscal year since 2011 and every year it sets 2by2 sales records. It has been basically the same promotion for seven of the eight iterations (2012 being the exception) and it has yet to plateau in sales. We only make small tweaks in POS design and media buys from year to year. It is the one promotion that is immune to time of year; no matter when it is run, sales have always increased significantly when compared to the previous year's promotional period. Better still, it usually sees an increase in residual sales of 8% to 10% for at least six weeks; once, the 10% sales lift continued for nearly 12 weeks after the promotion ended.

A distinct memorable project was a last minute request from the Attorney General. I was asked to create some visual aids for an upcoming news conference. Typically I can print, cut and mount from our in-office plotter, but ours had gone down two days prior. A new one was on order but wouldn't be delivered for a few weeks. We had to outsource the printing and mounting, which had cut down on how much time I had to create the posters. One of the chart images I was given (a graphical chart map of the United States) was a very low resolution image that could not be increased in size. A better resolution file could not be found on short notice, so I had to recreate the entire chart from scratch. I have some Photoshop and Illustrator background, but am not a graphic artist by any means. Working the wee hours, I was able to recreate the chart image in time and it turned out great! ■

Digital Retail Transformation

The Elements of Change



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STRATACACHE

Propelling the Illinois Lottery Forward With Data-Driven Solutions

By Andrew Lang, VP Insights for Camelot Illinois

Camelot Illinois began managing the Illinois Lottery in January 2018 with the goal of establishing a strong foundation for long-term sustainable growth and building the Lottery's reputation as a champion for the people of Illinois.

Given the state's political climate, a public skeptical of local politics, and the lingering impact of the Lottery's inability to pay large prizes back in 2015 due to the state's budget impasse, positioning the Lottery as an authentic champion for the people of Illinois is critical for the Lottery's ongoing success, as is broadening participation.

Understanding the consumer dynamics facing the Lottery was always going to be crucial to repairing brand connection and building its player base. Implementation of consumer-first, data-driven solutions and insights form the foundation for building a modern lottery in Illinois that appeals to a broader base of players and delivers greater returns to the Common School Fund and other good causes.

Understanding Illinois Lottery Consumers

Brand Health Tracking

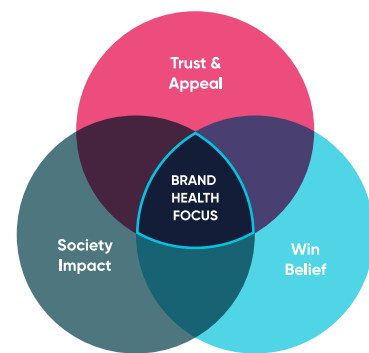
By initiating a continuous dual brand and campaign tracking study, the Illinois Lottery is able to capture a regular "pulse" of the brand's health and equity.

Purpose: Establish a brand equity benchmark and set targets for improvement.

- Identify the brand qualities (i.e. consumer perception defining general brand sentiment to the public) that are most important to prioritize for long-term improvement.
- Monitor lottery participation levels and the performance of marketing campaigns.

Approach: In partnership with an independent market research agency, 200 unique online survey interviews are collected each week, across a representative audience of Illinois residents. The representative audience is reflective of the United States Census Bureau demographics for Illinois. Additionally, respondents must be over the age of 18 and current Illinois residents.

Discovery: The brand equity benchmark established in year one was relatively low, but stable. The research indicated that in order to improve participation



and brand connection, the Lottery needs to focus on improving three areas of consumer sentiment:

- Trust in the lottery
- The Lottery's impact on society
- Lottery "win belief"

Next steps: The Illinois Lottery is set to launch a new master brand campaign later this year. These three areas of sentiment form the foundation for the master brand and will be embedded in portfolio positioning. Ongoing brand health tracking will demonstrate the impact of the campaign on brand equity.

Foundational Research

A needs-based segmentation study was conducted to further understand Illinois' diverse population and the potential for the lottery to break into more consumers' routines.

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Purpose: Frame Illinois residents into actionable consumer profiles to prioritize who the Illinois Lottery is speaking to (i.e., audience targeting) and how it's reaching them (i.e., marketing content and placement).

Approach: Quantitative survey of 2,000 Illinois residents, age 18+, not opposed to playing the lottery, and reflective of the state's demographics. Segments of players were then established from the respondents' attitudinal statements about games of chance, consumer behaviors and demographics. This needs-based segmentation diagnosis was intended to uncover consumer needs and create opportunities for the lottery to fulfill.

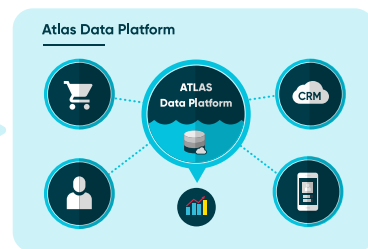
Discovery: In Illinois, the addressable market (age 18+, not opposed to playing the lottery) is quite large and fairly dispersed across consumer segments, indicating a rich opportunity for growth. Six unique consumer segments emerged and were prioritized based on the most actionable areas to drive business performance, measured by a segment's economic potential and capturability. While five of the six segments presented an opportunity to grow the Illinois Lottery to varying degrees, three segments presented the biggest opportunity score – "Entertainment Explorers," "Mobile Socializers," and "Satisfied Dabblers."

Next steps: In the current financial year, these three segments will be prioritized based on the opportunities to grow participation through:



- ECONOMIC POTENTIAL**
What's the segment truly worth?
- Size of consumer segment
 - Illinois Lottery participation levels
 - Openness to spend more on lottery
 - Purchasing lottery tickets as gifts
 - Frequency of engaging in other competitive games of chance
 - Future spend on competitive activities
 - Income and age

- CAPTURABILITY**
What segment is currently open to / aligned with the Illinois Lottery?
- Brand connection
 - Lottery games ever purchased
 - Excited emotion felt from the lottery
 - Lottery ticket purchase location (online vs. brick and mortar stores)
 - Lottery specific perceptions
 - Digital media presence



- Expanding the core through Entertainment Explorers.
- New growth opportunity through Mobile Socializers.
- Seasonal product specific opportunities through Satisfied Dabblers.

This will be evident through the Illinois Lottery's marketing and media buying schedule, which will transition from a mass market approach to be more tailored and strategic with creative briefs and media buying specifically for these segments.

Data Driving Performance

The lottery industry has its challenges when it comes to accessing data. Typically access to information is highly compartmentalized based on either a lottery's organizational structure or its systems. A little bit of information comes from printers, some from systems providers and some from web-hosting and marketing companies. The burden is then on the lottery to try and look at these pieces of information and connect the dots. More often than not, a lottery can find itself somewhat flying blind.

Camelot's Atlas Data Platform collects and collates all data sources from across the lottery ecosystem into a "one-stop-shop," from which the Lottery is able to build models and test what is really important in order to make incremental improvements across the business.

Regular Business Critical Reporting

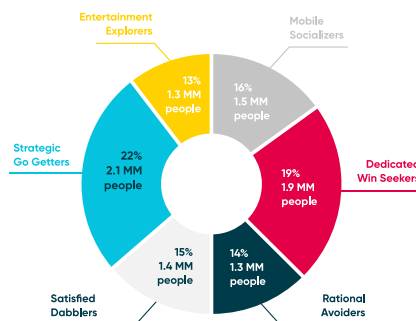
All data sources from across the business – including retail, player, web and app and CRM – are captured in real time. From this, easy-to-access business reports are generated upon which informed, actionable business decisions can be made. These include:

- A weekly trading summary, which is automatically generated and sent to

Consumer Segments

12.8M | **TOTAL POPULATION OF ILLINOIS**
PEOPLE

9.6M | **ADDRESSABLE MARKET**
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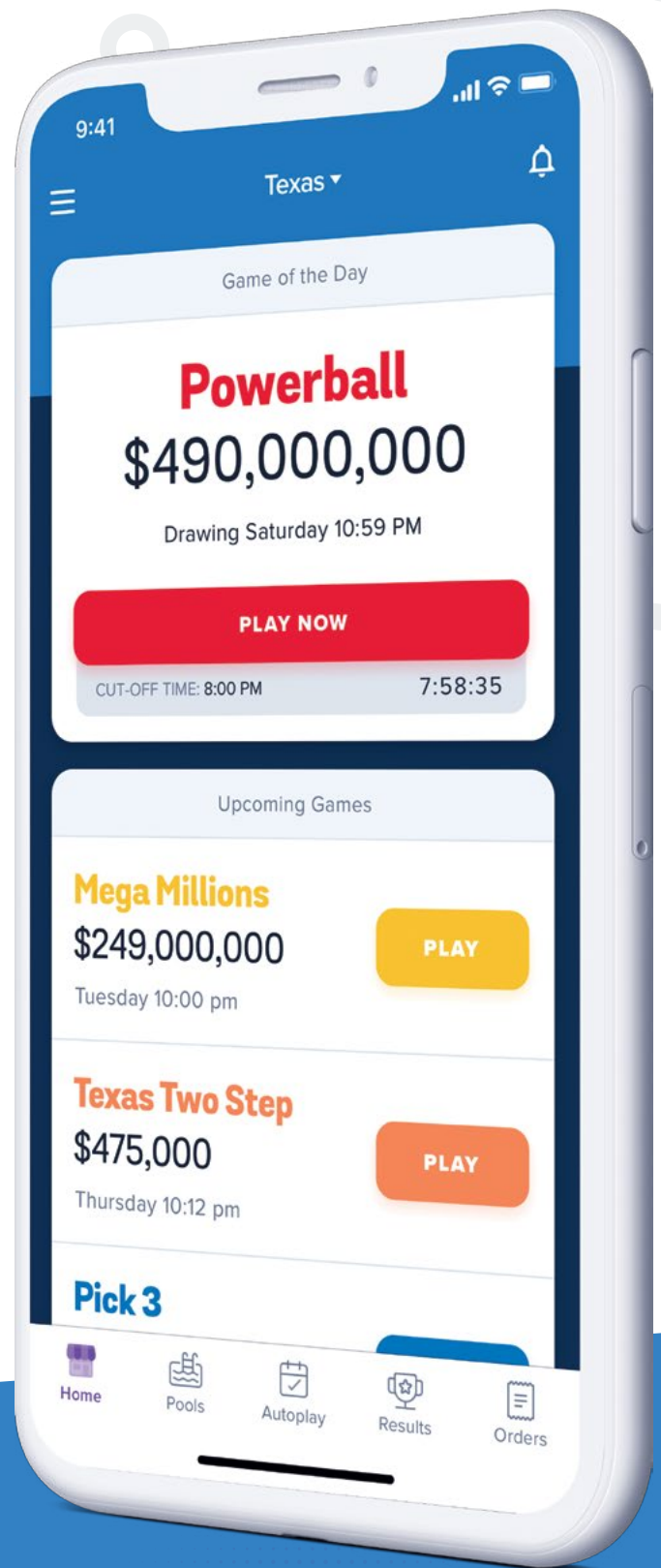
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all business leaders at the beginning of the sales week. This report gives an accurate picture of overall business performance, by channel, region and product, against budget and against the previous week/month/year and year-to-date.

- A daily sales summary, which is automatically generated and arrives in inboxes every morning, detailing the performance of the business from the day before. This provides a snapshot view with all sales data from across all channels in one place, marked against the same day during the previous week, month, and variance against budget and includes major jackpot tracking (e.g. Mega Millions, Powerball and Lotto).
- A real-time portal that provides a live data view and is automatically updated every five seconds. The customizable portal tracks headline sales figures for retail and digital channels and shows sales totals tracked against the same day in the previous week.

Optimizing Marketing Spend

Generating maximum impact from scarce marketing dollars is always a priority for the Lottery. The Atlas Data Platform combines detailed information about how and where the Lottery's consumer-facing dollars have been spent



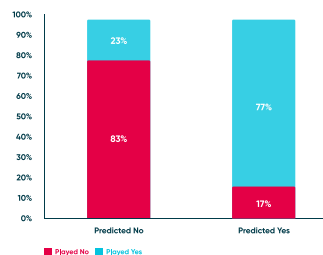
with an in-house econometric model to determine which channels deliver the greatest marketing ROI.

Improving Instant Ticket Availability

With a network of over 2,700 vending machines, ensuring instant tickets are in stock and available for sale is vital. The Atlas Data Platform connects multiple reports from a variety of vendors to provide a complete view of instant ticket stock at a bin and pack level. This analysis creates a priority list, identifying stores where addressing the number of out of stock bins will have the biggest impact. This enables the Lottery's sales representatives to operate efficiently and effectively to improve sales and profitability of their retailers.

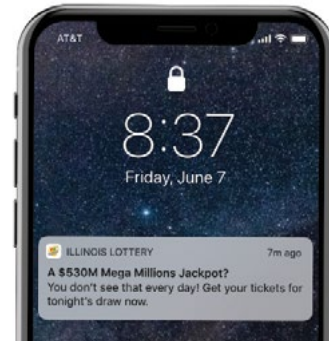
Predictive Modeling

The Illinois Lottery is able to trade the draw in real time by predicting and driving player behavior through modeling in the Atlas Data Platform. For example, players can be scored on a propensity to participate in a given draw, at a given jackpot size. This information is fed into each player's profile and updated in real time to ensure the Lottery is delivering the right message at the right time to different player segments.



Trading the Draw in Real Time

Direct marketing campaigns, including app push campaigns and direct customer emails, are a low cost and highly effective way to drive draw participation. However, they need to be used effectively to avoid annoying players, which could lead them to switch off this important communication channel. Using real-



time data feeds, the Lottery removes players who have already purchased tickets for an upcoming draw from each communication about that draw. This approach was used to good effect for the \$530 million (advertised) Mega Millions draw on June 7, 2019, where a push campaign ran twice during the day triggering only players not already in the draw to act. By removing players who had already bought their tickets, the Illinois Lottery was able to generate an uplift in sales and incremental revenue, when compared against a control group who did not receive any communication.

In Summary

A deep understanding of the consumer is vital to engaging players, growing sales and increasing proceeds to the state. The Illinois Lottery understands that players use multiple channels and devices to find information and purchase tickets, and they need to be communicated with in a relevant, personalized and timely manner. Analyzing available data to make informed decisions will lead to sustainable, responsible growth in lottery profits for the State of Illinois. ■



Andrew Lang, VP Insights, Camelot Illinois

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Responsible Gambling



Lori Rugle, Responsible Gambling Specialist, NASPL

Stigma, Shame and the Importance of Language

“Words are important. If you want to care for something, you call it a ‘flower’; if you want to kill something, you call it a ‘weed.’”

- Don Coyhis, Founder White Bison and Wellbriety Movement

We all know the children’s comeback to name calling: “Sticks and stones can break my bones, but words can never hurt me.” I am sure back in the mists of time some very well-meaning parent, trying to comfort their child who had encountered being bullied, shamed and name called, came up with this saying. I think we all know, however, that words can be horribly hurtful and heartbreaking. Beyond just the personal impact of words, language also has a broader impact on public attitudes, public health and public policies.

I recently presented on this topic at the National Council on Problem Gambling’s 33rd Annual Conference. While I have been advocating for using non-stigmatizing language in the field of problem and responsible gambling for several years, the real impetus for this presentation occurred

a year earlier at another problem gambling conference. I was sitting in a pre-conference workshop alongside a dear friend, colleague and person in long term recovery. The topic was on helping families living with problem gambling. The presenters consistently talked in terms of “the gambler”: “the gambler’s” harmful impact on their family, how to cope with “the gambler,” what to do about “the gambler’s” lying.

You get the picture – or maybe you don’t. About halfway through the presentation, my friend, and person in recovery from a gambling disorder, leaned over and whispered to me, “If they say ‘the gambler’ once more, I may scream and run out of the room.” I too had been feeling increasingly uncomfortable with the use of this term. It felt like sandpaper rubbing on my skin and clearly did to my friend as well. This certainly isn’t trying to fault the presenters. In fact, most presenters on the topic of problem/responsible

gambling use this label/terminology. It is much more the rule rather than the exception in presentations, publications, research articles, the media, etc.

“I don’t get it, what’s the big deal?” you may be thinking. Indeed, that is generally the response I get from most people – advocates, expert presenters, researchers and even those in recovery. Not too long ago, I had a conversation with a psychologist who often presents on gambling disorder. I suggested that he modify his language from talking about “gamblers” to using “individuals who have a gambling disorder.” His response was, “That’s too much. Can’t I just say at the beginning of the presentation that when I say “gambler” I mean a person with a gambling disorder?” My answer was an emphatic, “No! So you have to say a few more words. It is worth it not to contribute to the stigma and suffering that those in recovery have to contend with.”

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Labels Matter

The importance of this type of labeling has been highlighted by other (mental health, substance use disorder, physical disability) advocates for many years. Michael Botticelli, former director of the Office of National Drug Control Policy (ONDCP), points to substance use disorder research that demonstrates how the judgement of even trained clinicians is affected by minor changes in language.

One 2010 study by J.F. Kelly and C.M. Westerhoff found that clinicians were more likely to assign blame and punishment to a client described as a substance abuser than if that client were described as having a substance use disorder. A 2013 study looking at the impact of labels for a person with a gambling disorder, by J. Horch and D. Hodgins, found that using the labels “problem gambler” or “gambling addict” generated more negative descriptions.

However, even the researchers were surprised that simply using the word “gambler” was not a neutral label. The label “gambler,” though somewhat less than the other two labels, still was significantly associated with descriptors of violent, antisocial, impulsive, risk-taking, compulsive and irrational. Studies have also found that disordered gambling, as is also found with substance use disorders, is more likely to be attributed to “bad character” than other health conditions.

The language we use not only reflects our belief system, but also contributes to the creation of our belief system in ways we may not even be fully aware. In the study of clinicians’ responses to the use of substance abuser versus a person with a substance use disorder, I am sure the clinicians would not have considered that they had any bias towards clients with substance use problems, no matter how they were described. However, discussing the impact of language and labels is not just a conversation about what is politically correct or polite terminology. Words have impact on the clinical care given and how

medical professionals and policy makers actually view and treat individuals with gambling disorder.

Labels such as problem gambler or gambling addict put the focus on the whole person. When I describe someone as a “gambler” or “problem gambler,” I am implying that this is the whole of who they are. That the person is the problem and that they are defined by the worst things they have done in their life. However, the behavior – excessive gambling with harmful consequences – is the issue on which we need to focus. Our language needs to emphasize that we are talking about multidimensional people who have problems with the behavior of gambling. We are talking about people who have problems, not people who are a problem.

People with stigmatized disorders such as gambling disorder internalize negative perceptions and stereotypes.

We are talking about people who have problems, not people who are a problem.

Such self-stigma can lead to a profound sense of shame, isolation and loneliness. Such self-stigma then only exacerbates the disorder and can even contribute to the high suicide rate among those experiencing a gambling disorder. Additionally, self-stigma can also delay seeking help or avoiding help all together.

Even the language of responsible gambling has been reported to contribute to stigma. In a series of studies using focus groups of individuals who gamble (including those who had experienced problems with gambling), H.E. Miller, S.L. Thomas and P. Robinson concluded in a 2018 report that the language used by governments and the gambling industry around responsible gambling contributed to negative stereotypes of people experiencing gambling problems as “irresponsible” and “undisciplined.”

Participants in the study felt that responsible gambling language focused on individuals making irresponsible choices rather than individuals having

a recognized and recoverable disorder. They also felt there could be more attention to the addictive nature of some gambling products (particularly electronic gambling machines) rather than on personal decision making.

Additionally, to the extent that responsible gambling discussions emphasize individual responsibility, they are likely to create norms that are impossible to attain for those who have a gambling disorder, leading to feelings of moral failure, self-blame, shame and stigma. Programs created by the British Columbia Lottery Corp. and the Ontario Lottery and Gaming Corp. address this by changing the language of their responsible gambling conversation to the more proactive and positive-framing brands of GameSense and PlaySmart, respectively.

In other areas of health care and behavioral health care, consumers’

right to influence the language used to describe conditions and their inclusion in the development of health services and government policy has been considered important. The National Alliance on Mental Illness’ key phrase

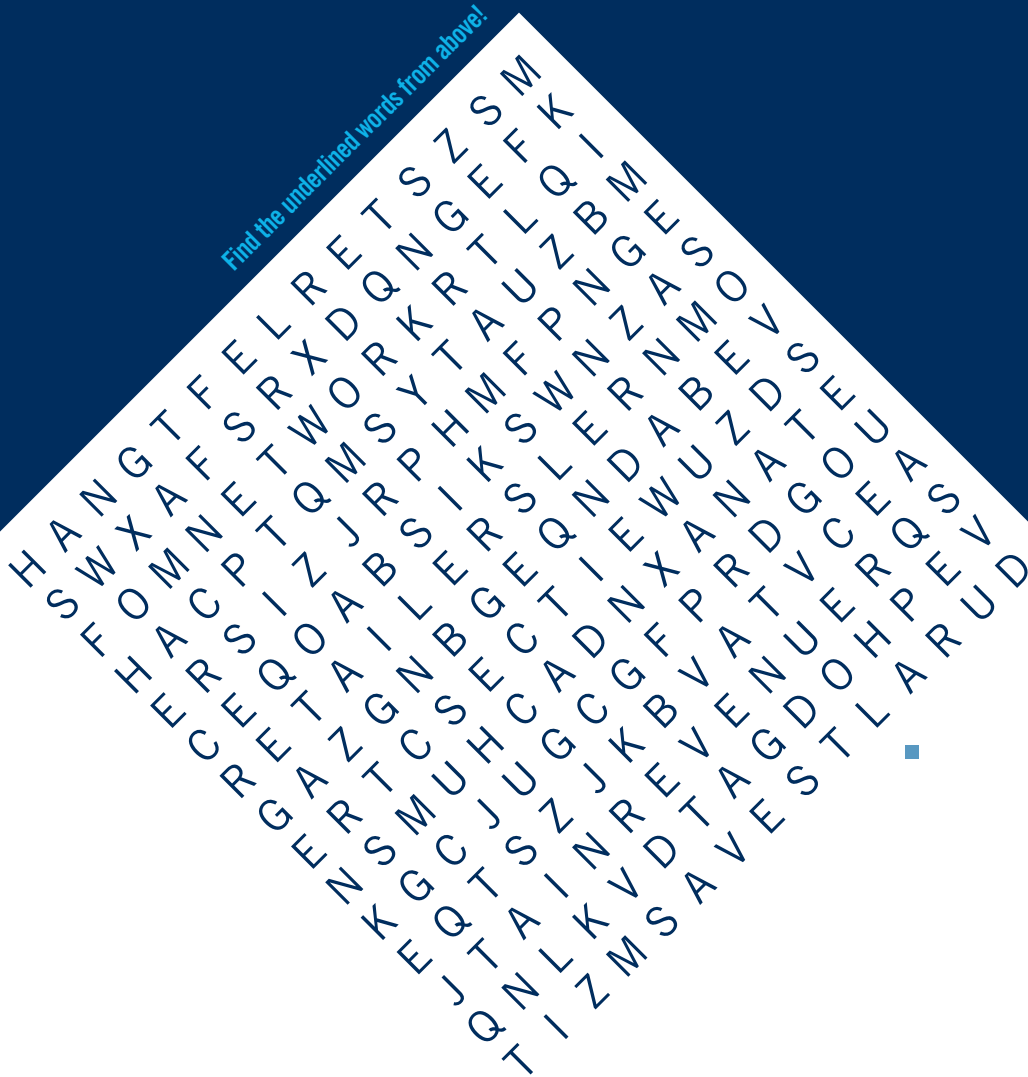
“Not about us, without us,” says it all. However, limited attention has been given to consumer perspectives in gambling. Indeed, including the voice of consumers impacted by a gambling disorder has been specifically rejected by consumer groups addressing substance use disorders, such as Faces and Voices of Recovery. It is therefore particularly important that lotteries and others in the gambling industry join with stakeholders in the field of problem and responsible gambling to address issues of language and stigma.

Language Recommendations

The recommendations listed below are modified from the guidelines recently created by the National Council on Problem Gambling, modeled on the ONDCP guidance to all federal agencies in the use of clinically appropriate language for substance use disorders and the Associated Press Stylebook guidelines to the media.

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.



1. When discussing an individual with a gambling disorder, use language that puts the person first and the disease second.

Describe the individual as a person who is experiencing/recovering from a gambling disorder or a gambling problem rather than as a problem, addicted, pathological or disordered gambler (or even simply as a gambler). Understand that someone in treatment/recovery is a person with a health condition. This terminology clearly demonstrates that the disease is a secondary attribute and not the primary characteristic of the individual's identity.

2. Avoid using stigmatizing terms and images for both a person with a gambling disorder and for anyone in a relationship with a person with a gambling disorder.

Whether in news stories or even in responsible gambling PSAs, avoid images, scenarios or descriptions of a person with a gambling disorder that only emphasize the negative consequences of their gambling such as lying, stealing and anti-social behavior, or that label those with a gambling disorder as liars, cheats, con-artists, manipulators, etc. Avoid using sensational stories and examples in public awareness efforts. The stories of individuals who have lost or stolen hundreds of thousands of dollars are the extreme and may contribute to stigmatizing this disorder or make it difficult to relate to.

Alternatively, recognize that the use of humor can be stigmatizing as well. Do not use humor in discussions, marketing or advertising for public awareness of problem gambling/responsible gambling that might diminish the impact of this disorder or make light of the pain of those who experience a gambling disorder.

For those who are in a relationship with a person with a gambling disorder, rather than using stigmatizing terms such as "co-dependent" or "enabling," talk about a person who cares about or is in a relationship with a person with a gambling disorder and state that loved ones can unintentionally reinforce gambling behavior.

Rather than talking about a relapse, refer to the recurrence of the disorder.

Use language, stories and images that are honest and relatable, and that humanize and personalize gambling disorder.

3. Share the solutions that exist.

Emphasize recovery stories showing that recovery is possible and attainable. Present examples of the quality of life that is achieved by those in recovery from a gambling disorder and the benefits of recovery to individuals, families, employers and communities.

6. Support and communicate information about multiple pathways to recovery.

Everyone's path to recovery will look different, and that's ok! Support efforts to develop a comprehensive range of problem gambling recovery resources, including harm reduction as well as abstinence-based options.

7. Emphasize an evidence-based and global view.

Illuminate gambling disorder as a chronic disease, not as an acute condition. Gambling disorder is recognized as a brain disease, not occurring as a result of "bad character" or moral failing. As such, recovery from a gambling disorder can be supported by access to continuing care and recovery resources.

8. Include consumers in recovery from a gambling disorder and family members as stakeholders in policy, program and product development and implementation.

One of the most significant ways to reduce stigma and assure the use of non-stigmatizing language is to include those in recovery from a gambling disorder and other stakeholders in decision and policy making processes. It is essential to have these groups and individuals as part of our advocacy, policy and program conversations to make sure we are not perpetuating stereotypes of making decisions based on implicit or explicit biases. ■

Resources for Recovery:

Lanie's Hope

*Glenn's Gamble:
A Marine's Battle for
Gambling Addiction
Recovery*

*Voices of Problem
Gambling Recovery*

4. Provide details of these solutions and information on resources for help.

Provide information and stories of how treatment and self-help programs work for individuals and families. Demystify the treatment and recovery process. Support increasing the accessibility to treatment and recovery resources.

5. Increase familiarity and humanize those with a gambling disorder.

Research has shown that increasing familiarity with a disorder can decrease stigma and help "humanize" those who experience the disorder. Use language, stories and images that are honest and relatable, and that humanize and personalize gambling disorder. Avoid sensationalizing, fear and blame tactics that portray those who are suffering as extreme, alien or "other."

A spotlight shines down from the top of the frame, creating a bright, conical beam of light that illuminates the text below. The background is dark, with some faint structural elements visible at the top.

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CONVERSATIONS WITH A BOOKIE - PART 2

STEPHEN WADE, PRINCIPAL, LOTTERY MANAGEMENT CONSULTING, LLC.



In my last article, I recalled the start of a lucky day when I caught both a free first class upgrade for a long flight and the start of an education in sportsbooks. The education was courtesy of Andre, who was traveling on behalf of one of those companies that made a big splash promoting daily fantasy sports a few years ago. Andre occupied the first class seat at my elbow. His mission was to explain to state legislators how running a sportsbook differs from running a lottery. Consequently, he was well prepared with examples that were relevant for his audience.

As we crossed the continent, he pulled up archival web pages to show the betting propositions that were available just before Super Bowl 53 – that’s to say, probably the single biggest sporting event in the U.S. in 2019 in terms of betting. Certainly, a principal nexus of entertainment and other every other business, in terms of marketing and advertising. Another yearly installment of a spectacle that predictably generates even more buzz than a billion dollar lottery jackpot.

By the time we were over Montana, Andre showed me that his book lost money taking bets on that game.

As we continued eastward, he explained that this was not an unusual or disastrous outcome, but rather part of their normal operation.

As a lottery advisor, I am used to seeing the “house” make big money when a game briefly captures everyone’s attention. I struggled to assimilate the notion of accepting bets where the most

likely outcome is a loss to the house. As we crossed the Midwest, I kept hoping that Andre would reveal some trick by which the biggest betting spectacle of the year turned out to be a money-maker for his shop. Instead, by the time we began our descent, I had a better understanding of what we might call hedging, an increasing wariness about online influencers and a deep respect for the art of running a sportsbook.

I will try to convey here some of what I learned.

THE BASICS, REVISITED

You may remember that in Super Bowl 53, the New England Patriots played the Los Angeles Rams. The Patriots were favored to win.

Since I was starting low on the learning curve, Andre had to spend a fair amount of time just explaining the notation of the offers shown on the archival pages from that time. I recapped that part in my previous article. The essence of it is this: The Patriots were favored, meaning more money was bet backing them to win (even with a point spread). The book was accepting bets for the Patriots to win by three points or more, requiring Patriots backers to put up \$127 to win \$100. On the other side, Rams backers were putting up \$100 to win \$115. Given these conditions, the sportsbook would have been almost indifferent to the outcome of the match, if precisely 50% of the bettors had backed the Patriots. The book would have stood to lose no money on a

Patriots win, or to make a little money on an upset. The sentiment of the bettors, however, was such that about 67% of the money was bet on the Patriots to win. This put the sportsbook in the position of losing money on (what most agreed was) the most likely outcome of the match.

“So, if I understand this,” I said, “in all the excitement leading up to the kickoff, with millions of dollars pouring in every little while, you are taking bets that put you deeper and deeper into a hole if the Patriots win? Which you fully expect them to do?”

“Well, sure. We use the same sort of expected value calculation as any business: probability of an outcome times its value, summed over all outcomes. And as we watched the money come in, we also see where people think the probabilities are. No one really knows what’s going to happen. You could take a “wisdom of crowds” approach. That would suggest that since 67% of the money was on the Patriots, they had a 67% probability of covering. If the Patriots are really 67% likely to cover, then we are looking at a net loss on the event. I think our in-house people may have been a little more sanguine about the Rams. I remember a discussion about the difference between popular sentiment and actual probability of the Patriots covering, as if anyone could know that number. The number I remember is 58%. That is, given the way we took the bets, with 67% of the money on the Patriots, if the real likelihood of the Patriots covering were 58%, we



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would be at a breakeven point on the expected value of the match. That’s to say, no significant gain or loss for the house.”

“And did your in-house experts think the match was that near to even?”

“No, not really. That’s why we hedged.”

HEDGING THE BETS

Now, I suppose that like most people, I have used common figures of speech without a full appreciation of where they originate. “Batten the hatches” conveys “prepare for turbulence,” even though most of us have never handled a batten, let alone secured a hatch with it. “Hedge your bets” we understand to convey “don’t commit fully.” But just how to go about doing that to a bet, I did not know. So, I asked what I hoped would pass as an intelligent question.

“How did you hedge?”

“At minus 130 on the spread,” was the answer.

No doubt this was a good and succinct answer to an intelligent question. However, since my question was really “What in the world do you mean by a hedge?” masquerading as “How did you finesse this particular hedge?” it did not help me.

“I lost you there,” I confessed.

Andre, the smooth educator, quickly realized the true nature of my question. “You saw,” he reminded me, “that in terms of our public-facing action, we were in effect betting on the Rams, or betting on the Patriots not to cover. So, the upset would be profitable for us. Trouble is, it’s unlikely. To hedge, we need to find another party to bet with, where we can bet on the Patriots to win, or cover that spread. That way if the Patriots cover, we have some cash coming in to help with

what we are paying out. If the Patriots don’t cover, we have to pay off on our hedge bet. But we were flush in case of an upset, remember?”

“So you are making the likely outcome less costly, by making the upset less profitable?”

“That’s the deal we made.”

“With whom?”

“Our partners are strategic assets whom we decline to identify,” he said with a tight-lipped smile. “That’s our regulation answer. But what I said earlier, the number? With this partner, compared to the mass market, we put up a bigger bet to back the Patriots -130 instead of -127. And this was just between us, see? So if the Patriots cover, our partner pays us 100; if they fail to cover, we pay them 130. We both felt it made sense.”

“And you negotiate a volume of bets that also makes sense for you?”

“Right. You want to think of these as prices, not as dollar amounts. The dollar amounts would have a lot more zeroes.”

“Is this the sort of thing you talk about with legislators?”

“Not usually. It depends. Some of them are more concerned about match fixing. Now that’s an easy one for me, advocating for legalization. When people try to fix a match, they generally back it up with a lot of money, and if we can see the money we have a better chance of catching the fix. If we can agree to get it out in the open, with agreements about data sharing, then we’re way ahead.”

“Yes, I recall hearing about that at one of our lottery conferences. And you know, it makes sense that they would have concerns that way. In movies and such the bookie is always the shady character who is looking to rig a fight, or something. They are probably relieved to hear you coming out for some kind of transparency. So, no surprises for you, in talking with legislators?”

THE IMPACT OF INFLUENCERS

Andre considered. “Actually,” he said, “there was something new this trip. I think people who run for election are very tuned in to the power of social media. And the potential scamming that can happen there. You know, the practice of paying people as ‘online influencers,’ and so on. You’ve got people sharing what appear to be independently considered opinions and real experiences, where in fact they are being paid by someone to manipulate their followers.”

I acknowledged that I was familiar with the practice.

“And then you’ve got the exposure of all this echo-chamber stuff, where you can have really active accounts that are nothing but bots built to amplify a chosen message... legislators maybe have seen some of this. They are alert to it.

“So now they look at sports betting,” he continued, “and you’ve got any number of people who are potentially influencers, who like to post stuff, who love having followers, who live on their phones... and [legislators] look at me, and I’ve just told them that we knew we were likely to lose money on the Super Bowl because too many people were favoring the Patriots... and they say, ‘How do we know you won’t be paying people to shift public opinion for the benefit of your sportsbook?’”

Andre opened his eyes wide and raised his eyebrows, replaying the scene for me. “But these are independent posters and bloggers and so forth. We have no control over them. They are not on our payroll, or anyone else’s, so far as I know.”

Andre glanced around to see that no one appeared to be listening in to our conversation.

“And they come back with: ‘Surely we both know that it is not a matter of people on the payroll. In a web-enabled business, it is not uncommon to trace web traffic. You will know where those bettors were, just before they came to your site. If they bet the way you would like them to, you know who to thank. And potentially who to pay.’ Affiliate Marketing: They are absolutely up on it! I was amazed. Some of these legislators would know exactly how to set up a scam like that.”

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“SOMEHOW,” I REFLECTED, “IT DOES NOT INSPIRE A LOT OF CONFIDENCE WHEN SOMEONE SAYS ‘I AM NOT A SHILL.’”

“Would it be a scam?”

“More than the rest of what goes on, you mean? Maybe not. And when you get right down to it, what do we really know about the motivation behind the stuff people put on the web? I do know that some of the guys who blog about sports and betting go out of their way to say they have no connection to any bookie. I suppose they are acknowledging the obvious temptation. So, I guess if they claim to be pure and are not, they’re scamming. Certainly not good for their credibility if they are thought to be paid influencers. Or shills, as they were called in an earlier age.”

“Somehow,” I reflected, “it does not inspire a lot of confidence when someone says ‘I am not a shill.’”

“Still,” said Andre, “I don’t see this being a killer for web-enabled sports betting. There are going to be lots of opinions out there in the runup to a match. Over the long run, the folks who make the most accurate predictions are going to thrive, and the others will fade. If the odds-setters get it too wrong, there’s no way paid influencers are going to turn it around for them. So, some of that may go on, and legislators are smart to be wary of it, but that’s all part of the new information economy. Everybody can publish their opinions, there’s no gatekeeper, and who do you trust? I don’t think there’s any way to legislate better behavior here.”

As our plane docked at the gate, I thanked Andre for the interesting

conversation. In those few hours, I feel that I got a start at understanding the complexities of managing a sportsbook. The notation of single-event betting makes sense to me now. I think of the sportsbook as sort of a daredevil enterprise compared to a lottery. As a bookie, I would be riding the edge between likely and unlikely in order to make the business work. I would want to have a network of peers who might be amenable to high-volume hedge bets. I would need to maintain an understanding not only of the game and the competitors, but of changing public opinion, and how it might be shaped. It would surely be engaging; it might be exhausting.

Looking at single-event sports betting from the lottery perspective is like watching surfers from the shore. I am comfortable admiring the spectacle. If the spectacle draws a crowd, maybe the lottery can make products that play on the sports theme – even beyond the parlay bets that have been explored. Where there’s an excited crowd, there’s probably a way to sell them something that gives them a feeling of participation. Watch for innovation in that space! ■

Welcome to the NASPL Matrix



NASPL Resource Index



Awards



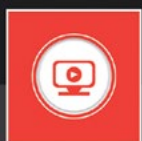
Responsible Gambling



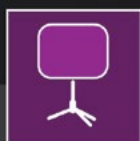
Insights



Lottery 101



Webinars



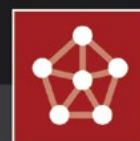
Presentations



Classifieds



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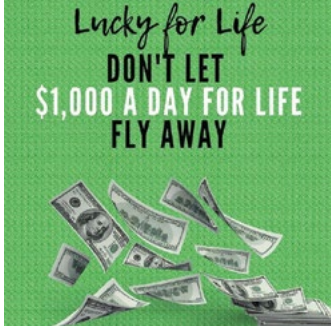


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Lottery Week

In July, dozens of lotteries across the U.S. participated in the first annual Lottery Week, with special games, activities, social messaging and more. While each lottery celebrated in their own unique way, every campaign was designed to promote interaction with players and retailers; introduce fun, new giveaways and prizes; and, most importantly, acknowledge the significant contributions that lotteries make in the communities they serve. Check out more Lottery Week highlights by searching **#LotteryWeek** on Instagram, Twitter and Facebook.



Lottery Week

Let's give a big
"Woo Hoo For You"
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 since 1985!

NATIONAL
Lottery Week
 JULY 15-21

WINNERS



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JULY 15-21



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25¢
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Lottery Week
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LOTTERY WEEK

Lottery Week
 July 15-21, 2019

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 Virginia Lottery

Date: July 2, 2019

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MONOPOLY JACKPOT

FOR SECOND-CHANCE PROMOTION
 STANDS AT

\$88,527





Hot Topics in Phoenix

There was a lot of enthusiasm about the future at NASPL's annual Professional Development Seminar.

By Patricia McQueen



It's hard to say what was hotter in Phoenix during the NASPL Professional Development Seminar in July – the temperature or the topic of in-lane solutions, which are ramping up in the lottery industry.

There's no doubt that the buzz throughout the conference was about new developments on this front in several states – such as Texas, which is bringing Dollar General into the lottery fold using the Quick Ticket. Dollar General has more than 15,000 stores across the United States and would be a significant addition to the lottery retailer mix. The NASPL standard API is also now coming into play in a few states with other major retailers, facilitating further expansion of lottery. These developments have everyone in the industry optimistic as they open up brand new distribution channels for lottery.

A record number of participants – there were 585 registrants – attended the 2019 conference, which is unique in providing small-group formats for each of nine primary lottery disciplines: accounting, audit, information technology, legal, product managers, public relations, research, sales and marketing and security. They drilled down into dozens of focused topics in their group discussions – 67 sessions in total across all disciplines. Many utilized formal presentations; these are available for review on the NASPL Matrix. Most of the conference's six general sessions were recorded and those videos are also available on the Matrix.

PDS also provides great opportunities to network with peers – within a discipline and across disciplines. The week's primary social event was the All Delegate Night at Rustler's Rooste, a western steakhouse

with breathtaking views overlooking the Phoenix valley, complete with fun and games and a live longhorn steer to awe guests.

General Sessions

The opening general session on July 23 discussed the **benefits and risks associated with systems modernization**. Led by moderator Sarah Taylor, Executive Director of the Hoosier Lottery, the panel included Greg Doucette, Vice President Solutions Delivery, Bulletproof; Patrick Kamm, Vice President, Technology Operations, IGT; Harold Mays, Acting Director, Illinois Lottery; and Shandi Terlecki, IT Governance Manager, Oregon Lottery.

All agreed that today's lottery gaming systems have become very complex and often involve multi-vendor solutions, so replacing those



Opposite Page Inset: Arizona Lottery Executive Director Gregg Edgar.
Left: Keynote speaker Khalid Jones.

systems is different than it used to be (some systems currently in use actually pre-date the iPhone). The general advice given was to carefully define all the requirements up front, involve all departments in your lottery and be absolutely transparent every step of the way. Governance is key to success, but it doesn't have to be a wall of red tape, noted Terlecki. The migration of data is also a critical component of success, emphasized Doucette, since there is no going back once the switch has been flipped, so to speak.

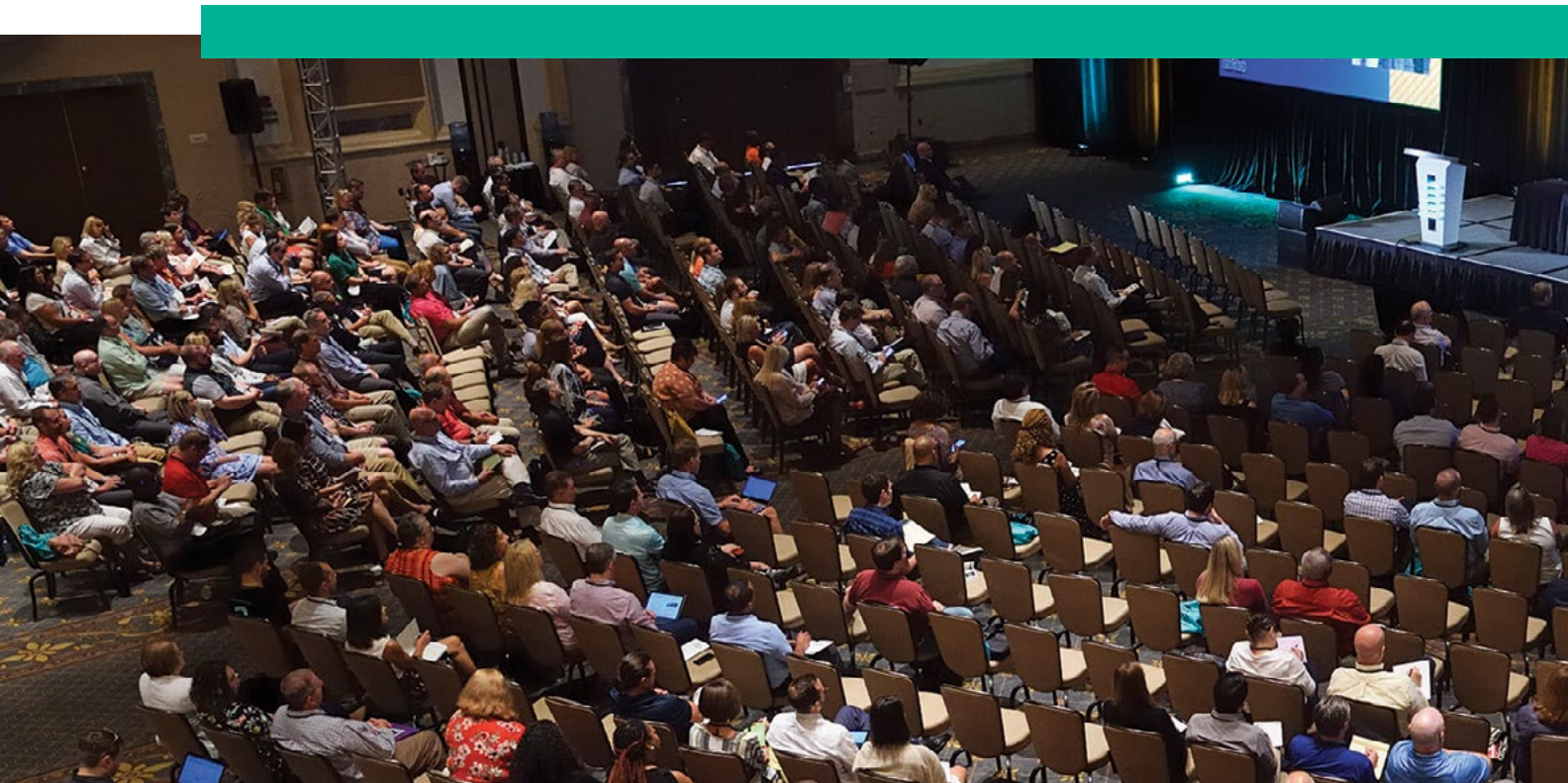
Keynote speaker **Khalid Jones**, the Managing Partner of SourceRock Partners, LLP, discussed the expectations of the younger generations, millennials and Gen Z.

Calling these generations – anyone under the age of 30 – the “next gamers,” he described them as predominantly mobile and setting consumption and gaming trends that cannot be ignored. They live in the “now,” they thrive on socialization and consider gaming to be a social activity, and they want to participate and make an impact, not just observe. In addition to mobile gaming, they are big into eSports and live streaming.

When Jones examined online lottery games from a few lotteries, he noted that they were missing most of what these “next gamers” look for – interactivity, social components and the “live” aspect. Few had any element of player choice. He suggested that in

order to appeal to the next gamers, new online games should be multi-player, truly interactive or live. He is working with the Arizona Lottery to help them take advantage of these characteristics with new and free-to-play games and new prize types.

Two related general sessions started the July 23 afternoon program. Providing an update on **in-lane solutions and the NASPL API** was Paul Riley, IGT's Vice President of Innovation and Lottery Transformation, who has been involved in the API project since day one. He described the big Texas initiatives with Dollar General and H-E-B (the latter stores will use the API to print tickets on retail receipt paper). Various aspects of these





Above: Lori Rugle, Nicole Kostura, Chip Polston, Marcus Glasper and John Hagerty, participate in the responsible gambling general session. Right: Megan Finnerty, Founder and Senior Director of the Storytellers Project.



projects were also discussed in group session in several disciplines.

Then a pair of speakers from payments processor WorldPay took to the stage, discussing the future of **payments in the lottery and gaming industry**. Andrew Crowe, the company's Vice President, Market Development, and Senior Vice President Joseph Pappano together described what is happening as two time-tested, highly regulated industries are converging – the lottery and gaming industry and the payments industry. As cashless payments are rolled out, lotteries need to accommodate the demands of the consumer and the player. There are many different alternative payment methods besides just credit and debit cards – such as digital wallets, stored value, contactless cards – and

the consumer dictates how they want to conduct their transactions. The speakers also pointed out that payments data provides enhanced understanding of consumers, and by appending that data to lottery play, lotteries can more fully identify consumer behaviors and preferences. In addition to this general session, there were additional group sessions drilling down into payment options.

The final two general sessions took place on July 24. First was a panel discussion on **responsible gambling**, led by NASPL's Responsible Gambling

Specialist Lori Rugle. Participating were Marcus Glasper, Director of Washington's Lottery; John Hagerty, Public Affairs Specialist for the Virginia Lottery; Nicole Kostura, Assistant Director of Sales, Marketing and Product Development for the Ohio Lottery; and Chip Polston, the Kentucky Lottery's Senior Vice President of Communications, Public Relations and Social Responsibility.

They advised lotteries to establish relationships, if they haven't already, with their local councils and agencies – starting with local affiliates of the



National Council on Problem Gambling. “Keep the lines of communication open and look for common ground,” said Polston, especially whenever there are conflicts. Glasper noted that working with your local councils helps turn them into advocates when you want to advance new policy initiatives. There was also a discussion about RG terminology – that the term “responsible gambling” is increasingly leading to stigmatizing, as it implies that everyone else is irresponsible. As a result, some lotteries have started moving away from using “responsible” in their messaging.

Finally, attendees learned about **storytelling** from Megan Finnerty, Founder and Senior Director of the Storytellers Project. She gave a compelling talk about affirming your sense of community through storytelling. She let others do their own storytelling – all three guest speakers have been positively impacted by programs funded by the Arizona Lottery. First was a volunteer with Arizona’s Court Appointed Special Advocates (CASA), which trains and certifies volunteers to be advocates for foster children. Next was an

employee with the Arizona Game and Fish Department, who talked about providing opportunities for teachers to learn about wildlife. Finally, a young man with cerebral palsy stood before the crowd and told his story of making lemonade from the lemons life had dealt him. He drew a standing ovation at the conclusion of his story.

Later in the day, Finnerty also sat down with the public relations group to go into further detail about storytelling, including how to use it as a marketing tool to create new business opportunities.



Above: Patrick Kamm, Greg Doucette, Sarah Taylor, Harold Mays and Shandi Terlecki participate in the systems modernization general session. Below: Volunteers stuff the delegate bags and delegates check in at registration.





Gregg Edgar and his team of Arizona Lottery volunteers.

Other Highlights

There were too many individual sessions at PDS to list here, but a sampling of the topics underscores the depth of the conference:

- Retailer feedback and retailer perspectives
- Integrity and verification in RNG
- Public records and winner privacy
- Instant ticket trends, prize structures and single ticket accounting
- Experiential marketing and prizes
- Engaging the next generation of players
- The first year of sports betting
- Driving sales and brand equity
- Lottery courier services
- Data-driven decision making

Sessions weren't limited to what is going on in the lottery industry. For example, the rapidly growing phenomenon of eSports was discussed in one combined group session. Comprised of video game competitions, complete with teams and leagues, 70% of participants and fans are millennials and Gen Z. They are the "unreachable" – they don't watch television, for example. The prizes – in the millions of dollars – are raised through crowdfunding. The presenter, Arizona State University Marketing Faculty Associate John Pierce, advised lotteries on how to take advantage of eSports: Offer instant tickets with video game themes, develop partnerships with the teams and the leagues just as they have with professional and college sports, and even hire the gamers. These players see the world very differently and their backgrounds would provide lotteries with diversity of interest.

On the final day of the conference, there were presentations on how some of the country's biggest retailers are starting to embrace lottery like never before. A representative from Kroger described how the company has dedicated one person at the corporate

level to oversee lottery, while the Arizona Lottery outlined success with Walmart through vending machines and Costco through pre-packaged instant games sold at a discount.

With all this and more to take back to their lotteries for discussion, it's no wonder that people left Phoenix ready to forge ahead into the future of lottery! ■

NASPL would like to thank all of our presenters, moderators, panelists and planning committee members, and especially our host, the Arizona Lottery.



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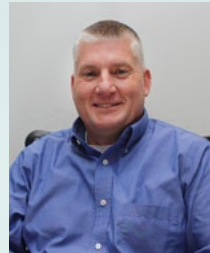
Powers Award Winners

During the 2019 Professional Development Seminar, NASPL announced the winners of the prestigious Powers Award. Read on to learn about this year's winners.



Margaret Annino
Principle Cost Analyst
Connecticut Lottery

A 23-year veteran of the Connecticut Lottery, Margaret was promoted to Principal Cost Analyst in 2016. In addition to her primary responsibilities – which include daily maintenance of the general ledger, financial statement reporting, budget preparation and reporting, and a myriad of reports on sales and prizes trends – she recently supported a team of people to migrate to a new accounting software and general ledger system. She was instrumental in this multiyear project by taking an active part in retaining and re-balancing 19 years of financial information, automating and creating monthly recurring entries, reducing the number of days in the monthly close process, reducing the time necessary to prepare financial statements, and creating and maintaining essential management reports. As if her day is not busy enough, Margaret supports Connecticut Lottery social events, by assisting and organizing several potluck luncheons throughout the year. She is cheerful, courteous to her colleagues and generally sought after as a team member for her expertise and thoughtfulness.



James Bartlett
Interim Chief of Operations
Illinois Lottery

Every lottery has a person who is the glue of the agency and knows where all the bodies are buried (and is also responsible for burying a few). For Illinois, that person is James Bartlett. Coming to the Lottery as a contract employee eight years ago, he knew nothing of the lottery business but was proficient in systems. He quickly learned how the Illinois Lottery worked and what improvements they needed. He helped operationalize a brand new gaming system and addressed all the back-office system needs. Today, James has interwoven himself into every system Illinois uses. He is the resident expert on all things lottery from a systems and technology standpoint; he not only understands what the systems do but why they do it. So when it came time to transition to a new private manager, his participation and knowledge was critical to the project's successful implementation. James was integrally involved in every aspect of the 2018 Illinois Lottery technology transition project. He held down his day-to-day obligations in operations, facilities, drawings, ICS management and reporting, all while carving out time to define business and functional system requirements, conduct business process mapping exercises, assist other groups, define and conduct user acceptance test plans, and so much more. James was the point person, defining what the Illinois Lottery needed and ensuring that they got it.



George Wayne Carrington
Support Services Specialist
DC Lottery

Wayne Carrington is a "million-dollar ticket" at the DC Lottery. Wayne has served dutifully with the Lottery for over 33 years. In that time, he has demonstrated unquestioned loyalty, flexibility and foresight. He anticipates departmental and organizational needs, researches required resources, successfully executes strategies and provides detailed follow-up of implementation. Wayne has successfully accommodated all levels of DC Lottery staff in the areas of transportation, building services, equipment maintenance, mail services, moving services and events logistics. Always seeking to evolve in his professional performance, Wayne has most recently taken on the role of evaluating space, logistics and conceptualization for the new Sports Wagering Division of the DC Lottery – creating a plan and working with vendors to execute all logistics surrounding construction, installation and delivery of materials. In addition to his remarkable professional performance, Wayne is a calming presence in a fast-paced, often hectic work environment; he will always take a moment to provide insightful advice and guidance to his colleagues, all with a smile on his face.



Kristin Cleveland
Senior Corporate Accounts Manager
Florida Lottery

Over the last nine years, Kristin Cleveland has proven herself to be an exceptionally talented and valuable employee of the Florida Lottery. As the Lottery's Senior Corporate Accounts Manager, Kristin is relied upon heavily for consistent exemplary work product and leadership. Under her watch, in fiscal year 2019 the Lottery's top 25 corporate accounts saw growth of nearly 10%, or more than \$330 million over the previous year. When the Florida Lottery started converting its aging gaming system earlier this year, Kristin volunteered herself, in addition to her normal duties, to take on the lead role in coordinating and organizing conversion-related activities in the field. Simply put, Kristin is a difference maker who continually takes on new initiatives and is one of the brightest stars of the sales division. She exemplifies the essence of teamwork by always offering to do more than asked. And she comes to work every day with a smile, desire to learn and a positive attitude that is infectious.



Colleen Dvorak
*Director, Retailer Relations
and Sales Bureau*
Wisconsin Lottery

Colleen is the type of employee an employer wishes to have – and the Wisconsin Lottery is lucky to have her. Having joined the Lottery in 2001 as the Pull Tab Coordinator, she quickly impressed senior management with her leadership qualities and style. While Wisconsin faces obstacles to growth opportunities, sales – particularly instant scratch ticket sales – have soared under Colleen's leadership. Since being named Director of Sales, the top project on her list was to have fair compensation for Field Marketing Representatives. Last December, the changes that she fought for came to fruition and the Field Marketing Representatives saw pay adjustments along with a progression pay series. Colleen never gives up on a project and will always stand up for what is right. She leads by example, follows through and will always pitch in where needed.



Edward J. Farley
*Assistant Executive Director and
Chief Administrative Officer*
Massachusetts Lottery

Last year, the Massachusetts Lottery began its first headquarters move in over twenty years. The move involved over 100 team members and over 70 individual workstations, not to mention the Lottery's public facing cashing and purchasing location. Going beyond his normal job duties, Ed volunteered to lead the effort, organize other team members and oversee all interactions with other state agencies and outside contractors. Helping with everything from the location of electrical outlets to the placement of collaborative work areas, Ed participated in every meeting to make sure the new headquarters would meet the current and future needs for Lottery operations. As with any large-scale physical project, the challenges were many. But he helped build a team that was responsive, professional and capable. And after the official move, the new location was fully operational from day one. Bottom line: He got the job done.



Mary Harville
*Senior Vice President, General Counsel
and Corporate Secretary*
Kentucky Lottery Corporation

Mary has tirelessly worked to help the Corporation successfully navigate a number of high-profile situations. She helped rally leaders in Kentucky and other Lottery personnel during the recent Department of Justice ruling saga, ensuring the college scholarship and grant programs funded by Kentucky Lottery proceeds were protected. Mary has worked with these same decision-makers as the state considers sports gambling, keeping them educated on the changing landscape and how the Lottery would best fit into any plans. She's negotiated with vendors on a number of different games, helping bring them quickly to market in order to fuel a record-breaking sales year in Kentucky. Beyond these initiatives, Mary is a significant contributor to numerous behind-the-scenes projects. She is a well-liked and respected co-worker among her peers and has been a key player in the success enjoyed by the Kentucky Lottery.



Keith Kocher
*Director of Gaming Facilities and Director
of Program Assurance and Integrity*
Kansas Lottery

Keith Kocher has been with the Kansas Lottery since 2000. In his role as both Director of Gaming Facilities and Director of Program Assurance and Integrity, he manages and directs the gaming facility program and associated activities to ensure compliance with the Expanded Lottery Act SB66, while also developing and overseeing program policies and procedures to support program initiatives and goals. Keith also prepares annual fiscal documents for legislation and monitors dozens of contracts to ensure that the Lottery not only meets but exceeds requirements. His knowledge and expertise in the legislative process have greatly enhanced the Lottery's level of operational efficiency, integrity and accountability. In addition to his day-to-day obligations, Keith played a large role in the July 2018 conversion of Kansas' major operating system, a process which affected the entire organization as well as over 1,700 retailers across the state. His skills and leadership were absolutely essential in making the conversion a success.



Victoria Hillstrom
Director of Human Resources
Missouri Lottery

In her role, Victoria has provided outstanding service in the areas of employee recruitment, orientation, development and state benefit communication. She has streamlined and standardized the Missouri Lottery's hiring practices to make the process more efficient. Through her efforts, the Lottery has shortened the timeline from application to hire and improved the on-boarding process to better integrate new employees and prepare them to be successful, productive team members. Victoria has also implemented an employee development plan to improve employee training relevance. And she continues to work with the executive team to develop strategies to reduce employee turnover. Her extensive knowledge of state and federal HR guidelines, high level organizational skills and outstanding contributions to the Missouri Lottery are deserving of special recognition.



John Miutz
*Advertising and Retail
Communications Manager*
Virginia Lottery

John oversees all advertising campaigns and budgets across all platforms for the Virginia Lottery. From the billboards that dot Virginia's highways to the point-of-sale assets that line the counters and walls of lottery retailers, John shepherds each from genesis to launch and beyond. John has been with the Virginia Lottery for 21 years, and in the industry for 27 years, but he approaches each day, each meeting and each colleague with an open mind and a commitment to finding the solutions that best solve the problem at hand. Though John is in charge of many massive tasks for the Lottery, he will help anyone, with anything, at any time, inside or outside of his immediate job description. He works with multiple departments on a daily basis, and his attitude generates an environment that is conducive to the kind of effective communication that is the centerpiece of any successful business.



Dave Niederer
Senior Technology Officer
Hoosier Lottery

As Senior Technology Officer, Dave is responsible for all computer and application issues, providing constant support and assisting all updates and technical trainings. Following the Hoosier Lottery's MUSL audit during fiscal year 2018, Dave began the process of investigating a lockdown alternative. With no example or template to follow, he developed an LDA that has been tested, approved by MUSL and implemented at the Hoosier Lottery during fiscal year 2019. Operating with the new LDA in place has resulted in streamlined efforts in the event of a lockdown, as well as significant cost savings to the Hoosier Lottery.



Ammie Smith
Senior Marketing and Product Development Manager
South Carolina Education Lottery

Ammie Smith began her career in Marketing and Product Development in 2006, serving in the capacity of Event Marketing Coordinator. Her talents were quickly recognized, and she rose through the ranks to her current role as Senior Marketing and Product Development Manager. Ammie has represented the South Carolina Education Lottery well through her association with the American Advertising Federation, Leadership Columbia and the Junior League of Columbia, plus her participation in various speaking engagements. Under Ammie's leadership and direction, the South Carolina Education Lottery's Product Development team stands as one of the best in the country, with projected instant product sales of \$1.4 billion for fiscal 2019; an increase in the sale of \$10 instant tickets by approximately 24%; and a per capita ranking of third, nationally. Her talents have earned her well-deserved recognition and respect from her peers throughout the lottery industry.



Karen Russo
Responsible Gambling and Community Outreach Coordinator
Ohio Lottery

Through Karen's work, Ohio has become a nationally recognized leader in responsible and problem gambling services. In 2012, the Ohio Lottery was the impetus behind the introduction of Ohio for Responsible Gambling (ORG), one of the first multi-agency state collaborations – including the Ohio Casino Control Commission, Ohio State Racing Commission and Ohio Mental Health and Addiction Services – in the country. This initiative enabled state agencies to reduce and ultimately eliminate duplication of efforts in the encouragement of responsible gambling and to more effectively make use of problem gambling resources. ORG became a nationally recognized program. Acknowledging that problem gamblers need a one-stop approach that offers support, confidentiality and respect for individual choice, work with ORG also spawned a new statewide VEP program, which allows an individual to voluntarily self-exclude from all eleven gambling facilities in Ohio (casinos and racinos) by signing up at one facility. Among her many contributions to the field of responsible and problem gambling, Karen spearheaded the arduous task of consolidating different programs statewide into one cohesive wrap-around support system to create this new Ohio VEP.



Kelly Stuckey
Financial Operations Manager
Texas Lottery Commission

Kelly has been an integral part of the Texas Lottery's success for many years. She strives for excellence in all that she does. Her expertise in all aspects of the gaming system and internal financial system allow her to be extremely proficient in her job duties. And as a result, Kelly is heavily relied upon by the senior management team for financial guidance. She has a unique ability to quickly analyze financial and policy impacts and effectively communicate those impacts to leadership within the agency, as well as legislative offices. Her contributions to the agency are numerous. In supporting the financial operations of the more than \$6 billion in annual sales generated by the Texas Lottery, preparing the more than \$200 million annual lottery operating budget and legislative appropriations request, preparing cost benefit analyses for vendor contracts, or determining the return on investment for a particular promotion, Kelly's performance is second to none.



Paula Tiedt
Director of Technology and Platforms
Michigan Bureau of State Lottery

Paula began her career with the Michigan Lottery in 1992 as a programmer. Now Director of Technology and Platforms, she and her team oversee the planning, testing and operation of all major Lottery IT systems. Paula's accomplishments over the past twenty-seven years could fill a textbook. When Michigan's first multi-jurisdictional game – The Big Game – launched in 1996, Paula worked through the night to ensure proper balancing. Many of the procedures she helped establish for The Big Game – now Mega Millions – are still used by the Lottery today. Paula also played a major role in two statewide central gaming system conversions, in 1999 and again in 2009. Both conversions, affecting billions of transactions annually, were highly successful. In 2014, she helped the Lottery launch an all-new internet sales platform, pioneering new processes and procedures for digital instant games, draw games, remote-gaming servers and internal control systems. Thanks in part to Paula's help and expertise, this iLottery program has also been a success story. Aside from her technical prowess, Paula is known to her colleagues as a friend, an advocate and a constant source of positive energy. She has left an indelible mark on both the Michigan Lottery and the entire industry.



Todd Vodden
Scratch Product and Customer Support Services Manager
Minnesota Lottery

As Scratch Product and Customer Support Services Manager, Todd is responsible for managing and directing the scratch games products of the Minnesota Lottery and to develop strategies that increase Lottery sales, working in coordination with Sales and Marketing to develop brand awareness. The position also oversees the Customer Support Services department, providing services including, but not limited to: customer support to Lottery retailers, players and the public; payment of claims; retailer accounting and training; and special events. In his role, Todd has directly contributed to increased efficiencies in scratch games sales, helping the Lottery reach both a scratch games sales record and a total sales record in fiscal 2019. He is recognized in the lottery industry as an innovator of scratch game products. During a recent conversion project, Todd maintained a positive and encouraging attitude and viewed challenges and obstacles as opportunities for business optimization. Coming in early, staying late, learning new processes, and training others all in a collaborative effort are just a few examples of Todd's commitment to the Lottery's success.

Ott Brown NASPL Scholarship Winner



La'Shawn Reid
Sales Program Manager
Virginia Lottery

La'Shawn's ascent at the Virginia Lottery has been fueled by hard work and skill. In her seven years with the agency, she has risen from working part time at the Help Desk, to Sales System Specialist, and now to her current role as Sales Program Manager. She is thorough, has an eye for detail and possesses impressive technical knowledge. La'Shawn has accomplished many things during her Lottery tenure, including overseeing the technical side of Virginia's 2017 conversion. She was in charge of making sure the new Lottery hardware and software made it into the field and functioned correctly – a gargantuan task given the number of Lottery retailers in Virginia. In her current role, La'Shawn oversees internal training, communications with retailers, technical manuals and the online tool that keep retailers informed on sales data and new games. Her role requires her to work with several departments, her colleagues in the field and Lottery vendors, and she does each with equal expertise. She has worked diligently in each position she has held and earned more responsibility as her career has progressed. Now, in her first management role, La'Shawn continues to exhibit the kind of passion for growth and leadership that make her stand out.

Congratulations to the 2019 Powers and Ott Brown Scholarship Winners!



Rebecca Hargrove and Rose Hudson with Powers Awards winners (left to right) Kelly Stuckey, Ammie Smith, Dave Niederer, Victoria Hillstrom, Edward Farley, Mary Harville, Colleen Dvorak, Kristin Cleveland, George Wayne Carrington and John Miutz.

Ott Brown NASPL Scholarship winner La'Shawn Reid receives her award from Rebecca Hargrove and Rose Hudson.





A WINNING TRANSFORMATION IN ARKANSAS

The Arkansas Scholarship Lottery is the host for the 2019 NASPL Annual Conference, and their enthusiastic This is Winning! theme sets the tone for everything they do.

By Patricia McQueen

On September 28, 2009, the Arkansas Scholarship Lottery opened for business, with four instant games at price points of \$1, \$2 and \$5. It was the culmination of a whirlwind few months, from enabling legislation in March 2009 to seating the Lottery Commission by May and staffing beginning in June, including the hiring of its first Director, Ernie Passailaigue. Vendor contracts were signed just 44 days before tickets went on sale.

“That was a pretty astounding situation,” recalls Bishop Woosley, who was on staff as the Lottery’s Chief Legal Counsel back then and who has served as Director since February 2012. Hiring some 70 employees, licensing as many as 1,400 new retailers, developing instant tickets and creating a marketing campaign – all in less than three months. “Obviously the pace of our startup was insane, and it was an incredible achievement. We exceeded all expectations with our sales for the first couple of years.” That was great news for students in Arkansas, who are

the beneficiaries of lottery proceeds in the form of scholarships.

But becoming the fastest lottery startup in history came with a price. In a state nearly surrounded by other lottery states, there would be no gradual game introductions. “We kind of threw everything but the kitchen sink out there, so there wasn’t a lot left to do” in terms of games and price points, with the underlying desire of social responsibility. Sales had peaked at \$473 million in its third year and started declining thereafter to a low of \$408 million in fiscal 2015, while revenues raised for scholarships hit \$97.5 million before dropping to \$72.6 million.

“There was a really negative opinion about the Lottery for a few years,” noted Woosley, with the declining sales and scholarship revenues exacerbated by some much-publicized internal challenges. It didn’t help that the Lottery was established with a Commission structure and accompanying formalities that led to a lot of angst and negative media coverage. That changed in early 2015,

as the Commission was abolished and the Lottery became part of the state’s Department of Finance and Administration Office – under the umbrella of the Governor. “That has given us more political insulation and has allowed us to be more agile. Being able to focus on what you are doing as opposed to external noise has been an incredible benefit.”

That was the beginning of a long process that has led to a complete transformation of the Arkansas Scholarship Lottery. “We had to reinvent ourselves – we had a huge task to change the public perception of the Lottery.”

Woosley and his staff have been more than up to the challenge. Sales have rebounded, finally surpassing the previous high in fiscal 2018 with sales just shy of \$500 million, and then hitting a record \$515 million in fiscal 2019 (preliminary results), with a record \$98.4 million raised for scholarships. Sales were up – with several all-time highs – for most of the Lottery’s products. “For those of us who have



Arkansas Governor Asa Hutchinson

been around the entire time, it's almost kind of a victory parade – finally seeing the fruits of your labor. It has been a five-year journey that has been very tough, but also very rewarding,” said Woosley.

In total during its 10 years, the Lottery has generated almost \$4.5 billion in sales, paid more than \$3 billion in prizes to players, and raised \$859.6 million for scholarships (with 542,000 awarded and counting). “We are most proud of reinvigorating the Lottery and really changing the attitude of the citizens here in Arkansas about the Lottery and the brand.”

To do that, the team had to dive deep into its programs and games. More than any other U.S. lottery, Arkansas relies upon instant games – they were almost 82% of sales in fiscal 2018, and even with big jackpots triggering draw game growth in fiscal 2019, instant still accounted for more than 79% of sales.

“When we hit that low of \$72.6 million for scholarships, that was devastating to all of us because the last thing you want to do is let the students down,” lamented Woosley. “Our staff and our vendors had to really dig deep and analyze literally every aspect of our business to determine where we could turn it around, where to find incremental sales without necessarily introducing new price points or new products.”

Addressing Instant Games

One of the first things addressed was the prize structure for instant games, specifically how the prize fund was being used. A percentage of that fund was going towards programs and prizes in the Lottery’s players club, The Club. “We have a great players club, but we needed to do a full analysis of what we needed to fund the players club versus what was needed in the games to improve prizes,” Woosley explained. “What we’ve actually found is that players care more about money in the game than they necessarily do about being able to get a free widget.”

By adding some of that funding back into the games’ prize pools, players have more winning experiences. “If you can add just the slightest amount back into the games, they actually feel that, and that is money that sometimes is churned or reinvested back into the game.”

Even that small amount – 0.15% in Arkansas’ case, with a reduction from 1.5% to 1.35% in the amount of the prize fund that is directed to players club programs – can put a lot more cash in the games.

Doing that obviously spurred sales, but the Lottery still had to come up with ideas to recapture and excite the lapsed instant players. “Our Gaming Director, Mike Smith, and his team did

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an excellent job of creating tickets that would excite our instant ticket player base and bring them back to being everyday lottery players," said Woosley.

"All of this really supercharged our instant ticket sales," he added, noting that sales have increased from a low of \$322 million five years ago to more than \$407 million in each of the last two years. "The turnaround has been incredible and our instant ticket sales are as healthy as they've ever been."

A Winning Brand

Next in line was addressing the Lottery's advertising campaigns. To save money right after startup – an important goal – most commercials were done internally and used animation. After a few years, those

got kind of stale, and it was time to revamp the campaigns. Fortunately, the Lottery has been able to gradually increase its advertising budget, although it is still less than 2% of sales – a paltry amount compared to what consumer products companies typically spend on advertising. But this is an era in which lottery advertising budgets often come under fire. "We have been lucky that people in Arkansas recognize that in order to make money, you have to spend money," said Woosley. "You have to be able to market your product."

The increased budget helped to move away from animation and towards live action in its commercials, but the real game-changer was the new This is Winning! rebranding effort, launched in early 2018. The ongoing campaign is the end result of the Lottery's self-exploration and exhaustive research with consumers. All the feedback from focus groups, for example, said that people want to see winners.

That presents a challenge today when an increasing number of winners don't want to tell their stories or provide any publicity. "So then we thought about what our definition of winning really is," explained Woosley. Certainly the game winners win, but it doesn't end there. "The scholarship recipients win, their families win and the retailers win."

With that realization, This is Winning! celebrates all the different ways people win with the Lottery – from players winning prizes to students receiving scholarships to retailers earning a commission from sales and even bonuses from selling big winning tickets. Past winners were asked if they'd like to participate in the campaign, which doesn't have to fully identify names or locations but uses photos to show people reacting, smiling and celebrating. "They really enjoy themselves," noted Woosley. "We have a good advertising staff and agency that makes it fun for them."

He is confident that the rebranding campaign, coupled with tremendous public relations efforts, have completely changed the perception of the Lottery in Arkansas and have had a tangible impact on sales. "In all of our spots, you are seeing someone

who has been touched in some way by the Lottery. And seeing someone who might be your neighbor, or someone you recognize, or even just seeing a real person – it all changes the way people think about lottery. It makes it real."

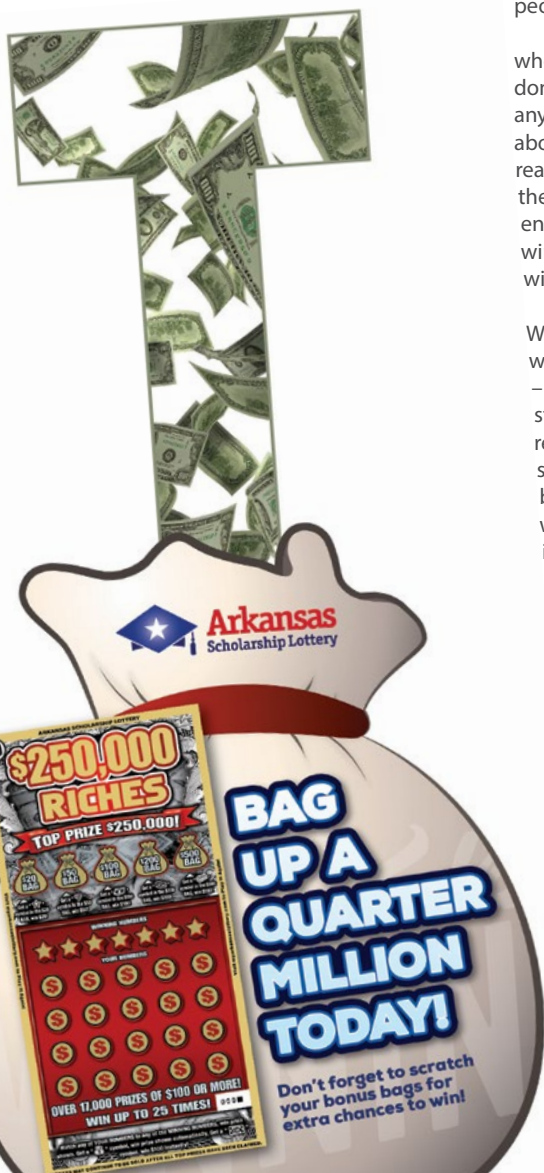
New Retail Focus

Making it real also factors into the Lottery's focus on improved retail execution. "We can have the best ticket and the best marketing campaign, but if the ticket is not in the bin, it won't make any difference," said Woosley. He knows from experience – there was a time not that long ago when retailers often had out-of-stock bins, and it was quite frustrating. It was all part of the low regard with which the Lottery was held, and retailers didn't quite make the connection between in-stock tickets and their commission revenues.

All that has changed. The Lottery's sales staff has been coached on how to motivate retailers, to encourage them to stick with planograms, keep bins full and activate tickets within 48 hours of launch. New instant games are generally launched on the first Tuesday of every month, and players always want what is new. "Eighty percent of our sales comes from instant games. If we do an advertising spot or place point of sale materials promoting the new tickets coming out, and those games aren't in the bins right away, that has an enormous impact, because the first week on the market is the biggest week of sales."

Retailers are shown the data – how much sales they can expect if they activate tickets within 24 hours, 48 hours or 72 hours. When they see the dramatic decline in sales the longer they wait, and that they can potentially increase sales by 30% if they just spend a few minutes to activate the tickets, "it's real to them, and we have really formed their behavior. That has been huge!" Woosley exclaimed.

Combined with a strategy that sends up-to-the-minute data on activations to the Lottery's marketing sales reps, who can immediately call on retailers who have yet to activate, it has all had a significant impact, and currently about 90% of retailers activate all new tickets within 48 to 72 hours of launch.



Arkansas Scholarship Lottery at a Glance

	Instant Ticket Sales	Draw Game Sales	Total Sales	Total Prizes	Net to Scholarships
FY2019*	\$407,825,514	\$107,667,993	\$515,493,507	\$349,877,142	\$98,411,747
FY2018	407,604,791	92,103,185	499,707,976	341,895,420	91,844,929
FY2017	368,454,561	80,686,467	449,141,028	306,429,388	85,157,060
FY2016	360,007,743	95,591,659	455,599,402	308,947,315	85,274,927
FY2015	335,000,613	73,662,767	408,663,380	280,466,794	72,619,369
FY2014	322,415,276	87,657,850	410,073,126	274,950,099	81,488,844
FY2013	355,061,785	84,486,209	439,547,994	292,124,182	90,257,161
FY2012	391,290,225	81,795,382	473,085,607	315,318,828	97,510,280
FY2011	387,476,608	76,540,743	464,017,351	307,454,705	74,229,349
FY2010**	335,487,156	48,211,299	383,698,455	247,723,040	82,799,809

Current games:

Instant tickets: About 55 new games per year; \$1, \$2, \$3, \$5, \$10 and \$20

Terminal games: Mega Millions, Powerball, Natural State Jackpot, Lucky for Life, Cash 3, Cash 4, Fast Play

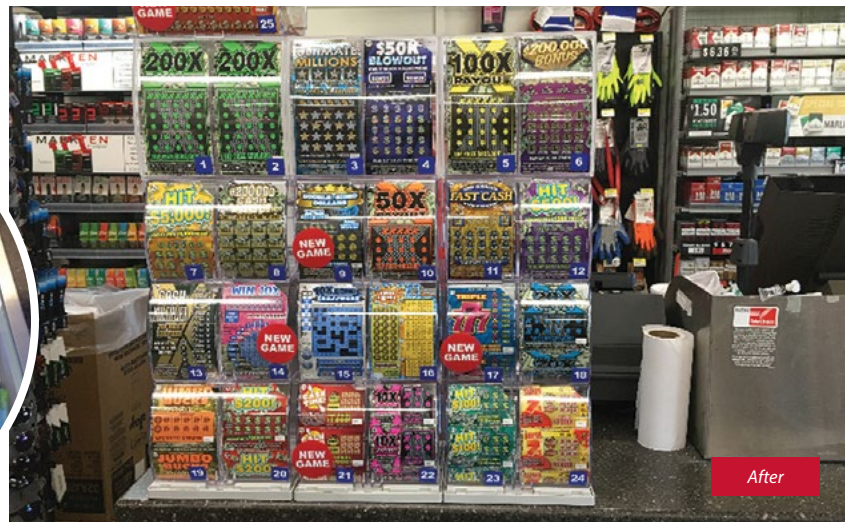
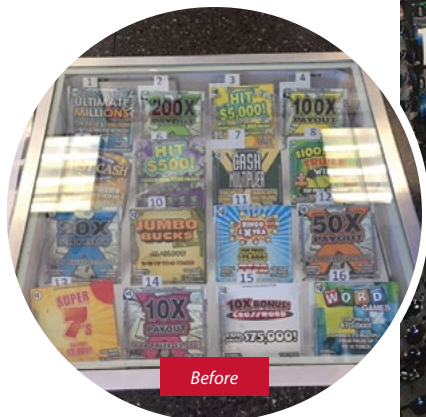
Vital statistics:

Number of employees: 64 **Licensed retailers:** 1,912 (as of July 31) **Vending equipment:** TVMs in 119 locations (as of July 31)

* Preliminary and unaudited

** Partial startup year

E-Z Mart stores went from in-counter to on-counter ticket displays, resulting in a big increase in sales.



Another important change two years ago was adding the Lottery's first key accounts manager, Ellen Seaton. Chain stores make up about 900 of the Lottery's 1,900+ retail stores, including the new Walmart Supercenters coming into the lottery space. "We have seen a significant impact with having one person manage all our corporate chains," said Woosley.

The benefit comes from establishing personal relationships with chains' district or regional managers, which enables one-on-one discussions with

them about how they can improve sales in their stores, often by using simple tools and techniques.

One dramatic example is the work done with E-Z Mart, a regional chain that has 83 stores in Arkansas. For the Lottery's first nine years, E-Z Marts utilized in-counter dispensers, which simply aren't very visible. Efforts had been made to try to get them out of the counter, but it took Seaton to build the relationships and trust with the company. By showing them data that they could increase sales significantly by

moving the ticket display and utilizing other best practices like keeping the bins full, E-Z Mart finally made the move. A few other chains have also moved their tickets out of the counter or increased their facings. "They have all seen their sales dramatically increase, and that has been a huge part of our overall increase in sales."

The favorable relationships with corporate chains also played a big role in getting legislation passed in 2017 that allows debit cards for lottery purchases. "Our chains really led the charge on



that,” noted Woosley, adding that legislators are more likely to pay attention when big employers in their districts ask for changes that would help them – such as allowing the use of debit cards for lottery. Stores that now accept debit cards have seen sales 7 to 11% higher than those that don’t.

Another tool that has been implemented fairly recently allows the Lottery to drill down to the zip code level and examine quarterly instant ticket sales. They might look at the 20 retailers whose sales have increased the most, and the 20 whose sales have declined the most, then look for reasons for the declines. Sometimes it means another store opened in its neighborhood, so the overall balance should be about the same. But sometimes it means there’s a new manager who needs more training, or uncovers another reason for the slowing sales, one that can be easily addressed. “It’s been a huge tool for us to, again, change their behavior and put some procedures in place,” Woosley explained. “I think the store employees, managers and district managers have really enjoyed that, because it’s great if we can show them a way to keep their sales up.”

Building on the Momentum

Keeping those sales up going forward is the challenge all lotteries face, especially coming off a record year that was in part driven by unpredictable giant jackpots. Arkansas has proven that sometimes just sitting down and examining what you have pays off in spades. “In the past few years, everything we have done has made all the difference in the world when you do not have a new product to launch, when you don’t have a new price point. You really have to drill down into what you do, and work out a better way to do it.”

Now it's time to keep building on that momentum. The Lottery faces new competition in Arkansas, with the state's two racetracks recently expanding to full casinos and adding sports betting. And it is still without tools used in some other states, like keno (a proven source of new revenue for lotteries) and online sales, but like others in the same situation, it will continue to do the best it can.

Woosley is counting on the developments previously mentioned, like the expansion to Walmart Supercenters with vending machines – that began in August. “If you introduce 69 new retailers in a state that has 1,900 retailers, that’s going to be a pretty nice boost.” The E-Z Mart store improvements were completed in June and that will also help. “So we hope a lot of our growth is going to come from the new retailers and making some of our old retailer chains better.”

The Lottery is also looking at an in-lane solution with Abacus, perhaps

sometime next spring. As a smaller lottery with a small staff, Woosley is happy to let some of the other states do the initial heavy lifting on projects such as these. “We don’t need to reinvent the wheel. It’s great to be original, but we can’t afford to make mistakes. We need to let the bigger states succeed or fail in new initiatives, and borrow from their success.”

On the game front, he is excited to finally have a ticket in partnership with the University of Arkansas Razorbacks – something he’s been trying to get for years. The Lottery has worked with the University in other partnerships, but finally succeeded in getting an instant ticket on the market. It was to be released on August 27, and some of the Lottery’s 10th anniversary celebrations may feature the new \$5 game. Those celebrations will also surely focus on winning – the winners, the scholarship recipients and the retailers.

Woosley is understandably proud of what the Lottery has accomplished

in recent years, including the additional achievement of just having completed the Responsible Gambling Verification Program offered jointly by the North American Association of State and Provincial Lotteries and the National Council on Problem Gambling. The Arkansas Scholarship Lottery received verification at the planning level.

“The last five years spent turning things around and changing the public perception have been the most rewarding and noteworthy thing that we’ve done, along with raising some \$860 million for scholarships in our 10 years. That far exceeds what anyone expected the Lottery to do.” ■

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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)



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%

South Carolina Education Lottery
Meet Mitch
 Chernoff Newman/Mad Monkey

Tennessee Education Lottery Corporation
Lotto America - Yankee Doodle
 The Buntin Group

Wyoming Lottery Corporation
Mega Millions Radio Ad
 Warehouse Twenty One

RADIO ADVERTISING - CORPORATE/BENEFICIARY

Arkansas Scholarship Lottery
Beneficiary Scholarship Deadline
 Arkansas Scholarship Lottery/CJRW

British Columbia Lottery Corporation
Play It Forward
 123 West for BCLC

Connecticut Lottery Corporation
Thank You, Connecticut
 Connecticut Lottery/Decker

Michigan Lottery
Our Tree
 SMZ

Missouri Lottery
Play It Forward - Cause an Effect
 Barkley

New Hampshire Lottery Commission
General
 New Hampshire Lottery Commission/GYK Antler

North Carolina Education Lottery
North Carolina School Heroes
 Mullen Lowe

Oregon Lottery
Brand Promise
 Pollinate

Tennessee Education Lottery Corporation
Beneficiary - Wait, Really?
 The Buntin Group

Washington's Lottery
FY19 Beneficiary - Thanks to the Players
 Cole & Weber

West Virginia Lottery
Play It Forward - Education
 West Virginia Lottery

RADIO ADVERTISING KENO GAMES

Kansas Lottery
Racetraz - Special FX
 Kansas Lottery

Massachusetts State Lottery
Rituals
 Massachusetts Lottery/Connelly Partners

New Hampshire Lottery Commission
Keno 603
 New Hampshire Lottery Commission/GYK Antler

New Jersey Lottery
This Changes Everything
 PureRED

North Carolina Education Lottery
Keno - Live Broadcasting
 Mullen Lowe

Tennessee Education Lottery Corporation
KENO to Go - Magic Trick
 The Buntin Group

RADIO ADVERTISING COORDINATED CAMPAIGN

Arizona Lottery
Holiday Scratchers® - Shop Less Scratch More Campaign
 OH Partners

British Columbia Lottery Corporation
Daily Grand Awareness Campaign
 Sidlee for BCLC

DC Lottery & Charitable Games
\$30 Scratcher Campaign
 MDB Communications

Delaware Lottery
Collect 'N Win Summer Campaign
 OneMagnify

Idaho Lottery
30th Anniversary - Elevator & Mariachi Band
 Mitchell+Palmer

Interprovincial Lottery Corporation
Lotto Max Campaign
 FCB Toronto

Kansas Lottery
HMR - Early Bird
 Kansas Lottery

Loto-Québec
Katelynn, Coffee, Name, Contact
 Lotto 6/49

Louisiana Lottery Corporation
Crawfish Campaign
 Louisiana Lottery Corporation

Maryland Lottery & Gaming
Maryland 7s Scratch-Offs Campaign
 GKV

Minnesota State Lottery
Holiday Campaign - Dwight Elephant
 Periscope

Missouri Lottery
Gourmet Getaway Promotion - Language Lessons Campaign
 Barkley

New Hampshire Lottery Commission
Powerball Jackpot Alert
 New Hampshire Lottery Commission/GYK Antler

New York Lottery
The Price Is Right
 McCann New York

Oregon Lottery
When We Play
 BPN

Pennsylvania Lottery
Pick Games
 MARC USA

Tennessee Education Lottery Corporation
Holiday Radio Campaign
 The Buntin Group

Texas Lottery Commission
Multiplier Campaign
 THIRD EAR

Virginia Lottery
Expedition Radio - Mermaids, Tree Bark, On Tour
 BMA

Washington's Lottery
Seahawks - Take Your Loud on the Road Campaign
 Cole & Weber

West Virginia Lottery
The Lotto Bros Radio Campaign
 West Virginia Lottery

PRINT ADVERTISING RETAILER SIGNAGE/MERCHANDISING

Arkansas Scholarship Lottery
Millionaire Mirror
 Arkansas Scholarship Lottery/CJRW

California Lottery
Holiday Scratchers
 David & Goliath/Alcone

Colorado Lottery
Blowout Scratch Point of Sale
 Cactus

Delaware Lottery
Collect 'N Win Summer Campaign
 OneMagnify

Hoosier Lottery
Hit Scratch-Offs
 The Buntin Group

Idaho Lottery
Marilyn Monroe
 Idaho Lottery

Loto-Québec
Fish
 Voyage de pêche

Maryland Lottery & Gaming
Holiday Scratch-Offs - Retail Monitor Graphic
 GKV

Missouri Lottery
Happy Rails Summer Promotion
 Barkley

Nebraska Lottery
Daily Games Wobbler
 Smith Kroeger

New Jersey Lottery
Pick 3 Random Number Generator
 New Jersey Lottery

New Mexico Lottery
Winner Board
 New Mexico Lottery

New York Lottery
Holiday Envelope & Display
 McCann New York

North Carolina Education Lottery
Holiday Clear Ticket
 Mullen Lowe



THE LOTTERY CENTER™

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MENU BOARD

Display up to 30 display cards.

MONITOR

Space for your lottery supplied monitor.

DIGITAL SCREEN

Display current jackpots with your existing jackpot sign.

LIT HOLDER

Display playslips or brochures.

TICKET CHECKER

Check for winning tickets with the ticket checker.

MENU BOARD

Smaller Menu Board allows for highlighting up to six newest or specialty games.



Ontario Lottery & Gaming Corporation

Instant Monopoly - Retail Takeover

BMR

Oregon Lottery

New Brand Imagery

Lottery Team

Pennsylvania Lottery

Look What Just Dropped in POS

MARC USA

Tennessee Education Lottery Corporation

Halloween Jumbo Bucks Instant Games - Table Tent

The Buntin Group

Texas Lottery Commission

Cash Explosion Gemini Topper

THIRD EAR

Virginia Lottery

X the Money - PCI Insert & Expedition Change Mat

BMA

**PRINT ADVERTISING
OUTDOOR**

Arizona Lottery

Holiday Scratchers® - Shop Less Scratch More 3D Billboard

OH Partners

Arkansas Scholarship Lottery

Draw Game Digital RSS Feed

Arkansas Scholarship Lottery/CJRW

California Lottery

Dia De Los Muertos Scratchers

Casanova

Colorado Lottery

Holiday Scratch

Cactus

Connecticut Lottery Corporation

Hot-n-Spicy - Feel the Heat

Connecticut Lottery/Decker

Delaware Lottery

SportsPick

OneMagnify

Idaho Lottery

Marilyn Monroe - Wooh Billboards

Mitchell+Palmer

Louisiana Lottery Corporation

Saints

Louisiana Lottery Corporation

Maryland Lottery & Gaming

Maryland 7s Scratch-Offs

GKV

Missouri Lottery

Happy Rails Summer Promotion

Barkley

New Jersey Lottery

101 Days of Summer 2018 - Frozen Billboards

PureRED

New York Lottery

Cashword Subway (MTA) Liveboards

McCann New York

Ontario Lottery & Gaming Corporation

Lotto Max - GO Train and Streetcar Takeover

FCB Toronto

Oregon Lottery

State Parks

Lottery Team

Pennsylvania Lottery

Neon Outdoor

MARC USA

Tennessee Education Lottery Corporation

\$5 Billion Beneficiary

The Buntin Group

Texas Lottery Commission

Multiplier - Yeah

THIRD EAR

Virginia Lottery

Expedition - July

BMA

Washington's Lottery

BARQ!

Cole & Weber

Wyoming Lottery Corporation

Mega Millions Billboard

Warehouse Twenty One

**PRINT ADVERTISING
COLOR OR BLACK AND
WHITE**

British Columbia Lottery Corporation

Ticket Extravaganza Campaign

DBB for BCLC

Hoosier Lottery

The Wizard of Oz Scratch-Off

The Buntin Group

Louisiana Lottery Corporation

LSU Program

Louisiana Lottery Corporation

Maryland Lottery & Gaming

Preakness Program Ad

GKV

New York Lottery

Yankees Program Ad

McCann New York

Pennsylvania Lottery

Gus - Holiday Print

MARC USA

Tennessee Education Lottery Corporation

Black History Month

The Buntin Group

Texas Lottery Commission

Gem 7s Minibillboard

THIRD EAR

Virginia Lottery

UVA National Champs

Congrats Ad

Virginia Lottery/RTD

Washington's Lottery

Ranch

Cole & Weber

**PRINT ADVERTISING
CORPORATE
BENEFICIARY**

Arkansas Scholarship Lottery

Arkansas Next Magazine Ad

Arkansas Scholarship Lottery/CJRW

British Columbia Lottery Corporation

Play It Forward

123 West for BCLC

Nebraska Lottery

State Fair 2018 Guidebook Ad

Smith Kroeger

North Carolina Education Lottery

North Carolina School Heroes

Mullen Lowe

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Play/Pick Slips



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Contact us: sales@montenegro-inc.com

Pennsylvania Lottery
Benefits Older Pennsylvanians
Outdoor
MARC USA

Tennessee Education Lottery Corporation
\$5 Billion Beneficiary
The Buntin Group

PRINT ADVERTISING COORDINATED PRINT CAMPAIGN

California Lottery
Monopoly Scratchers
David&Goliath

Colorado Lottery
Proceeds Coordinated OOH
Campaign Cactus

DC Lottery & Charitable Games
Electric Neon Scratchers
Campaign
MDB Communications

Delaware Lottery
Powerball Power Payout
OneMagnify

Idaho Lottery
Holiday Scratch Campaign -
Joy Easy & Noel Brainer
Mitchell+Palmer

Illinois Lottery
Time
Camelot/OKRP

Iowa Lottery Authority
Summer of Silverado
Iowa Lottery

Loto-Québec
Bixi and Osheaga
Lotto 6/49

Louisiana Lottery Corporation
Lottery MG Advocate Spadea
Louisiana Lottery Corporation

Maryland Lottery & Gaming
The Price is Right Scratch-Off
GKV

Massachusetts State Lottery
Neighborhoods & Mass Cash
Massachusetts Lottery/Connelly
Partners

Minnesota State Lottery
Day of the Dead Campaign
Periscope

Missouri Lottery
Happy Rails Summer Promotion
Barkley

Nebraska Lottery
2018 Beneficiary Print Campaign
Smith Kroeger

New Jersey Lottery
... Meets Quick Draw
PureRED

New Mexico Lottery
Holiday Scratchers - My True Love
Gave to Me
New Mexico Lottery

New York Lottery
Holiday
McCann New York

Ontario Lottery & Gaming Corporation
Lotto 6/49 - Joy of Anticipation
Campaign
FCB Toronto

Pennsylvania Lottery
Gus - Holiday Print Campaign
MARC USA

South Carolina Education Lottery
Carolina Millions
South Carolina Education Lottery

Tennessee Education Lottery Corporation
\$5 Billion Beneficiary Campaign
The Buntin Group

Texas Lottery Commission
Multiplier Campaign
THIRD EAR

Virginia Lottery
Holiday POS
BMA

Washington's Lottery
Shredded
Cole & Weber

Wyoming Lottery Corporation
Powerball Campaign
Warehouse Twenty One

SPECIAL CATEGORY ORIGINAL MUSIC FOR TV OR RADIO

DC Lottery & Charitable Games
\$30 Scratcher
MDB Communications

Georgia Lottery Corporation
Daily Draw - Winning
BBDO

Idaho Lottery
Benefits - Improvements in Sync
Mitchell+Palmer

Michigan Lottery
Our Tree
SMZ

Missouri Lottery
A Look Inside -
Missouri Fight Song
Barkley

Nebraska Lottery
Truck\$ & Buck\$ - TV Music
Smith Kroeger

New York Lottery
The Price Is Right
McCann New York

North Carolina Education Lottery
The Back Scratch
Mullen Lowe

Pennsylvania Lottery
Piano
MARC USA

Virginia Lottery
MobilePlay
BMA

Western Canada Lottery Corporation
Big Spin
McCann

Wisconsin Lottery
Holiday Scratch - Man Me Likey
Hoffman York

SPECIAL CATEGORY USE OF HUMOR (RADIO)

California Lottery
Holiday Deck the Halls
David&Goliath

Connecticut Lottery Corporation
Valentine's Day - Cupid Approved
Connecticut Lottery/Decker

Delaware Lottery
Collect 'N Win Summer Campaign
- Second Chance
OneMagnify

Georgia Lottery Corporation
Stacked Scratchers - Big Voice
BBDO

Hoosier Lottery
Jackpot Scratch-Offs
The Buntin Group

Idaho Lottery
Raffle - Mobile Helper App
Mitchell+Palmer

Interprovincial Lottery Corporation
Lotto Max - Yard Work
FCB Toronto

Kansas Lottery
Triple Motor Mayhem -
Mayhem Voice
Kansas Lottery

Loto-Québec
Prince of the Desert
Lotto Max

Louisiana Lottery Corporation
Lucky 13
Louisiana Lottery Corporation

Massachusetts State Lottery
Rituals
Massachusetts Lottery/Connelly
Partners

Minnesota State Lottery
Holiday Campaign -
Dwight Elephant
Periscope

Missouri Lottery
Scratchers as Gifts - Turtleneck
Barkley

New Hampshire Lottery Commission
Keno
New Hampshire Lottery
Commission/GYK Antler

New Jersey Lottery
Lucky Ideas
PureRED

New Mexico Lottery
Gold Mine - 9X Scratchers
New Mexico Lottery

New York Lottery
X Series - Jogger
McCann New York

North Carolina Education Lottery
Some Money
Mullen Lowe

Pennsylvania Lottery
Pick 3
MARC USA

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Fastrak
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Tennessee Education Lottery Corporation

Holiday Instant Games - Get to Work
The Buntin Group

Texas Lottery Commission

Gem 7s - Pirate
THIRD EAR

Virginia Lottery

Extreme Millions - Winners
BMA

West Virginia Lottery

The Lotto Bros - App
West Virginia Lottery

SPECIAL CATEGORY USE OF HUMOR (TV)

Arkansas Scholarship Lottery

Big Win
Arkansas Scholarship Lottery/CJRW

Colorado Lottery

Crypto Bro
Cactus

Delaware Lottery

Collect 'N Win Summer Campaign - TV Spot
OneMagnify

Georgia Lottery Corporation

Monopoly - Real Estate
BBDO

Hoosier Lottery

Jackpot Scratch-Offs
The Buntin Group

Idaho Lottery

Frogger TV - The Office Boss
Mitchell+Palmer

Interprovincial Lottery Corporation

Lotto Max - Break Room
FCB Toronto

Kansas Lottery

HMR - Holiday Rush
Kansas Lottery

Kentucky Lottery Corporation

Holiday Hit and Run
Kentucky Lottery Corporation/
Bandy Carroll Hellige

Louisiana Lottery Corporation

Winner Winner Chicken Dinner
Louisiana Lottery Corporation

Massachusetts State Lottery

Holiday Fatigue Syndrome
Massachusetts Lottery/Connelly
Partners

Minnesota State Lottery

Vikings Scratch Game - Hose
Periscope

Missouri Lottery

**Scratchers as Gifts -
Unfake the Joy**
Barkley

New Hampshire Lottery Commission

Gym Rats
New Hampshire Lottery
Commission/GYK Antler

New Jersey Lottery

Licky 7s (Extended)
PureRED

New Mexico Lottery

Hallo-Day Scratchers
New Mexico Lottery

New York Lottery

X Series - Salon
McCann New York

North Carolina Education Lottery

Darts
Mullen Lowe

Pennsylvania Lottery

Realtor TV
MARC USA

South Dakota Lottery

Lotto - Long Walk
South Dakota Lottery/
Lawrence & Schiller

Tennessee Education Lottery Corporation

Hit Instant Games - Kung Fu
The Buntin Group

Texas Lottery Commission

Pac-Man
Texas Lottery Commission

Virginia Lottery

Expedition - Eagle
BMA

Washington's Lottery

**Seahawks - Take Your Loud
on the Road**
Cole & Weber

West Virginia Lottery

The Lotto Bros - Alien
West Virginia Lottery

Wisconsin Lottery

All or Nothing - Answer
Hoffman York

SPECIAL CATEGORY USE OF CINEMATOGRAPHY

Arkansas Scholarship Lottery

Big Win
Arkansas Scholarship Lottery/CJRW

California Lottery

Monopoly - Play for Real
David&Goliath

Colorado Lottery

The Will
Cactus

Georgia Lottery Corporation

Keno - Medieval Demo
BBDO

Idaho Lottery

Benefits - Lighting the Way
Mitchell+Palmer

Interprovincial Lottery Corporation

Lotto 6/49 - Joy of Anticipation
FCB Toronto

Louisiana Lottery Corporation

Jackpot Family
Louisiana Lottery Corporation

Maine State Lottery

Megabucks - Lake
Fuseideas

Minnesota State Lottery

Billion Dollar Commercial
Periscope

Missouri Lottery

**Happy Rails Promotion -
Like Royalty**
Barkley

New Jersey Lottery

Room Full of Winners
PureRED

North Carolina Education Lottery

**Carolina Black,
Drawn to the Black**
Mullen Lowe

Oregon Lottery

Brand Promise II
Polliante

South Carolina Education Lottery

Past Due
Chernoff Newman/Mad Monkey

Tennessee Education Lottery Corporation

**Beneficiary TV - Lifetime of
Opportunities**
The Buntin Group

Texas Lottery Commission

Gem 7s - Vinyl
THIRD EAR

Virginia Lottery

Expedition - Clown Wrestling
BMA

Washington's Lottery

Walking
Cole & Weber

West Virginia Lottery

The Lotto Bros - Meteor
West Virginia Lottery

SPECIAL CATEGORY TV OR RADIO SPOT FITTING NO OTHER CATEGORY

Arizona Lottery

Fantasy 5 - Live Your Million
Dollar Fantasy TV
OH Partners

British Columbia Lottery Corporation

**Lottery Winners Awareness
Campaign - Sandee and Wayne**
DDB for BCLC

California Lottery

Lunar New Year - Year of the Pig
Time

Colorado Lottery

Prizes Remaining TV Campaign
Cactus

Idaho Lottery

30th Anniversary - Cubicle
Mitchell+Palmer

Iowa Lottery Authority

Summer of Silverado
Strategic America

Kansas Lottery

PlayOn - Second Chances Golf
Kansas Lottery

Louisiana Lottery Corporation

Hero Tickets
Louisiana Lottery Corporation

confidence GAINED

The risks are expansive, but so are the rewards.

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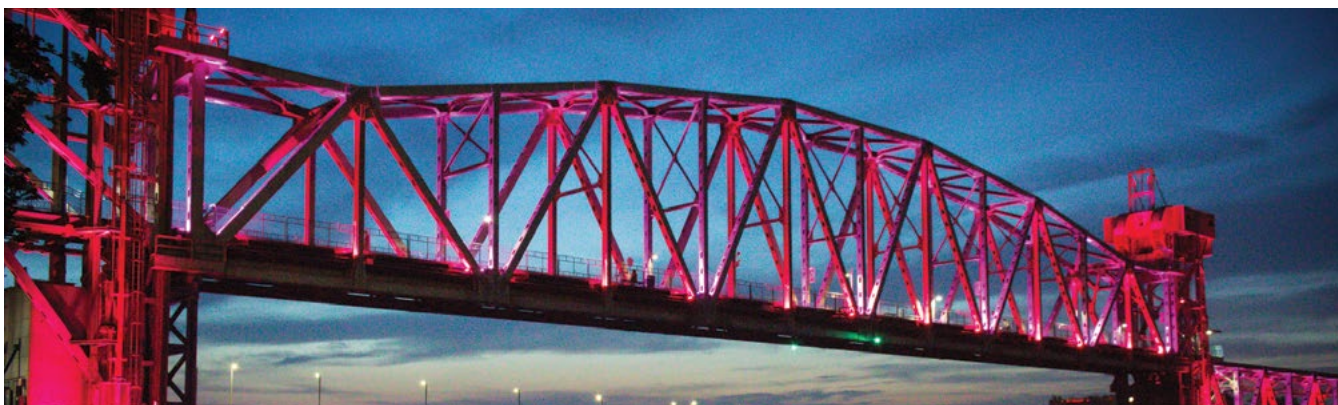
"Our first SOC 2 with BerryDunn was easily the best audit experience we've ever had. Throughout the entire process we sensed that the BerryDunn team was truly acting as our partner. They dug down into the details of our policies and procedures to uncover every aspect that needed improvement. And, they 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.





Maryland Lottery & Gaming
 Old Bay Bucks Scratch-Off -
 Old Bay Bucks
 GKV

Michigan Lottery
 iLottery - Walk This Way
 SMZ

Missouri Lottery
 Happy Rails Promotion -
 Like Royalty
 Barkley

New Mexico Lottery
 Warehouse Dash
 New Mexico Lottery

New York Lottery
 Collect 'N Win - Baseball
 McCann New York

**North Carolina Education
 Lottery**
 Loaded - So Loaded
 Mullen Lowe

**Ontario Lottery & Gaming
 Corporation**
 WinPossible - Toronto Raptors
 The Hive Inc.

Pennsylvania Lottery
 Bowling TV & Social Video
 MARC USA

**Tennessee Education Lottery
 Corporation**
 Game on TV - Fill Up
 The Buntin Group

Virginia Lottery
 MobilePlay
 BMA

Washington's Lottery
 Shredded - 60s Movie Trailer
 Cole & Weber

West Virginia Lottery
 The Lotto Bros -
 Lightning Strike TV
 West Virginia Lottery

SPECIAL CATEGORY CORPORATE/ BENEFICIARY VIDEO

Arkansas Scholarship Lottery
 Meet Jalease, Lottery Scholarship
 Recipient
 Arkansas Scholarship Lottery/CJRW

Minnesota State Lottery
 Live Feed
 Periscope

Missouri Lottery
 Play It Forward - A Look Inside
 Barkley

**North Carolina Education
 Lottery**
 Helping to Build Schools -
 The Jones County & Alamance
 County Stories
 Mullen Lowe

**Ontario Lottery & Gaming
 Corporation**
 PlaySmart -
 Corporate Training Video
 FCB Toronto

Oregon Lottery
 Upstream
 Pollinate

**Tennessee Education Lottery
 Corporation**
 Corporate Diversity Video
 The Buntin Group

Texas Lottery Commission
 Where the Money Goes
 Texas Lottery Commission

Virginia Lottery
 Thank a Teacher -
 Art & Core Campaigns
 Virginia Lottery

Washington's Lottery
 Little LVM
 Cole & Weber

West Virginia Lottery
 Play It Forward - Seniors
 West Virginia Lottery

Wyoming Lottery Corporation
 Giving Back Longform Video
 Warehouse Twenty One

SPECIAL CATEGORY TV CAMPAIGN UNDER \$25,000

Connecticut Lottery Corporation
 Thank You, Connecticut
 Connecticut Lottery/Decker

Idaho Lottery
 Broncos, Bengals & Vandals
 Campaign
 Mitchell+Palmer

Iowa Lottery Authority
 Suite Seats
 Strategic America

Kansas Lottery
 HMR - Talking Tickets
 Kansas Lottery

Louisiana Lottery Corporation
 Fireball 7s
 Louisiana Lottery Corporation

Maryland Lottery & Gaming
 Gold Rush Scratch-Offs -
 Golden Retriever
 GKV

New Jersey Lottery
 Responsible Gaming -
 Dream Big, Play Responsibly
 Moon Doggy Media

New Mexico Lottery
 My Rewards
 New Mexico Lottery

New York Lottery
 Responsible Gaming -
 March 2019 Video
 McCann New York

**North Carolina Education
 Lottery**
 NC Fast PSA
 Mullen Lowe

Pennsylvania Lottery
 Keno - It's Simple
 MARC USA

**Tennessee Education Lottery
 Corporation**
 Diversity - Paint
 The Buntin Group

Texas Lottery Commission
 Pac-Man
 Texas Lottery Commission

CORPORATE COMMUNICATIONS EMPLOYEE/PLAYER NEWSLETTER

Connecticut Lottery Corporation
 Chatter That Matters
 Connecticut Lottery

Hoosier Lottery
 CSR Employee Newsletter
 Hoosier Lottery

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Maryland Lottery & Gaming
Maryland Lottery & Gaming Gazette - June 2019
 Maryland Lottery & Gaming

Missouri Lottery
Monday Message - March 11, 2019
 Missouri Lottery

New Mexico Lottery
Big Winners Player Newsletter - DOUGH-NUTS!
 New Mexico Lottery

New York Lottery
February 2019 Newsletter
 McCann New York

Ontario Lottery & Gaming Corporation
Did You Know? - June 2019
 Ontario Lottery & Gaming Corporation

Texas Lottery Commission
TLC Team News - Fall 2018
 Texas Lottery Commission

Virginia Lottery
Lottoland Lately
 Virginia Lottery

CORPORATE COMMUNICATIONS **RETAILER NEWSLETTER**

Delaware Lottery
Ticket Talk
 OneMagnify

Georgia Lottery Corporation
March Newsletter
 Georgia Lottery Corporation

Hoosier Lottery
November 2018 Retailer Playbook
 Hoosier Lottery

Kentucky Lottery Corporation
The Quarter - Holiday Issue
 Kentucky Lottery Corporation/
 Bandy Carroll Hellige

Louisiana Lottery Corporation
July/August - All About the Saints
 Louisiana Lottery Corporation

Maryland Lottery & Gaming
Maryland Lottery Retailer Report - July-September 2019
 Maryland Lottery & Gaming

Missouri Lottery
Retailer Connection - December 2018
 Missouri Lottery

New Jersey Lottery
Retailer Focus - June 2019
 New Jersey Lottery

New Mexico Lottery
Retailer Newsletter - Best Practices, June 2019
 New Mexico Lottery

Ontario Lottery & Gaming Corporation
OLG Lotto Post - October 2018
 Marshall Fenn

Texas Lottery Commission
RoundUp - June 2019
 Texas Lottery Commission

Virginia Lottery
Playbook - Feb 2019
 Virginia Lottery/BMA

West Virginia Lottery
FY 2018 Progress Report
 West Virginia Lottery

Western Canada Lottery Corporation
Lotto Line - July/August 2018
 Western Canada Lotteries

RESPONSIBLE GAMBLING COMMUNICATIONS **PRINT**

Hoosier Lottery
Responsible Gaming Best Practices Article
 Hoosier Lottery

Loto-Québec
Here We Card!
 Loto-Québec

Maryland Lottery & Gaming
Preakness Responsible Play Program Ad
 GKV

Missouri Lottery
Do the Right Thing - Retailer Responsibility and Integrity Program
 Missouri Lottery

New York Lottery
Responsible Gaming - March 2019
 McCann New York

North Carolina Education Lottery
Lottery Link Newsletter - March 2019 PGAM
 Mullen Lowe

Ontario Lottery & Gaming Corporation
PlaySmart - How To Play - Blackjack Brochure
 FCB Toronto

Texas Lottery Commission
Dogshow
 Texas Lottery Commission

Wisconsin Lottery
Shark Bowl
 Hoffman York

RESPONSIBLE GAMBLING COMMUNICATIONS **VIDEO**

Connecticut Lottery Corporation
Gambling Awareness Month - Use Your GameSense
 Connecticut Lottery/Decker

Hoosier Lottery
CSR Café Video - Odds
 The Buntin Group

Loto-Québec
Lottery Tickets Are for Adults Only!
 Loto-Québec

New Jersey Lottery
Responsible Gaming - Dream Big, Play Responsibly
 Moon Doggy Media

New York Lottery
Responsible Gaming - March 2019
 McCann New York

Here for You!

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NASPL Booth 113



Clock



Animated LED sign



PLAY RESPONSIBLY

Easy set-up full-color flag



Ticket dispenser jackpot sign



Compact jackpot easel



Illuminated arched easel



Play slip & pencil holders

CM GLOBAL

Ontario Lottery & Gaming Corporation
PlaySmart - How To Play - Sic Bo
FCB Toronto

Oregon Lottery
Trilogy - Broken
Brightwater

South Carolina Education Lottery
Past Due
Chernoff Newman/Mad Monkey

Tennessee Education Lottery Corporation
Two Buddies - Responsible Gaming Social Video
The Buntin Group

Texas Lottery Commission
It Only Takes One
Texas Lottery Commission

RESPONSIBLE GAMBLING COMMUNICATIONS RADIO

New York Lottery
Responsible Gaming - March 2019
McCann New York

South Carolina Education Lottery
Past Due
Chernoff Newman/Mad Monkey

Virginia Lottery
Scrooge - Underage
Virginia Lottery

Wisconsin Lottery
Can't Get it Off Your Mind & Get Real
Hoffman York

RESPONSIBLE GAMBLING COMMUNICATIONS ELECTRONIC

Hoosier Lottery
Gift Responsibly Campaign
Laughlin Constable

Loto-Québec
Well Played!
Loto-Québec

Missouri Lottery
Corporate Social Responsibility Report - FY18
Missouri Lottery

New York Lottery
Responsible Gaming - March 2019 Social Posts
McCann New York

Ontario Lottery & Gaming Corporation
PlaySmart - Slots Education Module Videos
FCB Toronto

Pennsylvania Lottery
March Responsible Gambling Message
MARC USA

Texas Lottery Commission
It Only Takes One Video
Texas Lottery Commission

Virginia Lottery
Digital Play Responsibly Efforts
Virginia Lottery

RESPONSIBLE GAMBLING COMMUNICATIONS COORDINATED CAMPAIGN

Connecticut Lottery Corporation
Give a Toy, Not a Ticket Campaign
Connecticut Lottery/Decker

Hoosier Lottery
PGAM 2019 Campaign
The Buntin Group

Loto-Québec
Respecting Your Limits - The Right Call
Loto-Québec

New Jersey Lottery
Responsible Gaming Newspaper Ads
New Jersey Lottery

New York Lottery
Responsible Gaming - March 2019 Campaign
McCann New York

Ohio Lottery
Stop! - Get Help, Give Help
Northlich

Ontario Lottery & Gaming Corporation
PlaySmart - We Know Gambling Campaign
FCB Toronto

Oregon Lottery
Trilogy Campaign - The Wall
Brightwater

Texas Lottery Commission
It Only Takes One Campaign
Texas Lottery Commission

Virginia Lottery
Play Responsibly Campaign
Virginia Lottery

BEST NEW MEDIA

Arizona Lottery
Willie's Virtual Holiday Party Giveaway
OH Partners

Arkansas Scholarship Lottery
March Ticket Madness Social Media
Arkansas Scholarship Lottery/CJRW

California Lottery
Holiday Gift of Timing Videos
David&Goliath

Georgia Lottery Corporation
Holiday Gift You Matic
BDO

Hoosier Lottery
Holiday Mystery Microsite
Laughlin Constable

Idaho Lottery
30th Anniversary - Facebook Live Trivia
Idaho Lottery

Kentucky Lottery Corporation
Reindeer on the Run!
Kentucky Lottery Corporation/Bandy Carroll Hellige

Loto-Québec
Arachnophobia
Phobie

Maryland Lottery & Gaming
Game of Thrones Social Media
GKV



EVENTS



Austin Conference

November 18-21, 2019

AUSTIN, TEXAS



D.C Conference

May 2020

WASHINGTON, D.C.



NASPL 2019 - Awards Entries

Massachusetts State Lottery
KENO Train Wraps
Massachusetts Lottery/Connelly Partners

Michigan Lottery
Let's Play
Ovative Group/Ostrum Creative

Minnesota State Lottery
Bold Deliveries
Periscope

Missouri Lottery
Play It Forward - A Look Inside
Barkley

New Hampshire Lottery Commission
Find the Goat Promotion
New Hampshire Lottery Commission/GYK Antler

New Jersey Lottery
Anything Can Happen in Jersey - Funniest Female in Jersey
Image Revolver

New Mexico Lottery
Powerball Power Cruise Winners - Social Media Promotion
New Mexico Lottery

New York Lottery
The Price Is Right - Instagram Sweepstakes
McCann New York

North Carolina Education Lottery
Back Scratch Social Media Stunt
Mullen Lowe

Ohio Lottery
Instagram - Instagrab Giveaway
Marcus Thomas

Oregon Lottery
Featured Four Scratch-Its - Legendary Games
Lottery Team

Pennsylvania Lottery
Updated iLottery Paid Social
MARC USA

South Carolina Education Lottery
Meet Mitch
South Carolina Education Lottery

Tennessee Education Lottery Corporation
Gemini Touch - Attract Loop
The Buntin Group

Texas Lottery Commission
Multiplier - Pop, Emojception, Balloons
THIRD EAR

Virginia Lottery
Attract Screen
Virginia Lottery

West Virginia Lottery
West Virginia Press Association Digital Partnership
West Virginia Lottery

MULTICULTURAL ADVERTISING

Arizona Lottery
Lucha Libre Scratchers Campaign
OH Partners

California Lottery
Dia De Los Muertos Scratching Skulls
Casanova

Connecticut Lottery Corporation
Hot-n-Spicy - Feel the Heat/ Siente El Calor
Connecticut Lottery/Decker

Georgia Lottery Corporation
Hispanic Atlanta United Scratcher
PM3/BBDO

Massachusetts State Lottery
Emerald 8s
Massachusetts Lottery

Minnesota State Lottery
Day of the Dead
Periscope

New Mexico Lottery
Tapatío Scratchers
New Mexico Lottery

North Carolina Education Lottery
Loaded TV - So Loaded (Spanish)
Mullen Lowe

Oregon Lottery
Education
Pollinate

Pennsylvania Lottery
Black History Month POV
MARC USA

Texas Lottery Commission
Multiplier - Safari Radio (Spanish)
THIRD EAR

Virginia Lottery
Holiday POS
BMA

Wisconsin Lottery
Shark Bowl - Responsible Gaming
Hoffman York

HICKEY AWARDS SPECIAL EVENTS PROMOTION

Arizona Lottery
Arizona Lottery Capitol Museum Exhibit
OH Partners

Arkansas Scholarship Lottery
Powerball and Mega Millions Pop-Up Events
Arkansas Scholarship Lottery/CJRW

DC Lottery & Charitable Games
\$30 Scratcher - Deal or No Deal Event
DC Lottery

Delaware Lottery
The Event
OneMagnify

Idaho Lottery
Sizzlin' Summer
Idaho Lottery

Minnesota State Lottery
Bold Deliveries
Periscope

Missouri Lottery
Working Women's 2019 I Love Lucy Event
Missouri Lottery

New Jersey Lottery
Million Dollar Replay Party
New Jersey Lottery

New Mexico Lottery
Powerball Power Cruise Winner Experience - Social Media Promotion
New Mexico Lottery



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



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New York Lottery
New York State Fair
McCann New York

North Carolina Education Lottery
Carolina Panthers - Ticket Release & Second Chance Winner Reveal
Mullen Lowe

Ohio Lottery
Skee-Ball - Roll for Ohio
Marcus Thomas

Ontario Lottery & Gaming Corporation
NBA Winners Corner Fan Experience
NBA Canada/Victory

Pennsylvania Lottery
Super Bucco Run
MARC USA

Texas Lottery Commission
Luck Happens - Integrated Cross-Platform Experiential
THIRD EAR

Virginia Lottery
Win a Spin Drawing
Virginia Lottery

HICKEY AWARDS AUDIO/VISUAL PRESENTATION

Maryland Lottery & Gaming
Ravens In-Stadium LED/ Wingback 2018
GKV

Minnesota State Lottery
Billion Dollar Premiere
Periscope

Ohio Lottery
Voluntary Exclusion Program Training Video
Ohio Lottery

Tennessee Education Lottery Corporation
Corporate Diversity Video
The Buntin Group

Texas Lottery Commission
Cowboys Scratch Ticket Press Conference
Texas Lottery Commission

West Virginia Lottery
Retailer Best Practices
West Virginia Lottery

HICKEY AWARDS POTPOURRI PROMOTION

Arkansas Scholarship Lottery
This Is Winning Sign
Arkansas Scholarship Lottery/CJRW

California Lottery
Dia De Los Muertos Influencer Contest
Casanova

Idaho Lottery
VIP Club Classroom Wishlist Program
Idaho Lottery

Loto-Québec
Interacting With Clients to Better Inform Them!
Loto-Québec

Maryland Lottery & Gaming
Honfest Proposal - Lucky in Love
Maryland Lottery & Gaming

Massachusetts State Lottery
Scratch for Cash Promotion
Massachusetts Lottery

Minnesota State Lottery
(In)convenience Store
Periscope

Missouri Lottery
Second Chance of a Lifetime - Happy Rails Promotion
Missouri Lottery

New Jersey Lottery
Wicked Week of Winning
New Jersey Lottery

New Mexico Lottery
My Rewards Player Loyalty Program Launch
New Mexico Lottery

New York Lottery
Collect 'N Win Program
McCann New York

North Carolina Education Lottery
North Carolina School Heroes
Mullen Lowe

Tennessee Education Lottery Corporation
Educator of the Week Program
The Buntin Group

Texas Lottery Commission
Vegas Challenge Integrated Campaign
Texas Lottery Commission

Washington's Lottery
Let's Imagine Together Campaign
Cole & Weber

West Virginia Lottery
Pirates Baseball Promotion for Retailers
West Virginia Lottery

Wyoming Lottery Corporation
Cowboy Draw BOGO Promotion
Warehouse Twenty One

HICKEY AWARDS WEBSITE

Arizona Lottery
Arizona Lottery Website
Riester

Arkansas Scholarship Lottery
Arkansas Scholarship Lottery Website
Arkansas Scholarship Lottery/CJRW/
Miles Partnership

Idaho Lottery
Idaho Lottery Website
c308 Marketing

Kentucky Lottery Corporation
Kentucky Lottery Corporation Website
Kentucky Lottery Corporation/
Bandy Carroll Hellige

Maryland Lottery & Gaming
Maryland Lottery Website
GKV

Michigan Lottery
Michigan Lottery Website
Michigan Lottery

Minnesota State Lottery
Billion Dollar Commercial Website
Periscope

New Hampshire Lottery Commission
New Hampshire Lottery Commission Website
New Hampshire Lottery Commission/GYK Antler

North Carolina Education Lottery
North Carolina School Heroes Website
Mullen Lowe

Texas Lottery Commission
Big Cedar Lodge Microsite
Texas Lottery Commission

West Virginia Lottery
West Virginia Lottery Website
West Virginia Lottery

Wisconsin Lottery
Wisconsin Lottery Website
Hoffman York

BEST NEW INSTANT GAME

California Lottery
\$30 California Millions
California Lottery

DC Lottery & Charitable Games
\$30 Scratcher Launch
DC Lottery

Idaho Lottery
30th Anniversary - Family of Games
Idaho Lottery

Loto-Québec
Bingo Box
Loto-Québec

Maryland Lottery & Gaming
Old Bay Bucks Scratch-Offs
GKV

Massachusetts State Lottery
\$10 Holiday Cash Blowout
Massachusetts Lottery

North Carolina Education Lottery
Holiday Clear Ticket
Mullen Lowe

Ontario Lottery & Gaming Corporation
\$5 Big Brother Canada
Ontario Lottery & Gaming Corporation

Texas Lottery Commission
Gem 7s
Texas Lottery Commission

West Virginia Lottery
Metallic Family
West Virginia Lottery

BEST NEW DRAW GAME

Idaho Lottery
Powerball Arcade
Idaho Lottery

Interprovincial Lottery Corporation
Lotto Max 2.0
Ontario Lottery & Gaming Corporation

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.



NASPL 2019 – Awards Judges

Dozens of industry participants, representing lotteries and their ad agencies, shared their time and expertise to judge this year's NASPL Awards. We recognize them here and thank them for their service.

Ken Phox
 Group Creative Director
 OH Partners

Amy Colburn
 VP Client Services
 OH Partners

Amber Seale
 Brand Management
 Director
 Florida Lottery

Kyle Matos
 Group Account Director
 PP+K

Sherie Moody-St.Clair
 Marketing Director
 Idaho Lottery

Joe Quatrone
 Creative Director
 Mitchell+Palmer

Chris Ebel
 Creative Director
 Laughlin Constable

Stephen Ortiz
 Director, Sales
 and Marketing
 Kansas Lottery

John Nohe
 President & CEO
 JNA Advertising

Quinn Dossett
 VP Marketing
 Louisiana Lottery

Jill Baer
 Director of Creative
 Services
 Maryland Lottery

David Blum
 Senior VP
 GKV Advertising

Leo Mamorsky
 Chief Marketing Officer
 Maryland Lottery

Jason LaFrenz
 Director of Marketing
 Minnesota Lottery

John Dobson
 Brand Director
 Barkley US

Jordan Breindel
 Associate Creative
 Director
 Barkley US

Mark Carpenter
 Executive VP Creative
 Strategy & Production
 Services
 Smith Kroeger

Clay Hove
 Creative Director
 KK BOLD

Connie Miller
 Deputy Director -
 Office of Operations
 Ohio Lottery

Scott Frost
 VLT Regulation Manager
 Ohio Lottery

Nicole Kostura
 Assistant Director -
 Sales, Marketing &
 Product Development
 Ohio Lottery

Tom Ackerman
 Assistant Director -
 Office of Marketing
 Ohio Lottery

Maureen Hall
 Deputy Director -
 Office of Information
 Technology
 Ohio Lottery

Mike Bycko
 Visual Communications
 Manager
 Ohio Lottery

Sue Diamond
 VLT Regulation Manager
 Ohio Lottery

Brandie Reisman
 Director of Marketing
 and Administration
 Oklahoma Lottery

Thais Rodick
 Program Marketing
 Manager
 Oregon Lottery

Tina Erickson
 Traditional Product
 Manager
 Oregon Lottery

Gabe Medway
 Sr. Digital Graphic
 Designer
 Oregon Lottery

Mark Stricker
 Sr. Marketing
 Communications
 Manager
 Oregon Lottery

Tiffany Lenocker
 Marketing
 Communications
 Coordinator
 Oregon Lottery

Chuck Baumann
 Communications
 Specialist
 Oregon Lottery

Adam Cicco
 Creative Director
 MARC USA

David Seman
 Assistant Creative
 Director
 MARC USA

Scott Wiechmann
 SR Creative Director
 Lawrence and Schiller

Andrew Leeper
 Brand Strategy
 Coordinator
 Texas Lottery

Leo Olper
 Managing Director
 Third Ear

Terri Rose
 Director of Marketing
 Virginia Lottery

Jason Black
 Executive Creative
 Director
 Cole & Weber

Sara Harpold
 Advertising Manager
 West Virginia Lottery

Kayla Brown-Giordano
 Deputy Director,
 Marketing
 West Virginia Lottery

Robin Medina
 Chief Operations Officer
 Wyoming Lottery

Jordan Dean
 Creative Director
 Warehouse21

Andy Biernat
 Regional Sales Manager
 Arkansas Lottery

Bob Coleman
 Product Manager
 Arkansas Lottery

Kara Lee Ford
 Campaign Coordinator
 Arkansas Lottery

Mark Hearn
 Regional Sales Manager
 Arkansas Lottery

Mike Smith
 Director of Gaming
 Arkansas Lottery

Lindsey Teague
 Product Manager
 Arkansas Lottery

RESPONSIBLE GAMBLING JUDGES

Dr. Jeffrey Derevensky
 Director, International
 Centre for Youth
 Gambling Problems
 and High-Risk Behaviors
 McGill University

Maureen Greeley
 Executive Director
 Evergreen Council
 on Problem Gambling

Marlene Warner
 Executive Director
 Massachusetts Council
 on Compulsive Gambling

Chip Polston
 Sr. VP, Communications,
 PR and Social
 Responsibility
 Kentucky Lottery Corp.

Keith Whyte
 Executive Director
 National Council on
 Problem Gambling

Lori Rugle
 Responsible Gambling
 Specialist
 NASPL

Carla Tricarichi
 Deputy Director
 Public Policy
 Ohio Lottery

Karen Russo
 Responsible Gambling
 and Community
 Outreach Coordinator
 Ohio Lottery

Jon Manning
 President
 Brightwater Agency

Julie Livingstone
 Executive Producer
 & Writer
 Brightwater Agency

Don Feeney
 Policy Research
 Consultant
 National Council on
 Problem Gambling



Take Your Game from Ordinary to Spectacular

Visit us at NASPL to learn about our exciting new fly-away packages! With customized prizes including iconic entertainment, decadent dining, rejuvenating spa treatments, and the ultimate sports package – there's something for everyone.

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CAESARS



Wendy Montgomery, Senior Vice President, Global Brand, Marketing, and Communications, and Jay Gendron, Chief Operating Officer, Lottery, with IGT's new GameTouch Draw and GameTouch 20 self-service vending machines.



Bringing Channel Expansion to Life

North American lotteries are capturing opportunities to expand and grow their player base as new solutions roll out.

Q. Where is IGT focusing today to help customers fill gaps and meet challenges?

Jay Gendron: One of the most pressing business challenges for lotteries is the need to pursue and implement new sales channels to drive growth. It ranks at the top of the list when we ask customers about their business concerns in satisfaction surveys, and it's a challenge that has a lot of facets – from mobile, digital, online and interactive channels, to cashless transactions and expansion of the retailer base. The fact that there are so many aspects is also good news, because each one offers opportunities for growth, and we want to help our customers capture as many as possible.

When NASPL conference attendees visit the IGT booth this year, one of the things they'll see is that we've heard what they've asked for, and we've answered by rolling out solutions that bring channel expansion to life.

Q. With so many angles to channel expansion, what are you emphasizing?

Gendron: We're working with customers and other collaborators on many fronts. One of the industry's initial priorities was to develop a lottery API (Application Programming Interface) to make it easier for lotteries to sell in-lane and through large corporate chain retailers. IGT has actively supported and participated in the NASPL Standard

API Initiative since 2015, and through the dedicated work of NASPL's Retail Modernization Committee over several years, IGT and other vendors have now developed and released two versions of the API to support both wagering and the redemption of draw-based games in-lane.

IGT has been a pioneer in launching in-lane sales internationally, and we're now working collaboratively with technology providers such as InComm, Blackhawk Network and Abacus to flesh out in-lane solutions for North America. The Texas Lottery Commission has really been at the forefront in advancing and embracing the in-lane channel, and we're proud to be working with them to deploy in-lane solutions that make lottery more convenient for

players, both in traditional venues like the grocery chain H-E-B and in Dollar General stores – driving expansion into a new retailer category.

On another front, IGT is rolling out new and specialized vending formats to support lotteries' efforts to add retail locations and grow the player base. The first machine to roll out was the award-winning GameTouch™ 20, developed for retailers with vending height restrictions, such as Walmart. Expansion of lottery into the Walmart chain is something IGT has been working on for many years, and by the end of 2019, GameTouch 20 machines will be deployed in about 1,100 Walmart Supercenters in 10 states – more than 70% of the Walmart Supercenters in the U.S. that are actively selling lottery.

Another vending solution to support channel expansion is IGT's new GameTouch Draw. It was designed to introduce lottery draw and monitor game portfolios into social spaces such as bars and restaurants, to engage current and potential new player groups without burdening servers and other staff. We're due to roll out units at scale by the end of this year, and by mid-2020 we expect to double the number deployed.

Q. With online and mobile play currently not possible in most U.S. jurisdictions, is that the limit of channel expansion?

Gendron: Not at all. Even though many lotteries can't offer full iLottery platforms, the digital landscape in the U.S. is continuing to develop. To date, IGT has worked with lotteries to deploy nearly two dozen solutions that advance customers' efforts to provide players with more digital access – such as convenience and wagering apps, subscription services and other solutions. The first lottery-operated sportsbook in the U.S. following the PASPA ruling is powered by the IGT PlayDigital end-to-end sports betting solution on behalf of the Rhode Island Lottery. With IGT's QuickBet™ kiosks now deployed in the state and mobile betting due to go live next, we're working with the Lottery to provide new channels and an opportunity to attract new demographics that are essential for growth. And in May of this

year, the Virginia Lottery launched a whole new gaming experience with its MobilePlay application, powered by IGT's award-winning PlaySpot™ tethered-wagering solution. PlaySpot gives lotteries an innovative way to connect and engage with more players via their personal mobile devices and expand the game-play options within a licensed retail location, connected via Bluetooth to the lottery terminal. The application digitizes both the retailer and the player experience in Virginia and is already garnering some promising numbers. As the industry evolves, it's a forward-looking, bridging strategy for states that can't offer internet-based wagering.

Q. Where else are you investing to attract more player engagement?

Wendy Montgomery: Customers have told us that adding more convenience and relevance to attract players is another high priority for them, and this underpins the channel expansion that Jay has been describing. IGT is heavily focused on understanding and innovating around player needs. That's the big picture, and that's key to the strategic direction for our customers and our own business. It's also been a driving force behind IGT's roll out of cashless vending, now live and offering players more convenience in four U.S. jurisdictions. Vending machines that accept cashless derive 10 to 15% of their sales this way, of which IGT estimates 4 to 5% to be incremental sales. We're constantly exploring retail, consumer and technology trends and investing in opportunities to attract more player engagement, from developing new game content to helping lotteries make use of data and artificial intelligence to better serve players.

Q. Wendy, your role has expanded in the past year to oversee IGT's global brand, marketing, trade shows and external communications for both lottery and gaming. What does this mean for customers?

Montgomery: One thing the industry has been talking about more and more in recent years is the convergence of lottery and gaming and how there's some blurring of the lines, especially

with the introduction of sports betting. From a player perspective, it's blurring even more. How does IGT leverage our global gaming perspective to better help lottery customers reach their players? The expansion of my role is one of the ways IGT is breaking down traditional silos to provide our customers and our own teams with a broader perspective. Internally, it affords us an opportunity to see our work within the bigger picture of gaming trends and what drives player behavior. And, from a communications perspective, it helps us share learnings and leading practices with our global customers.

One goal is to develop more ways to harness IGT's wealth of research and player insights – be they lottery players or gaming players, or the intersection of the two – to assist customers on both sides of the business and to continue to develop the games and the delivery technologies that players and customers want. My whole career has been player- and consumer-centric, focused on understanding consumers and market trends and then applying that understanding. From consumer packaged goods to media and entertainment, to being a lottery operator and now a lottery and gaming growth partner, I've had a true belief in the importance of focusing on the consumer.

Consumers are moving along with technology in all areas of their lives. Likewise, we don't want to limit our own view. We want to think beyond and outside of our organization and our industry. We're in the entertainment industry, providing fun experiences and competing for discretionary dollars. We're working to deliver the best playing experiences and the best games and to make sure they're purchased in the most convenient way. That's how we will best support our customers. ■





intralot

Sports Betting Developments in the U.S.

Nick Papadoglou, Vice President and Chief Commercial Officer, INTRALOT Inc.

Q. What are some of the latest developments in sports betting?

Nick Papadoglou: Although the industry is still in the infancy stage, we have seen significant changes in the landscape over the last year, primarily from a regulatory aspect. Many of the states have started to understand the benefits that regulating sports betting bring to the state and to their communities such as increased taxes, funds for good causes, jobs and responsible gaming. We have a lot of experience in regulated sports betting markets around the world so we are working closely with our partners and customers to help contribute toward their efforts in realizing these benefits in their states.

Q. How do you see lottery being involved in sports betting?

Papadoglou: There are different models being applied on a state-by-state basis. There are some jurisdictions where the lottery is both the operator and the regulator, such as Delaware, West Virginia, DC and Montana; or is only the regulator, as in Tennessee. In other states lotteries are not involved, such as Nevada and New Jersey. We believe that as time goes by more state lotteries will realize the benefits of being involved with these new opportunities. As a company with extensive experience in regulated markets all over the globe for more than 20 years, we are uniquely qualified to help states achieve their goals. There are many positive impacts that lotteries can bring to sports betting with great examples in

Europe, Africa, Asia, and Latin America. If we take the example of Europe, most lotteries are successful sellers of sports betting games utilizing their traditional retail network, self-service terminals as well as their digital channels. They don't see themselves as competitors to casino operators of sports betting, but on the contrary, as a complementary product and offering.

Q. What is your strategy in the U.S. market?

Papadoglou: We have been successful so far in the market by securing some important deals with our existing lottery partners, and have ambitious plans in the market to continue growing as regulations continue to be passed in more states in the upcoming months and years. Our obligation is to work closely with our customers and regulators to provide our unique insights and lessons learned from other regulated markets. Moreover, our goal is to penetrate the market and utilize our established network of leading partners in the gaming industry who complement our proprietary solutions to create a unique position in the market.

Q. How do your products and services fit the U.S. market?

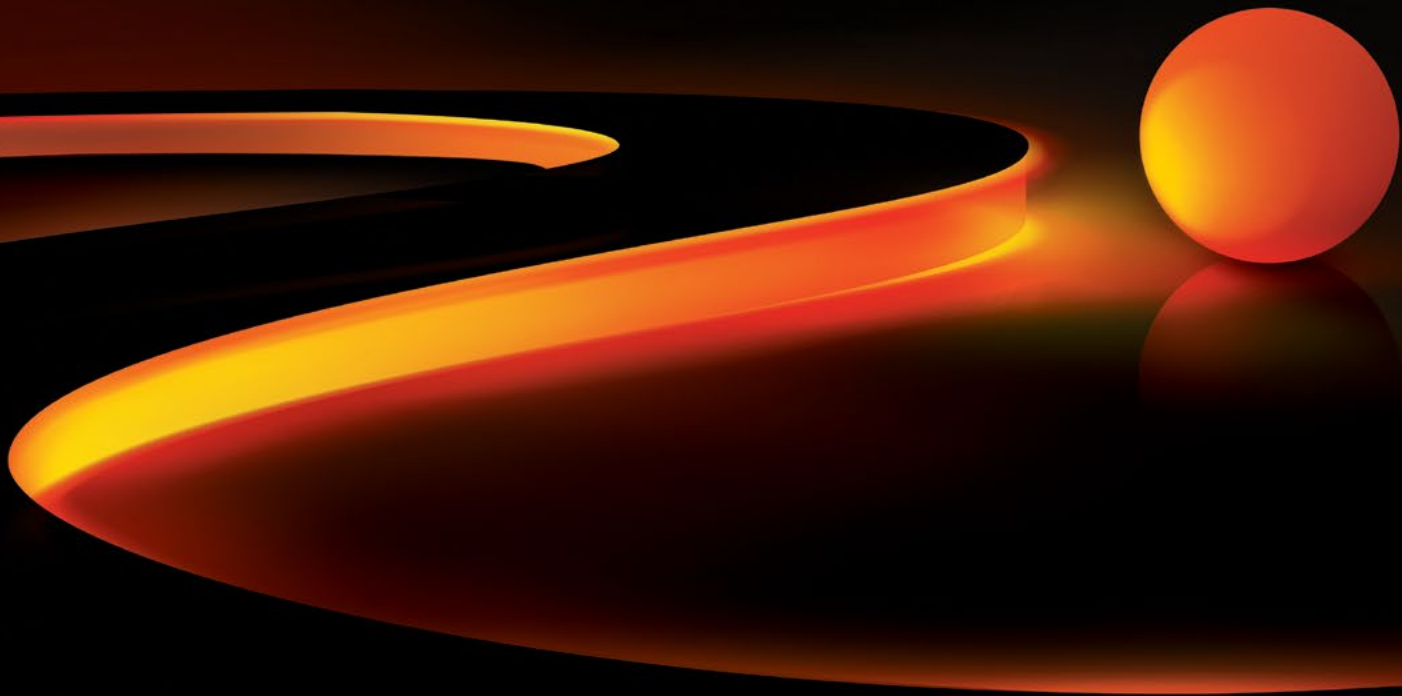
Papadoglou: We know that U.S. players will be very demanding. The regulatory framework and compliance requirements can also be very challenging and demanding. In this context, we have heavily invested over the last few years to evolve our sports betting solution,

INTRALOT Orion, to be in a position to meet and exceed these demands and requirements. The modular architecture of our products and the way we design them allow us to meet the challenges of a market such as the U.S., and most importantly we are able to customize and localize our products to be compliant with state and federal regulations.

In terms of sports betting product offering, we offer a world-class solution in all of the most popular sports, with both pre-game and in-play bets on all touchpoints, such as over-the-counter terminals and self-service terminals, as well as desktop and mobile native applications.

We have a proven track record of effectively addressing the revenue-boosting needs of operators in regulated environments. Our unparalleled ability to guarantee payouts makes us the best choice for risk management while offering increased margins to lottery operators. Spanning a variety of operating models, our project portfolio includes some of the world's largest sportsbooks in terms of wagers and amount handled. Our experienced team of traders uses advanced algorithmic pricing, based on in-house probabilistic models, to ensure razor-sharp odds, accurate price changes and fast event settlement 24/7. Our trading team tracks betting transactions in real time, identifies potential risks, sets up risk and liability limits, detects possible abnormal player behavior and takes corrective actions by adjusting odds and even blocking bets and events as required. All of these capabilities allow us to offer a world-class competitive product and service unmatched in the industry. ■

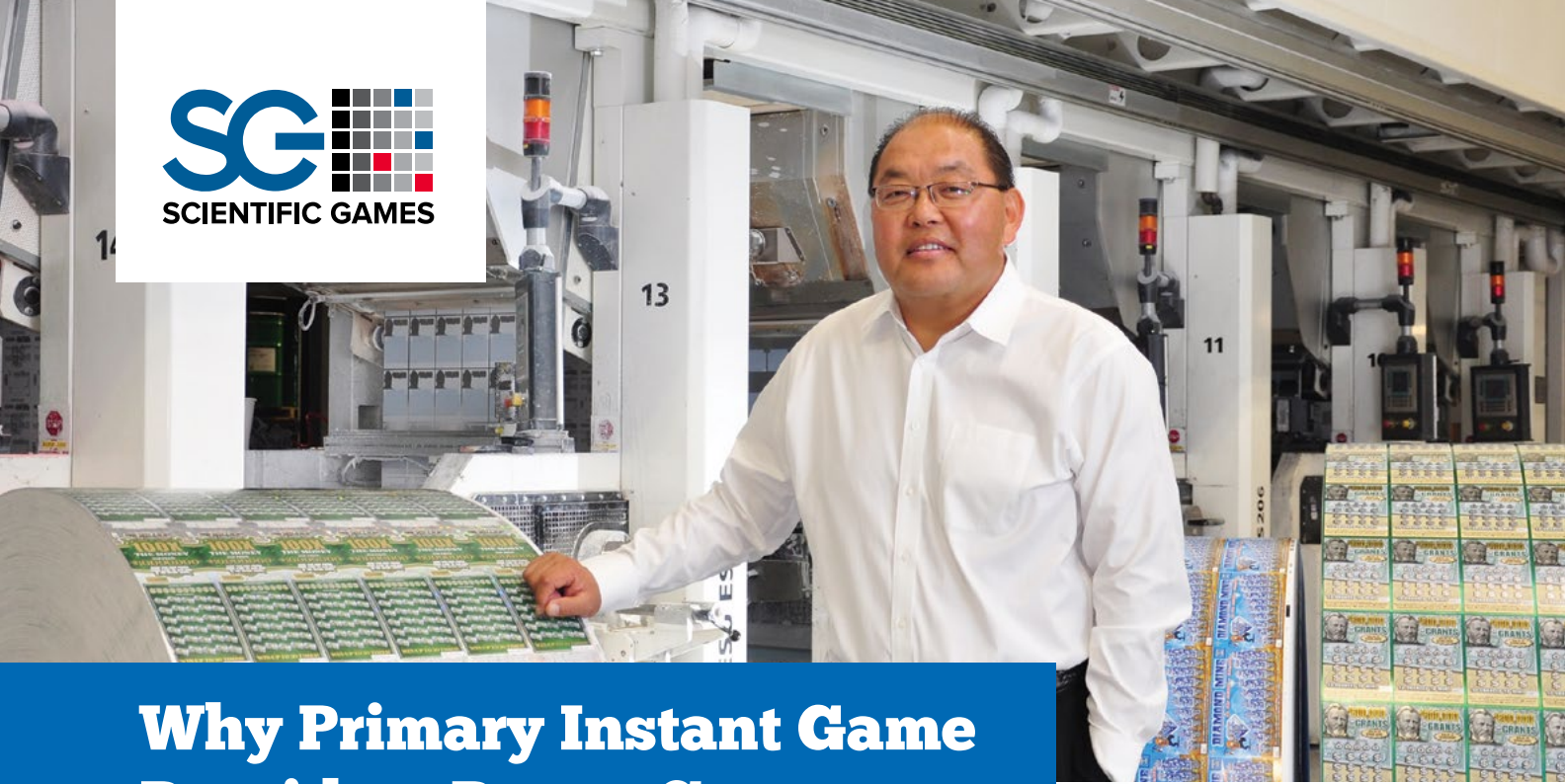
i shapes
the
future



i want to be ahead of the game
i want to thrive and conquer
i want intense experiences
i want solutions that fit into my world
i am your player, are you ready for me?

Modernizing lotteries in a digital world

intralot



Why Primary Instant Game Providers Power Success

*Sam Wakasugi,
VP of Strategy Business Management,
Americas, Scientific Games Lottery*

Sam Wakasugi is the kind of guy who earns your respect when it comes to talking about the lottery. His knowledge spans across a career that began in the early 1980s and has touched nearly every aspect of the business. Particularly how to develop, create and sell instant games.

Learning the importance of establishing strong relationships while helping in his father's store as a young boy, Wakasugi has traveled and lived around the globe working for lotteries or serving them as a trusted partner. From lottery sales rep to state sales director and executive director, his path eventually led him to Scientific Games.

Wakasugi championed the start-up of the company's instant game management program for the Florida Lottery in 1997, and worked as a regional vice president serving the lotteries in California, Oregon, Washington, Idaho, Colorado, Indiana, Illinois, Texas and Arizona. Next, Wakasugi became VP of North American sales, guiding relationships and strategies for the company's instant game customers. Then came chief marketing officer and the opportunity to launch the world's largest lottery, the China Sports Lottery, in time for the 2008 Olympics, after which he returned to his home in the U.S. in 2015 to work as VP of strategy business management for the Americas.

His thoughts on the \$87 billion global instant product category run deep, and they are shared with the confidence of four decades of data amassed by Scientific Games, the largest creator, manufacturer and manager of instant games in the world.

Q: With the unique perspective your career has given you on both sides of the desk – lottery and provider – and in so many different markets, what's your philosophy on instant games?

Sam Wakasugi: I believe in the primary provider relationship with customers because instant portfolio game management is proven to drive a lottery's weekly per capita business more than a game-by-game strategy. It's our business religion at Scientific Games. When a lottery chooses one supplier to support 90%-plus of retailer sales, the weekly per capita performance, portfolio management, synergies of marketing and promotion, and advanced logistics prove this is the best way to go.

Nine of the Top 10 performing instant game lotteries in the U.S. (weekly per capita) have chosen Scientific Games as their primary instant game provider, with an average of 91% of their business trusted to Scientific Games. There are lotteries that award their instant game business to

multiple vendors, but the synergies and performance demonstrate it is not the ideal model for driving weekly per capita sales performance.

Q: In a competitive industry, there are numbers presented in ways that can be misleading, or not completely understandable. How do you cut through the clutter of it all with your customers?

Wakasugi: We've been collecting data for more than 40 years. Our MAP™ instant database is the largest in the industry, with more than 2.7 million weekly sales data points on 53,000 games. We have a team of data scientists, and we have conducted more than 2,000 research projects and focus groups that gives us real data to help make portfolio decisions that drive instant game performance.

Currently, Scientific Games produces 74% of instant games in the U.S. What this number actually means is that we research, design, develop, program and manufacture games, and provide advanced logistics to bring them to market. We aren't just validating these products in retail transactions.

Here's an analogy that may help. Scientific Games is like Netflix or HBO, we create the content. We are not the cable company that just delivers content.

Q: Aside from creating the instant game content, it sounds like there's much more involved for a company to be able to say they are the primary provider to nine of the Top 10 instant game lotteries in the world?

Wakasugi: Yes, and it goes back to the primary provider relationship. When you are working with a lottery and generating more than 90% of their instant retail sales, you're able to implement best practices for portfolio management. The life cycle of the game begins with the insights and analytics that help us create and recommend product for the lottery, and ends with the consumer's experience with that game.

Before we even begin, we know through all of the data in our system what's working in the marketplace. The full life cycle is everything that happens along the way, such as selecting theme, price point and playstyle, graphic design, game programming, security, predictive ordering, advanced logistics, retail optimization and digital engagement with players.

We are there every step of the way. It begins and ends with insights and analytics. Our data scientists are now actually on site at many of our Scientific Games Enhanced Partnership (SGEP) operations where we facilitate a full lifecycle instant game management program. We're putting together game plans with our customers with data informing which games – themes, price points, etc. – have the best chances for success, as well as how to launch games, quantities needed at each retailer, etc.

For the U.S. lotteries using SGEP, instant game per capita sales outpace the rest of industry by 40%. The program's operating scale accounts for approximately one-third of total U.S. retail sales, and five of the Top 10 weekly per capita lotteries are participating in SGEP.

Q: Can we talk about game security? Not everyone knows what goes on behind the scenes because, well, most in the industry just assume the games are secure.

Wakasugi: Security is vital to the instant game, and we take it very seriously. The lottery can never lose the public's trust that someone might

know where the winning tickets are in the entire process I just described. Games are getting bigger, top prizes are getting bigger and security is more important than ever. Scientific Games protects the prizes.

To give you just a glimpse of what happens behind the scenes, we've had more than 10,000 instant games go through our SAS auditing process, which is more games than our competitors combined.

We have patented technologies like KDS360, a software security system that extends the protection of an instant game from initial game data generation through the final delivery of the game to the lottery or its retailers, including the critical process of prize balancing.

Q. Now for more tech talk. Are there any new technologies that are driving instant game performance for your customers?

Wakasugi: We're very excited about our next generation OrderCast™, that's the predictive ordering and inventory management in our SGEP program.

It gets better and better. Now OrderCast has machine learning. It is similar to the technology used by Apple and Amazon with Siri and Alexa. The more data we provide it, the more it learns.

The Florida Lottery is one of the best examples of how our SGEP strategy grows retail sales and profits with the addition of OrderCast to its instant game management program in 2011. Since 2011, Florida's instant game sales have grown from \$2.3 billion to \$4.7 billion. Instant weekly per capita sales have nearly doubled, and gross gaming revenue has climbed 88%.

The Kentucky Lottery uses it now because of the tremendous impact it made when President and CEO Tom Delacenserie led the Florida Lottery. Since SGEP launched in Kentucky in September 2018, instant game sales have increased 10.5% in the first 10 months over the same period a year prior.

At retail, we are working with lotteries and major retail chains such as 7-Eleven, Circle K, Walmart and Kroger as well as smaller regional chains in 10 states on launches and pilots of SciQ®, our intelligent instant game ecosystem. Retailers and lotteries using SciQ are experiencing

on average a 12 to 15% increase in instant game sales. They are gaining all new consumer insights because of the Big Data generated by SciQ.

Q: There's quite a bit of discussion going on about digital engagement. What are your thoughts on extending the instant game experience?

Wakasugi: Scientific Games has always let the player lead, and clearly the player has led us to online and mobile channels. They're seeking an entertainment experience with the physical instant game when they scratch to win, and now a digital experience.

Since 2001, Scientific Games has created more than 700 digital games – play for fun, second chance opportunities and promotions that extend the play experience. We were the first to incorporate licensed brands into these kinds of digital experiences, and the players love them. We have quite a large portfolio of brands that add excitement to our customers' games.

We pioneered the linked instant game concept about 10 years ago with the first DEAL OR NO DEAL, and we've become experts in executing these big blockbuster events that offer once-in-a-lifetime experiences for lottery players. In our WILLY WONKA GOLDEN TICKET™ game, players engaged in the WILLY WONKA CHOCOLATE TOWER™ digital game as part of the second chance opportunity to win a trip to Las Vegas and participate in the BILLION DOLLAR CHALLENGE™ for the opportunity to win up to \$1 billion. It's the top-selling linked instant game in history. JAMES BOND™ is up next.

Q: Instant game retail sales in the U.S. passed the \$50 billion mark. Are we tapped out? Where do we grow from here?

Wakasugi: Not even close. We've actually been working hard to share this story. The average weekly per capita for instant game sales is \$3.19 for U.S. lotteries. If every lottery performed at the Top 10 average of \$4.80, instant sales could reach \$80 billion. That's just the average of the Top 10. As an industry, we're not anywhere near maturity. There is still untapped potential. ■



Building Retail Relationships

Retailers are the lifeblood of the lottery industry – for the foreseeable future, they will continue to be the dominant channel through which lottery tickets are sold, even as some lotteries add online and mobile play options.

The industry has made considerable progress in recent years to make selling lottery easier for a wider variety of retailers, and new developments are changing the way lottery can be sold at retail. But these changes are not the only ways lotteries can enhance their retail partnerships.

So we asked our associate members the following question:

What can lotteries do to build upon their relationships with retailers?



The lottery industry continues to evolve and adjust as new opportunities and challenges reflect ever-changing consumers and market trends. Today, many of our industry's opportunities and challenges are at retail, the lifeblood of lottery revenues – and their returns to beneficiaries.

Retailers are seeking new ways to optimize all aspects of their operation to reduce costs and increase profits. Most have the same goals: reduce labor and operational costs by employing new technologies that create operational efficiencies, limit inventory shortages and provide data insight and market visibility for their stores.

Lottery games are one of the only consumer product categories clearly driving repeat retail traffic from the many winners it generates. But if products are out of stock, or aren't merchandised to catch the eye of the consumer, lottery profits suffer. It's no secret that a retailer's attentiveness to applying lottery best practices is challenged by profit margins, security and reporting for lottery products. As a result, store managers and associates focus on the tasks and products that require their attention and provide a higher return with less fuss.

Every day there are new, more profitable products than lottery games that c-stores and other lottery retailers can sell. For example, CBD and tobacco products have much higher profit margins and take up valuable counter space. This is particularly important to the growing number of c-store retailers, which represented 63% of U.S. lottery sales in FY18.

Retailers want to increase their lottery product sales, but they want lottery to fit within their operational

plan. We as an industry need to "future proof" lottery at retail. Lotteries and their technology suppliers must continue talking to retailers, examining their needs and addressing their challenges by innovating. They must align how lottery products are sold with the operational ecosystem of modern retail.

Modernization through technology is key to future proofing. Like other consumer products, lottery games should be an easy, convenient and as frictionless as possible purchase for both the player and the retailer.

This is why the technology innovation teams at Scientific Games make retail a priority. We've invested in the award-winning SCiQ® intelligent instant game ecosystem and the PlayCentral® 54 self-service terminal, which won the Walmart Services Division 2019 Supplier of the Year for Product. Our instant game in-lane solution easily integrates right into the checkout experience. Retail innovation is a winning strategy that's working for our lottery customers and retail partners.

intralot

Lotteries rely on their retailers to sell their games and products and be the “face” of the lottery. With their retail relationships, lotteries should emphasize implementing programs to make the retailers feel as part of the lottery family, to motivate them and turn them into successful lottery retailers. One of the common techniques that creates a bond between a retailer and the lottery and increases revenues is a retail incentive program.

INTRALOT experts are able to provide all tools and experience in assessing the retail landscape to evaluate market conditions and develop the proper incentives.

Retailer incentives consist of a diverse collection of motivational tools, mostly short term, to stimulate revenue increase and loyalty building within retailers’ networks. The main corporate objectives driving the use of incentives are:

- Increase sales revenues;
- Increase lottery and games visibility;
- Reward retailers as brand custodians;
- Improve network relations;
- Gain network support for players’ promotions; and
- Increase games trial.

Additionally, retailers benefit from the implementation of incentives, since they:

- Increase commission revenues;
- Enhance players’ loyalty to the retailer; and
- Have potential to increase in-store traffic resulting in increased store revenues and turnover.

INTRALOT has the experience and know-how in implementing retailer incentive schemes, like:

- Open-ended programs – award participants who achieve a predetermined performance level.
- Closed-ended programs – reward top qualifiers (i.e. top 10 retailers).
- Multi-level programs – retailers win increasing levels of rewards, according their performance.

Retailer of the Year

INTRALOT has developed the “Retailer of the Year” as part of its strategy to actively involve retailers in selling lottery. Every year a lottery retailer is honored for its overall performance and contribution to the lottery business. The winning retailer could gain a bonus, a plaque, special in-store displays and equipment, t-shirts for employees and an on-site celebration. This motivates retailers to increase their lottery sales and be innovative and creative in the way they promote their lottery products.

Retailer Reward Program

INTRALOT has developed the “Retailer Reward Program” in order for retailers to be motivated to sell more lottery products. It is similar to credit card rewards programs. The key idea is based on earning points for selling featured games, and having the option to redeem earned points for great premium items.

Lotteries should understand that the retailers are the people who know the players and through them the players learn about lottery games and decide what and how to play. Having happy retailers means having a successful lottery.



Engage Retailers with Integration, Reporting and by Speaking Their Language

Retailers are responsible for the lion’s share of U.S. lottery sales, with more than 98% of U.S. lottery profits still deriving from this channel. Even as the consumer landscape evolves, retail will produce the overwhelming quantity of lottery sales for the foreseeable future, making it critical to ensure that lottery products remain important to retailers. Following are three opportunities to build upon this longstanding and mutually beneficial relationship by giving retailers every incentive to continue viewing lottery as a key product in their portfolio.

Integrate and Connect Operations.

Lottery is unique in the retail landscape, operating outside traditional processes

to track consumer packaged goods. Integrating the lottery operation with retailers’ systems not only simplifies their accounting process and reduces the associated labor, it also gives retailers better visibility into their lottery operations. Spanning nine lotteries and 18 retail chains, IGT has integrated with retailer systems to enable in-lane sales through retailers’ point-of-access devices and allow tracking through their back-office systems. With years of experience gained in international jurisdictions, IGT is currently working with the Texas Lottery to integrate lottery into the operations of major retailers H-E-B and Dollar General, using two different models for in-lane sales.

Enable Single, Consolidated-View Reporting.

Retailers want a single, chain-wide view into their lottery sales and operations, particularly in the case of large national and regional accounts. IGT can support lotteries and retailers with a unified, cross-jurisdictional view of performance for all locations where they operate through a unique Retail Market Insight (RMI) tool developed and maintained by IGT. RMI is the largest U.S.-centric retail database in the lottery industry, with more than 320 trillion data points covering 76% of the U.S. population in lottery states and 73% of traditional lottery retailers. The tool is available to all U.S. lotteries regardless of which vendor’s lottery system they use, giving retailers and lottery decision-makers the ability to analyze lottery performance trends within and across jurisdictions to grow sales and profits.

Speak Their Language and Walk in Their Shoes.

This involves having a view from the inside out on how retailers work and how their needs and expectations are changing. IGT’s Retail Sales and Execution team provides a range of Plus-Services and access to specialized team members with decades of national retail and lottery-category management experience to advise and assist in building retailer relationships. Today, we are working with lotteries to implement major initiatives with retailers including Kroger, Casey’s General Stores, CVS, Dollar General and Walmart, where IGT lottery vending machines will be deployed in about 1,100 of the retailer’s Supercenters by the end of this year.



As the first contact point for players, retailers are often the public face of lottery. Offering promotions and incentives encourages retailers to become lottery brand advocates, fostering working relationships that can strengthen sales. The following examples highlight the important advantages that lotteries can benefit from by partnering with their retailers.

The Michigan Lottery collaborated with a retail partner to leverage the retailer's loyalty program. For every dollar spent on instant tickets, customers received one entry for a draw to win free fuel for a year or \$400 in instant tickets. The Lottery covered the fixed costs of the prize – a mutually beneficial strategy providing budget clarity to the Lottery and promotional savings to the retailer. Due to year-over-year growth in instant sales and participation, this promotion was offered for the fourth time in 2019!

To encourage awareness of and enrollment in the Maryland Lottery's My Lottery Rewards program, each \$10 purchase of Mega Millions tickets at a specific convenience store partner included an entry to win free sandwiches for a year. The promotion was supported by retailer eblasts and fulfilled the goal of boosting in-store lottery sales.

Idaho Lottery VIP Club members enjoyed the benefit of a strong retailer network partnership with a promotion designed to drive retail traffic. Members had the opportunity to exchange VIP points for in-store food certificates, with redemption contingent on enrollment in the retailer's loyalty program.

Clearly, leveraging lottery and retailer loyalty initiatives creates a win-win relationship for both parties, driving cross-promotion, increasing player engagement and strengthening partnerships.



The greatest thing lotteries can do to improve their retail relationships is to make doing business with the lottery easier and more consistent across jurisdictions. This is actually easier than most might think. With the development of the North American Association of State and Provincial Lotteries (NASPL) Application Programming Interface (API), which allows for an independent common retail interface, lotteries can offer products and services from a number of vendors that have never had direct access before. The Multi-State Lottery Association (MUSL) Rule 2 amendment in 2017 allows safe, secure execution of lottery play on plain white ePOS paper from third party suppliers. The NASPL API and MUSL Rule 2 change also allow lotteries to unify how they do business with lotteries cross jurisdictionally.

This integration has the added benefit of making the sale of draw games seamless to the consumer while at the same time helping the retailer control the lottery category. Once the retailers can truly get control of distribution and shrink with less labor than before, the best retailers will find innovative ways to sell more lottery product, instead of spending all of their time just controlling it.

Gaining knowledge of what retailers want and need in order to make selling lotteries easier and more profitable (without raising commissions) will not only improve relationships with retailers but build a lasting partnership.



A well-executed retail offering and a supportive retail network are fundamental to a lottery's success. With changing consumer trends and digital channels influencing consumer behavior, lotteries can demonstrate value and drive performance through effective use of data, digital integration, and by driving foot traffic.

A data-led lottery can clearly demonstrate to individual retailers how their store is performing across different product categories compared to peer stores, and then drive improvements to bridge any performance gaps. Integrated data modeling can also help accurately monitor stock levels and inform the retail distribution strategy to both manage bottom line costs and maximize sales impact.

While retailers can sometimes be resistant to digital, the data supports "all boats rising" with retail sales growing in digital lotteries. Digital is not a trend in the consumer world, it is the consumer world. A successful digital program combines digital and retail, e.g. store locators, cross-channel promotions and ticket scanning. Following its recent iLottery conversion, the Illinois Lottery app scans over 10,000 retail tickets daily – further engaging these players and encouraging them back in store.

Retailers value foot traffic and the power of bringing people in store, with the potential it brings to drive sales across all categories. In a recent promotion for the Illinois Lottery, instant ticket players were rewarded with a discount coupon to be used the following day – with a 41% redemption rate. Effectively using point of sale and jackpot signage demonstrates the lottery's ability to get customers from the pump to the counter.



Lotteries can build upon their relationships with retailers by working closely with retail partners to maximize sales, collaborating to introduce solutions that:

- Increase convenience (for both retailers and consumers);
- Reduce lineups at the checkout;
- Decrease perceived consumer wait times; and
- Increase lottery purchases.

At Carmanah Signs, the marketing technologies we see driving the greatest results at retail right now are in-lane point-of-sale (POS) signage and lottery digital menu boards. Many of our lottery customers are working increasingly

closely with their retail partners on lottery retail POS.

For example, Carmanah has been working with Premier Lotteries Ireland (PLI) and Fastrak Retail UK to co-develop customized in-lane solutions for the Irish National Lottery, placing thousands of mini jackpot sign display units in checkout lanes across Ireland and successfully growing sales. As part of this initiative, PLI set a precedent in building relationships with retailers by creating their own Retailer Council. This council works together to create and implement new ideas that advance the retail environment.

Carmanah is also joining forces with lotteries and retailers in the case of lottery digital menu board rollouts. These menu boards increase sales by driving spontaneous lottery purchases and encouraging players to choose their tickets while waiting in line. This technology levels up brand image while serving up hyperlocal content tailored specifically to each retail location.

In the end, the relationship with retailers is about open dialogue, collaboration on new ideas, and tailoring solutions that drive sales.



One of the most effective and efficient ways lotteries can improve upon their retail relationships is to partner with an existing third party provider such as InComm. With such a partnership, lotteries are immediately connected to a massive retailer network of over 500,000 stores across the U.S., a network that took over 25 years to build, bringing lotteries an instant nationwide scale of physical locations to promote and sell their products and to build brand recognition and the number of impressions. Third party providers have strong existing relationships with traditional and non-traditional retailers. This partnership is a win-win as it allows lotteries to grow and expand their current traditional footprint while the retailers are provided with new opportunities for incremental growth.

For new non-traditional merchants, lotteries should think about how to license them outside of the normal licensing process of the traditional

lottery retailer model. A hybrid licensing agreement or contract could alleviate some of the barriers that may dissuade new locations from coming aboard. New non-traditional merchants selling in-lane or digital/virtual products could be licensed in a manner similar to how keno retailers were licensed in the past. With InComm bearing the financial settlement responsibility with the lottery and no terminal equipment requirements, recruitment could be streamlined in many cases (statutes and regulations allowing, of course).

Partnering with third party networks and leveraging existing retail/merchant relationships is like having a whole new corporate account management department. It's the single most efficient way to break into new trade style types while providing additional product options to the existing retailer base.

Jackpocket

Lotteries are acknowledging an accepted truth: nothing is stopping the online train. In welcoming its possibilities and exploring new avenues for growth, the industry at large is following suit. But what lotteries now view as the inevitable long game, most retailers still see as a threat, when their stores are not solely dependent on lottery sales but on business generated from other in-store purchases. Kit-Kats, magazines and beer are to them what Mega Millions, Powerball and Lucky for Life are to us. So the obvious question is: how do lotteries weave their retailers into the overall infrastructure of online lottery sales, to ensure they can easily see the upside?

At a basic level, the conversation should focus on ways to provide incentives to online play that parlay into foot traffic for retailers. In a real-world scenario, this could translate to redemption promotions that push customers back into the retail environment, where their online plays are rewarded with in-app cash or bonuses that can only be used in-store. This is where a qualified third party – such as a courier with the right technological chops – has the opportunity to come in and create a new end-to-end solution that can seamlessly bridge online orders with incentivized retail buys. This is the scenario where everyone wins.

As lotteries continue to embrace mobile-centric options to improve their bottom line, it's their responsibility to facilitate healthy conversation around online commerce. The quicker everyone boards the train, the quicker we can create new value.



By far, this is one of the most important questions a lottery should consider when introducing digital products and solutions. Relationships that lotteries have fostered with their retailers for decades as the primary sales channel for lottery products positioned retail as a dominant force with major staying power. In fact, the broader retail industry expects that retail will continue to dwarf the online channel. According to some reports, by 2021 eCommerce is expected to represent only 17.5% of retail sales.

For this reason, lotteries that design products and solutions to serve an omniplayer mindset are positioned for success. There are several examples deployed by leading digital lotteries, particularly the Michigan Lottery, that deliver upon this commitment to retail.

Retail-based payment methods that fund an iLottery wallet is one strategy. These payment methods originate through a cash transaction at retail. Retailers receive a selling commission for offering this payment solution, and benefit with additional retail transactions from players preferring this mechanism to fund iLottery play.

Retail products and omnichannel promotions are strategies that introduce new ways to build retailer relationships. Codes printed on retail tickets offering iLottery incentives, such as free games, also include an opportunity to receive a retail coupon – driving the player back to the retail store. Promotions designed with a similar customer journey have also proven to drive foot traffic to retail, while supporting iLottery acquisition and retention goals.

Placing the player experience at the center of a lottery's strategic planning will naturally yield omnichannel strategies that simultaneously benefit retailer relations.

INSPIRED

Lotteries can continue to build on their relationships with retailers by offering products and services that are new and interactive and can engage new players without alienating their core audience. Lotteries continue to diversify their offerings to retailers, creating content that engages players and an environment where a lottery player will want to stay in the venue and play the games more frequently.

Inspired has brought its innovations to lottery and sports betting retailers worldwide, creating games and content that keep players interested in the product and offer a more fulfilling experience from a game play mechanic perspective. Virtual sports, in particular, is new to retailers in North America, but has been a key component of lottery and sports betting retailers throughout Europe, South America and Asia. These virtual sports are a realistic and social experience for players, and the content has players increasing their frequency and spending at retail establishments. The stakes are generally lower, and the games are viewed as more entertaining than some traditional lottery channels.

Inspired is excited about the opportunity to create new partnerships with lotteries to diversify their offerings with the goal of supporting retailers' efforts to create new experiences, create new players and engage lottery customers for longer periods of time.



A key for success is ease of ordering inventory and portraying the value of a partnership with the retailer and the lottery. Gaming system providers must be able to provide insightful and useful sales reports that meet the particular needs of an individual retailer or corporation. With the explosive use of artificial intelligence and data analytics, we are able to better

understand consumer demands and habits, allowing us to provide them with targeted products and services that meet their demands, and can ultimately increase sales.



Lotteries can help retailers with things like product placement and game education. We notice that some retailers don't have the ticket dispensers and/or machines in locations that have maximum visibility. Additionally, if they know and share the success of certain games, players may be more inclined to play more, and non-players may be more likely to try.

Sometimes it seems that lottery, for some retailers, is an afterthought or a burden. If they really knew how much it could impact their overall business, they might be more engaged. We've noticed that the retailers who have had more sales success are far more excited about receiving their deliveries. When they see my couriers coming in to make their deliveries, they treat us like royalty – even to the point where their customers know who we are.



We've found that retailers want to be heard. It's as simple as that. Send people to their stores, ask them what they think about the lottery products they carry, and then be sure to take their feedback to those who can effect change within your organization. Listening is important, but being heard includes acting on that feedback when prudent.



The retailers that choose to sell lottery products are a key ingredient in the continued success of the lottery. Therefore:

- Developing a quality retailer base is critical to the success of a lottery.
- Retailers provide lotteries with direct access to shoppers / players = sales.
- Poor quality retailers (and lottery execution) results in business declines!

To build strong and continued relationships with the retailers, the lottery must conduct the following on regular basis:

Weekly Sales Calls. Conduct weekly sales calls with jurisdiction-wide field staff management who are specifically focused on achieving overall sales objectives, providing specific sales program direction, seeking feedback on all sales programs/products from the field, and gathering suggestions on impediments to sales.

Ongoing Consistent Communication. Regularly inform retailers of upcoming programs and changes using biweekly sales tactics, monthly instant game lineups with top selling games, new products, merchandise and promotions on one-sheet sell-in pieces.

Commit to Training. Provide an ongoing assessment of training needs based on changes in the retail environment.

Forum for Consistent Retailer Feedback. Conduct Retailer Advisory Board meetings on a consistent basis with select top performing retailers as well as a representative cross-section of your retailer network.

Sales Performance Measurements. Provide updated weekly tracking reports to ensure consistency across the state in tracking regional sales goals, terminal installation goals, sales staff sales goals, retailer sales goals and incentive program tracking.



Regardless of the industry, business relationships are strongly built upon trust and communication. For lottery brands, continuing to deliver on supporting local businesses and helping deliver business outcomes will build upon and strengthen the relationship with retailers.

For convenience store retailers, lottery is a large aspect of their business as 46% of lottery tickets are sold directly in c-stores. By aligning and partnering with larger state lottery brands, these retailers are trusting that larger, statewide advertising campaigns will drive foot traffic and increase visibility of their business, their customer base and their revenue.

Working directly with a variety of clients, including over 20 state lottery brands, we help solve advertising challenges, drive relationship growth and deliver on overall business outcomes.

GSTV's data and analytics offering, OCTANE, delivers consumer insights, addressable campaign targeting and rich attribution capabilities. Our IGNITE Creative + Content Studio helps clients create or optimize content best suited for our network – connecting the most compelling content to the right audience at the right moment and location, driving engagement and spending.

Coming full circle, driving the right messaging to reach these captive, spending consumers will help drive sales while consumers are steps away from the c-store, building awareness for the lottery brand, and continue to grow relationships with the retailer.



As the technological revolution continues to take place and mobile sales continue to grow, smart retailers recognize the need to offer their customers an omni-channel sales option. The vast majority of

retailers now offer such sales options; consumers can purchase groceries, clothes, furniture – you name it and it is most likely available through your mobile phone. Unfortunately, the majority of U.S. lotteries do not sell lottery products online; but what if the lotteries' retailers were able to sell lottery products, in particular the draw games, online?

Imagine, every retailer with omni-channel sales channels, whether they are lottery retailers or not, have created websites to promote their goods and services, and as a result they have amassed customers that they have relationships with. So, to answer the question: What can lotteries do to build upon their relationships with retailers? Let's leverage those relationships and allow them to sell lottery online.

This would make retailers a true partner with the lottery and allow sales 24 hours a day without any added burden on retailers or the lottery. For those retailers who don't currently sell lottery products, the lottery can gain countless new points of sale, providing an enormous, diverse network of retailers in cyber space to provide the ultimate in convenience to lottery customers.

With such a proposition, retailers should embrace the opportunity to earn more commissions and help the lottery contribute more to good causes with minimal additional cost.



We believe it is critical for lotteries to educate their retailers on the positive impact of the introduction of digital sales – even if a lottery cannot currently sell tickets via the internet. We are seeing positive results in jurisdictions where lotteries use an omni-channel approach to encourage cross channel sales.

La Fleur's Magazine commissioned a major study, I-Lotto or Nay-Lotto, to see if the introduction of internet sales had a negative effect on a lottery's traditional sales. This study was presented at La Fleur's iLottery Digital conference in June.

The data consisted of retail sales from the Michigan Lottery over 417 weeks for instant, Powerball and Mega Millions.

This data was collected between January 1, 2011, and December 30, 2018, by the Michigan Lottery, which provided the data to *La Fleur's Magazine*. We controlled for year-over-year changes in the Michigan population and inflation prior to analysis as they were not of primary interest.

For each analysis, *La Fleur's* followed the same series of steps: 1) We visualized the series and checked for notable outliers. 2) We decomposed the series to visualize the overall trend and seasonality. 3) We evaluated the stationarity of the series by examining autocorrelation plots (ACF) and partial autocorrelation plots (PACF) figures.

In summary, the best fitting model is consistent with the hypothesis that the introduction of internet sales did not impact retail sales.

The study was conducted by Dr. C. G. La Fleur, who earned her PhD in cognitive psychology from the University of Virginia.



The retail industry continues to navigate a period of significant business model disruption.

Retailers are investing millions of dollars into new technology to help shave costs and improve the consumer shopping experience. For example, Amazon plans to introduce 3,000 mobile app-driven, clerkless Amazon Go stores in the U.S. We can expect to see significant changes in brick and mortar retailers where lottery tickets are sold. Leading retailers such as Walmart, Albertsons/Safeway, Kroger and 7-Eleven are investing heavily to deliver the connected, automated and mobile experiences consumers are craving. The lottery industry, whose success remains highly dependent on the retail channel, must evolve in a similar direction, at a similar pace.

What does this mean for the lottery industry? The industry has done a great job marketing lottery sales to capture impulse purchases in-store and at the register. However, as "checkout" goes increasingly mobile, lottery sales must do so as well. With smartphone ubiquity reaching 97% of all U.S. consumers aged 18 to 54, and mobile ticketing becoming commonplace (e.g. airlines, movie

theaters), there remains no acceptable reason for lottery to sit on the sidelines.

Lazlo enables an entirely new distribution channel for lottery tickets, yet one that remains aligned with retailers' vision for consumer shopping. With Lazlo, consumers can use the retailer's app to buy digital lottery tickets at the register or in-lane. We enable enhanced offer targeting and other features that increase lottery sales and lottery's value to retailers.



With entertainment and overall consumption patterns evolving in nearly all consumer categories, the interests of lotteries and retailers are more aligned than ever before. Lotteries understand that optimizing consumer engagement requires healthy retailer relationships and they must view them as vital partners going forward.

As the types and features of new games provided by companies like Milestone Entertainment continue to expand, especially on mobile devices, one way lotteries can build upon retailer relationships is to actively communicate the unique benefits of these lottery products. Smaller retailers may benefit from less capital-intensive options new game technologies provide, but operations of all sizes can enjoy increased in-store foot traffic, per-visit spending and overall visits. Methods of capturing performance data to illustrate these benefits are becoming more efficient too, so lotteries can more frequently generate summaries which can be shared with retailers.

Lotteries must also continue to provide the most appealing games available, including online second-chance games and those which truly engage younger audiences. There is ever-increasing competition for consumers' time and attention, so any new games should be intuitive and fun to play and be part of longer-term marketing campaigns and interactive experiences. These can offer added value, including increased chances to win, digital currency and in-store coupons, over prolonged periods of time, to benefit both retailers and

lotteries. Evergreen game mechanisms can be tied to loyalty programs that maintain or improve brand value for the lotteries and ensure players return to the retailer locations as profit-generating, satisfied consumers.



The specific ways lotteries can build upon the relationship with their retailers will vary from market to market. There are a few opportunities that come to mind.

Make it easier to do business with lottery. One of the keys is for lotteries to work together to standardize reporting, auditing and transaction-processing methods so that multistate retail organizations have singular standardized business process to follow. This will be an important priority as the increase in mergers and acquisitions expand the dominance of multistate corporate account retailers and drive the contraction of local independent convenience stores.

Convince our retail channel partners to look at the tremendous success stories of land-based retailers in those states where iLottery is implemented. The evidence shows conclusively that iLottery literally augments and enhances land-based retail sales. Retail sales go up because iLottery attracts new consumer groups to lottery and engages core customers in the interactive relationship that drives retail sales.

Increase same-store sales. Modernize in-store POS infrastructures and inventory management systems. Increase the variety of ways that the consumer can play the lottery. Enable cashless and in-lane purchases, etc.

Expand the lottery land-based footprint. Implement self-serve kiosks and play stations that can be installed into new venues and trade-styles.



The instant ticket purchase is primarily an impulse decision made at point of purchase, logically leading retailers to place ticket dispensers at the front counter. However, with an abundance of impulse products to showcase on and around that area, retailers often find themselves stressed for space. Schafer Systems provides lotteries with innovative solutions to address this challenge, facilitating meaningful dialogue between a lottery and its retailers about product placement. With retailer requirements in mind, lotteries can choose customizable solutions that maximize the visibility of lottery products while respecting space constraints at retail.

For example, Schafer partnered with the Hoosier Lottery to install Lottery Centers in 13 test locations throughout the state. The all-in-one system included a ticket checker, menu board, dispensers, jackpot signs and ESMM monitors. Both the Lottery and retailers appreciated the instantly improved appearance and organization the system provided to the Lottery's products at checkout.

In Louisiana, Schafer tackled the unique challenge of teller windows at retail, which restricted both counter space and ticket visibility. Working with the Louisiana Lottery, Schafer developed customized window menu boards and point of sale pieces to showcase instant games available for purchase at the teller window, resulting in a sales lift for the retailers' instant and draw games.

By thoroughly understanding retailer needs and leveraging Schafer Systems' innovative products, lotteries can support the pursuit of retail excellence while strengthening their relationships with retail network partners, contributing to sales growth and ultimately benefiting the good causes that lotteries support.

Szrek2Solutions

Lotteries rely heavily on retailers, and all programs that improve lottery-retailer relationships are a win-win. Szrek2Solutions supports the Texas Lottery Commission's Retailer Cash Incentive Program via our contractual relationship with IGT Texas by providing our Trusted Draw EDS system with a random number generator and our Trusted Audit Integrity Verification system. The drawing portion of the cash incentive program awards prizes to retailers and encourages increased sales. The Trusted Draw system is designed with weighted odds, or multiple shares, to reward retailers for sales performance: higher performing retailers can earn more shares and get a better chance to win a drawing prize.

In this way, the Lottery rewards the retailers and gives them an incentive to sell more tickets in the future. This encourages retailers to streamline the process they use to sell tickets to the end customer and improve the variables that retailers can control – ensuring that they have all scratch tickets in stock while optimizing ticket placement and lottery game merchandising efforts. We believe this drawing solution is of value to the Texas Lottery Commission and allows them to drive same-store sales and revenue growth.



Brick and mortar retail is changing rapidly. New store designs and layouts, lower profiles, expanded product categories and the advent of new technology will drive retail changes in retail for years to come. Creating customer loyalty and providing a great customer shopping experience are the top priorities for retailers. What does this mean for the lottery? No longer will one size fit all, requiring lotteries to become more flexible and nimble to meet these changes. Retailers are already requiring

merchandising aids to support their design standards and requesting displays that are eye catching, durable, secure and user friendly. We can expect this trend to continue.

Established in 1985, Take-A-Ticket operates a 45,000 square foot manufacturing operation and has developed and customized dispenser and merchandising aids for the industry for more than 30 years. Take-A-Ticket is proud to announce its capability to provide hi-res, full color printing on virtually all materials, providing custom retailer and lottery logos, images and messaging on virtually all dispensers and displays.

Research has shown that increasing ticket facings increases sales for the lottery and profits for retailers. Take-A-Ticket's product offerings allow lotteries to expand facings easily as they grow, while adhering to retailers' design standards.

If a lottery or retailer has a specific need, Take-A-Ticket can develop a cost-effective solution. Lotteries will no longer need to settle for products that no longer meet the retailer's needs or just don't work anymore.



Leverage a "Power of +" Marketing Model

The effect of digital transformation on traditional retail is undeniable. More than ever retailers and lotteries should partner to maintain relevance, traffic and share of wallet. By combining and concentrating efforts on shared customers, lotteries and retailers can maximize marketing impact.

Here are a few examples of how a lottery and retailer should consider combining their marketing efforts to maximize brand and business impact.

Energy. Lotteries are by definition entertainment brands designed to deliver a potentially exciting experience. Lotteries should work closely with their retail partners to turn routine visits into surprising and delightful in-store experiences that create an energy around

games and other retail offerings. Done well, the energy will be contagious and everyone benefits.

Exclusivity. The key to success in marketing is often differentiation. Lotteries must understand any differences in the customers of their retail partners and strategically design exclusive offers that a retailer would promote and merchandise potentially leveraging a trade or co-op program.

Engagement. Understanding customers at a personal level is the ultimate key to loyal and profitable relationships. As lotteries become more available for purchase online, it will be both an amazing opportunity but equally critical need to develop an approach to sharing and combining customer data with what a retailer collects.

As our name suggests, we have built our business based on the **Power of +**. A similar approach by lotteries in partnership with retailers will ensure the impact of marketing will be greater than the investment.



We asked our associate members the following question:

What can lotteries do to build upon their relationships with retailers?

intralot

INTRALOT

64, Kifissias Ave. & 3, H. Sabbagh / S. Khoury St.
15125 Athens, Greece
Phone +30 210 615 6000
Fax +30 210 610 6800

INTRALOT, Inc.

11360 Technology Circle
Duluth, GA 30097
Phone (678) 473-7200
Fax (770) 295-2590

www.intralot.com

Nikolaos Nikolakopoulos, Group Deputy Chief Executive Officer, INTRALOT
Chris Sfatos, Group Deputy Chief Executive Officer, INTRALOT
Byron Boothe, Interim Chief Executive Officer, INTRALOT, Inc.
Nick Papadoglou, Vice President and Chief Commercial Officer, INTRALOT, Inc.
Chris Tzoumaras, Senior Vice President Operations, INTRALOT, Inc.

Year of inception: Greece (Parent Company) 1992; United States 2002

Contact:

Chryssa Amanatidou, Group Corporate Affairs Director,
+30 2106156000; amanatidou@intralot.com

INTRALOT, a public listed company established in 1992, is a leading gaming solutions supplier and operator active in 47 regulated jurisdictions around the globe. With €0.9 billion turnover and a global workforce of more than 5,200 employees in 2018, INTRALOT is an innovation-driven corporation uniquely positioned to offer to lottery and gaming organizations across geographies market-tested flexible, reliable and secure gaming products and services. INTRALOT handles an average of €17.5 billion of wagers per year and has approximately 285,000 of its proprietary terminals deployed worldwide.

Based on its strategic approach, The Intelligent Future of Gaming, INTRALOT has invested in the development of next-generation gaming solutions and services to support lotteries' modernization and digital transformation. This includes a holistic product portfolio that focuses on the player's modern needs and offers entertainment experiences through all distribution channels, across all verticals (lottery, betting, interactive, VLT).

INTRALOT has adopted a global growth strategy designed around synergies with local partners that aims to expand its market penetration capacity and diversify its product portfolio in local markets.

As member of the UN Global Compact, INTRALOT is a global corporate citizen committed to sustainable development and is an active proponent of the principles of responsible gaming, possessing the WLA Responsible Gaming Framework Certificate.

The company maintains the highest security certifications, as INTRALOT has been the first international vendor in the gaming sector to be certified according to the World Lottery Association (WLA) Security Control Standard in 2012, and has been certified with the ISO 27001 for its Information Security Management System (ISMS), maintaining the ISO 20000-1 certification on Information Technology Service Management.

INTRALOT contributes decisively to the future developments of the industry, being a member of the major lottery and gaming associations around the globe: Platinum Contributor of WLA, Premium Partner of European Lotteries, Level I Associate Member of NASPL (North American Association of State & Provincial Lotteries), Star Contributor of CIBELAE (Lottery Association for South America and the Iberian Peninsula), Gold Sponsor of APLA (Asia Pacific Lottery Association), Member of GSA (Gaming Standards Association) and Gold Member of AGEM (Association of Gaming Equipment Manufacturers). In addition, in 2018 INTRALOT became an Associate Member of the state lotteries' mutualized monitoring system on sports betting.



International Game Technology PLC

Corporate Headquarters:

66 Seymour Street
London WH1 5BT
United Kingdom
Phone +44 02075353200

Providence Operating Headquarters:

10 Memorial Boulevard
Providence, RI 02903
Phone (401) 392-1000; Media line (401) 392-7452
Fax (401) 392-1234

www.IGT.com

Marco Sala, Chief Executive Officer, IGT PLC

Renato Ascoli, Chief Executive Officer, North America

Jay Gendron, Chief Operating Officer, Lottery

Walter Bugno, Chief Executive Officer, International

Fabio Cairoli, Chief Executive Officer, Italy

Wendy Montgomery, Senior Vice President, Global Brand, Marketing, and Communications

Contact:

Reach our employees by email at firstname.lastname@IGT.com

A global leader in lottery and gaming, IGT is uniquely positioned to transform play by leveraging a substantial investment in innovation and a wealth of premium content, customer intelligence, operational expertise, and leading-edge technology. Our gaming platforms and solutions anticipate the demands of players and enable them to experience their favorite games across all channels and regulated segments, from lotteries and gaming machines to digital gaming.

IGT has a well-established local presence and relationships with governments and regulators in more than 100 countries around the world. We help redefine markets, transform businesses and create value by adhering to the highest standards of service, integrity, and responsibility. IGT has more than 12,000 employees and nearly \$5 billion in revenues, and is listed on the New York Stock Exchange under the ticker symbol IGT.

Lottery – We drive growth for customers and lead innovation in all aspects of lottery, from the player experience to lottery and retail management.

Gaming – We develop and deliver dynamic systems, gaming machines, and other growth-driving innovations to gaming venues around the world.

Digital – We provide new game and system solutions for mobile, web and retail that support the growth of casino, lottery and online operators.

Betting – We provide a complete, end-to-end sports betting solution to deliver technology and services for retail, mobile, and web that enable our customers to create a world-class offering tailored to their sports betting needs.



Scientific Games Corporation

6601 Bermuda Road
Las Vegas, NV 89119
Phone (702) 897-7150
Fax (702) 897-2284

www.scientificgames.com

Barry Cottle, President and Chief Executive Officer
James Kennedy, Chairman, Lottery
Patrick McHugh, EVP and Group Chief Executive, Lottery
Michael Conforti, President, Global Strategic Accounts
John Schulz, SVP, Instant Products Technology, Lottery
Jennifer Welshons, SVP, Marketing & Insights, Lottery
Stephen Richardson, SVP, Chief Compliance Officer

Year of inception: 1973

Contact:

Therese Minella, APR, Director, Lottery Communications (770) 825-4219, therese.minella@scientificgames.com

As a world leader in gaming entertainment, Scientific Games' mission is to empower our customers by creating the world's best gaming and lottery experiences. Our casino, lottery and digital games reach players wherever they are, whenever they want to play and in any channel they choose: retail, casino, digital or sports.

For more than 84 years through our acquired companies, Scientific Games has delivered what customers and players value most: trusted security, creative content and innovative technology. Beginning with the world's first slot machine, the "Bally Baby" in 1936, to our development of the world's very first secure lottery instant game in 1974, and our revolutionary SCiQ® lottery retail ecosystem in 2018, we are a trusted business partner to more than 1,500 customers around the globe.

Headquartered in Las Vegas, Nevada, with over 10,000 employees worldwide, Scientific Games serves our customers from manufacturing and commercial facilities on six continents. We offer a fully-integrated portfolio of technology, platforms, content and services for gaming and lottery industries.

Scientific Games' history of success has been driven by our highly experienced professionals who are committed to excellence. Our products have been developed by some of the world's top game designers, mathematicians, marketing research analysts and product managers.

We are an industry leader in developing and applying market research, analytics and consumer insights to gain a deeper understanding of player demand and preferences. As a result, we continue to generate new ideas and innovative gaming solutions that provide players with exciting experiences – and retailers with operational efficiencies.

Scientific Games is committed to corporate social responsibility, and we work closely with our customers, governments, regulators and industry associations to support player protection and responsible gaming.

We drive the global lottery and gaming industry forward by maximizing our customers' performance with a proven portfolio of products, technology and services featuring: instant, draw and hybrid games; Keno; licensed brands; digital games, promotions and player events; loyalty rewards; iLottery (eDraw and eInstants); sports betting; gaming systems technology; retail solutions; mobile apps; internet platform and CRM; and managed services.



Pollard Banknote Limited

140 Otter Street
Winnipeg, MB R3T 0M8
Canada
Phone (204) 474-2323

www.pollardbanknote.com

Doug Pollard, Co-Chief Executive Officer
John Pollard, Co-Chief Executive Officer

Year of inception: 1907

Contacts:

Doug Pollard, dpollard@pbl.ca
John Pollard, jpollard@pbl.ca
Jennifer Westbury, Executive Vice President, Sales & Customer Development, jwestbury@pbl.ca

Pollard Banknote partners with lotteries around the world to create and market high performing instant games and solutions that excite and engage players. Focused on innovating within the lottery market, we also provide industry leading retail and digital solutions.

Our team is dedicated to delivering on three key dimensions for success: **outstanding games** that excite loyal players and attract new ones, **retail excellence** through effective in-store strategies and retail network expansion, and **digital innovation** that allows lotteries to connect with players in new ways.

Our affiliated companies include:

- American Games and International Gamco specialize in charitable and alternative gaming products;
- Schafer Systems offers a full range of retail merchandising solutions, from instant ticket dispensers and lottery play stations to menu boards and point of purchase displays;
- Diamond Game provides specialized ITVMs, digital game machines and mobile devices designed to engage players in social establishments;
- Fastrak Retail provides lotteries around the globe with world class point of sale, dispensing solutions and retail merchandising products; and
- NeoPollard Interactive, our joint venture, provides online and mobile gaming products and services, including fully managed e-commerce solutions, in the iLottery space.

All of our products and supporting services are designed with the express goal of elevating our lottery clients and creating the ultimate player experience. Our approach has resulted in some of the industry's most sought after instant products, from the incomparable shine of Scratch FX® to the first-ever transparent ticket, Clear Play™ and our broad range of licensed games. Our retail optimization products include innovative in-lane sales solutions like scanACTIV™, Schafer Systems merchandising solutions and Diamond Game electronic ticket machines that open new retail channels. A full suite of digital products range from game apps and player engagement products including playON™ and gameON™ to Lottery Optimization Tools like sureTRACK™ and optIFORCE™ and a complete iLottery platform offered through NeoPollard Interactive.

Additional services we provide include product category management, integrated marketing solutions, market research services, retail development services and lottery management services.



Abacus Solutions International Group

Old Bank House
59 High Street
Odiham, Hampshire RG29 1LF
United Kingdom
Phone: +44 1604 846777
www.lotteryeverywhere.com

Simon Butler, Chief Executive Officer

Year of inception: 2008

Contacts:

*Simon Butler, s.butler@abacus-bv.com
Terry Presta, Head of Business, North America,
t.presta@abacus-bv.com
Dennis Miller, Head of Sales, North America,
d.miller@abacus-bv.com
Tim Yahya, Head of Lottery Retailer Relations, North America,
t.yahya@abacus-bv.com*

Fully managed service offering includes:

- Lottery in-lane, self-checkout, and self-serve
- Instant ticket sales and validation through our gateway
- E-commerce and mobile solutions
- Abacus games portfolio, including Bill Paid™, PlayPort Gaming Solutions and ScanACTIV™
- Retailer loyalty solutions, follow-on promotions and second chance draws
- Dedicated management portal: control and monitoring of all services

Abacus is the gateway at the heart of connecting consumers, retailers and lotteries in the global market. As a NASPL API gateway provider, we support in-lane sales, lottery self-checkout and lottery expansion to retailers who won't accept traditional terminals.

Abacus believes the future of lottery lies in integrating into the existing retailer and consumer infrastructures by providing a highly secure transaction gateway that enables all parties to work together and create mutual growth. The Abacus Fusion Platform sits at the heart of connecting consumers, retailers and lotteries, with the Abacus team managing integration from start to finish. Abacus believes in building long term relationships by working together to develop new and innovative solutions. By using cutting edge technology, created by forward thinking industry experts, the Abacus gateway enables lotteries and retailers to respond to the ever-changing consumer market with speed, agility, reliability and integrity. Abacus has built close working relationships with leading retail vendors that support big box grocery and drug retail chains with a global partnership with Toshiba Global Commerce Solutions.

Alchemy3, LLC

860 Warsaw Rd. Suite 200
Roswell, GA 30075
Phone (770) 442-6993
Fax (678) 389-8514
www.alchemy3.com

*Paul Guziel, Chief Executive Officer
Jeffrey Schweig, President*

Year of inception: 2007

Contact:

Jeffrey Schweig, (770) 442-6993, js@alchemy3.com

Primary products and services:

- Instant and draw game promotional executions
- Strategic business and marketing planning
- Integrated marketing programs
- National campaigns
- Premium branded games
- Collect 'n Win mobile and interactive applications
- Loyalty programs
- Web/drawing services

Founded in Alpharetta, Ga., in 2007 by lottery industry veterans, Alchemy3 has quickly become a leader in lottery strategic planning. The company creates "smart gaming solutions" that oftentimes merge licensed consumer brands and lottery games. Alchemy3 represents a select group of brands including The Home Depot, StubHub, Royal Caribbean International, Honda, MGM International Resorts and Bass Pro Shops to name a few. We have achieved our market position by putting clients' needs first – providing them with "boutique" type attention. We execute programs with the highest level of integrity, honesty and thoughtfulness.

Lottery customers: Alchemy3 provides marketing services to all North American state and provincial lotteries.



Blackhawk Network

6220 Stoneridge Mall Road
 Pleasanton, CA 94588
 Phone (925) 229-9990
 Fax (925) 226-9083
www.blackhawknetwork.com

Talbott Roche, Chief Executive Officer
Joan Lockie, Chief Financial Officer

Contacts:

*Richard Gottlieb, Vice President, Lottery, (925) 738-3899,
 Richard.gottlieb@bhnetwork.com*
*Anthony Molica, Director of Business Development, Lottery & Gaming,
 360-481-5333, Anthony.molica@bhnetwork.com*

Blackhawk Network delivers branded payment programs to help our partners increase reach, loyalty and revenue. This includes our innovative in-lane lottery solutions, which make playing and gifting lottery more convenient and fun. We currently offer our products and solutions directly or through commercial relationships in the United States and 25 other countries. Our physical retail network includes over 250,000 locations worldwide including the largest grocery retailers in the US.

Our Story:

Blackhawk Network understands today's crowded marketplace. We began in the very heart of the retail industry – grocery – where brands have long competed on crowded shelves for customer attention and affection. In 2001, Blackhawk invented a whole new way for brands and retailers to motivate consumers when we launched third-party retailing of gift cards.

Through our continued expansion into lottery products, B2B, B2C, digital settings and international markets, we've developed a complete suite of branded payment solutions for businesses. Today, Blackhawk Network is a multinational corporation with subsidiaries and partners throughout the world.

Camelot Lottery Solutions

200 West Jackson Boulevard, Suite 425
 Chicago, IL 60606
 Phone (312) 380-0108
www.camelotls.com

Wayne Pickup, Chief Executive Officer
Gareth Garner, Vice President Finance and Business Operations
Simone Harrison, Vice President, Sales and Marketing, North America
Rhonda Muehlenbruch, Vice President Customer and Product
Emilia Mazur, Director Corporate Affairs

Year of inception: 1994

Contact:

Emilia Mazur, emilia.mazur@camelotls.com

Camelot Lottery Solutions is a leading solutions and technology provider to lotteries around the world, helping customers reach new players and deliver responsible growth through increasing engagement with the lottery brand, leveraging data and digital technology and providing new ways to play. With a unique combination of operator credentials and technology competencies, Camelot LS has a track record of innovation and sustainable growth.

Our digital and data platforms and digital services power some of the most innovative and fastest growing digital lotteries in the world, including the Illinois Lottery, the UK and Irish national lotteries and Loterie Romande (Switzerland). Camelot LS is the integrated business manager of the Illinois Lottery and is a long-term strategic partner of the Arkansas Scholarship Lottery.

Lotteries grow responsibly by focusing on the player experience, giving players a personal connection to the games they play and the community benefits they create. Whether through data and digital enablement, brand optimization, or retail or marketing strategies, Camelot enables its customers to be successful in an evolving market.

Camelot LS is owned by the Ontario Teachers' Pension Plan and is part of the Camelot Group of companies.



Carmanah Signs, A Division of STRATACACHE

5-6025 12 ST SE
Calgary, AB T2H 2K1
Canada
Phone (403) 252-6047
www.carmanahsigns.com

Cameron Waldie, President and CEO
Maxwell Goldstein, Vice President Sales - Americas
Jon-Paul Bussoli, Vice President Product Development
Kalon Armstrong, Business Development Director
Ryan Ali, Interactive Design & Marketing Manager
Nadene Beyerbach, Marketing & Sales Support Manager

Year of Inception: 1993

Contacts:

*Maxwell Goldstein, (416) 786-3700,
mgoldstein@carmanahsigns.com*
Cameron Waldie, (403) 930-4272, cwaldie@carmanahsigns.com
Kalon Armstrong, (403) 930-4242, karmstrong@carmanahsigns.com

Carmanah Signs develops and delivers digital sign networks, interactive experiences, retail sensors and innovative jackpot signs to the lottery and gaming industry. Our software platform enables users to manage digital content and interactive experiences (including lottery, gaming, sports betting, monitor games and more) from one central interface.

Carmanah's retail marketing technologies and data insights help transform the player journey, deepen player insights, boost brand equity and increase sales.

A leading supplier to the global lottery industry for over 20 years, Carmanah is the Lottery & Gaming Division of STRATACACHE, the world's largest provider of intelligent in-store marketing technology. Together, STRATACACHE and Carmanah have over 2.4 million digital signs and 155,000 wireless jackpot signs at retailers globally, serving 54 lottery jurisdictions and 500+ casinos on four continents.

InComm

250 Williams Street, 5th Floor
Atlanta, GA 30303
Phone (770) 240-6100
Fax (404) 601-1000
www.incomm.com

Brooks Smith, Chief Executive Officer
Stefan Happ, President
Scott Meyerhoff, Chief Financial Officer
Michael Gruenhut, General Counsel

Year of inception: 1992

Contacts:

*Mark Smith, Vice President Marketing, Lottery and Gaming,
(404) 747-5130, marksmith@InComm.com*
*John Houseal, Vice President of Product, (770) 815-3349,
jhouseal@InComm.com*
*Craig Fitzgerald, Senior Director, Product Management - Lottery,
(678) 296-8276, cfitzgerald@InComm.com*

Primary products and services:

- Extensive retail distribution in convenience stores, big box, chain drug, grocery, specialty and general merchandise locations
- Extensive prepaid product portfolio
 - Financial services
 - Toll and transit
 - Digital downloads
 - Lottery and gaming
 - Music and entertainment
 - Loyalty/promotions
 - Healthcare
 - Wireless/long distance
 - Bill pay
- Interactive gaming and lottery solutions

Leveraging deep integrations into retailers' point-of-sale systems, InComm provides connectivity to a variety of service providers that allow consumers to conduct everyday business at more than 500,000 points of retail distribution. Whether those consumers are activating prepaid products, paying bills, enjoying real-time discounts through a membership card, purchasing digital goods in-store or adding funds to an online account, InComm is there to provide unique gift-giving opportunities, cater to on-the-go shoppers, deliver added value through loyalty programs and serve cash-based consumers.

With 386 patents, InComm is headquartered in Atlanta with a global presence in more than 30 countries in North and South America, Europe and the Asia-Pacific region.

Jackpocket

Jackpocket

8 W. 40th Street
New York, NY 10018
Phone (646) 755-7070
www.jackpocket.com

Peter Sullivan, Chief Executive Officer
Leo Shemesh, Chief Technology Officer
Eric Parker, Vice President of Lottery Operations
Andrew Fries, Vice President of External Affairs

Year of inception: 2013

Contact:

Sarah Arvizo, sarah@jackpocket.com

Primary products and services:

- Private and Public Pools: Lets players combine their tickets in a shared pot for better odds. Players can create personalized, private groups, or join thousands of others across multiple jurisdictions in a Powerball or Mega Millions pool.
- Autoplay: Players can set up a subscription mode to automatically enter into drawings using Quick Pick numbers or their favorite numbers, so they never miss a play.
- Ticket Lock: Proprietary ticket-scanning technology ties the ticket serial number to the player's identity, eliminating the risk of ticket loss or theft.
- Responsible Gaming: Safeguards such as daily deposit and spend limits, self-exclusion, and in-app access to problem gambling resources ensure responsible play.

Jackpocket is a mobile-first company helping to modernize and grow state lotteries, with a mission to create a more convenient, fun and responsible way to play. As a no-cost, no-integration, turnkey courier service, Jackpocket helps lotteries drive incremental revenue – benefitting essential state programs – by engaging traditional players while attracting new customers like millennials. Through the Jackpocket app, players can order tickets for their favorite games, check lottery results, join lottery pools with other Jackpocket players, and turn on autoplay so they never miss a drawing. Jackpocket is the first third-party lottery service to be certified for online responsible gaming by the NCPG.

Lottery customers: Minnesota, New Hampshire, Texas, Washington D.C.



NeoPollard Interactive LLC

920 N. Fairview Avenue
Lansing, MI 48912
www.neopollard.com

Doug Pollard, Co-Chief Executive Officer
Moti Malul, Co-Chief Executive Officer
Liz Siver, General Manager

Year of inception: 2014

Contacts:

Doug Pollard, (204) 474-2323, doug.pollard@neopollard.com
Moti Malul, (734) 353-4275, moti.malul@neopollard.com
Liz Siver, (248) 790-0762, liz.siver@neopollard.com

NPi is the established, trusted leader within the iLottery industry providing the best technology solutions, revenue-generating managed services, most innovative game content and outstanding customer service – all delivered by the best people.

Technology: NPi's state-of-the-art iLottery platform, NeoSphere, provides a centralized PAM for managing player information, transaction records and digital wallet accounts. NPi also provides a MUSL certified interactive central gaming system and game management platform.

Managed Services:

NPi's comprehensive suite of operational services include:

- Customer Engagement Marketing: Serving lottery needs for analysis, player segmentation, acquisition marketing, retention marketing and player conversion strategies.
- Games Studio: Delivering varying levels of game customization to deliver a customized game portfolio for each unique lottery market.
- Player Support: Offered through 24/7 email, chat and phone support.

Games: Market-proven portfolio of interactive games across categories of elstants, eKeno and eDraw-based games.

NPi brings together two of the world's best companies in the areas of lottery and internet gaming – Pollard Banknote and NeoGames. NPi combines the marketing expertise and extensive worldwide lottery experience of Pollard Banknote with the proven leadership and technology of NeoGames in launching new online and mobile gaming products and services. NPi is designed to be flexible and responsive to the rapidly evolving internet lottery space. Our player-focused approach extends across our comprehensive suite of iLottery managed services and is deep-rooted in our best-in-class technology. This proven approach results in revenue maximization for lotteries seeking to develop their interactive business.



Diamond Game

9340 Penfield Ave.
Chatsworth, CA 91311
Phone (818) 727-1690
Fax (818) 727-1692
www.diamondgame.com

Bill Breslo, President
Bryan Greene, Senior Vice President of Technology and Operations

Year of inception: 1994

Contact:
Bill Breslo, (818) 727-1690 x203, bbreslo@diamondgame.com

Primary products and services:

- ITVMs
- SSTs
- Lottery systems

Diamond Game specializes in developing modernized lottery products to help lotteries expand their retailer base and increase revenues. Known for its modernized ITVMs with animated video displays that enhance the player experience of instant tickets, Diamond Game continues to innovate in the area of ticket dispensing, as well as digital play styles. NexPlay™, our latest self-service player activated terminal, offers multi-game features, traditional draw game sales, and our popular animated instant ticket games. Diamond Game's products are ideal for social establishments where players seek entertainment and an engaging play experience.

Lottery customers: Maryland, Michigan, Missouri, Ontario Lottery & Gaming Corp., Loto-Québec



Inspired Entertainment, Inc.

250 West 57th Street, 22nd Floor
New York, NY 10107
Phone (646) 565-3861
www.inseinc.com

Lorne Weil, Executive Chairman
Brooks Pierce, President and Chief Operating Officer

Year of inception: 2006

Contact:
Shannon Aberdeen, Senior Marketing and Events Executive, shannon.aberdeen@inseinc.com

Primary products and services:

Virtual sports, VLTs, interactive gaming and server based gaming systems.

Inspired Entertainment is a global games technology company, supplying virtuals, interactive gaming and server based gaming systems with associated terminals and digital content to regulated lottery, betting and gaming operators around the world. Inspired currently operates over 34,000 digital gaming terminals and supplies its virtual sports products through more than 40,000 retail channels and over 100 websites, in approximately 35 gaming jurisdictions worldwide. Inspired employs more than 650 employees in the UK and elsewhere, developing and operating digital games and networks.

Lottery customers: Inspired's customer base includes regulated operators of lotteries, licensed sports books, gaming halls, bingo halls, casinos and regulated online operators. Key customers include major regulated lottery and gaming companies such as Michigan Lottery, William Hill, Ladbrokes Coral Group, OPAP, ATG, Sky Bet, Betfred, Genting, Betfair Paddy Power, SNAI, Sisal, Lottomatica, Codere, Sky Vegas, the China Sports Lottery, Fortuna and Caliente.



AllOver Media

16355 36th Ave. N, Suite 700
 Minneapolis, MN 55446
 Phone (763) 762-2000
www.allovermedia.com

Jeff Griffing, Chief Executive Officer
Mike Albo, Vice President, Brand Partnerships
Jordan Schumack, Senior Director, C-store Operations

Year of inception: 2003

Contact:

Mike Albo, (763) 762-2148, mike.albo@allovermedia.com

Primary products and services:

- Gas pump toppers
- Gas nozzle advertising
- One-sheet posters
- Door, window and cooler clings
- Mobile billboards (static and digital)
- Bar media (coasters, posters and clings)
- Door hangers
- Wallscapes

AllOver Media (AOM) specializes in lottery promotions throughout the United States. AOM partners with lotteries for POS campaigns, as well as general brand recognition across targeted markets, counties, zip codes and states. AOM's portfolio of media products includes gas station advertising, indoor billboard advertising at bars and restaurants, transit advertising, truckside billboards, mobile billboards and digital mobile billboards. AOM provides coverage within nearly every zip code in the United States and designs programs with the objective of driving lottery ticket sales.

Lottery customers: Arizona, Arkansas, California, Illinois, Indiana, Maryland, Missouri, Nebraska, New Jersey, New York, Pennsylvania, Virginia

BerryDunn

100 Middle Street
 PO Box 1100
 Portland, ME 04104
 Phone (207) 775-2387
www.berrydunn.com

John Chandler, Managing Principal

Year of inception: 1974

Contacts:

Mark Caiazzo, Principal, (207) 541-2321, mcaiazzo@berrydunn.com
Chris Ellingwood, Senior Manager, (207) 541-2290, cellingwood@berrydunn.com

Primary products and services:

- SOC examinations and readiness assessments
- IT audits and reviews
- Security assessments
- Risk assessments and risk management consulting
- Compliance audits and readiness assessments
- ISO consulting
- IT internal audit
- NIST 800-53/800-171 Gap Assessments and Assurance

BerryDunn is a full service Certified Public Accounting (CPA) and consulting firm providing IT assurance services to public gaming clients since 1995. In addition, we offer a full line of management and IT consulting services to clients nationwide, as well as Canada and the Caribbean. We are independent of the industry and do not sell, endorse or manufacture specific products, services or vendors.

Lottery customers: Scientific Games, Inc. (SOC examination services at operations sites in Arizona, Connecticut, Delaware, Illinois, Iowa, Maine, Maryland, Oklahoma, Pennsylvania, SG Gaming Game Development, SG Instant Ticket Game Development, SG iCore, and SGI's National Data Center), IGT (SOC examination services at operations sites in Georgia, Florida, Indiana, Michigan, Minnesota, Missouri, Nebraska, New Jersey South Dakota and Tennessee, and for IGT instant ticket operations); New Hampshire Re-Play; other past clients include the Tri-State Lotto Commission and lotteries in New Hampshire, Oregon, Texas and Rhode Island.



CMGlobal

1201 North Fourth St.
Watertown, WI 53098
Phone (920) 567-0333
Fax (920) 261-4500
www.CMGlobal.com

Andy Weber, President and Chief Operating Officer
Ed Cahoon, Vice President of Sales

Year of inception: 2001

Contact:

Andy Weber, (920) 567-0363, AWeber@CMGlobal.com

Primary products and services:

- Signs
 - Illuminated, non-illuminated, jackpot signs
- Displays
 - Literature holders, kiosks, merchandising tools, scratch dispenser headers, traditional and illuminated
- Scratch ticket dispensers
 - Any size, illuminated or non-illuminated
- Graphics and design work
 - Logos, literature, store design
- Sales promotions and premiums
 - Scratchers, pens/pencils, custom premiums

CMGlobal is a creative, cost-effective supplier for all of your lottery marketing needs. We work with some of the largest retailers, consumer goods companies and lotteries in the U.S., supplying on-time solutions to marketing problems. We are headquartered in the heartland (Wisconsin) with regional offices across the country. We offer in-house design and engineering, product management, warehousing and fulfillment, and spectacular sales and customer service. And we have many years of lottery-specific experience; we can add value to any program. We look forward to working with you!



Delehanty Consulting LLC
Security, Integrity, and Performance

Delehanty Consulting LLC

742 Basswood Ave
Verona, WI 53593
Phone (608) 832-1751
www.delehantyconsulting.com

Herb Delehanty, Principal

Year of inception: 2003

Contact:

Herb Delehanty, herb@delehantyconsulting.com

Primary products and services:

- Performance reviews and consulting
- Best practice studies
- Social media evaluations
- Risk assessments and security evaluations
- Gaming system procurement and implementation
- System acceptance testing
- Lottery workshops and seminars

Delehanty Consulting LLC was created to assist lotteries in enhancing their security, integrity and performance. Our consultants collectively have over 70 years of lottery experience from engagements with more than 45 lotteries on five continents. Our experience covers a broad spectrum of disciplines. We are the industry leader in providing independent lottery consulting services. You can trust us with your unique lottery requirements.

Delehanty Consulting LLC is the only lottery consulting company that is 100 percent independent of all lottery service providers. We do not perform work for gaming system or lottery ticket providers and never hire lobbyists to influence decisions regarding lottery operations.



Delivery & Distribution Solutions, LLC

16W 251 S. Frontage Road, Suite 21
 Burr Ridge, IL 60527
 Phone (630) 537-1544
 Fax (630) 590-5894
www.deliveryanddistribution.com

Denis S. Monroe, President and Chief Executive Officer
Jaryl Norman, Vice President of Operations
Kevin Soto, Vice President of Business Development

Year of inception: 2005

Contacts:

Denis S. Monroe, (630) 537-1544, ext. 301, denis@deliveryanddistribution.com
Kevin Soto, (630) 537-1544, kevin@deliveryanddistribution.com
Ronald Beverly, Operations Manager, (630) 537-1544, ext. 104, ronald@deliveryanddistribution.com

Primary products and services:

- Courier services
- Warehousing
- Order fulfillment
- Customized logistics programs

Delivery & Distribution Solutions, LLC (DDS), is a family owned and operated courier and logistics company that embraces technology. DDS uses state-of-the-art systems and devices to offer the same "bells and whistles" the larger companies do, but with better results. Whether it's our standard parcel delivery service or a customized logistics program, DDS' people specialize in delighting our customers.

Lottery customers: Illinois Lottery, Camelot Illinois, North Carolina, Scientific Games

EquiLottery Games

1300 W. Main Street
 Louisville, KY 40203
 Phone (502) 644-1454
www.EquiLottery.com

Brad Cummings, Founder and Chief Executive Officer
Jacob Hein, Sr. Director of Operations
Dreshon Bonds, Director of Marketing
Kaitlyn Johnston, Director of Horse Racing

Year of inception: 2014

Contact:

Jacob Hein, jacob@equilottery.com

Primary products and services:

- Win Place Show®, a daily \$2 draw game based on the results of live horse races that premiered through the Kentucky Lottery in 2019.
- Baseball Bucks™, a daily \$5 parlay style draw game based on the results of Major League Baseball games in partnership with MLB.
- Basketball Bucks™, Football Bucks™, and Hockey Bucks™, each with the same format as Baseball Bucks featuring other professional sports.
- Race Car Cash™, a weekly \$5 draw game based on the results of auto racing and in partnership with Speedway Motorsports, which owns Atlanta Motor Speedway, Bristol Motor Speedway, Charlotte Motor Speedway, Kentucky Speedway, Las Vegas Motor Speedway, New Hampshire Motor Speedway, Sonoma Raceway and Texas Motor Speedway.
- Software development, third party sports data integration, complementary mobile app (Win Place Show app in App Store and Google Play), third party licensing and broadcast rights arrangements, video streaming, sports data, development of annual event calendars, regional staff, second chance raffle prizes and intellectual property licensing.

Sportsbooks are designed for game of skill players, but what about products that appeal to lottery players who prefer games of chance? EquiLottery Games is offering The Sportsbook Alternative™, which gives your players the opportunity to engage in the excitement of live sports in a format they prefer. And our games are legal in 33 states without statutory change.



Fastrak Retail

Heapy Street
Macclesfield, Cheshire SK11 7JB
United Kingdom
Phone + 44(0) 01625 439 966
www.fastrakretail.co.uk

Manal Bensalah, Global Sales & Marketing Director
Mick Tooley, Commercial Director

Contacts:

Manal Bensalah, manal.bensalah@fastrakretail.co.uk
Mick Tooley, Mick@fastrakretail.co.uk

Year of inception: 2004

Fastrak Retail creates world class lottery point of purchase and instant ticket dispensing solutions that help lotteries around the world increase player engagement and drive increased sales. With 20+ years of experience in creating innovative design, Fastrak Retail has a deep understanding of the retail environment with extensive knowledge of consumer habits and player trends.

We have an experienced and dedicated design team and prototyping department who can create the perfect retail solutions for your lottery needs. Our experienced and skilled manufacturing teams produce high quality products in a wide range of materials and processes to a global client base.

Fastrak is a truly global company with representatives located in Europe, North America and Australasia, which means we are ideally placed to deliver a professional global service, evolving into a one stop shop for lotteries.



Gaming Laboratories International (GLI)

600 Airport Road
Lakewood, NJ 08701
Phone (732) 942-3999
Fax (732) 942-0043
gaminglabs.com

James R. Maida, President and Chief Executive Officer
Paul J. Magno, Executive Vice President

Year of inception: 1989

Contact:

Michael Capen, (702) 914-2220, m.capen@gaminglabs.com

Primary products and services:

- iLottery testing
- Instant and scratch lottery ticket testing
- Network risk assessments
- Physical and information security audits
- Project management
- Responsible gaming audits
- RFP consulting
- RNG analysis
- User acceptance testing (UAT)
- VLT testing
- Sports betting, testing and consulting

Gaming Laboratories International, LLC (GLI) delivers the highest quality lottery testing, consulting and assessment services. GLI's laboratory locations are found on six continents, and the company holds U.S. and international accreditations for compliance with ISO/IEC 17025, 17020 and 17065 standards for technical competence in the gaming, wagering and lottery industries. GLI is an associate member of NASPL, the World Lottery Association, European Lotteries Association, and CIBELAE.



Golden Race

Ruby Court, Apartment 6
 Andrea Debono Street
 Birguma, Naxxar
 Malta
 Phone +34 952 124098
www.goldenrace.com

Martin Wachter, Founder and Chief Executive Officer
Rene Wachter, Chief Operating Officer
George Vonapartis, Regional Director, North America

Year of inception: 2006

Contact:

George Vonapartis, (902) 877-7972, gvonapartis@goldenrace.com

Primary products and services:

- Virtual Sports
 - 3D sports: virtual football, with single match, league and cup formats (including World Cup and Euro Champions); 3D horse racing and harness racing.
 - HD pre-recorded sports: real fighting, 3x3 basketball and races (bikes, dogs, horses, dirt track, speedway and karts).
- Virtual Games: Spin2Win Deluxe, Keno Deluxe, Perfect Six, Mini Roulette and Poker.

Golden Race is a leading developer and provider of award-winning virtual sports and profitable betting solutions for retail and online operators. The company offers a complete betting experience with an extensive ever-growing suite of virtual games available 24/7 and a completely customizable all-in-one betting solution.

Its innovative and realistic virtual sports events quickly attract and engage players with numerous features that maximize retention. The system is reliable, scalable, intuitive and very easy to set up and manage, providing operators instant control of the odds, limits and payouts.

Licensed under various regulatory bodies around the world, Golden Race has partnered with numerous market leaders and experiences excellent year-by-year growth globally. Currently, the company processes more than 15 million tickets daily in more than 40,000 shops and 300 online integrations worldwide.

GSTV

1201 Woodward Ave
 Detroit, MI 48226
 Phone (313) 580-0600
www.gstv.com

Sean McCaffrey, President and Chief Executive Officer

Year of inception: 2007

Contact:

Nick Yacobucci, Account Executive, Nick.Yacobucci@gstv.com

Primary products and services:

- National full sight, sound and motion video network.
- Flexible, data-driven targeting opportunities.
- Creative strategy and content solutions services via in-house creative agency.

GSTV is a data-driven, national video network, engaging consumers with full sight, sound and motion video. Reaching one in three adults 18+ at an essential waypoint on their consumer journey – and steps from the convenience store.

GSTV drives immediate action and creates lasting brand impressions, delivering measurable results for the world’s largest advertisers. After fueling, 68% of viewers are headed into the c-store, and one in three will purchase a lottery ticket today.

GSTV’s convenience and fuel partners include leading retailers like 7-Eleven, Arco, BP, Circle K, Chevron, Exxon-Mobil, Gulf, KwikTrip, Marathon, Phillips 66, Speedway and Sunoco.

Lottery customers: Proven success with over 20 state lotteries leveraging GSTV to increase ticket sales.



Ipsos Limited Partnership

700-6th Ave SW, Suite 1950
 Calgary, AB, Canada T2P 0T8
 Phone (587) 952-4871
 Fax (403) 294-1535
www.ipsos.ca

Didier Truchot, President Directeur Generale, Ipsos
Gary Bennewies, President, Ipsos LP
Andrew Cochrane, Chief Financial Officer, Ipsos LP

Year of inception: 1979

Contact:

Paul Lauzon, Senior Vice President, (587) 952-4871,
paul.lauzon@ipsos.com

Primary products and services:

- Market research
- Segmentation studies
- Tracking studies of all types
- Concept testing of online and scratch products
- Product/volumetric forecasting
- Market and opinion tracking
- Media habits and shopping behavior assessments
- Retailer interviews
- Qualitative research

With more than 20 years of experience conducting gaming marketing research, our Lottery & Gaming team has earned an international reputation for producing the total market intelligence required to build strong business strategies. We employ a broad range of methodologies to support an even wider range of research approaches: market segmentation, game development research, marketing communications and public policy reviews.

Lottery customers: Current agency of record for: Florida, Minnesota, Hoosier Lottery, MD Lottery/GKV, Western Canada Lottery Corp., Interprovincial Lottery Corp., and Washington's Lottery.

Others: Michigan, Arizona, Montana, Atlantic Lottery, Nebraska, British Columbia Lottery Corp., California, New Mexico, Connecticut, New Jersey, Colorado, Ontario Lottery & Gaming Corp., Georgia, Oregon, Idaho, Rhode Island, Illinois, Saskatchewan Gaming Corp., Wisconsin, Manitoba Lotteries, Texas.



Jumbo Interactive Ltd.

Level 1, 601 Coronation Drive
 Toowong, Queensland 4066
 Australia
 Phone +61 7 3831 3705
www.jumbointeractive.com

Mike Veverka, Chief Executive Officer and Director/Founder

Year of inception: 1999

Contacts:

Brian Roberts, President North America, (760) 521-2929,
brianr@jumbointeractive.com
Michael Driver, Head of Business Development,
michaeld@jumbointeractive.com

Primary products and services:

- e-Retailer: A turnkey sales channel at no additional cost; use our team to sell your games online. We only sell in jurisdictions where authorized by the lottery. Jumbo follows the traditional retailer model common to most lotteries and applies this model to internet and mobile.
- Powered by Jumbo: A powerful suite of modules makes managing a lottery easier and effective. Jumbo provides the Software as a Service (SaaS), maintaining the technical infrastructure; choose how much you want to do with our support:
 - Jumbo Engage: Send targeted messages to engage your customers.
 - Jumbo Customer: Use your customers' data to better understand and support them.
 - Jumbo Transact: Plug-in online sales channels optimized for conversion and experience.
 - Jumbo Lottery: Comprehensive draw and game management.

Jumbo has been selling lottery tickets via its flagship website, www.ozlotteries.com, for over 18 years and via its 5-Star native app for the past eight years.

Jumbo has all the credentials and capabilities to enable digital sales channels to market and promote a lottery's game portfolio that is budget neutral to the lottery. Through its e-retailer model, Jumbo also enables traditional brick and mortar retailers to create omni-channel distribution of lottery games that broaden the lottery's awareness, reach and convenience for players – a powerful and successful arrangement for all stakeholders.

Jumbo Interactive, an AU\$1+ billion market cap company trading on the Australian Stock Exchange, is an innovative technology company servicing the lottery industry.

Kambi



Kambi

1 Queen Caroline Street
London W69HQ
United Kingdom
Phone +44 (0) 203 617 7270
www.kambi.com

Kristian Nylén, Chief Executive Officer
Erik Lögdberg, Deputy CEO, Chief Business Development Officer
David Kenyon, Chief Financial Officer

Year of inception: 2010

Contact:

Charlotte Šik, +44 (0) 77 143 05650, charlotte.sik@kambi.com

Primary products and services:

- Fully-managed online and retail sportsbook solutions:
 - Technology platform
 - Pricing and trading
 - Risk management
 - User interface
 - Player analytics
 - Sportsbook compliance and integrity monitoring
 - Marketing support

Kambi is a provider of premium sports betting services to licensed B2C gaming operators, driven by its vision to create unique and engaging sports betting experiences.

Our services encompass a broad offering from front-end user interface through to odds compiling, customer intelligence and risk management built on an in-house developed software platform.

Kambi's 20-plus customers include 888 Holdings, ATG, DraftKings, Greenwood Gaming & Entertainment, Kindred Group, LeoVegas, Mohegan Gaming & Entertainment, Rank Group, and Rush Street Interactive. Kambi employs more than 700 staff across offices in Malta (headquarters), Romania, the UK, Philippines, Sweden, Australia and the United States.

Kambi Group plc is listed on First North at Nasdaq Stockholm.

Lottery customers: Latvijas Loto, National Lottery AD

La Fleur's Magazine

20 Courthouse Square, Unit 207
Rockville, MD 20850
Phone (301) 610-6070
Fax (301) 610-6072
www.lafleurs.com

Terri Markle, Founder, CEO and President, TLF Publications, Inc.
Bruce La Fleur, Executive Vice President, TLF Publications, Inc.
Byron La Fleur, Associate Publisher, TLF Publications, Inc.

Year of Inception: 1991

Contact:

Terri Markle, terri@lafleurs.com

Primary products and services:

- Publishing trade magazine and webzines
- Organizing annual educational lottery conferences
- Organizing eConferences
- Publishing statistical research books
- Publishing digital data reports

La Fleur's Magazine is the global lottery industry's most trusted source for lottery data and information vital to this \$316 billion market. It's published by TLF Publications. Its founder, Terri Markle, has reported on the lottery industry for the past 39 years. La Fleur's Magazine was launched in 2003 and is published in both paper and digital versions. The magazine is a must-read for lottery executives to evaluate their organization's sales performance.

TLF Publications also publishes multiple statistical books including La Fleur's World Lottery Almanac, La Fleur's European Lottery Abstract, La Fleur's VLT Special Report, La Fleur's Compendium of Best Instant Games, and iLotto or Nay-Lotto: An Academic Study on iLottery's Effect on Traditional Sales. Finally, TLF Publications will organize its La Fleur's 2019 Austin Conference (Nov. 13-16, 2019) and its La Fleur's 2020 DC Conference at George Washington University in Washington, DC (May 2020).

North American lottery customers: Arizona, Arkansas, ALC, BCLC, California, Colorado, Connecticut, D.C., Delaware, Florida, Georgia, Hoosier, Illinois, Iowa, Kansas, Kentucky, Loto-Quebec, Louisiana, Maryland, Massachusetts, Michigan, Minnesota, Missouri, Montana, Nebraska, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Ohio, OLG, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Vermont, Virginia, Washington State, WCLC, West Virginia, Wisconsin and Wyoming



Lazlo 326

5755 Northpoint Pkwy, Suite 41
Alpharetta, GA 30022
Phone (770) 664-2775
www.lazlo326.com

Chris Demetree, Chief Executive Officer
Mike Pinkus, Chief Technology Officer, Founder
Art Kiuttu, Senior Vice President Lottery & Gaming Development
Greg Baker, Senior Vice President Operations & Support

Year of inception: 2014

Contact:

Art Kiuttu, (210) 254-6725, Art@Lazlo326.com

Lazlo created a world where consumers can use their mobile phones to buy lottery tickets, at the register or in-lane. Instead of managing paper tickets, retailers can now sell digital lottery tickets and players can securely store their tickets on their phones the way they do photos, airline tickets, theater tickets, shopping lists, etc.

Lazlo product features:

- Produces secure, encrypted digital lottery tickets.
- Offers players an easy, convenient way to use their mobile phones and allows players to select game plays before completing their purchase in-store.
- Integrates with retailer or loyalty apps and POS systems.
- Supports all lottery draw games.
- Integrates with existing legacy gaming systems.
- Drives marketing with CPG partners enabling unlimited ticket branding potential and drives customer value and loyalty.

Lazlo is lottery for today's mobile user and provides the convenience, privacy and security of a traditional paper ticket. The player selects game plays and places them in a mobile cart. When at the retailer, the player selects "checkout" and a barcode is generated on the mobile device. The clerk scans the barcode and the player's ticket images are downloaded to the player's mobile device.

Lazlo drives marketing, supports retailer partnership and engages players. It was developed by leaders in the gaming-tech, lottery and retail space.



LD Plastics & Displays

1130 Pearl Street
Brockton, MA 02301
Phone (800) 256-5611, (508) 584-7651
Fax (508) 580-9764
www.ldplastics.net

Dana Hermanson, President
Gary Hermanson, Vice President
Regis Dufour, Vice President Sales

Year of inception: 1978

Contact:

Danielle Simmons, (508) 584-7651, dsimmons@ldplastics.net

Primary products and services:

- Instant ticket dispensers
 - On-counter
 - Wall hanging
 - Modular
 - All in one
- Point of purchase displays
- Signage/sign holders
- Bet slip towers
- Product merchandisers

LD Plastics & Displays is a long-time manufacturer of high-quality custom fabricated products. With over 40 years of experience, LD Plastics & Displays has worked diligently to achieve practical, effective solutions to merchandising and display demands for many consumer brands including the lottery industry. All multi-game units are easily modified to most any size and configuration.

Lottery Customers: Colorado, Connecticut, Florida, Indiana, Illinois, Massachusetts, Maine, Minnesota, North Carolina, New Hampshire, Rhode Island, Virginia



MONTENEGRO



Milestone Entertainment

1590 Rosecrans Avenue, Suite D-329
 Manhattan Beach, CA 90266
 Phone (310) 866-3534
www.milestoneentertainment.com

Randall Katz, Co-Founder and Chief Executive Officer
Gary Dawson, Co-Founder and Chief Creative Officer
Scott Jensen, Chief Operating Officer and Executive Vice President
Robert Tercek, President
Andy Walraven, Creative Director

Year of Inception: 2000

Contact:

Scott Jensen, scott@milestoneentertainment.com

Primary products and services:

- Internet and mobile games
- Digital entertainment platform services
- Marketing and go-to-market planning
- Strategic workshops and consulting
- TV game shows and production
- International distribution and localization

Milestone Entertainment’s executive team has been designing, producing and marketing breakthrough consumer experiences, games, and interactive entertainment across all screens and platforms worldwide for 30 years. Milestone’s unique omni-channel approach effectively engages audiences – even the latest generation expecting optimized digital innovation – on television, computers, tablets and smart phones.

Milestone collaborates with lotteries and agencies to successfully launch new, compelling games and game-centric marketing campaigns. Custom-tailored design and strategy workshops offer industry insights, as well as proven tactics for retailers, and help define achievable, metrics-based performance goals. Milestone’s partners benefit from an extensive patent portfolio of game mechanics and features, and expertise with well-known brands and legendary game franchises. Milestone also offers international distribution, customization and localization services to enable the creation of original entertainment for every popular device in the world.

Lottery customers: California, Idaho, Kansas, New Hampshire, South Carolina, Vermont, Folkspel (Sweden), Française des Jeux (France), National Lottery (UK), New Zealand, South African National Lottery, Veikkaus (Finland)

Montenegro, Inc.

25 E. Main Street, Suite 205
 Roselle, IL 60172
 Phone (630) 894-0350
 Fax (630) 894-0095
www.montenegro-inc.com

Edgar R. Enciso, President
Irma V. Bates, Vice President

Year of inception: 1996

Contacts:

Ken Bates, Vice President Sales, Ken.Bates@montenegro-inc.com
Joe Marola, Director of Print Procurement, Joe.Marola@Montenegro-inc.com
Beth Davison, Customer Service Manager, Beth.Davison@montenegro-inc.com
Fernando Fabela, Customer Service, Fernando.Fabela@montenegro-inc.com

Primary products and services:

- Paper: Electronic thermal ticket, instant ticket
- Packaging: Tamper evident shipping bags, tape, cartons
- Print: Playslips, electronic ticket stock, POP, POS
- Specialty “just in time” inventory programs

Founded in 1996, Montenegro is a 100 percent minority owned growing company. Our insight into effectively meeting requirements of projects and creating effective partnerships can help organizations improve their minority spend obligations while maintaining high service levels and cost savings. Montenegro is committed to finding solutions, developing strong relationships, increasing the well-being in our community and embracing change.

We currently service 17 states with custom lottery tamper evident shipping bags and other packaging products. Additionally, we provide thermal ticket stock, play slips and inventory management programs to ensure quick delivery and allow lottery locations to utilize our “just in time” inventory program. This advantage allows our lottery customers better cash flow and extra floor space in their warehouses.

Furthermore, we provide specialty print solutions including specialty envelopes, posters, labels, door clings and display items to name a few.

Lottery customers: Scientific Games, IGT, Northstar Lottery, Camelot, Intralot.



PBI
RESEARCH SERVICES



PBI Research Services

900 Larkspur Landing Circle, Suite 201
Larkspur, CA 94939
Phone (415) 482-9611
www.pbinfo.com

John Bikus, President

Year of inception: 1980

Contact:

John Bikus, (612) 277-0599, jbikus@pbinfo.com

Primary products and services:

- Advanced death audits
- Locate services
- Data cleanse services

As the leading provider of death audit, locate, and data cleanse services, PBI Research Services partners with lotteries to address both winner and retailer compliance concerns:

- **Death Audit Services.** Using over 20,000 data sources along with artificial intelligence and human expertise, PBI offers the most timely and comprehensive method for identifying deaths. This service is used to:
 - Insure winners (annuitant/weekly) are not fraudulently representing themselves to avoid taxes.
 - Identify deceased retailers for whom licensed must be replaced.
- **Locate Services.** Using a combination of mail, phone calls, and social media searches, PBI can validate retailer addresses, eliminating fines associated with incorrect addresses.
- **Data Cleanse Services.** Use our Social Security number verification tools to avoid fines associated with incorrect winner information.

Let PBI put over 35 years of expertise along with the latest technology solutions to work for your lottery.

Lottery customers: Massachusetts, New Jersey

Pro-Lite

3505 Cadillac Ave., Building D
Costa Mesa, CA 92626
Phone (855) 533-5225 / (714) 768-6001
Fax (855) 463-3273 / (714) 668-9898
www.pro-litelottery.com

Andy Kaoh, Owner/President

Year of inception: 1981

Contact:

*Tom Yerke, Vice President of Sales, (714) 668-9988,
Tom.Yerke@pro-lite.com*

Pro-Lite’s lottery signage solutions are designed with sales generation in mind. Our patented technologies are proven to generate more awareness for the lottery jackpots – and awareness is essential for more sales. Our recent lottery sign innovations include:

- **Day of Drawing (DOD).** DOD is a clear indicator of what day numbers are drawn and has been adopted by the Massachusetts, Connecticut, Arizona, Maryland, Rhode Island and Minnesota lotteries.
- **Big B – “B” Digit display feature** accurately conveys jackpots in excess of a billion dollars – adopted by the Florida, Massachusetts, Connecticut, Missouri and Rhode Island lotteries.
- **Millions/Billions Display** – No more confusion with a static “millions” under big jackpots. This digital feature that accurately conveys jackpots in excess of a billion dollars has been adopted by the Massachusetts, Connecticut, Maryland, Rhode Island, Ohio and Kansas lotteries.

Pro-Lite’s LED product line now includes models for window, countertop, floor and outdoor applications. Pro-Lite has also developed promotional marketing solutions for lottery keno games in several states.

Pro-Lite Inc. introduced LED technology to the U.S. in 1981 and has since supplied over one million signs to customers worldwide.

In 2000, Pro-Lite introduced updatable LED jackpot signage to the U.S. and holds the distinction of supplying New York Lottery with the largest lottery sign program.

Lottery Customers: Over 100,000 LED signs have been made for more than 45 North American, Caribbean, Central American and European lotteries. Out of the 45 US lotteries, 40 are currently using Pro-Lite products. Internationally, Pro-Lite has supplied British Colombia, Ontario and Atlantic in Canada, Honduras in South America, and Switzerland and Italy in Europe.



Public Gaming Research Institute (PGRI, Inc.)

218 Main Street, Suite 203
 Kirkland, WA 98033
 Phone (425) 449-3000
 Fax (206) 374-2600
www.PublicGaming.com

Paul Jason, Publisher and Co-Chief Executive Officer
Susan Jason, Publisher and Co-Chief Executive Officer

Year of inception: 1975

Contacts:

Paul Jason, (425) 449-3000, Pjason@PublicGaming.com
Susan Jason, (425) 985-3159, Sjason@PublicGaming.com

Primary products and services:

- Public Gaming International Magazine, published six times a year
- www.PublicGaming.com, an industry news website
- www.PGRItalks.com, for video-recorded presentations and interviews
- "Morning Report" e-newsletter sent out every Monday
- Four daily e-newsletters, Monday through Thursday
- Smart-Tech: conference held annually (in March) in Miami
- Lottery Expo: conference held annually (in October) in New York City

Public Gaming Research Institute is dedicated to the support and growth of lottery organizations around the world, government sponsored gaming of all varieties, preservation of responsible regulatory policies and the forging of an informed and enlightened approach to public policy issues. We do this by providing information resources, daily e-news services and in-depth commentary by experts and leaders in the gaming industry, and by keeping our readers and constituents abreast of the status of legal, political and regulatory matters that so affect our industry.

Our mission is to serve the government-gaming industry. Our constituents include everyone who supports lottery and government gaming.

Schafer Systems Inc.

1000 Flag Road
 Adair, IA 50002
 Phone (641) 742-3266, (800) 222-4489
 Fax (641) 742-3624
www.ssi-ia.com

John Worth, President
Diane Littler, Sr. Director of Finance
Teresa Immel, Sr. Director Sales & Marketing
Nathan DeArment, Director of IT
Rob Tarrell, Director of Operations

Year of inception: 1986

Sales Contacts:

Teresa Immel, (641) 742-5133, teresa.immel@ssi-ia.com
Shay Wahl, Sales and Marketing Manager, (573) 415-5455, shay.wahl@ssi-ia.com

Primary products and services:

Instant ticket dispensers, play centers, literature holders and point of purchase display products.

Since 1986 Schafer Systems has been an innovative, leading manufacturer of plastic products for the lottery industry. With a solid reputation for quality and service, Schafer Systems provides retail solutions for lotteries around the world.

Each lottery retail location is unique, and the goal of our dedicated team is to inspire and partner in developing new ideas, functionalities and looks. We recognize that you have ideas too, so let our top-of-the-line designers and engineers take your idea from concept to reality. From instant ticket dispensers and ticket menu boards to play centers, promotional items and literature holders, we have the point of sale solutions the lottery industry needs.

The Schafer Systems sales team is led by Teresa Immel and Shay Wahl. Together they provide product expertise, custom product ideas and excellent service. Our newest products are sure to make lottery items stand out with integrated technology, lighting and so much more. If you haven't see what we have to offer, now's the time!



Spectra Systems
CORPORATION

Smartplay International

1550 Bridgeboro Road
Edgewater Park, NJ 08010
Phone (609) 880-1860
www.smartplay.com

Thomas Markert, President
Darrell Smith, Vice President, Sales and Marketing

Year of inception: 1993

Contacts:

Thomas Markert, tom@smartplay.com
Darrell Smith, darrell.smith@smartplay.com
Mariana Mokritski, Client Relations Manager,
mariana@smartplay.com

Smartplay International is the industry's foremost supplier of drawing systems. The company manufactures and supports lottery drawing equipment, digital drawing systems and custom game show equipment. Since 1993, the company has served over 400 of the world's most prestigious lottery and gaming organizations in over 85 countries. Smartplay's lottery equipment has been certified by GLI, KPMG, Eclipse, BMM and numerous state jurisdictions. The company is ISO 9001-2015 certified and adheres to a strict manufacturing and quality control process.

In addition lottery and gaming products, Smartplay offers clients a range of other services, including custom design and fabrication, maintenance and service-level agreements, on-site services such as installation and training, and a wide range of drawing balls, convenience products and ball calibration equipment.

Lottery customers: We actively service over 200 lotteries in 85 countries.

Spectra Systems Corporation

40 Westminster St., 2nd Floor
Providence, RI 02903
Phone (401) 274-4700
www.spsy.com

Nabil Lawandy, Chief Executive Officer
Brian McLain, Chief Financial Officer
Matt Pratap, Director ICS Operations

Year of inception: 1996

Contact:

Matt Pratap, (604) 638-1719, mpratap@spsey.com

Primary products and services:

- ICS (internal control systems) for monitoring and auditing all forms of lottery – traditional draw games, instants, iLottery interactive, mobile and pari-mutuel gaming.
- Sports betting internal controls and reconciliation for regulators.
- Electronic RNG draw monitoring and auditing.
- Dashboard portal for at-a-glance game and draw status across all games.
- Central gaming system independent, our ICS interface supports all major gaming vendors.
- ICS operations are ISO/IEC 27001:2013 certified.

Spectra Systems is an established world leader in providing technology for securing transactions, from gaming to banknotes and brand protection. Spectra's Premier internal control system is the industry's most advanced ICS offering for realtime protection and is the leading supplier of realtime auditing, fraud control and risk management systems to government-sanctioned gaming operators. Prior to the strategic acquisition of the ICS business for regulated gaming markets, the company penetrated the currency and document security markets through a series of supply and licensing agreements with governmental, institutional and corporate partners.

Lottery customers: Spectra Systems serves over 20 lottery jurisdictions across the U.S. and worldwide; currently deployed in North America, the Caribbean, Europe and Asia. Premier Integrity systems monitor and audit more than \$25 billion in annual sales for lotteries and pari-mutuel organizations.

Szrek₂Solutions



Szrek2Solutions LLC

60 Spencer Avenue
 East Greenwich, RI 02818
 Phone (401) 398-0395
www.szrek.com

Irena Szrek, Managing Director and Partner
Walter Szrek, Senior Technologist and Partner

Year of inception: 2003

Contact:

Helena Pereira, Marketing Director, helena@szrek.com

Primary products and services:

- Trusted Products Suite™ high performance Trusted RNG™ Platform for random number generation, integrity verification, and transaction and ticket authentication
- Trusted Draw™ secure digital draw system, with proof of integrity
- Trusted Play™ secure RNG server for instant and interactive games
- Trusted Audit™ verifying data integrity for all products, 100% fault and fraud detection
- Trusted Monitor™ dashboard for viewing processes and transactions
- Trusted Transaction™ securing bets before the draw / event
- Trusted Ticket™ securing white paper tickets and electronic receipts
- RNG and audit products implementation and support for both online and offline systems
- Complete draw solutions for all games, with security, integrity verification, animation upload
- RNG games support:
 - 2nd chance draws, raffle games (regular raffle, lotto combination, and Joker raffle), promotions
 - Lotto, numbers, bingo, keno, multiplayer games, instant win games and many other games

Szrek2Solutions is a private international service and product supplier offering secure solutions for the gaming industry, specializing in providing secure RNG platforms with fraud detection and fault protection. Headquartered in Rhode Island, Szrek has provided its Trusted Product Suite™ since 2003 to address demand for secure automated generation of winning numbers and game outcomes for all game types and gaming environments. Szrek patented technology ensures transparency, proof of integrity and independent systemic audit verification of the RNG and draw process. Our motto: "When I play I trust."

Lottery customers: Iowa, Texas, Oregon, Florida, Georgia, Kentucky, Rhode Island, New York, Virginia, IGT, Scientific Games International, Lottomatica, Sisal, Loterie Nationale Luxembourg, Ithuba and ONCE.

Take-A-Ticket, Inc.

130 Montgomery St.
 Albany, OR 97321
 Phone (800) 253-4295, (541) 967-0433
www.tatinc.com

Seth Tigner, President
Zach Tigner, Research & Development, and Secretary
Tami Dennis, Director of Sales & Administration

Year of inception: 1985

Contact:

Tami Dennis, info@tatinc.com

Primary products:

- On-counter dispensers
 - Available in two games up to 60 games
 - Rotating dispensers, displays and brochure holders
 - Lighted menu boards
 - Fabricated and injection molded dispensers
- In-counter and under counter dispensers
 - Available in 8-48 games
 - Allows tickets to be displayed inside or under the sales counter, saving valuable counter space!
- Brochure holders, specialty and custom items

Take-A-Ticket, Inc. was the first lottery ticket dispenser company. TAT was founded by Cal Tigner in October of 1985; when wanting to purchase a ticket he said, "If you can't see it, how can you buy it?" TAT is a family-based business with over 100 years of combined experience and customer service. Take-A-Ticket has designed numerous dispensers to meet the needs of lotteries and store chains throughout the years. Movement and lights make the most eye catching display piece in a convenience store. Small on-counter footprint makes it ideal for lotteries expanding into non-traditional sales locations.

Lottery customers: Take-A-Ticket provides lottery products to nearly all U.S. lotteries, plus international clients.



Tilt Creative + Production

23 S. 13th Street, Suite 301
Richmond, VA 23219
Phone (804) 346-3232
www.tiltcp.com

Ron Carey, Founder and Chief Executive Officer
Bill Hickman, Chief Growth Officer

Contact:

Bill Hickman, (804) 346-3232 ext. 101, bill.hickman@tiltcp.com

Primary products and services:

- Lottery brand strategy development
- Game marketing strategy development
- Player engagement strategy development
- Full-service creative: design, art direction and copy
- Digital content and game advertising campaign development
- In-house still and video production capabilities: both on-location and 16,000 sq. ft., fully-equipped, multi-set studio
- In-house still and video post-production capabilities: edit, motion graphics/3D animation and audio suites including recording booth

Tilt C+P is a collection of thinkers, makers and maximizers of all forms of strategic marketing content designed to help lotteries grow their brand and bottom line while minimizing production budgets.

Our team has decades of experience partnering with over 100 leading consumer brands and major retailers to develop and deliver impactful marketing content across every type of screen and environment.

Our "Power of +" creative production model makes every partnership unmistakably easy, efficient and impactful by concentrating all efforts under one roof and eliminating unnecessary hand-offs and markups across multiple marketing companies.

We're a proudly independent and minority-owned business. While based in Richmond, Va., our partnerships exist from coast to coast. We are also active members in NRF (National Retail Federation), NMSDC (National Minority Supplier Development Council), ANA (Association of National Advertisers) and IHAF (In-House Agency Forum).

Waymack and Crew

301 Main Street, Suite 100
Little Rock, AR 72201
Phone (501) 372-1981
www.waymackandcrew.com

Dan Waymack, Owner/Director
Kama Johnson, Director of Operations

Year of inception: 1992

Contact:

Kama Johnson, (501) 773-4582, kama@waymackandcrew.com

With extensive video experience in the lottery and gaming industry, Waymack and Crew tell stories on screen that inform, excite and inspire – from national TV spots to targeted digital web-based content. We do more than just create evocative commercials and content, we strive to create confidence.

Lottery customer: Arkansas



Worldpay Gaming

8500 Governors Hill Drive
 Cincinnati, OH 45249-1384
 Phone/Fax (401) 369-1051
www.worldpay.com

Andrew Crowe, Vice President, Market Development

Year of inception: 1971

Contact:

Andrew Crowe, (401) 369-1051, andrew.crowe@worldpay.com

Primary products and services:

- World-class payment processing for lotteries
- Military-grade data security – PCI compliant solutions
- Consumer behavior and payment data analytics
- Cashless gaming

Six points of lottery interaction:

- Clerk-activated retail
- Self-service retail
- Internet
- Mobile
- Sports
- Courier services

Lotteries have a lot on their minds – managing a shifting regulatory environment and engaging with new technologies and distribution channels to responsibly grow sales and support the good causes they serve. Worldpay Gaming’s robust integrated payments platform delivers the scale and security required to ensure an efficient, safe and positive customer experience.

Lottery customers: Arizona, Delaware, Georgia, Illinois, Kentucky, Michigan, New Hampshire, New York, North Carolina, North Dakota, Ohio, Pennsylvania, Rhode Island, Virginia.



NASPL Associate Membership

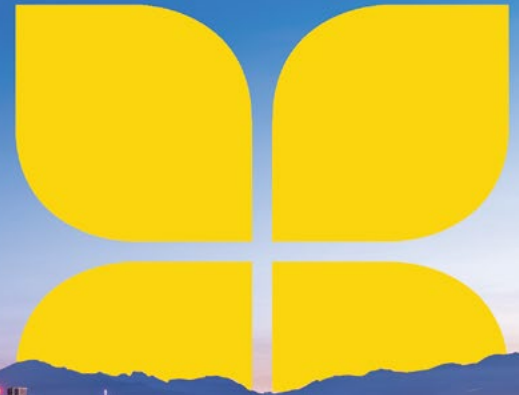
NASPL would like to thank all associate members for their support. We encourage everyone attending our annual conference in Little Rock to spend time in the exhibit hall visiting with all of them, and with other exhibitors as well. They look forward to talking lottery with you!





**WORLD LOTTERY
SUMMIT 2020
VANCOUVER**

Save the date:
Oct 26-30, 2020



2019 CALENDAR

September 17-20, 2019

NASPL 2019 Annual Conference
Little Rock Convention Center
Little Rock, AR

Hosted by Arkansas Scholarship Lottery

October 14-17, 2019

G2E Global Gaming Expo
Sands Expo Las Vegas
Las Vegas, NV

October 28-30, 2019

PGRI Lottery Expo
Park Lane Hotel, Central Park South
New York City, NY

November 18-21, 2019

La Fleur's 2019 LotTECH Connect
AT&T Hotel & Conference Center
Austin, TX

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



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

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i shapes
the
future

i want to be ahead of the game
i want to thrive and conquer
i want intense experiences
i want solutions that fit into my world
i am your player, are you ready for me?

Modernizing lotteries in a digital world

intralot