

NEW DECADE
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LOOK**

HOOSIER LOTTERY | WINNING WITH LOTTERY FUNDING

THE OFFICIAL PUBLICATION OF THE NORTH AMERICAN ASSOCIATION OF STATE & PROVINCIAL LOTTERIES

INSIGHTS

JANUARY/FEBRUARY 2020



- LOTTERY COMES TO THE -
MAGNOLIA STATE



During my speech to end the NASPL conference in Little Rock, I noted that we aren't just in the lottery business – we're in the life changing business. From lottery winners, to students who receive lottery-funded scholarships, to retailers who receive a selling bonus for selling a large jackpot ticket, our agencies have an enormous impact on our states, provinces or jurisdictions. That impact doesn't stop with the people directly affected by the lottery. We also indirectly affect citizens through vendor partnerships, staff volunteer hours and the mark made by scholarship recipients who graduate and elect to stay in state to work and better their communities.

Below are a few of my favorite stories about the direct and indirect impact the Arkansas Lottery has on this state.

Our Governor, Asa Hutchinson, announced early in his campaign that he would place an emphasis on making computer science education for all one of his core campaign promises. Shortly after he was elected, we began our #ThisIsWinning campaign and became aware of a recent lottery scholarship recipient who was making waves in the coding world. After graduating with the help of that Lottery scholarship, she became the Director of the Arkansas Coding Academy. Mary Condit now trains new software developers, helping them pursue a career in computer coding, to hopefully stay and work in the state of Arkansas. There you have a trickle-down impact of the Arkansas Lottery: A Lottery scholarship recipient stays in state and graduates, stays in state after graduation, and advances one of the governor's largest policy initiatives, which helps to benefit the students of Arkansas. Winning!

How about a tearjerker? One of my favorite Arkansas Lottery stories is that of Phyllis Thomas from Little Rock. In 2011, she and her husband won a \$50,000 Powerball prize. It was only after conducting our search of past winners for the #ThisIsWinning campaign that we found Phyllis and heard her story. What we didn't know when she won was that her husband had recently been diagnosed with Alzheimer's and was slowly losing his ability to remember family and friends and the experiences he shared with his loving wife. In order to maximize their time together and make memories with each other while they still could, Phyllis and her husband elected to use the winnings to travel. They went on several once in a lifetime trips, in the Caribbean and throughout the U.S. Imagine having the ability to go on an incredible personal journey with the person who means the most, all thanks to a Powerball prize. Coming from a family that has felt the direct effect of Alzheimer's disease ourselves, Phyllis' story hit me right between the eyes.

Beyond beneficiaries and winners, there are also ways to leverage our relationships with our vendors to positively impact our communities. In Arkansas, we challenged our vendors, Intralot and Scientific Games, to give back to our communities. They did so in a big way, by contributing \$40,000 each to the Upward Bound programs benefiting Arkansas colleges and universities. These contributions, directed specifically at technology, provided \$80,000 worth of computers and essential tech accessories for Upward Bound students. The impact of these gifts could never be measured, but I can assure you there is a college graduate somewhere in Arkansas whose journey was made easier as a result.

So, there you have it. Three examples of the direct and indirect impact of the lottery on our state. And there are hundreds of other stories like them, across all of our jurisdictions.

My guess is that the citizens of my state never contemplated the wide ranging direct and indirect impact of the lottery when they voted Yes in November of 2008. I hope they do now.

BISHOP WOOSLEY
Director, Arkansas Scholarship Lottery
NASPL President



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CIRCULATION:

Insights ISSN 1528-123X,
January/February 2020,
Volume No. Twenty, Issue One.
Published bi-monthly by NASPL
(North American Association of State
and Provincial Lotteries)


7470 Auburn Road, LL1
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i shapes
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i want to be ahead of the game
i want to thrive and conquer
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i want solutions that fit into my world
i am your player, are you ready for me?

Modernizing lotteries in a digital world

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On the cover: Rep. Alyce G. Clarke buys the first Mississippi Lottery ticket.



CONGRATULATIONS, MISSISSIPPI LOTTERY!

Just 87 days after awarding its contracts, the Mississippi Lottery successfully went live on November 25th with nearly 1,200 retailers - and realized more than \$30 million in sales in the first three weeks!

As a lottery-growth partner to the Mississippi Lottery, IGT promises to deliver unrivaled gaming experiences that engage players and drive growth.

We are proud to have been named the lottery partner of choice for the Mississippi Lottery.

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Reimagine **Next**

2020 isn't just a new year – it's a new decade, a new beginning.

And Scientific Games has a bold new look to kick it off.

So look for us as we work with our lottery partners to reimagine the future.

**Know more.
PLAY BETTER.**



RG for All

GameSense, the BCLC's player-facing responsible gambling program designed to assist players in making informed choices, is now available to all NASPL members at no charge.

In 2009, the British Columbia Lottery Corporation launched GameSense, a new RG program designed to support and educate players on healthy gambling habits and provide a more balanced approach to gaming. Now, BCLC is providing members of the North American Association of State and Provincial Lotteries with the opportunity to license GameSense for free.

In order to provide GameSense to NASPL members free-of-charge, BCLC created a unique, out-of-the-box model, which includes GameSense-branded assets and materials for use online and in lottery retail locations. Players in participating jurisdictions would have easy access to support and educational tools grounded in research-based guidelines and best practices.

"We're extremely pleased, and thankful for the hard work BCLC has done to make this initiative available to NASPL members across North America," said David Gale, NASPL's Executive Director. "It's a groundbreaking program, with an active and dedicated community of partners. This gives all our member lotteries the opportunity to join in, and to continue

"We're extremely pleased, and thankful for the hard work BCLC has done to make this initiative available to NASPL members across North America."

- David Gale

to grow and improve the responsible gambling activities in their own jurisdictions."

At its core, GameSense aims to help players make informed decisions and keep gambling fun, by improving player trust, awareness and education. This is made possible by providing players with tools to help understand how games work, how to set and stick to personal time and monetary limits, and to be open and honest with family, friends and oneself when it comes to gambling habits. The program has earned international recognition, such as the World Lottery Association's Best Overall Responsible Gambling Program in 2010, and the National Council on Problem Gambling's Social

Responsibility Award in 2015.

GameSense can already be found in several jurisdictions throughout North America, including Alberta, Saskatchewan, Manitoba, Connecticut and Massachusetts, and across the suite of gaming facilities operated by MGM Resorts International. Participating jurisdictions are encouraged to work together and share their findings, thereby creating a continual flow of new, valuable research and information. And additional participation means additional data.

"By collaborating with our industry partners in North America, we are creating a community of lottery jurisdictions with a shared commitment to player health," said Kevin Gass, BCLC's Vice President of Lottery Gaming. "Working together enables us to share key learnings and improve best practices for players all over the world, including right here in BC, where our focus remains on providing great gambling and greater good." ■

GameSense

The 2019 Responsible Gambling Holiday Lottery Campaign and Beyond



By Keith Whyte, Executive Director, National Council on Problem Gambling, and Dr. Jeffrey Derevensky, Director, International Centre for Youth Gambling Problems and High-Risk Behaviors, McGill University



Since 2007, the National Council on Problem Gambling and the International Centre for Youth Gambling Problems and High-Risk Behaviors at McGill University have invited lotteries and non-lottery organizations to participate in the Responsible Gambling Holiday Lottery Campaign to raise awareness about the risks of underage lottery play during the holiday season. Whether or not it is legal for minors to participate in lottery activities in specific jurisdictions and states, public education campaigns like the Responsible Gambling Holiday Lottery Campaign play an important role in educating the public about the risks of underage play.

Research shows that early gambling experiences, including with lottery tickets, are a risk factor for later

gambling problems. A large number of young people report their first gambling experience occurs around 9-11 years of age. Adult problem gamblers report an earlier age of onset for their gambling activities. According to the National Council on Problem Gambling's National Survey on Gambling Attitudes and Gambling Experiences (NGAGE), lottery play is the most common form of gambling in the United States. Over 65% of people who gambled in the last year did so on the lottery! This broad exposure makes the lottery industry an influential partner in public awareness and responsible gambling efforts like the Holiday Campaign.

The Holiday Campaign provides free materials for U.S., Canadian and international lotteries, as well as

non-lottery organizations, to run an effective public awareness campaign across multiple platforms including social media, print, radio, television and retailer training. In 2019, every U.S. and Canadian lottery participated, along with a growing number of international lottery and non-lottery organizations.

Looking ahead to 2020 and the years beyond, the Responsible Gambling Holiday Lottery Campaign will hope to maintain the 100% participation of U.S. and Canadian lotteries, while continuing to increase international lottery participation. This year again the Campaign was endorsed by NASPL, European Lotteries and the World Lottery Association. Another future goal is to develop a universal campaign hashtag to promote

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We expect to continue to raise the bar to participate and will be searching for funding to evaluate the impact of campaign messages on actual consumer awareness and behavior.

dynamic social media engagement. We expect to continue to raise the bar to participate and will be searching for funding to evaluate the impact of campaign messages on actual consumer awareness and behavior.

We are grateful for the support of NASPL leadership and staff and appreciate the hard work of the NASPL Responsible Gambling Committee in providing outreach and enlisting participants. The ongoing responsible gambling collaboration between NCPG and NASPL provides a model for other sectors of the gambling industry. We look forward to working with you in the New Year!

The 2019 Responsible Gambling Holiday Lottery Campaign participants included:

Lottery Level 3: British Columbia Lottery Corp., Connecticut Lottery Corp., DC Lottery, Hoosier Lottery, Illinois Lottery, New Jersey Lottery, Oregon Lottery and Virginia Lottery.

Lottery Level 2: Alberta Gaming, Liquor and Cannabis Commission, Austrian Lotteries, Florida Lottery, Hrvatska Lutrija d.o.o., Iowa Lottery Authority, Ireland's National Lottery, Kansas Lottery, Kentucky Lottery Corp. Maine Lottery, Massachusetts State Lottery, Michigan Lottery, Minnesota Lottery, Missouri Lottery, New York State Gaming Commission, North Carolina Education Lottery, Ohio Lottery, Rhode Island Lottery and Texas Lottery Commission.

Lottery Level 1: Arizona Lottery, Arkansas Scholarship Lottery, Atlantic Lottery, California Lottery, Colorado Lottery, Delaware Lottery, Georgia Lottery Corp., Idaho Lottery, Loto-Québec, Lottotech

Ltd (Mauritius), Louisiana Lottery Corp., Manitoba Liquor & Lotteries, Maryland Lottery and Gaming Control Agency, Mississippi Lottery Corp., Montana Lottery, Nebraska Lottery, Nederlandse Loterij (Netherlands Lottery), New Hampshire Lottery Commission, New Mexico Lottery, North Dakota Lottery, Nova Scotia Gaming Corporation, Oklahoma Lottery, Ontario Lottery and Gaming Corp., Pennsylvania Lottery, Saskatchewan Lotteries, South Carolina Education Lottery, South Dakota Lottery, Tennessee Education Lottery Corp., Ukrainian National Lottery (UNL), Vermont Lottery, Washington's Lottery, West Virginia Lottery, and Wisconsin Lottery.

Non-Lottery Participants: AdCare Educational Institute of Maine, Area Substance Abuse Council (ASAC), Centerstone, Community & Family Resources, Community Action for Capable Youth, Coos Health & Wellness, Florida Council on Compulsive Gambling, Indiana Council on Problem Gambling, Jackpocket, Kansas Coalition on Problem Gambling, Lake-Geauga Recovery Centers, Maine Council on Problem Gambling, Maryland Center of Excellence on Problem Gambling, mkodo, Nicasa Behavioral Health Services, Northstar Problem Gambling Alliance, Ohio Mental Health and Addiction Services, Problem Gambling Network of Ohio, RI Council on Problem Gambling, Rosecrance Jackson Centers, Scientific Games, Southwest Michigan Behavioral Health, SustainableGAMING, Umatilla County Public Health, and the Zepf Center. ■

Holiday Campaign Levels of Participation

Lottery Level 1

- Sign up as a Campaign participant
- Press release or media placement
- 1-4 social media messages posted (promoting responsible gambling / appropriate age for lottery play / youth gambling stats / parental awareness tips)

Lottery Level 2

- Sign up as a Campaign participant
- Press release or media placement
- 5-10 social media messages posted (promoting responsible gambling / appropriate age for lottery play / youth gambling stats / parental awareness tips)
- Retailer training / messaging on youth gambling
- Targeted print / digital design advising parents to "gift responsibly" / "lottery tickets are not for children"

Lottery Level 3

- Sign up as a Campaign participant
- Press release or media placement
- 11+ social media messages posted (promoting responsible gambling / appropriate age for lottery play / youth gambling stats / parental awareness tips)
- Retailer training / messaging on youth gambling
- Targeted print / digital design advising parents to "gift responsibly" / "lottery tickets are not for children"
- Commercial (TV or radio) advising parents against purchasing lottery tickets for kids

Non-Lottery Organizations

- Sign up as a Campaign participant
- Press release or media placement
- 11+ social media messages posted (promoting responsible gambling / appropriate age for lottery play / youth gambling stats / parental awareness tips)

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



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



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Scientific Games' New Seven-Year iLottery Online/Mobile Games Contract to Drive Maximum Profits for Pennsylvania Lottery

Pennsylvania Lottery's Eighth Consecutive Record-Breaking Year of Profits Highlighted by Most Successful iLottery Launch in North America

Scientific Games announced that the Pennsylvania Lottery awarded the company a new contract for iLottery online/mobile games following a highly competitive procurement process. Scientific Games launched the Lottery's iLottery program in May 2018, and through the new contract will continue providing iLottery technology, online/mobile games and services for seven years with three additional one-year renewal options.

The Pennsylvania Lottery's iLottery program is the most commercially successful iLottery online/mobile launch in North America to date. Total sales for the Lottery's digital games topped \$342 million as of May 2019, the one-year anniversary of the program. That mark significantly surpassed any previous iLottery launch in the industry's history, and hit \$642 million in December 2019. The best-selling online/mobile games in Pennsylvania are MONSTER WINS, FOXIN' WINS and VOLCANO ERUPTION, with the GRUMPY CAT™ game debuting in April 2019 and quickly gaining popularity.

Pennsylvania Lottery Executive Director Drew Svitko said, "Our iLottery games have proven a fun, new way to play the Pennsylvania Lottery. Selling lottery online is a big part of our effort to modernize the lottery, appeal to new customers and meet our players where they already are, which is online, while generating new funds to benefit older Pennsylvanians. Sales of these new digital products as well as



sales for our instant and draw-based games at Pennsylvania Lottery retailers grew beyond all expectations over the last year."

Svitko said that the Lottery has experienced another record-breaking year. With \$4.5 billion in total retail sales led by \$3 billion instant scratch game sales, fiscal year 2018-19 was its eighth consecutive year of more than \$1 billion in transfers to benefit older Pennsylvanians.

"We thank the Pennsylvania Lottery for its trust in our iLottery technology, games and expertise to drive the most profits for programs benefiting older Pennsylvanians. Beyond the tremendous growth of instant and draw games, our iLottery partnership has generated significant incremental revenue. Scientific Games will continue to invest in innovation that keeps the Lottery relevant to consumers, and ultimately maximizes its returns to the Commonwealth of Pennsylvania," said Pat McHugh, Chief Executive Lottery for Scientific Games.

The Company's new iLottery contract includes implementation,

operation, maintenance and support of the iLottery solution and services, iLottery and web application, and web-based presence. Scientific Games also provides responsible gaming controls, a powerful Customer Relationship Management (CRM) suite and resources to enhance player engagement, and an innovative affiliate program that benefits Pennsylvania Lottery retailers. As part of the affiliate program, the Pennsylvania Lottery's more than 9,800 retailers are incentivized for every player they register for the iLottery program.

Scientific Games is also the current provider of the Pennsylvania Lottery's instant games as well as systems and retail technology. In 2018, the Pennsylvania Lottery ranked among the top 10 performing lotteries in the U.S. and the top 20 in the world. ■





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

We hope to see you there!

Oct 26-30, 2020



For latest conference updates,
please visit the official website at:
www.worldlotterysummit.org



Seeing North American Lotteries in a Global Context



By Stephen Wade

Principal, Lottery Management Consulting, LLC

The Global Lottery Data Compendium (GLDC) is a grand work of scholarship produced by the World Lottery Association (WLA), headquartered in Basel, Switzerland. The GLDC is based on direct reports from about 150 member lotteries from all around the world. Some lotteries that belong to NASPL are also members of WLA – if you work for one of the 25 North American lotteries that have this dual membership, you may have seen the GLDC. Like NASPL, the WLA also has associate members drawn from the major vendors in the lottery industry, and likewise if you work for one of these, you may have seen the GLDC.

To date there have been five annual editions, starting in 2014, that are accessible (to members only) from the WLA website. Each was distributed directly to members, as a handsome blue-and-orange covered book, in past years. But my guess is, most of my readers will not have had a chance to appreciate these volumes. So, let me entertain you with some thoughts that come from perusing what has been published.

First of all, on a personal note, I like to be reminded of the people from around the world that I have met at various lottery functions, just as I like to renew acquaintances when we actually meet at NASPL events. The GLDC states that over 100,000 people are directly employed, on a full-time basis, by lotteries and their vendors. Does that seem like a lot of people, or like a highly select group? All in one place, they would be a city of modest size

– perhaps a lot of people. These people run an industry that, in 2017 alone, sold over \$300 billion in lottery tickets. That's over \$3 million in sales per employee, on average – that sounds more like a highly select group. Either way, it's positive to be a part of it.

Second, again on a personal note, I like to be reminded of places that appeal to me, as a sometime traveler, that are attractively exotic yet have that familiar institution of the state sanctioned lottery. Could I possibly get a consulting gig with Pacifique de Jeux, in French Polynesia, or with Lotto New Zealand? Or, after it gets light again in the northern hemisphere, Veikkaus Oy in Finland?

Travel daydreams aside, it is interesting to see our North American enterprise in the context of the world lottery industry. We are not the biggest player. WLA draws members from five regions of the world: Asia and the Pacific, Europe and the Middle East, North America and the Caribbean, Latin America, and Africa. And that order of naming is also the order of importance, in terms of sales. We have consistently been number three, with about one-quarter of world sales. This is not an artifact due to excluding non-WLA-member lotteries in North America; the GLDC uses our more inclusive NASPL data in estimating the global totals. Between (fiscal) 2014 and 2017, North American sales as recorded by NASPL grew from about \$81 billion to over \$91 billion. Yet this double-digit growth moved the North American portion of global sales slowly, from 25% to a level not

yet exceeding 26.5%. This is because lottery sales expanded globally. Global growth has been largely due to advances in the regions of North America and the Caribbean, and Asia and the Pacific.

Here in North America, we know that instant games have been a big driver of increased sales over the past few years. Currently, instant games account for about 59% of traditional product sales among U.S. lotteries (they are somewhat less important in Canada). Yet the GLDC shows that worldwide, among WLA members, instant games account for only about 25% of sales. Draw games are by far the more important category, accounting for about 54% of sales, with the remaining 21% or so coming from “sports games.”

SPORTS REPORTING

The GLDC defines sports games broadly, in order to include the great variety of betting opportunities offered by state sanctioned lotteries around the world. Sports games in the broadest sense include not only the parlay bets on multiple match outcomes that are familiar to the Canadian lotteries (and increasingly, of course, to U.S. lotteries), but also single-event bets, typically on a fixed-odds basis, of the kind that were hard to find (legally) in North America until recently. Some WLA-member lotteries are involved in horse racing, whether on a fixed-odds or pari-mutuel basis. Some even offer novelty bets, as on the outcome of the Academy Awards. All these activities

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roll up under the “sports games” category as currently used in the GLDC.

It is certainly intriguing to U.S. lotteries that this somewhat amorphous category accounts for nearly as much reported sales volume, worldwide, as does the familiar instant game. What significance can this have? Is this the shape of our future?

Here, I must assert my scientist self, and point out that reported sales may not be all that significant. Every sale, after all, carries with it a liability to pay prizes, and prize expense is the single biggest cost of running any lottery game, or any lottery. If we are concerned with raising money for good causes, it is much more important to know what is left after paying prizes, or Gross Gaming Revenue (GGR). It is only on the basis of GGR that comparisons across the whole spectrum of lottery games can be meaningfully made. Thus in North America, instant games and draw games have roughly equal importance to GGR, even though instant games outsell draw games 6-to-4.

Even though we may prefer to know GGR, it is usually sales that are reported. The exception is where we agree that sales make no sense, as with electronic gaming machines or video lottery terminals. There, the high rate of returning prize money to players (often >90%) sustains engagement with the gaming session and leads to important GGR. Tracking the \$9 that the player will keep, out of \$10 in a session, as those \$9 cycle again and again through the machine, would produce an absurdly large and meaningless sales number. In this case we have agreed to talk about the net, or GGR. With other games, there is not universal agreement on how to talk about, much less report, the financial result.

The application of this to worldwide “sports games” is that I am not sure what is being reported. Those of us who are new to sports betting have heard from our European and Canadian colleagues that sports betting is a thin-margin business. That is, lotteries must compete with established black market providers for

sports betting dollars, and consequently the rate of return to players must be more generous than in many lottery games. NASPL has made the initial decision to report sports betting numbers as GGR, but how does the reported worldwide volume of sales in sports games relate to GGR? I am comfortable admitting that I do not know.

Given that the GLDC is based on reports from over 150 lotteries, operating in over 80 countries around the world, it would amaze me to find out that they have all reported in a standard and universally applicable way. I do know that obtaining and integrating all this information is very demanding work, very ably handled by the small WLA staff in Basel. Those who heard the association's Research and Communications Manager Matthew Spinks talk about the GLDC project at the Professional Development Seminar last summer in Phoenix will appreciate some of its challenges. Although most of us in North America are fluent in the English language, we still sometimes struggle for clarity; the effort of communicating clearly is often higher elsewhere.

GLOBAL TRENDS

What we do know about sports betting, both intuitively and on the evidence provided by the GLDC, is that it taps into popular culture in a deep way, and benefits from the energy generated by the “sports as entertainment” industry. The data in the GLDC suggests that globally, sports games are nearly as important as instant games. We know that the global picture obscures the current detail that North America accounts for a lot of the instant business and very little of the sports business. As North American jurisdictions ramp up their sports offerings, will sports games become the #2 lottery category globally? Or, alternatively, will the rest of the world catch up with North America by selling more instant games?

We might agree that another global trend that must influence growth in both of these game categories is the

role of digital connectivity in serving the products. The North American instant game business grew to dominance through effective physical merchandising. The size, color and variety of the printed tickets made them a recognizable presence in the right kind of store. And, significantly, the instant game has play value independent of any drawing or other scheduled event. The decline in entertainment value of televised lottery drawings has not hurt the instant game business.

Increasingly, however, instant games are becoming available through a digital channel that is complementary to physical retail. How size, color and variety contribute to success in the digital channel is still being worked out. Yet wherever instant games are presented, they are independent of real-time events. While this may have been an advantage in physical retail, it represents a lost opportunity in the digital channel. That is because most of the digital traffic in our current world serves entertainment. If instant games are static while entertainment (in sports and other forms) streams nonstop, then instant games miss the opportunity to be relevant to that (lavishly curated) torrent.

Sports games (in the broad sense used by the GLDC, as well as the more familiar ones) on the other hand make themselves dependent on, and part of, that entertainment-industry torrent. People may enjoy a feeling of participating in current events by betting on them. This becomes practical with the speed and convenience of the digital channel.

My guess, then, for what it is worth, is that in some near-future year the GLDC will show “sports games” as the #2 lottery game category worldwide, with differences between North America and the rest of the world shrinking.

The 2019 edition of the GLDC (based on 2018 data) is due to be released in the first quarter of 2020. I hope you get a chance to look through it, for all the reasons I mention and more! ■

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.



NASPL Information and Research Resources



By **Tom Tulloch**
Director of Administration, NASPL

RESEARCH

- 1: careful or diligent search
- 2: studious inquiry or examination; especially investigation or experimentation aimed at the discovery and interpretation of facts, revision of accepted theories or laws in the light of new facts, or practical application of such new or revised theories or laws
- 3: the collecting of information about a particular subject
(Merriam-Webster)

As the trade association representing lotteries throughout North America, the North American Association of State and Provincial Lotteries (NASPL) was founded in 1971 with one basic mission: to assemble and disseminate information and benefits of state and provincial lottery organizations through education and communications.

Research is one of the key ways NASPL fulfills that mission, and through the years our research functions have evolved to meet increasing needs. Today, we offer everything from our public-facing website, naspl.org, to extensive resources for our members such as the password-protected NASPL Matrix.

“NASPL has spent many years building a user-friendly database and

public information site to provide a wealth of information covering the lottery industry,” said Andrew White, Vice President of Operations for the organization.

The public website profiles all NASPL members, provides basic industry information and statistics, explores responsible gambling, explains where lottery proceeds go, and includes links to industry press releases, media contacts and RFP/job postings. Also available are archived issues of *Insights*, NASPL’s official publication.

THE NASPL MATRIX

The NASPL Matrix builds on that public site with member-only areas providing industry white papers, presentations given at NASPL events, webinars, industry best practices,

responsible gambling tools, advertising video archives and the NASPL Resource Index (NRI).

The NRI database includes individual lottery profiles showing the most recent fiscal year data from our members, along with historical sales and transfers, plus quarterly sales by product going back to FY2015. Other information gathered from our members include topics such as legal playing age, number of lottery employees, retailer counts and commissions, instant game introductions, prize payouts, lottery supplier contracts and much more. All of this data can be downloaded into Excel spreadsheets.

When asked what the biggest challenge is in organizing and analyzing the data available to a lottery, the Pennsylvania Lottery’s Cal Heath, Director of Research, answered,



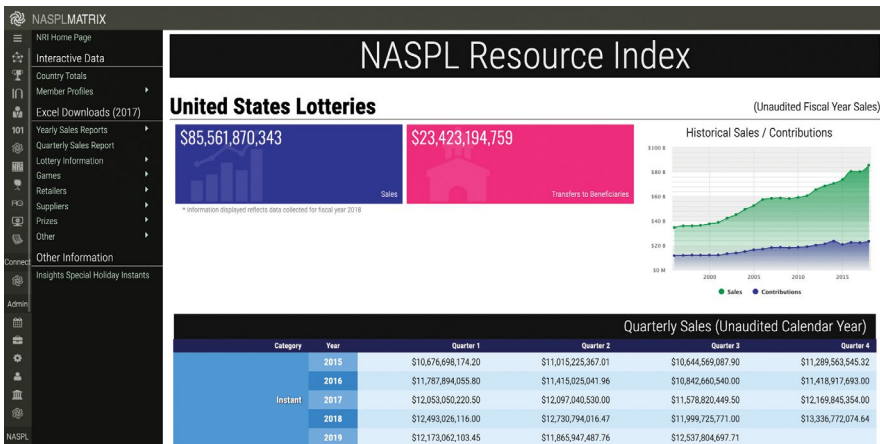
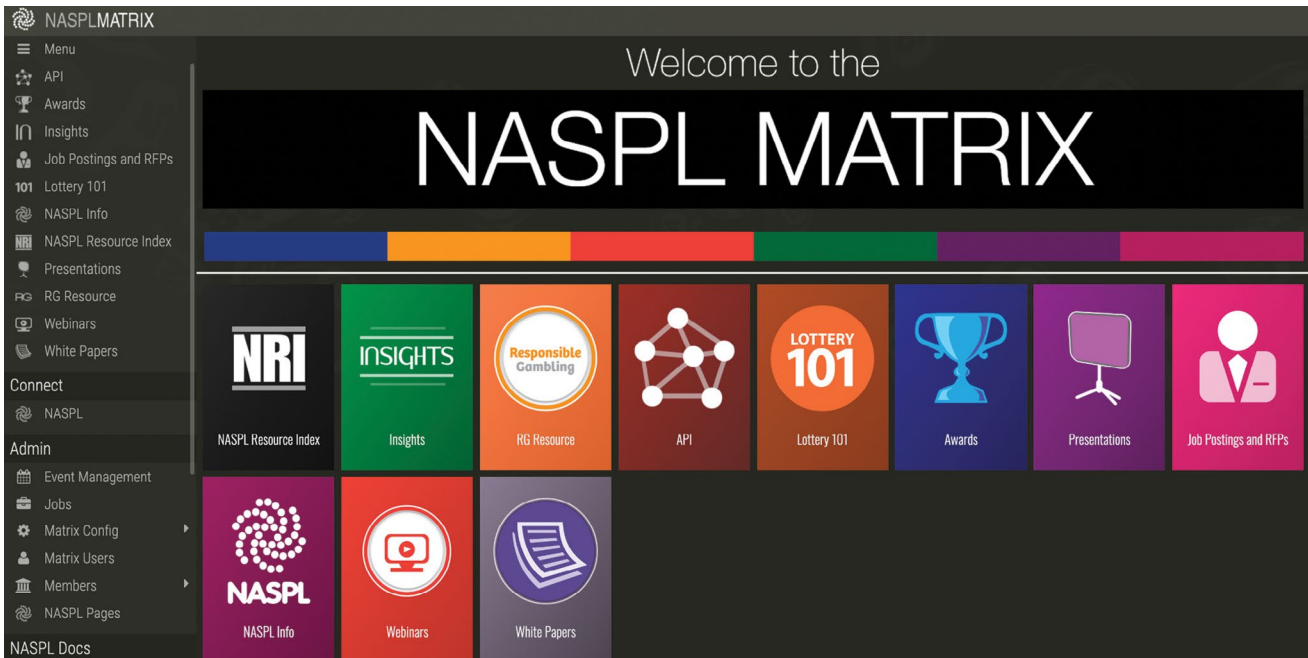
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“Timeliness and accuracy. I think the NASPL Matrix is about as timely as we could hope for. Accuracy is always a struggle no matter the resource and we sometimes have to guess on obvious errors and use interpolation where there are blanks in the data.”

The NASPL Matrix currently provides password-protected access to over 2,400 users, and we know that the site is accessed regularly by many of them. In 2019, there were over 12,000 visits to the NASPL Matrix, and almost 56,000 visits to the public NASPL website.

We also receive regular requests from our members relating to the Matrix and NRI spreadsheets, and often receive requests for data from sources outside of the industry including media, scholars and legislators. Over the years, we have also regularly worked with legislators and working groups from fledgling lottery states to provide industry-specific information prior to and during their initial startups.

In order to make the NRI relevant and timely, we depend on each lottery’s data administrators to enter

the specific data in to the database. Without 100% support, the accuracy of the overall data presented in the Matrix suffers, so we continue to pursue that support.

With the myriad of statistics available in the Matrix, the challenge becomes getting that data accuracy, and not just with 100% response rates. NASPL can “lead the way in developing industry standards and warehousing data for sales, profit, business types, etc.,” added Heath, in order to help lotteries gain even more insights into industry statistics.

Accuracy is one reason why in addition to the lottery-provided data stored in the Matrix, we also gather the final year-end key metrics for each lottery through the efforts of *Insights* editor Patricia McQueen. Sales by game, prizes and transfers to beneficiaries are compiled each year, and she provides a report and analysis in *Insights* magazine. We find that there are so many reporting intricacies from lottery to lottery that the most accurate and consistent sales, transfer and

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prize data can only be found in official financials. Preliminary data is always replaced with audited numbers when they become available, and these are also archived on the Matrix.

SUPPORTING MEMBER REQUESTS

In addition to the regular data offered through the Matrix, lotteries may have specific questions or projects they need assistance with. After all, research departments and staff vary in structure and personnel from lottery to lottery, with some lotteries having very sophisticated and well-staffed departments while others may only rely on other departments or suppliers for their research, data and analytics.

answer right away, or cover topics that aren't in our extensive archives. These often relate to what other member lotteries are doing in certain areas, so, with the blessing of lottery CEOs, we often reach out to all of our members to help come up with answers.

We have found that these information requests, or surveys, are still the most effective way of reaching out to our members and gathering relevant information. Because of the unique structure of the lottery industry, where lotteries do not compete with each other, our member lotteries are willing to share when asked. We greatly appreciate receiving information back from lotteries that may have important contributions to the questions posed by our members. Those responses are

SAMPLE RESEARCH REQUESTS

NASPL's member lotteries are always looking for information to help them with decision-making or in planning new products and services. Some of the more recent specific requests have been along the following lines:

- Status of gray machines
- Treatment of higher-tier winner claims
- Prize claims validations, processing and accounting
- Prize payment options
- Database integration with other governmental agencies
- Instant ticket security, fraud and stolen tickets
- Restricted players
- Second chance games
- Customer relations and player information services
- Lottery and sports team sponsorships
- Jackpot level advertising triggers
- Multilingual advertising
- Ticket inventory management
- Use of business intelligence systems
- Responsible gambling and self-exclusion
- Secondary advertising on tickets
- Player relations, VIP and loyalty clubs, player tracking
- Retailer relations, licensing, servicing and compliance
- Retailer incentive programs
- Walmart as a lottery retailer
- The RFP process
- Central monitoring systems

“Data analytics is still an attractive conference topic in the industry, but analytics is still not a priority for lotteries who have persistent staffing shortages in IT, sales, marketing, etc.”

- Michael Gonzalez

What would be on a lottery staffer's wish list to make their job easier? “Data analytics is still an attractive conference topic in the industry, but analytics is still not a priority for lotteries who have persistent staffing shortages in IT, sales, marketing, etc.,” said Ohio Lottery Director of Product Innovation Michael Gonzalez. “Lotteries need to do a better job quantifying the revenue ramifications of every single analytics project they conduct to explicitly express their value.”

At NASPL, we do our best to help support our members in these endeavors and in any other questions they may ask; rarely does a week go by that we don't get at least one request. Many of these questions we are unable to

often invaluable for enhancing decision making and operations at other lotteries.

We maintain an archive of these requests going back nearly 20 years – we often get similar requests and are able to quickly provide answers received in the past that may still be relevant.

Some of the areas with the most frequent requests are those related to new lottery retailers, retailer relations, advertising impacts, debit/credit acceptance, winner anonymity and player demographics. There is usually an increase in member requests for certain types of information at the start of a legislative session when new bills are being introduced, such as topics related to budgeting and advertising, mandated



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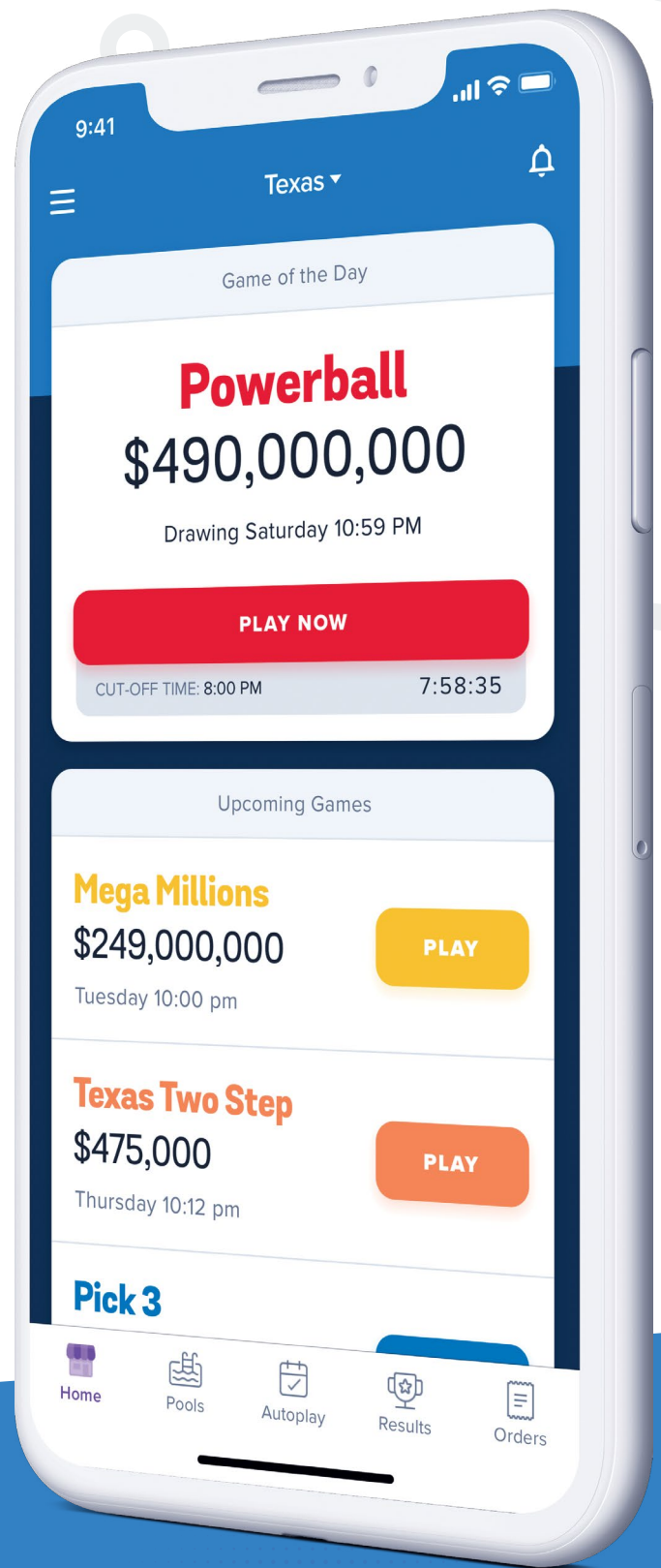
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returns, winner anonymity and sports wagering. We are currently engaged in helping members with research on the impacts of iLottery on retail sales, the impacts of electronic gaming machines, and sports betting.

Aside from these regularly requested subject areas, other surveys we have conducted over the past year include very specific topics such as shown in the sidebar on the previous page.

We are consistently working to keep up to date on studies and research, and welcome the opportunity for our members to add any relevant research they have conducted to our archives, present them through a webinar or have them considered for presentation at one of our events.

NASPL'S ONLINE COMMUNITIES

One of our newest initiatives has created online communities and forums for specific job functions, with the goal of enhancing communications for the purpose of sharing timely information with others. Forums have been developed through the NASPL Matrix for the Audit, iLottery, IT, Research and Product Managers groups. The research community is one that ultimately could have the biggest impact, facilitating discussion that gets to the roots of lottery success.

The NASPL Research Committee includes Chair Drew Svitko (Executive Director, Pennsylvania Lottery) and members Tom Seaver (Director, Colorado Lottery), Tracey Cohen (Chief Operating Officer, DC Lottery), Laura Sofro (Senior Manager, Business Analytics & Insights, Oregon Lottery), Cal Heath, and Matthew Spinks (Research and Communications Manager, World Lottery Association). The Committee has been organized to support NASPL's research mission: "To develop, share and discuss lottery insights, reports and analyses as a North American lottery research network." In

"Larger market trends don't care about borders."

- Michael Gonzalez

support of this mission and driven by the assistance of Michael Gonzalez and Tyna Saysiphaseut (Business Analyst, Idaho Lottery), the Committee has been successful in building a broad community and support base of lottery and supplier researchers.

"Frequent communication between lottery analysts throughout North America helps the industry gain more insight into industry statistics and analytics," said Gonzalez. "Larger market trends don't care about borders."

Early on, lottery researchers themselves were surveyed to help determine what research was most important to them. Topics identified included the need for research focused on new and non-traditional instant and draw games, alternative gaming, player loyalty programs, social media, responsible gambling, marketing analytics, ethnographic research, AI and machine learning, developing research and analytic programs, and data source consolidation.

The Committee has successfully organized and presented quarterly webinars for the community. Often featuring guest speakers, these webinars have included open discussion topics and managed topics such as Math Modeling for Lottery Games; State of Analytics at the Ohio Lottery; U.S. Gaming Going Digital: Opportunities and Risks for Lotteries; and Retailer Risk Management Systems (a joint webinar with the security community).

The Research Committee and the community are also very active in planning for the research track at NASPL Professional Development Seminars.

THE GRAND SCALE

Clearly, NASPL as an organization and all of our member lotteries track and monitor a great deal of information. That is critical to have an understanding of the tremendous impact of the lottery industry. In the United States alone, lotteries in FY 2019 generated \$83 billion in sales of traditional lottery products, more than \$8.2 billion in gross gaming revenue from lottery-operated gaming machines, table games and sports betting, almost \$53 billion in winnings sent back to players as prizes, and \$25.1 billion in proceeds returned to lottery beneficiaries such as education, the environment, economic development, senior and veterans programs, and more.

To further show this impact, NASPL has developed "Lotteries: Making a Difference," an important report which summarizes the impact lotteries have made since the launch of the modern era in 1964, and provides details on the good causes our member lotteries help support.

For example, from FY 1964 through FY 2019, U.S. lotteries have sold more than \$1.5 trillion worth of traditional lottery products, providing \$886 billion in prizes to players and \$89 billion in commissions and bonuses to retailers selling lottery. In total, and including casino operations in a few states as applicable, lotteries have produced more than \$502 billion in revenue to the good causes they support.

At this writing, similar information was being gathered for Canada, where lotteries began in 1970. Most Canadian lotteries also run other gaming activities in their provinces, as they are the operator of choice covering lotteries, casinos and charitable gaming, sometimes even horse racing.

That's a whole lot impact! ■



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VIRTUAL BASKETBALL



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Sherie Moody-St. Clair

Deputy Director of Marketing, Idaho Lottery

"BE LEGENDARY"

For Sherie Moody-St. Clair, the phrase "Be Legendary" is more than the motto of the Idaho Lottery, it's how she lives her entire life. An artist by nature, and by profession, her life's mission is to create legendary art with heart. Fortunately for the people of the Gem State, she's chosen to do so while working for the Idaho Lottery, creating legendary art for the Lottery's tickets, marketing and promotional materials, and creating legendary experiences for players.

"Sherie makes a difference to the Idaho Lottery family because she makes a difference to her own family – she's a terrific wife and mother," explained Director Jeff Anderson. "What people bring to work in large measure comes from their own life, and the reason she's good at whatever she does is because she cares. She's an integral part of what we do here at the Lottery and I can't even imagine us without her leading the marketing team. When Sherie became the Deputy Director, she really blossomed in the role as a leader, always looking for ways to make us better."

Moody-St. Clair joined the Idaho Lottery in June 1995 as a graphic artist after graduating with a bachelor of



"Sherie makes a difference to the Idaho Lottery family because she makes a difference to her own family..."

- Jeff Anderson

arts in advertising design from Boise State University. She became Creative Director in 2005 and was named Deputy Director of Marketing in 2008. She has been directly involved in the creation, coordination and implementation of the Lottery's multi-media advertising and marketing campaigns, but she has done so much more.

One unusual task you may not see on a marketing director's "to-do"





list is ticket design – she has personally designed a whopping 606 of the nearly 1,400 scratch tickets introduced by the Lottery since its inception in 1989. “We do pride ourselves on still designing most of our scratch tickets in house,” said Moody-St. Clair. “We feel like we know our market best and take pride in every ticket that hits the street. Designing tickets is actually my favorite thing to do. I feel like it keeps me in touch with our products and our players. I don’t do it all the time, but when I get to, it’s a good day.”

She oversees a marketing staff of five at the Lottery, and the team is responsible for producing, supervising and orchestrating all Idaho Lottery marketing and advertising activities, including budget management, product design, digital channels, point of sale, social media, public relations, loyalty club management, and much more. Some of these items are produced by one of the Lottery’s two agencies. Several years ago, the Lottery went from one agency contract to three – one for strategy, one for creative and one for media buying. “I found that not one agency is good at everything. This way we get a lot of minds on our business and the best for each specific area,” explained Moody-St. Clair.

Currently one agency has both the strategy and media buying contracts, while another has the creative contract. “We have learned to work as a well-oiled machine,” she said,

explaining that the key to overcoming any challenges is making sure there’s a good communication strategy and collaboration among all the participants, and making sure everyone is on the same page with respect to goals. “We position our agencies, in fact all of our vendors, as one big family, and we do business that way.”

One of the many things she’s proud of is the Wooh Crew, which takes the idea of an event team to a whole new level, focusing on providing a great entertainment experience for customers. She also admires her marketing staff. “They are amazing humans with so much talent. They inspire the Lottery to continue to grow, and have lived up to our promise, developed years ago, of being legendary.” And she’s grateful for the Lottery’s leadership team. “Nothing is possible without them.”

Moody-St. Clair and her marketing staff have led the way to numerous industry advertising and marketing awards for the Idaho Lottery, and in 2018, she was honored with the Idaho Advertising Federation Silver Medal Award.

She enjoys spending her spare time with her family – longtime husband Matt and three teenagers who are themselves showing signs of the legendary behavior that seems to run

“We feel like we know our market best and take pride in every ticket that hits the street.”

in the family, excelling in school and extra-curricular activities.

And she gives back in many ways, not just through her work at the Lottery. An active member of her church, she uses her vacation time each summer to teach art classes to youngsters at a campground retreat. “Kids are so optimistic, resilient and creative. I really value those times with them, to teach them to just have fun with art.” She serves as a board member of the Peace Pathways world headquarters in Missouri, and created a logo and website for its internationally acclaimed Children’s Peace Pavilion. She’s also a board member of several local organizations, including her neighborhood HOA, Camp Cascade (the aforementioned non-profit campground), and school groups promoting volleyball and dance.



Some of Sherie's ticket designs. Roasted Riches stands out because the artwork was done using actual coffee in the watercolor.

How have the Idaho Lottery's marketing strategies changed over the years and what is driving those changes?

Over the years I have seen a tremendous amount of change in marketing and advertising. While our main mission at the Lottery hasn't changed, the complexity of our product portfolio and the channels we promote in have changed dramatically. It used to be you could put up a billboard, run a television and radio ad, and maybe do an ad in the newspaper and you had everyone paying attention. Now we have numerous social media channels, digital channels, OTT (Over the Top)

streaming and many more owned channels, along with all the traditional channels. In addition, we have several more lines of communication and engagement than ever before – text messaging, chatting, home voice activated devices, push notifications and email marketing. A detailed strategy is more important than ever.

Being disruptive and innovative also needs to be a part of everything we do to stand out in such a cluttered and multifaceted environment. I would also point out a shift we've made over the past few years – we are much more focused on the customer experience and being involved personally in our

communities. We have been good at this in the past as well, but I think we got side-tracked for a few years focusing on just the numbers and not the people. When you are working too hard trying to meet a sales goal, for example, you might end up doing things that actually frustrate our customers because there's too much going on. In our marketing plan, we make sure to put the customer first, and make sure everything we do is actually what the players want. So when we shifted that focus, it actually helped us not only increase sales, but make our customers happier and have more fun because we were doing fewer things and doing them better.

What is more important – how an instant ticket looks or the prize structure offered?

That is the age-old question, the chicken or the egg. I would say it takes both, and it's best if they are hatched together in one cohesive nest. A game has to have prizes that appeal to players, things that surprise and delight. The graphics have to be appealing and entertaining. We like to be unique and humorous, and our players like it too. If we are having fun, so will our players. I always say if it makes me laugh, we should do it. Isn't that something we all strive for...making our players smile? It's entertainment at its finest.



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Are players embracing digital play enhancements even though they can't actually purchase tickets online?

Absolutely. We were one of the early adopters of interactive games even though we cannot sell online. Our players love the opportunity to extend their play, and love that we are being relevant to them so that they can play when and where they want to play. If you just stay with the classic paper ticket, I feel like you're missing a whole opportunity out there for engagement and entertainment. There's so much digitally that can create a really fun user experience. Our digital strategy and innovation is an important part of our marketing plan. In addition to game enhancements, one of our most popular digital introductions was our check-a-ticket app many years ago; I think we were one of the first lotteries to offer that. It's crazy how successful that app has been, and many new features have been added, such as automatically transferring points into the players' VIP club and automatic entry into second chance drawings where eligible. It's so easy to use, and it takes away some of the pain points that players have.

How do you keep the ideas fresh after almost 25 years at the Lottery?

I love this question, and if I'm honest I've been saying a little prayer every year that I might use my God given talent to make a difference in this world. I thank God every day that he allows me to keep coming up with new ideas. And it's not just about me – good ideas fortunately come from everywhere. It's really about being willing to take a chance and not be afraid to fail. I've skinned my knee several times, but I'm quick to get up and try again.

If you had one piece of advice for other lotteries, what would it be?

Love what you do – only good things come when you love what you



do. Think outside the box and, as I just said, don't be afraid to fail. As an industry I think we lag behind others, so don't aspire to be a good lottery, aspire to be an exceptional company. Be a leader, an innovator, a game changer. I dream of the day that someone sees us like they see the Nike swoosh. Everyone is having fun, loving what we stand for and embracing the Wooh! We all do such good things for our states. Let's do even more – let's be even more gooder!

So what is the most fun you've had over the years?

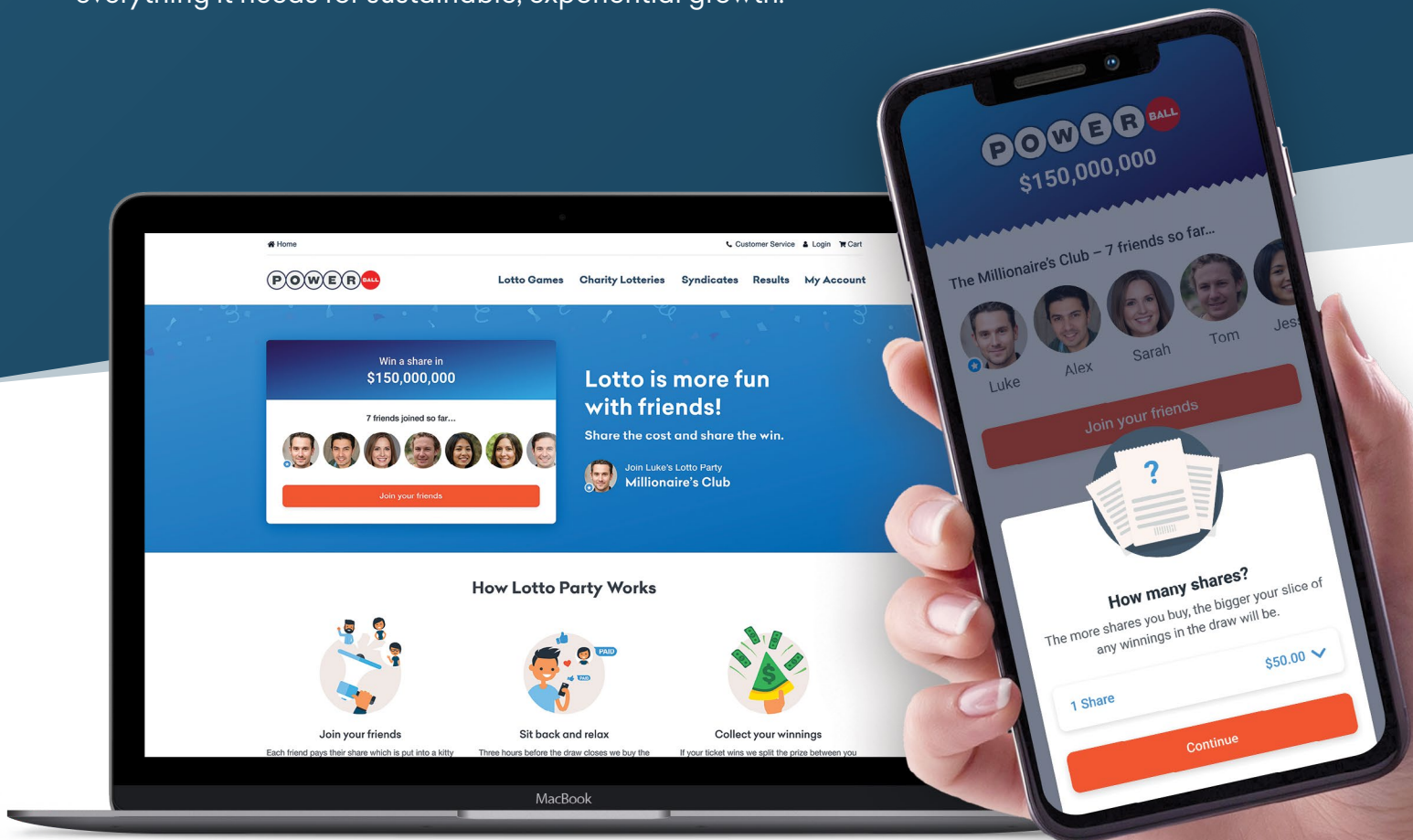
Ah geez. That is a tough question. There has been SOOOO much fun. I'm in my element when we are creating and dreaming the impossible. In fact, my best memories have been when we all come together to achieve the nearly impossible. Over the years we have done so many great things. I have had the pleasure of creating partnerships

with companies for scratch tickets or just partnerships in general. I've worked with Double R Ranch, Idaho Tourism, Bookoo Energy Drinks, Fandango, Jane Wooster Scott, Press Your Luck and Airstream. I'm also very proud of finally launching the first ever lottery VIP Club in 1999 – it took a couple of years for it to gain traction after I first pitched the idea. The VIP Club was at times a monster but has become our number one asset. We have also rallied to create amazing parade floats, the BALL character for Powerball, giant rolling balls, legendary scratch games, college classes on how to design a scratch ticket, and much, much more. Our Wooh Crew has also been a blessing. A crew that was fashioned after the Disney philosophy, they continue to amaze me, providing true entertainment to our players in the field.

Anytime we are doing something legendary, I'm having fun! ■

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Lottery Week

TELLING OUR STORY

Last summer, NASPL lottery members celebrated the first annual Lottery Week, highlighting the positive impacts their organizations have on their communities.

By Mackenzie Whitacre



In July 2019, dozens of lotteries across the U.S. participated in the first annual Lottery Week, with special promotions, giveaways, social messaging and more. While each lottery celebrated in their own way, every campaign was designed to promote interaction with players and retailers; introduce fun, new activities and prizes; and, most importantly, highlight the significant contributions that lotteries make in the jurisdictions they serve.

While many lotteries did utilize additional communication tools – like press releases, local news interviews and in-store digital signage – for their inaugural campaigns, most jurisdictions turned primarily to their websites, blogs and social media to get the word out. Using the hashtag #LotteryWeek, often in conjunction with their own tried and true branding and hashtags, lotteries posted across social platforms, featuring daily themes focusing on beneficiaries, winners, retailers, games, economic impact and other key topics. In their posts, they encouraged engagement and interaction from their players – with each lottery taking their own unique approach.

The Illinois Lottery, for example, introduced #FacesOfTheIllinoisLottery as part of their Lottery Week efforts. Using interview-based stories and touching photos, they created a social media campaign designed to humanize the brand and the many good causes it supports. Each day the team highlighted an individual directly affected by the Lottery's efforts. Their inspiring stories generated above average buzz from users.

Many other lotteries experienced a lift in user interaction during Lottery Week as well. The Ohio Lottery, for instance, saw a particular increase on YouTube, where they gained new subscribers, and Facebook, where they encouraged fans to share stories about their favorite retailers, why they play lottery, and more. Participants were entered to win a lottery prize pack.

Several other lotteries also featured social media giveaways as part of their campaigns. The North Carolina Education Lottery hosted lottery trivia, culminating with a Facebook Live event that included a drawing for five \$50 gift cards. The Nebraska Lottery held their own giveaway, offering three players a prize pack consisting of \$150 in scratch tickets, \$100 in Nebraska Pick 5 coupons and a Nebraska Lottery swag bag. In addition to this contest, Nebraska generated more user engagement by rounding out their campaign with a simple poll, asking players what color truck they would like to see on their 2020 Truck\$ & Buck\$ scratch game. The Arkansas



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The Chicago Police Memorial Foundation is one of the organizations that benefits from the Illinois Lottery's BLUE ticket. Introduced earlier this year, it has already provided financial support to families of fallen police officers and police memorials across the state. #LotteryWeek #FacesOfTheIllinoisLottery



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Scholarship Lottery asked recipients of the Arkansas Academic Challenge Scholarship (funded by the Lottery) to submit a photo for a chance to win \$100 in free lottery tickets; they also posted a Twitter poll, where respondents entered to win free Natural State Jackpot tickets.

Beyond Social Media

While social media strategies were a big component of all the Lottery Week campaigns, several lotteries took the festivities beyond the keyboards and smart phones. Many jurisdictions offered deals and contests to winners and players that visited district offices during the week. The Texas Lottery conducted statewide radio promotions, with approximately 40 stations hosting trivia and giveaways. The Nebraska Lottery offered a terminal game bundle sale, featuring a Pick 5, Pick 3 and MyDaY play at a discounted price. And the Connecticut Lottery even used Lottery Week as an opportunity to partner with the Red Cross to host their first blood drive – Save a Life, Win for Life. All eligible donors received a \$5 Win for Life scratch ticket.

“An initiative like this gives the lotteries an opportunity to share their stories and celebrate the good that’s

accomplished through all their hard work,” said David Gale, Executive Director of NASPL. “We were thrilled by the level of participation for the inaugural campaign, and we hope the public – players and non-players alike – learned a little more about their state lotteries.”

Lottery Week draws its inspiration from the first “National Lottery Day,” organized by the Massachusetts State Lottery in 2018. With its creation, Mass Lottery aimed to provide players with a day of special promotions and products, while also recognizing the Lottery as the single largest source of unrestricted local aid in the state of Massachusetts since selling its first ticket in 1972. Thanks to Mass Lottery, July 17 is now officially known as National Lottery Day in the U.S

Lottery Week 2020 will take place the week of July 13, anchored again by National Lottery Day on July 17. While most lotteries are still planning their summer promotional campaigns at this writing, a recent NASPL survey indicated that many are already anticipating Lottery Week, including some that did not participate the first time around.

“After a successful rollout in 2019, we can’t wait to see what creative promotions the lotteries have in store for this year,” said Gale. “It’s important for the public to know about the essential programs and initiatives their lottery dollars support. Campaigns like this make that possible. So we hope this is an event that continues to grow and evolve for years to come.”



BARRY PACK

Barry Pack is the Director of the Oregon Lottery and chairs the NASPL Responsible Gambling Committee. As we look forward to a busy 2020 in the area of RG, Pack recently shared some thoughts on the subject with NASPL Vice President of Operations Andrew White.



The American Gaming Association has spearheaded the Responsible Gaming Collaborative, of which NASPL is one of the key members. The Collaborative recently released its Effectiveness Principles. How does this align with current efforts of NASPL and its members?

I'm proud of the leadership role lotteries have played in promoting responsible gambling. Participating in the Responsible Gaming Collaborative was a natural extension of that work and allows NASPL an opportunity to shape the overall gaming industry's approach to responsible gambling. The Effectiveness Principles are not new to most lotteries – we've been implementing many of them for years. But it was significant that all sectors of our industry came together and agreed to a set of best practices.

Why are initiatives like the Holiday Campaign important to show the industry's dedication to preventing underage play?

Most lottery CEOs balance competing priorities – namely, raising revenue for the important programs funded by lottery dollars while minimizing the potential harms of gambling. Holiday

scratch sales provide a significant revenue boost to many lotteries and our bottom line often relies on the popularity of giving scratch tickets as stocking stuffers. Participating in a nationwide campaign in the U.S. to discourage underage play is a key way for U.S. lotteries to provide that balance. We can recognize the sales contribution while demonstrating our collective commitment to preventing underage gambling. That said, preventing underage play is a year-round focus in Oregon and is incorporated in all our marketing and outreach efforts.

What steps do you recommend to an organization that would like to create a robust RG program but is at the very beginning of the process?

Start out by being clear about the vision and your leadership's commitment to building a robust responsible gambling program. You don't have to aim for Level 4 WLA certification right out of the chute, but you do need to be clear why you're initiating a program, what objectives are attainable in years one, two and three, and what level of commitment and buy-in you have from the top. The best programs integrate

the concepts and best practices of responsible gambling in every nook and cranny of the organization and at all decision-making points, but they rarely start out that way. Know where you want to go, engage broadly with internal and external stakeholders, articulate and share a vision and develop a roadmap to get there. Crawl, then walk, then run!

How do programs like the NASPL RG Verification Initiative help lotteries improve their programming?

Independent verification of a lottery's responsible gambling program offers a host of opportunities and benefits. Benchmarking ourselves to best practices in the industry and the successful programs of our sister lotteries provides both inspiration and accountability. Third party certification also demonstrates that our programs are more than just words on paper, that they translate into measurable and confirmable actions. This helps stakeholders, policy makers and the general public trust that a lottery is committed to their approach to responsible gambling. I often describe our responsible gambling program as part of our social



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license to operate, but it must be more than just window dressing – it needs to be verifiable and effective if a lottery is going to grow and mature their gaming portfolio.

What are the top three issues related to RG in the gaming industry?

Rapid changes in technology are driving innovation and transformation throughout our industry. A lottery’s responsible gambling program must keep pace with the speed and agility digital transformation demands. The old ways of approaching responsible gambling may not be the right approach moving forward and lotteries need to be thinking about where they need to adapt and change their way of thinking. We also must remember that we have multiple stakeholders that must accompany us on this journey and think about the best way to bring them along.

"The rise of sports betting in America is bringing a new demographic to the table and they may need new approaches to outreach and messaging."

Evolving approaches to retail, mobile and digital sales will fundamentally change a lottery’s relationship with their players and the way players engage with the lottery and its games. Digital sales channels, along with known account-based play, bring new robust tools to promote responsible play, but lotteries must be ready to use them thoughtfully and appropriately.

The normalization of gaming and increased availability of gambling bring increased pressure for lotteries to do more to encourage responsible play and to promote awareness of the availability of treatment for those players that need help with their gambling. The rise of sports betting in America is bringing a new demographic to the

table and they may need new approaches to outreach and messaging. As acceptance of gambling increases, lotteries must look for ways to normalize responsible play and develop responsible gambling programs fully integrated with and specific to new games and gaming channels, not just as isolated and separate initiatives.

What type of RG research does Oregon conduct and how is it used?

The Oregon Lottery research program for responsible gambling and problem gambling encompasses five key areas:

Annual brand promise research is designed to provide information and data to inform our Corporate Social Responsibility program generally and our responsible gambling work specifically. This research is used to measure trends, identify opportunities and gaps and assess long-term impacts.

Cooperative research provides data to inform the overall Oregon problem gambling prevention and treatment system, supporting the strategies and tactics of multiple stakeholders including the Lottery and the Oregon Health Authority.

Project specific research is designed to evaluate and improve the performance of specific elements of our responsible gambling program – for example, testing the effectiveness of our communication strategies and messaging.

Responsible gambling inclusive research is research whose primary goal is not specific to responsible gambling but ensures the responsibility lens is applied to all aspects of the Oregon Lottery business.

Secondary research is data gathering through engagement with the overall gaming industry and public health consultants to monitor, analyze and disseminate external research used to inform Oregon Lottery strategies and tactics, with emphasis on new and evolving initiatives.

Where can lotteries go to find RG research?

NASPL is an excellent resource through both its Research Committee and Responsible Gambling Committee, as well as through its leadership in providing a responsible gambling and problem gambling track at its conferences. The National Council on Problem Gambling, the International Gaming Institute at UNLV and the National Center for Responsible Gambling are also excellent resources for research on responsible gambling as well as the prevention, intervention and treatment for gambling disorder. In Oregon and other jurisdictions, lotteries engage with their local NCPG or public health affiliates to develop and sponsor research agendas to drive innovation in the responsible gambling space.

How do the resources available via the NASPL Matrix help lotteries with their RG educational programs?

The NASPL Matrix provides a centralized repository for exploring many key aspects of responsible gambling across jurisdictions, including advertising, training for employees and retailers, a responsible gambling toolkit, verification of best practices, cross-jurisdictional results from a survey of lotteries’ social responsibility efforts, and a link to the NCPG website for more resources and information.

What lies ahead in 2020 for the NASPL RG Committee?

We’re a workhorse committee so we will be busy! We will continue to update our guidelines, refining our recommended approach to sports betting, digital advertising, and mobile sales as those aspects of our business continue to evolve and mature. Our committee will tackle the challenges presented by the key issues we see coming down the pipeline to ensure NASPL continues to play a leading role in this work. ■

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PROGRESS Report:

AMERICAN SPORTS BETTING

Lottery-operated sports betting generated \$635 million in handle and \$65 million in gross gaming revenue during calendar year 2019.

By Patricia McQueen

It's a brave new world for some American lotteries. By the end of 2019, five had launched their sports betting operations in the wake of the PASPA repeal in May 2018, with three more gearing up early this year. And unlike the model for the sales of traditional lottery games, which is very similar from state to state, sports betting is unfolding differently almost everywhere.

Since the debut of single-event sports betting outside Nevada in June 2018, 12 jurisdictions have launched in one form or another – five by lotteries and seven at casinos with regulation by state gaming commissions. Combined, they have generated more than \$700 million in cumulative gross gaming revenue through December 2019, with lotteries producing about \$95 million of that total.

Gross gaming revenue, or GGR, represents the total amount bet less winner payouts, and is one of two key values typically reported for sports betting. The other is total handle (may also be called turnover or some version of “write”), although handle is not reported in some jurisdictions. Where private operators run sports betting, there is generally a tax on GGR and that is the limit of the state's revenue, aside from any licensing fees. Where lotteries run sports betting, there is typically a payment to the book provider, which may be as high as 50% of GGR, and the lotteries send the balance, after expenses, to their beneficiaries as with other lottery products.

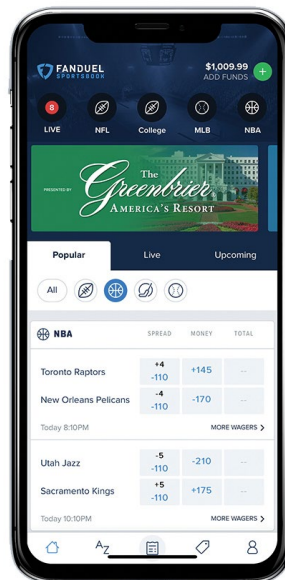
Off and Running

Delaware

The only state where a lottery had already been running one form of sports betting (parlay bets on football), Delaware was the first to launch full-scale sports betting on June 5, 2018. The Delaware Lottery's three racetrack casino partners are offering sports betting in addition to their casino products, and 102 selected lottery retailers still offer parlay bets. Sports betting is not currently offered through

online or mobile channels. The sports betting system is provided through the Lottery's contract with Scientific Games.

In calendar 2019, the three casinos generated about \$102.6 million in handle on sports betting and \$14.3 million in GGR. After commissions and vendor fees, the Delaware Lottery's share was \$6.2 million before operating expenses. Parlay betting on football, at retail only, produced about \$29.8 million in handle and \$11.5 million in GGR, with almost \$6.4 million to the Lottery after commissions and vendor fees, again before operating expenses. Note that these annual numbers are based on weekly sales.



West Virginia

The West Virginia Lottery's five casino partners can offer sports betting both at their facilities and through their mobile apps. Unlike the other lotteries which actually operate the sports betting system, contract with the sports book provider, etc., in West Virginia each casino contracts for its own sports book on-site and for online/mobile operations; the West Virginia Lottery acts primarily as a regulator. And in that role, there's one thing the Lottery insisted upon, which did take some extra time before launch: The sports book operators

(such as FanDuel and DraftKings) had to place their servers within the state so that the entire transaction, and therefore the complete money trail, stays in West Virginia.

The first casino in the state to offer sports betting was Charles Town, on August 30, 2018, followed quickly by the Greenbrier resort two weeks later; Mountaineer Park joined the group in November; all three initially offered only on-site betting. Wheeling and Mardi Gras launched their sports operations at the end of 2018, complete with online and mobile options. However, both facilities suspended sports betting a few weeks later following issues with technology providers; it has not yet resumed at either facility at this writing.

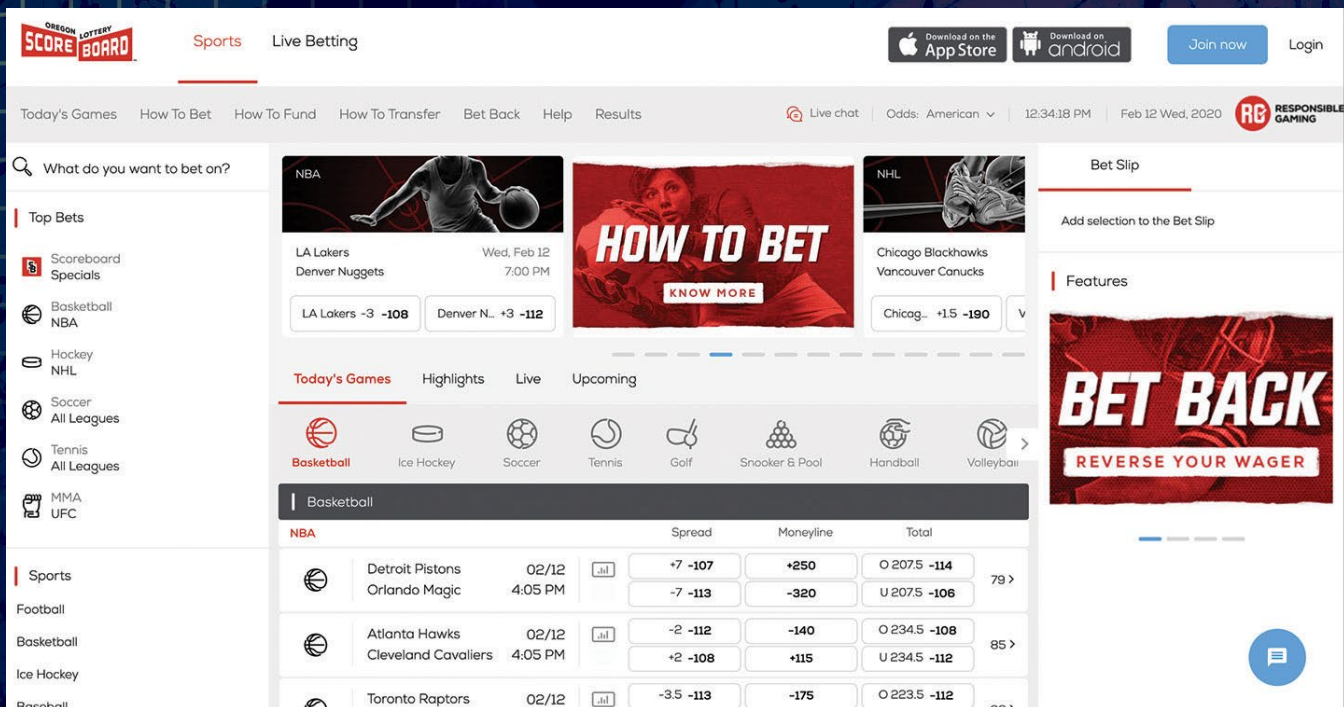
Late last summer, mobile betting was added to the mix at Charles Town and the Greenbrier. Each operator is allowed to have up to three apps.

In calendar 2019, like Delaware based on weekly sales periods, West Virginia's facilities produced \$212.3 million in total sports betting handle – \$155.6 million at the casinos and \$56.7 million through mobile apps. The latter number is impressive considering the partial year. The Greenbrier has had exceptional success in the digital realm, reporting \$24.5 million in handle through its app compared to \$3.3 million at its resort facility over the last four months of 2019.

The statewide handle produced a total of \$19.1 million in GGR during 2019, and the state receives a 10% privilege tax on that revenue, or about \$1.9 million.

Rhode Island

The Rhode Island Lottery offers sports betting through its two casinos, and launched sports books at the properties on November 26, 2018. Online and mobile options were added last September, and online/mobile registration has to be activated in person at either of the two facilities. The Lottery's systems provider, IGT, teamed up with William Hill for the sports books.



Sports betting handle totaled \$245.8 million in calendar 2019, with \$17.8 million in GGR. Of the total handle, \$26.3 million came through the online/mobile channels that became available in September; by December, the digital channels accounted for almost 30% of total sports handle.

Oregon

The Oregon Lottery – which years ago had offered football parlay cards – became the first U.S. lottery to launch sports betting unaffiliated with casinos, or in fact any retail location, when its digital operation began last October 16. The Lottery chose a European sports book provider, SBTech, and as a result, Oregon players have been able to bet on a much wider variety of sports, including events such as rugby, cricket, darts, snooker and pool.

Retail sports betting will likely follow, but exactly how that will happen has yet to be determined; officials want to thoroughly examine what makes sense in what kind of environments.

Through December 31, total sports betting handle in Oregon was \$45.3 million, with \$2.9 million in GGR.

New Hampshire

Following in Oregon's footsteps with a digital-only launch was New Hampshire on December 30. But while Oregon will study retail expansion very carefully, New Hampshire already has a retail plan in place based on the enabling legislation. Authorized are up to ten physical sports book locations in municipalities that have approved such operations (several already have); the first of these locations were expected to open in February. In addition, parlay cards will be sold through the Lottery's entire retail network.

Each of the three sports betting channels required a competitive bidding process, and Draft Kings won both the online/mobile and sports book operations. The Lottery's existing systems vendor, INTRALOT, will incorporate parlay cards into the current retailer network, likely beginning this spring.

The first month of sports betting in the state, which ended just before the Super Bowl, produced \$17.3 million in total handle, returning \$1.2 million in profit for education.

Waiting in the Wings

By the end of January, the DC Lottery and the Montana Lottery were in the final stages of licensing before launching their sports betting operations, and the Tennessee Lottery was moving down its own path.

Montana

Yet another sports betting model is being developed in Montana, where betting will be limited to licensed Montana Lottery retailers. Locations licensed to offer sports betting must have a gambling operator license from the Montana Department of Justice as well as an appropriate Montana liquor license – there are an estimated 1,400 locations that meet that criteria.

The Lottery will launch a website and app for players, offering details on upcoming games, lines, stats and other information. However, as gambling through the internet is not allowed by Montana law, players may only make bets through digital channels if they are located within a licensed facility. Otherwise they

have to place their bets on the kiosk(s) within the location.

At this writing, the Lottery is accepting retailer license applications and some of the final details are being worked out.

District of Columbia

By far the most complex sports betting implementation to date is happening in the smallest jurisdiction, the District of Columbia. The DC Lottery, or more formally the Office of Lottery and Gaming, will not only operate its own sports betting network, but it will be regulating two types of private operators as well. That means the Lottery will essentially be competing with itself – a role it wanted from the beginning in order to maintain the District's history of exciting games run with the utmost integrity.

"We've been the only gaming operator in the District for almost 40 years," said DC Lottery Executive Director Beth Bresnahan. "We felt it was important for us to play that regulator role should the city Council want to open this up to private businesses. And to play an operator role ourselves so we could modernize our game portfolio to attract a new generation and a new category of players. We want to really help shape the future of what the lottery industry offers in this country."

In a nutshell, the Lottery will operate its own city-wide retail, online and mobile sports betting network, and will also regulate private sports books. The latter could ultimately consist of the four major stadiums in the district, plus anyone else who wants to set up a sports book in their retail locations. The stadiums are entitled to a two-block exclusivity zone around their facilities in which no other entity can offer sports betting; even the Lottery's own locations and online/mobile system can't operate within that zone. Other privately-operated sports book locations are allowed mobile/online betting options, but only within the confines of their facilities.

The Lottery opened the license application process for private

"We want to really help shape the future of what the lottery industry offers in this country."

- Beth Bresnahan

operators in December, and by the end of January had received one application (for a William Hill sports book at Capital One Arena). That application was under review as of early February and Bresnahan expects more applications to be submitted as the weeks go by.

Proposed rules governing the Lottery's sports wagering mobile app and website were issued at the end of January; they are subject to a 30-day public comment period before they can be formally adopted. The Lottery anticipated a mid-March launch of these digital channels. Draft rules governing sports wagering at licensed DC Lottery retailers will be proposed this spring, for an anticipated rollout of the program in this fall, following an upgrade of lottery terminals and other equipment necessary to support the retail sports wagering network.

Tennessee

The eighth lottery on track to offer sports betting represents the eighth different model being used by lotteries in the U.S. to date. Until sports betting was legalized last year, lottery was the only legal gaming in Tennessee, so it made sense to have the Tennessee Education Lottery regulate the activity. In this case, the Lottery will not operate sports betting, but will license the actual operators – anyone who wants to put up the application fee (\$50,000) and the licensing fee (\$700,000) upon approval. Once licensed, an ongoing annual fee of \$750,000 applies for any sports betting operator. There is no limit to the number of operators that may be licensed, and sports betting will be limited to digital channels, online and mobile, with no retail locations allowed.

Draft rules and regulations were published in November, and a public comment period concluded on January 6.

A Global Perspective

At the European Lotteries/World Lottery Association Sports Betting Seminar in Madrid last November, there was much discussion about the newcomer to the block – the United States. After all, sports betting has been embraced in many parts of the world, with some 70% of sports betting revenues coming from lottery operators.

Much of the conversation centered around sports integrity and the need to keep crime out of sports. Lotteries around the world expressed concern that American sports betting operators – lotteries and casinos alike – didn't seem to be involved enough in sports integrity efforts.

And while American policymakers, with only a few exceptions, have generally been hesitant to allow sports betting at retail shops, many European lotteries have very advanced retail sports betting outlets. Recognizing that the digital experience is critical for sports betting, they have outfitted their retail shops with the latest in tools, such as tablets, so players can have that digital experience even at retail.

And there are other ways to combine the digital and retail world. French lottery operator Française des Jeux, for example, has a mobile app that lets players compose their bets at their convenience, and then generate a QR code to scan for the purchase at retailer. And for players who may not want to download an app, in 2017 FDJ launched a Facebook Messenger chatbot to generate those QR codes for retail.

Fortunately for the lottery industry, just about every new development is shared, facilitated by the regional associations including NASPL, so that best practices in the areas of operations and responsible gambling can be passed along from jurisdiction to jurisdiction. ■



- LOTTERY COMES TO THE -
MAGNOLIA STATE

For the first time in more than five years, there's a new American lottery, and Mississippi residents seem to have embraced the fun.

By Patricia McQueen

“

We're averaging over \$10 million in sales weekly on just scratch-off tickets.

Mississippians were greeted with an early holiday gift last November 25 – the launch of the Mississippi Lottery. It was the culmination of years – decades, in fact – of effort in the Magnolia State, and everybody wins. The biggest winner is the state and all of its residents, as the first \$80 million in lottery proceeds annually until 2028 benefit the state’s Highway Fund, facilitating much-needed repairs to make roadways and bridges safer for everyone. Any proceeds above \$80 million will go to the Education Enhancement Fund. Players win with the fun and games being offered, and retailers win with the six percent commission on lottery sales plus the additional in-store foot traffic that usually comes with lottery sales.

There are only five American states left without a lottery – two have no legal gambling at all (Hawaii and Utah), two have various forms of gambling, such as tribal casinos, pari-mutuel activity or charitable gaming (Alabama and Alaska), and one has extensive casino gambling (Nevada). Of this group, Alabama is the only one likely to join the club in the foreseeable future – there have been several failed attempts at legalizing a lottery there, but officials may not wait too long before following in the footsteps of its new lottery neighbor. Indeed, a new lottery bill was filed for the current legislative session in Alabama.

After all, the Mississippi Lottery made its first funds transfer on January 17, sending \$7.6 million to the state from sales through December 31. And through January 18, the first eight weeks of operation produced \$80.7 million in sales. “It has been an unbelievable start,” exclaimed President Tom Shaheen, who was the Mississippi Lottery Corp.’s first employee last June 1 – a position he knows well, having been the first employee of the North Carolina Education Lottery as he led that lottery through its first few years. “We’re averaging over \$10 million in sales weekly on just scratch-off

tickets,” he noted, adding that everyone expected only about \$3 million a week. That should make for a quick payoff of the Lottery’s startup loan of more than \$5 million.

Steps to Launch

Besides North Carolina, Shaheen was also involved in other lottery startups in Georgia, Florida and Texas, and also led the New Mexico Lottery for a time. Still, things have changed rapidly in the industry in recent years, and there was a lot to be learned. “I couldn’t have done this without the help of a lot of people,” he explained. “That includes our new employees; the state agencies that had to assist us; numerous lotteries that provided staff to assist in the major RFP evaluations, answer questions and help with other information, especially about their policies and procedures; the NASPL staff; the MUSL staff; our vendors; and other organizations. Meeting our challenges was based on the support of all these entities.”

Perhaps the biggest challenge, aside from the need to go from 0 to 100 in less than six months, involved retailers. The Lottery Law requires every single retailer to provide a bond based on twice the expected sales at each location. That alone was somewhat unusual, noted Shaheen. While lotteries typically do have bond requirements, they are often just for those with questionable credit histories or past problems with lottery ticket management – not required for everyone. “I

was concerned about whether or not we could get enough retailers to sign up.”

And then there was the issue of the bond amount. Without any sales history in the state, Shaheen and his team came up with a bond amount of \$8,000 based on estimated annual sales and the expected number of retailers at startup

As it turns out, the bond requirement has not limited the number of retailers wanting to offer lottery, but did create problems with the time it took for retailers to actually obtain the bond – typically two or three weeks. “That was the challenge, and it obviously made us very nervous given the short time frame we had to start the lottery, because if every one of these bonds was going to take three weeks, it was going to really slow down the process.” So the decision was made to start processing the applications without the bonds so retailers could be approved almost immediately once a bond was submitted.

Like sales expectations, the number of retailers has also exceeded goals. On launch day, 1,200 retailers were up and running; there were 1,350 by early January, and 1,500 was the target by the time Powerball and Mega Millions launched on January 30. Shaheen noted that there were enough approved applications to reach that goal, but with the need for physical installations and retailer training, at this writing he thought there would be around 1,450 active retailers for the launch of the draw games.



Rep. Alyce G. Clarke buys the first Mississippi Lottery ticket.

Retailer training was handled two ways. With the first wave of retailers at startup, the training was done by IGT, which holds both the gaming systems and scratch ticket (including printing, warehousing and distribution) contracts. Training sessions were held at strategic locations across Mississippi and was limited to scratch-off tickets. But as new retailers came on board after launch, the IGT training sessions were expanded to include draw games. For the original 1,200 retailers, training for the addition of draw games was conducted at each location by the Lottery's own sales team.

For everything else, Shaheen hit the ground running when he arrived on June 1, with his first task to find a location for lottery headquarters. Then RFPs for the two primary contracts had to go out on June 30. Bids were due August 1; two were received for each RFP, by IGT and Scientific Games. The contracts to IGT were awarded August 30. "That's a quick turnaround, and

there was a great deal of pressure on the vendors."

The ad agency contract was awarded to Mississippi-based Maris, West & Baker in early September. They handle all the advertising, including creative, production and media buying. They also assist Lottery staff as necessary for anything else, such as digital assets like the website and social media. "Our website was created and is maintained entirely in-house, as is all our social media," said Shaheen.

Two weeks before launch, teaser ads went out, and ads featuring the first four new games started the week of launch. The quartet included a \$1 game, a \$5 game and two \$2 games. More games have since been launched, including the first \$10 game, added January 7.

Earned media played a big role in the successful launch, with considerable media coverage in news outlets throughout Mississippi. "The local media have been very positive, and

seem to already have an understanding of lottery games and the business of lottery."

The launch party was held at one of the most eager retailers in the capital city of Jackson. Included was a live radio remote, a three-piece band with dancers as added entertainment. The ceremonial first buy was made by Rep. Alyce G. Clarke, who has wanted a lottery in the state for a couple of decades. In fact, the legislation is named the Alyce G. Clarke Mississippi Lottery Law.

"We had a great turnout," said Shaheen, with plenty of media representation along with players eager for a try at their luck. "The retailer was thrilled, as he sold a lot of tickets!"

Game Strategies

Despite the enthusiasm shown by early players for scratch-off games, many were still looking forward to "the actual lottery...where the big money

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is” – as one player was quoted in the media, referring to Powerball and Mega Millions.

The launch strategy for those games was simple, explained Shaheen, “because the excitement and the knowledge of the citizens of this state on Powerball and Mega Millions is just overwhelming. They know about the games because they’ve been playing them in three [neighboring] states for years.” So the plan was for simple, informational ads to announce the games’ arrival, while social media played a big role in building the excitement. Eventually some 40 billboards will be in place throughout Mississippi.

Much like the initial launch, the debut of the big draw games included a ceremonial first buy. This one was at a retailer in the southern part of the state, in the city of Pass Christian in the Gulfport-Biloxi metropolitan area. “We want to show Mississippians that the Lottery is not just in Jackson.” Buying the first draw game ticket was Sen. Philip Moran, one of the co-authors of the Lottery Law.

After the two national jackpot games, Shaheen won’t be in any great rush to launch other draw games. “We’ll take our time. There’s a lot of information for players and retailers to absorb.” With Powerball and Mega

Millions, for example, there are multiple ways to play, different purchase options, and play slips for picking numbers. Not only do players have to learn, but “it places a lot of pressure on retailers.”



He cited experience to date with the instant product. “The games have very simple instructions, but we receive questions from players asking if they won.” Players – and retailers – need time to understand existing games before more games are introduced into the market.

That said, a daily draw game (three or four digits) will be next, likely in late spring or perhaps not until after the start of the next fiscal year on July 1. “Some of our players are very familiar with Pick 3, so that should give us a basic core group of instant games, two big draw games and a local in-state game.”

Taking a longer view, other daily games and perhaps a for-life game could be in market within about two years. In addition to new games, a natural boost would come from eventually adding additional drawings to the daily games.

For scratch-off products, Shaheen expects the Lottery to introduce 40 to 45 games annually, with a goal of having retailers offer 25 to 30 games at any given time by next fall. A \$20 game will likely come during the next fiscal year.

Before the release of the \$10 game in early January, prize payout was averaging about 58%. While that may seem low by current industry standards, it was important to start at that level in a new market before sales volume was known. Shaheen is obviously very happy with the initial reception. “The games are designed to provide winning experiences at many levels.”

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Other Strategies

Aside from the games, there are many other moving parts with a new lottery. In Mississippi, the Lottery Law allows only core lottery games and retail distribution channels, so some things are off the table, such as online or mobile sales and any types of video gaming. Self-service vending machines are allowed and will roll out in the next six to eight months.

One initial concern that could have affected sales is that the minimum age to buy a lottery ticket in the state is 21, but that hasn't proven to be an issue based on the initial sales volume. While it is rare to have that minimum age for lottery purchases (in most jurisdictions it's 18), it's not without precedent – neighboring Louisiana is also at 21, as is Iowa.

An advantage in Mississippi is that the Lottery's rules and regulations allow retailers the choice of accepting cash, debit cards or credit cards for lottery purchases, acknowledging the fact that many people no longer carry cash.

As development continues, the Mississippi Lottery will eventually look at sponsorships in one form or another. While the state doesn't have any professional sports teams, the University of Mississippi (Ole Miss) and Mississippi State are enormously popular football teams. "We'll need to take a hard look at the cost of these sponsorships and whether or not we'll have the budget to participate. We probably may end up being more focused on community events, state fairs, festivals, etc."

Responsible gambling is a major part of the Mississippi Lottery. "Many people may think that we overemphasize it," said Shaheen, noting that both the RG message and problem gambling hotline number are everywhere. The Lottery Law requires the hotline number to be posted at every retail location, so the Lottery produced door decals for its retailers. In addition, the hotline and/or a responsible gambling

Despite the stress involved, there's nothing like the gratification when something you've been working on actually happens.

message are shown on the in-store marketing displays, on ticket backs, and on all signage and advertising materials. Radio and television ads are tagged with the message, and anyone speaking on behalf of the Lottery must include a discussion of responsible gambling.

In addition, the launch was just in time to participate in the Holiday Lottery Campaign sponsored by the National Council on Problem Gambling and the International Centre for Youth Gambling Problems and High-Risk Behaviors at McGill University, joining all other North American lotteries.

It remains to be seen what impact the Lottery will have, if any, on the well-established casino market in the state. There are 26 casinos concentrated in three regions – almost half along the Gulf Coast, with the rest generally along the Mississippi River in the central and northern sections of the state. Four of those casinos were among the initial round of lottery retailers. There are also three tribal casinos in other parts of the state.

The Future

In early January, the new Lottery was faced with an earlier than expected challenge, when a claim was made on ticket that had very obviously been altered to look like a \$100,000 winner – by gluing a winning strip onto the ticket. Lottery staff immediately knew there was a problem, and security personnel – former police officers – adeptly managed the situation. The surprising

element, at least for most of the native Mississippi employees, was the national attention the fraud attempt garnered by all the major news outlets. For Shaheen, he knew this kind of thing is always big news locally, but he too was surprised by the national attention. "Our staff handled it really well, and everything went very smoothly."

That episode behind them, the big challenge now will be to maintain the early sales momentum, and Shaheen hopes that the Lottery's deliberate business plan will lead the way. He has enjoyed the challenge of starting another lottery, although he noted that it seems harder than it used to be. "Despite the stress involved, there's nothing like the gratification when something you've been working on actually happens," he said.

Everything has been designed to set the Mississippi Lottery up well for the long run. "I believe it has a very bright future. We have a very positive player base here. My own philosophy is to start a lottery with long-term success in mind, to grow your business gradually. You don't need to be a first-year hero."

Although from the looks of the early numbers, there just may be a few heroes in Mississippi. ■



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THE CELEBRATION CONTINUES



A lot can change in 30 years, and the Hoosier Lottery is up to the challenge of making sure it's all for the better.

By Patricia McQueen

CELEBRATING 30 YEARS OF CONNECTING HOOSIERS.

We're proud to be a part of
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The Hoosier Lottery's official 30th anniversary may have been October 13, 2019, but the birthday party is a long one – “celebrating 30 years of connecting Hoosiers” continues through the Indiana State Fair this coming August. The focus is on how the Hoosier Lottery – the only North American lottery named for its people – has brought people together throughout the state: Lottery employees, including 10 who have been with the Lottery from the beginning; players, who have enjoyed the entertainment and won a few dollars along the way (almost \$14 billion); and retailers, including 355 that have been selling lottery under the same ownership since day one, whose relationship with the Lottery has been priceless, more than just the direct retailer commissions of nearly \$1.6 billion.

They have all helped the Hoosier Lottery generate \$23 billion in sales and provide more than \$6 billion in net profits to its beneficiaries over the years – most going to local communities as an offset to reduced vehicle excise taxes for car owners, but significant amounts also go to the Teacher's Retirement Fund and to support the pension funds of local police and firefighters throughout the state.

“It's amazing to see the impact the Hoosier Lottery has had on Indiana over the last 30 years,” said Executive Director Sarah Taylor. “We are always proud of our beneficiaries.”

As part of the anniversary celebration, retailer promotions are running periodically through August, with special offers for players at designated retail events. In addition, each of the

“It's amazing to see the impact the Hoosier Lottery has had on Indiana over the last 30 years.”

- Sarah Taylor

original 355 retailers are receiving a commemorative certificate to honor their commitment to lottery. Taylor herself tries to hand deliver as many of them as possible. “It has been fun, especially meeting some of the original owners” who were the first to offer lottery in Indiana.

Hoosier Lottery operations changed in 2012 with the development of a performance-based service agreement with GTECH Indiana (now IGT Indiana) to provide game development, product distribution, marketing, and sales services on behalf of the Hoosier Lottery. It is one of four lotteries in the U.S. with some sort of significant outsourcing agreement in place, covering essential sales and marketing services to one degree or another; the others are Illinois, New Jersey and Texas.

Lottery staff still handles all the primary operational functions of the Hoosier Lottery, such as licensing retailers, conducting the draws, paying prizes, managing finances and security, etc. Many of IGT Indiana's employees formerly worked at the Lottery, some of them since the very beginning. The two organizations are housed in the same building and generally work seamlessly together. Every spring, IGT Indiana presents its business plan for the next fiscal year, which contains some of the expected



HOOSIER LOTTERY AT A GLANCE

	Scratch Ticket Sales	Draw Game Sales	Total Sales	Total Prizes	Net to State
FY2019	\$974,884,849	\$372,870,808	\$1,347,755,657	\$859,997,715	\$312,223,309
FY2018	934,984,749	335,080,894	1,270,065,643	797,271,245	306,078,571
FY2017	907,583,688	305,492,684	1,213,076,371	774,409,540	288,038,493
FY2016	869,945,711	337,668,847	1,207,614,558	771,973,953	281,471,754
FY2015	759,457,779	281,206,095	1,040,663,874	670,980,026	242,667,738

Scratch Tickets:

About 45-50 new games per year; \$1, \$2, \$3, \$5, \$10, \$20, \$25, \$30 and \$50

Terminal Games:

Powerball, Mega Millions, Hoosier Lotto +Plus, Ca\$h 5, Daily 3, Daily 4, Quick Draw, Cash4Life, Fast Play

Vital Statistics:

Number of employees: 58 Hoosier Lottery, 125 IGT Indiana

Number of licensed retailers: 4,404 (as of 1/29/20)

Vending equipment: 580 ITVMs in 574 locations; 781 full-line self-service machines in 722 locations

strategies and tactics to achieve the Lottery’s goals. That business plan is then adopted by the five-member Lottery Commission.

Like any relationship, there sometimes needs to be additional communication to work out issues that come up from time to time, but that’s all part of the process. “Overall we’ve been very pleased with the agreement,” said Taylor. “Our success is their success, and I think we all operate with that in mind, so we keep to our mission to maximize revenue to the state of Indiana in a socially responsible way. Everyone has seen the fruits of their labor these last couple of years, especially.”

While sales and profits have grown, at the forefront of that growth has been the focus on responsible gaming. Taylor and the team at IGT Indiana, led by Chief Operating Officer and General Manager Melissa Pursley, are understandably proud of achieving Level 4 responsible gaming certification from the World Lottery Association. That is the ultimate achievement for any lottery, and only seven other American lotteries are similarly certified.

“Responsible gaming is a commitment we take very seriously.”

- Melissa Pursley

“Responsible gaming is a commitment we take very seriously,” said Pursley. “It’s the core of who we are.” Every stage of game development and every marketing campaign is viewed through a responsible gaming lens, she explained. “We see RG as a living and breathing thing,” added Taylor. “We are consciously making strides in the right direction on a continuous basis.”

Extra Thanks

As noted, the Hoosier Lottery has raised significant revenues in 30 years. Most of those revenues go to what is now called the Lottery Surplus Fund, a more cryptic name for the same fund that has received lottery proceeds since the beginning; until last July 1, it was called the Build Indiana Fund. Very early on, the fund could be used for designated infrastructure projects as approved by the legislature, but for

the most part it ultimately offsets the motor vehicle excise tax. By sending money to counties, the fund allows the state to reduce the excise taxes paid by vehicle owners by as much as 50%. It is essentially local aid with the end result being a reduction in those excise taxes.

Lottery revenues are allocated to two other funds as well. Annually, \$30 million goes to the Teacher’s Retirement Fund and \$30 million goes to support the pension funds of local police and firefighters throughout the state.

All three recipients of Lottery proceeds give the Hoosier Lottery something to crow about, but over the last couple of years Taylor and her team have specifically been re-establishing relationships with the people who actually receive the retirement and pension funds. It’s a way to personally thank them for their service, and these extra efforts help reinforce the good the Hoosier Lottery does in the state.

“We have been out visiting teacher retirement groups and also retired police and firefighters,” said Taylor, who never shows up empty handed. Compliments of the Hoosier Lottery are Mega Thanks coupons (for free

Mega Millions tickets) and a gift basket full of goodies that might include Lottery hats, mugs and shirts, plus free tickets.

Game for New Games

Of course, sales are the engine that drives those beneficiary revenues, and sales have gradually shifted to where the scratch-off portfolio now accounts for nearly 75% of total sales. “Together with IGT Indiana, we have in the past few years learned a lot, like every other lottery, on what the marketplace wants in terms of the types of games, ticket prices and other factors,” said Taylor.

“I think one of our most successful efforts has been the strategic introduction of innovative prize structures within our scratch-off portfolio,” added Pursley. She recalled that several years ago, there wasn’t much of a difference between tickets in any given price point, beyond the artwork – the top prizes and even play styles were the same. “We spent a lot of time working on how to differentiate games with the prize structure, like loaded games and games without breakeven prizes. Who would have thought that our best-selling \$10 game for a while would have a top prize of \$250?”

Certainly Hoosier Lottery has had considerable success the past couple of years with “loaded” tickets – those with a preponderance of prizes that are cashable at retail. The players love them because they see more lower prizes and they seem more winnable. The retailers love them because when players cash tickets in their stores, not only does everyone see more winning experiences, but those players are likely to spend back at least some of that cash, either on more lottery purchases or other products that they sell.

Hoosier Lottery is one of the few lotteries to launch tickets at the \$50 price point, and the team watched the marketplace carefully to determine when such a product might be accepted. So in December 2017, the Lottery’s first \$50 game was launched. “The

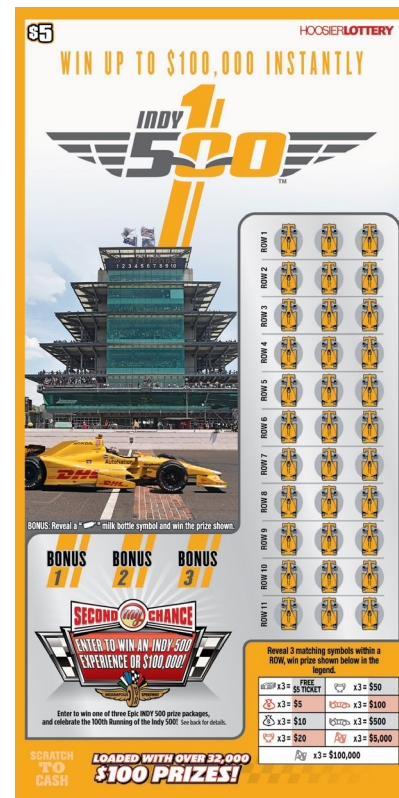
market was truly ready for it,” said Taylor. “They have loved our \$50 tickets!” Still, there was a lot of work on the prize structure, and key was having at least two high-level prize tiers; just one big top prize isn’t optimal because once it is won, in Indiana the game has to close. “We went back and forth before we got the prize structure to a place we were comfortable with, and the print run as well.”

Like many lotteries, Hoosier Lottery has struggled with \$1 and \$2 games, testing various ways to boost sales at the low end, such as regular monthly introductions and utilizing licensed properties. Sometimes they work well, and sometimes not so well, so it’s an ongoing challenge.

Regardless of the price point, IGT Indiana has placed an emphasis on trying to attract new players with pop culture themes and licensed properties. “We’ve had some really fun ones over the years,” said Pursley, citing a bacon-scented ticket that attracted lots of attention, even in earned media, garnering a mention on Jimmy Kimmel’s nightly show. And this spring, Hoosier Lottery will launch a new James Bond 007 ticket timed for the release of the new feature film in the Bond series.



For the 100th running of the Indianapolis 500 in 2016, Hoosier Lottery created a \$5 ticket with six different iconic scenes, and partnered with the Indianapolis Motor Speedway to bring that to life. “It allowed us



to have additional sales channels, as we were actually able to sell at the Speedway,” said Pursley. In addition, retailers in the area brought in more tickets and point of sale to promote the game. “It really generated a lot of excitement around the Speedway and opened up a new promotional selling channel.”

While “fun” doesn’t always equate to “top-selling” with these type of niche products, “we fundamentally believe that they have a place in our portfolio,” added Pursley.

On the draw side of the portfolio, Hoosier Lottery has been very active, trying various innovations to see what resonates with players. “That’s another advantage with IGT Indiana,” said Taylor. “Sometimes you get a chance to have something first, or pilot a new product. We’ve introduced some things that have worked, and some things that have not.” But with every try, she added, something is learned, and that’s a good thing, as what is learned can be used to modify the game in question,



Selected Hoosier Lottery Milestones

1988 - Lottery approved by 62% of Hoosier voters.

1989 - The October 13 launch included the debut of the television game show Hoosier Millionaire, which aired weekly for 16 years; the final episode was at the end of 2005. The show produced 191 \$1 million winners during its run.

1990 - The first draw games were introduced at various times throughout the year - Lotto Cash, Daily 3, Daily 4, and the original multistate Lotto America.

Early 1990s - Bar-coded scratch-offs were introduced, making redemption possible at any lottery retailer around the state.

1992 - Lotto America became Powerball, and the very first jackpot-winning Powerball ticket was sold in Indiana. Since then, more Powerball jackpot winning tickets have been sold in Indiana (39) than in any other jurisdiction.

1997 - The Lottery's first website was launched at hoosierlottery.com.

1998 - An Indiana-sold Powerball ticket worth \$295.7 million set a new North American record at the time.

2014 - The Hoosier Lottery App was first released.

2016 - The largest jackpot ever won in Indiana was a Mega Millions prize of \$536.3 million.



or to help develop a new game. “We are open-minded. We’ve enjoyed second chances on the draw games, and also look forward to changes and add-ons to the big national jackpot games.”

One successful innovation was taking its flagship Hoosier Lotto game to \$2 and adding the +Plus feature, an extra drawing that gives players a second chance to match their numbers. It’s similar to the format that Mega Millions will be launching in April called Double Play; not surprisingly, Hoosier Lottery will be one of the first lotter-ies to offer that option.

Fast Play is another product line that has received a lot of attention lately, after its initial launch in 2015. About a year ago, Hoosier Lottery went back to the drawing board, to learn more about what appealed to players, what price points and what launch schedules were appropriate. Importantly, steps were taken to better work with retailers and players to make them aware of Fast Play, to ignite a re-engagement in the product. “It has helped,” said Taylor. “We’ve seen a lift from that effort to better inform and educate everyone. It’s another area that has been exciting for us.”

Sales Initiatives

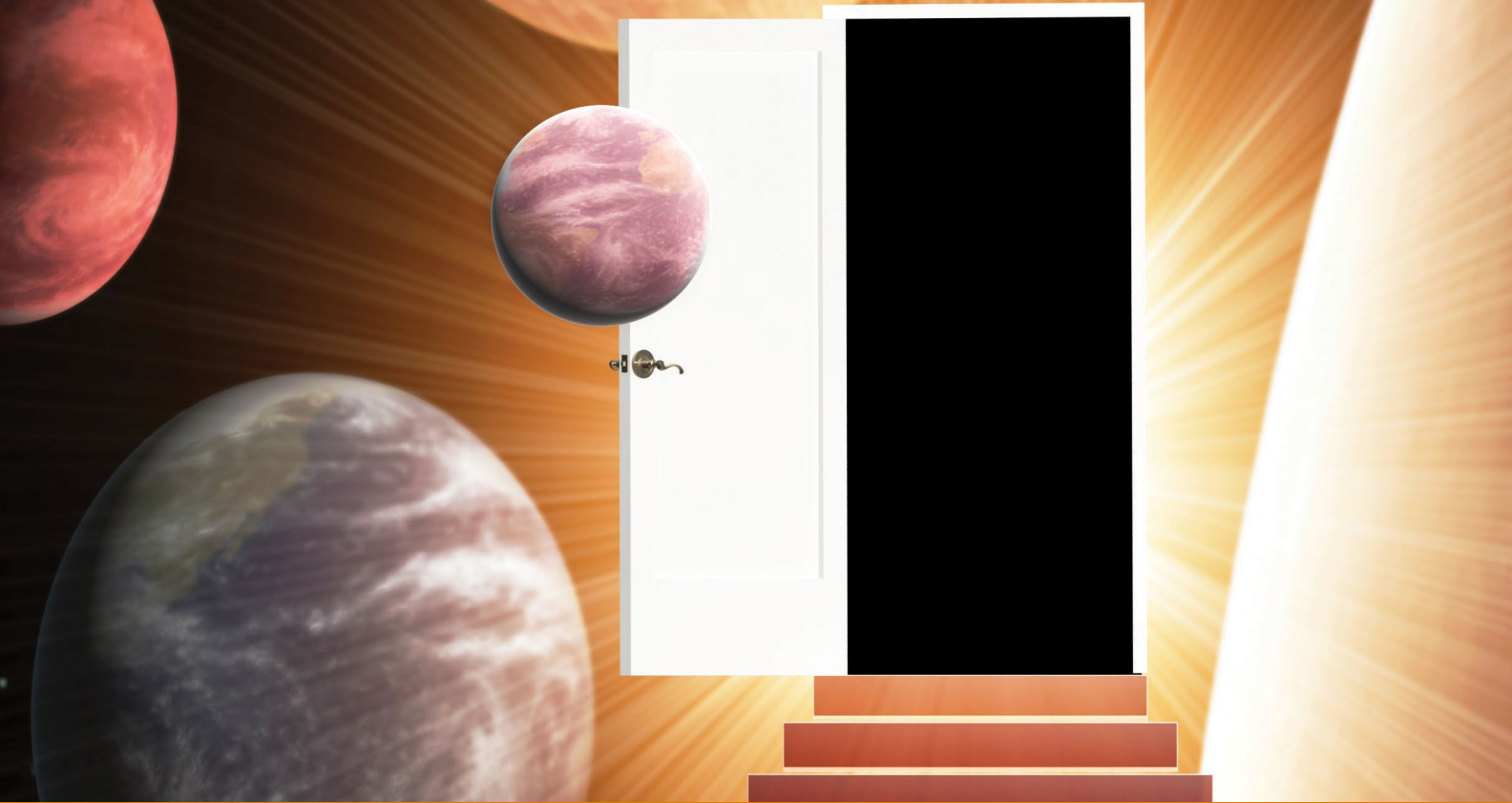
She credits the IGT Indiana sales team – many individuals who were previously Lottery employees – with really taking retail execution and service up a notch under Vice President of Sales Clayton Atkinson. A few initiatives have led the way, with a key goal of enhancing sales through existing retailers rather than only trying to increase the number of retailers.

For example, it’s important to ensure that lottery products are correctly placed at retail, that display equipment and POS materials are clean, clear and up to date. Two simple initiatives have really made a difference in Indiana. The “White Glove” program is something like spring cleaning, noted Taylor, just to make sure everything is polished. Then there’s “Fresh Eyes,” where a regional director might go to a different region, just to have a new set of eyes looking at placement at retail, making sure everything is up to high Lottery standards, and just generally having new conversations with retailers.

Another key initiative in the past couple of years is “Keep It Full” – to ensure that ticket bins and vending

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- News website: www.PublicGaming.com
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- e-mail: Pjason@PublicGaming.com
- **March 3, Tuesday 5:00pm: Opening Night Reception**
- **March 4, Wednesday: Conference Sessions followed by Reception**
- **March 5, Thursday: Conference Sessions conclude at 12:30pm PGRI conference followed by lunch and ... 1:30 to 4:30 pm. Women's Initiative in Lottery Leadership Seminar (WILL)**
- **March 5, Thursday 4:30 pm to 6:30 pm: WILL Reception**

GOVERNMENT LOTTERIES RESHAPING THE GAMES-OF-CHANCE INDUSTRY

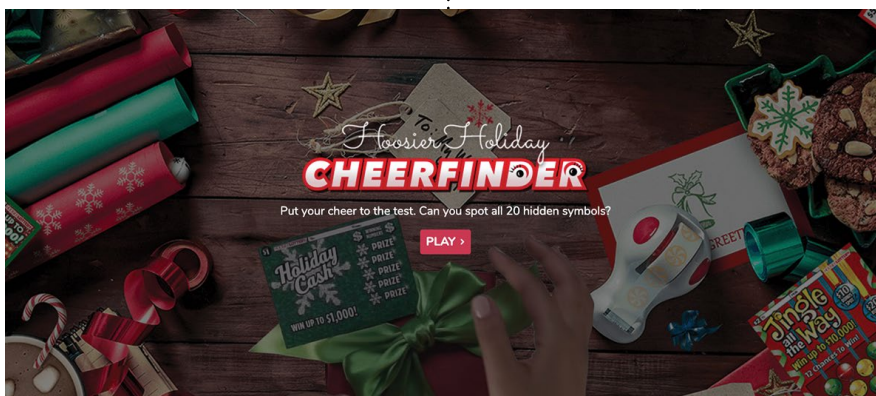
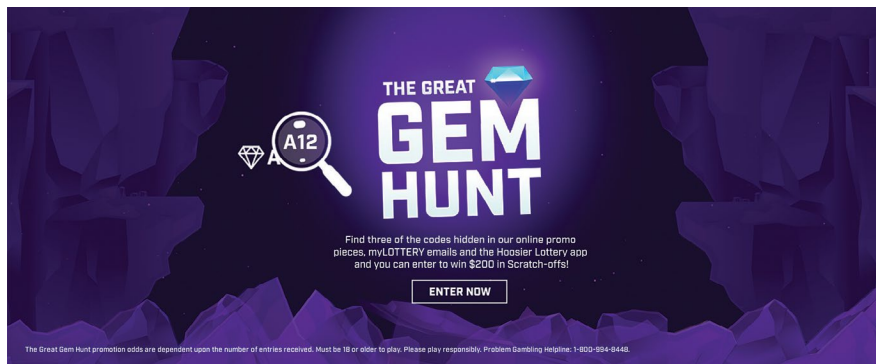
More to come as we confirm the speakers and clarify the program. We hope to see you there!
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machines are never empty in any position. After all, if tickets aren't available, retailers can't make their commissions and will be cashing fewer prizes. "I come from a retail background, and one of the things we'd always say to our merchants and to our operators was that people can't buy what you don't sell," said Pursley. So Keep it Full really focuses on keeping stock in the bins, especially in self-service machines, because a potential player will just move on if the "out" light is on, instead of asking about availability. Since the initiative began, out-of-stocks have been cut by more than half, and for some retailers they are down to zero. "That obviously represents a lift in sales for us," noted Pursley.

"We've been able to show retailers the analytics that back up our statements that keeping the bins full increases their sales," added Taylor. And during the high-volume holiday periods, both IGT Indiana and Hoosier Lottery employees assist out in the field to make sure tickets are always available. "I'm very pleased with this initiative."

Speaking of self-service, that's another area where there have been significant improvements by the IGT Indiana team. In addition to the initiative to keep them full, Taylor noted that there has been a general improvement in positioning and additional installations of vending at certain retailers throughout the state, ones that meet Lottery standards including line of sight for age control. And she credits the company for repurposing older machines or even machines originally used elsewhere. "We take hand-me-downs, we just have to rebrand them," said Taylor. "Clayton, and our IGT technology partners, make sure the older equipment works well and keep it up to date."

Self-service is one way of increasing access points at existing retailers; changes such as bin sizes for ticket display units also help increase the number of tickets available without increasing the space required. "Increasing



the number of facings within a retailer and investing in self-service have been where we have spent our efforts," explained Pursley. And like the rest of the industry, she's watching what is happening with Texas and its two in-lane sales approaches, as well as other developments in this area. "We are anxious to get on that bus."

IGT Indiana has also been encouraging retailers to accept debit cards for lottery purchases. Although Indiana law allows the use of both debit and credit cards, the Hoosier Lottery has chosen to focus on debit cards. "People are moving towards the cashless society," said Taylor, "and we feel the lottery conversations should revolve around debit cards." Just over 80% of the Lottery's retailer base now accepts debit cards, noted Pursley. "It's been a significant addition to our ability to better meet players where they are."

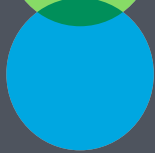
Marketing Gets Personal

Relationships with players are key to the Hoosier Lottery's marketing efforts, which are subject to a code of

conduct to ensure that the IGT Indiana program meets the Lottery's preference for ads and marketing materials that are appropriate for a state institution that emphasizes responsible gambling and age-controlled play.

Many of the recent efforts are aimed at better understanding lottery players to provide them with more relevant marketing messages, in the right media channels. "A big part of what we've done in the last three years has been really grounded in our data management platform and efforts related to identifying player behaviors and media consumption habits, allowing us to better reach them" explained Pursley.

By grouping players, and non-players, with similar characteristics, it helps communicate with them more effectively. Players registered with the myLOTTERY players club can receive even more personalized messaging if they so choose. "The myLOTTERY platform is the opportunity to establish more engagement and relevance with our players, and we can connect with them a little bit more one-on-one,"



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said Gary Melliere, Senior Director of Marketing for IGT Indiana. myLOTTERY has more than 600,000 members, about two-thirds of whom are considered to be active players.

And with the digital world all around us, more emphasis will come through social media channels, with an increasing focus on winner awareness. “We’ll be doing more to leverage social media accounts to tell winners stories,” said Melliere, adding that it’s not just about winners at the time of claim. “We’re looking to further enhance that, to follow winners in the weeks and months after they’ve claimed a prize, to more fully tell that story.”

Other things have been done in the digital realm as well, such as interactive experiences associated with certain instant games. A Holiday Mystery microsite was created for the 2018 holiday season, for example, where players could engage in a fun digital game for the chance to win a holiday gift pack. Web-based “hunts” have also been popular with players, who search for icons to enter for prize packs; these digital experiences were offered on a gem multiplier family of games last year and also for the 2019 holiday season with the Hoosier Holiday CheerFinder.

While these digital games have been very well received, IGT Indiana is still exploring the possibility of actually offering the sales of lottery tickets online, which is legal in Indiana. Like every lottery, Hoosier Lottery is facing an aging player base, with the challenge of how best to attract new players. “The best way to do that is to see where they are, which is on their phones and on their computers and on their tablets,” said Pursley. “We’re approaching it from a consumer landscape point of view first, and studying it right now. Obviously the financial metrics have to work for us, but we must also answer the question: Will it provide the opportunity to attract new players and grow our player base?”

The Next 30 Years

And the answer to that question is key to the Hoosier Lottery’s next 30 years. There’s no telling what the industry will look like that far ahead, but Taylor knows a thing or two about the more immediate future.

Game additions and enhancements will certainly help, and with the Lottery’s gradual shift to a reliance more on scratch games there can be more control over new games and

related activities on that side of the business compared to the unpredictable big jackpot games, even though the latter can provide more profit per sales dollar. So that shift also means a more careful look at the financials. “We have tried to stay pretty close over the years to a certain prize payout overall,” said Taylor, adding that cost efficiencies help with that.

On the draw game side, she’s excited about continued growth in Fast Play, the potential of the new Mega Millions Double Play option, as well as IGT’s new Cash Pop game, which may be introduced in the next fiscal year.

The possibility of online sales is still in the research phase with IGT Indiana, as noted above. “It would be a huge undertaking, and research helps decide when it might make sense given everything else going on in the market.”

Hoosier Lottery has shown that growth can come from within – from some of the extra touches as described earlier that combine a re-emphasis on some of the basics of retail with advanced digital solutions for enhancing customer relationships. “All of these things add up and have contributed to our growth,” said Taylor. ■

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



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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%

Winning With Lottery Funding

The benefits never end when it comes to the programs that are the direct beneficiaries of lottery revenues.

By Patricia McQueen

Since the modern lottery era in the United States began in 1964, lotteries have raised more than \$500 billion for good causes through FY19. In FY19 alone, American lotteries sent \$25.1 billion to their beneficiaries, and in Canada, C\$3.5 billion was raised by lottery operations for use by provincial governments.

In the United States, about two-thirds of that revenue has gone to education, in the form of scholarships and various forms of school aid. Lottery revenues have also benefited environmental causes, economic development and tourism, senior citizen programs and assistance for veterans. In some American jurisdictions and all of Canada's provinces, lottery revenues go to a general fund, to be used where there is the greatest need.

But the giving doesn't stop with formal funding. Many lotteries have gone the extra mile and created ancillary programs that complement their formal beneficiary funding. Sometimes even just a small effort is well appreciated and has a lasting impact.

The focus of this special *Insights* report is not necessarily on lotteries' "where the money goes" communications efforts, although the stories presented on these pages are of course part of those efforts. The goal was to simply showcase some of the stories, to show some of the very real impacts lotteries have on their communities and the people they serve. Hopefully this will ignite even more passion throughout the lottery industry to continue building knowledge of lottery impacts on society as a whole.

We certainly saw plenty of that passion during the first-ever Lottery Week, held across North America last July. Dozens of lotteries participated in that week-long event, funneling some of their creative juices into innovative awareness campaigns – not just about the funds raised for good causes, but for everyone who wins including players, retailers and communities. The Illinois Lottery, for example, used Lottery Week for an initiative called Faces of Lottery. Using interview-based stories and photography, a social media

campaign was designed to humanize the lottery brand and the good causes it supports. A recap of Lottery Week is on pages 32-33.

What an Impact!

Certainly the numbers lotteries are generating are significant and there's a lot to talk about. Consider the following examples.

"Washington, D.C., is the 'District of Champions,' where all we do is win!" exclaimed Nicole Jordan, Director of Marketing and Communications for the DC Lottery. Well, not always, she added, but there is still a lot of winning! While proceeds from the sale of DC Lottery games are not directly channeled to any one particular cause, profits transferred to the District's General Fund support a variety of important initiatives throughout the District of Columbia.

She pointed out that our nation's capital has enjoyed a recent streak of celebrations including the Washington Mystics' triumph in

the WNBA finals, the Washington Nationals' 2019 World Series win, and the Washington Capitals' take of the 2018 Stanley Cup Championship. Add to this list of wins the boosted bond rating the District received from Moody's, Fitch, and S&P to Aa1, and you'll get an understanding of why DC has taken on that moniker, "District of Champions."

Since the DC Lottery's inception in 1982, it has contributed more than \$2.1 billion to the District's General Fund. The annual transfer to the General Fund remains a vital component in aiding the city's economy, thereby benefiting all residents of the District of Columbia, as well as suburban commuters and tourists. The General Fund supports essential services such as education, recreation and parks, public safety, housing and senior and child services. The DC Lottery directly benefits players by paying out more than 55% of annual sales in prize money, which totals more than \$3.7 billion to date. Local businesses are also directly benefited through the commissions paid to retailers licensed to sell DC Lottery games and by offering contracting opportunities.

Over the past 36 years, the Charitable Games Division of the DC Lottery has helped local non-profits raise more than \$132 million for social causes benefiting the residents of the District of Columbia through the licensing of Bingo, Monte Carlo Night, Raffle and other charitable gaming activities.

"Given the city's unprecedented overall financial health, it would not be possible to identify a particular project supported by lottery transfers but it's always money well spent," said Jordan.

The Georgia Lottery started the whole idea of lottery-funded scholarships when it began in 1993. In FY19, the Lottery transferred \$1.21 billion

Professor Caleb Jackson

Caleb was born to teach. In fact, every kid he plays with leaves knowing a little more about something. One thing he doesn't know yet is that his dream of being a professor can one day come true, because you play the Georgia Lottery. For the past 25 years, the Georgia Lottery and you have been helping our students reach their true potential. That gets an "A" in Caleb's book.

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to the Lottery for Education Account – that's \$3.3 million (on average) raised every day for its beneficiaries, HOPE and Pre-K. In the last school year alone, over 171,000 students attended colleges throughout Georgia on the HOPE Scholarship and Grant Program. This year, more than 80,000 children are enrolled in Georgia's Pre-K Program in more than 3,800 Pre-K classrooms in all 159 counties in the state.

Since inception, a total of \$21.3 billion has been delivered to education. Those proceeds have

been appropriated and distributed to more than 1.8 million HOPE Scholarship recipients, and have sent more than 1.6 million four-year-olds to Pre-K programs throughout the state.

The programs that use Lottery dollars are the Pre-K Program and the following scholarships and grants: HOPE Scholarship Public, HOPE Scholarship Private, Zell Miller Scholarship Public, Zell Miller Scholarship Private, HOPE Grant, Zell Miller Grant, HOPE Career Grant and HOPE GED Grant.



Lottery scholarships in New Mexico can be used for virtually any degree path.

Three years after Georgia put the lottery focus on scholarships, the New Mexico Lottery hit the ground running with similar goals when it began in 1996. All proceeds benefit education in the state, and that means that part of every dollar spent on lottery tickets benefits New Mexico's future. It opens the door to new generations of New Mexicans to obtain a college education which otherwise might not have been possible. And that helps make New Mexico a better place to live. As of December 2019, more than \$837 million has been raised. Of that, \$66.5 million has gone to Public School Capital Outlay and \$770.8 million has been raised for Legislative Lottery Scholarships.

To put this in perspective, more than 122,000 New Mexicans have received a Legislative Lottery Scholarship. And, of those recipients, nearly 72,000 have graduated with the help of a Lottery scholarship. Over the years the Lottery's campaigns have focused on numerous aspects of the Legislative Lottery Scholarship program. For example, many students have been the first member of their family to pursue a college education. Or the various courses of study have been featured, since there are no limitations on what degree is pursued by scholarship recipients. The Lottery has also featured graduates of the program.

Many other lotteries are either solely or partially dedicated to funding scholarships – one even has the word in its name, the Arkansas Scholarship Lottery. In some cases lottery-funded scholarship programs were developed in existing lottery states after seeing Georgia's success.

For most of its 34 years, the Missouri Lottery's mission has been to help fund educational opportunities for Missouri students. In fact, the Lottery has contributed more than

\$6.5 billion to the state and public education since sales began in 1986. Lottery funding accounts for about 4% of the state's funding for public education each year – an effort that's shared by local, state and federal governments.

What does that 4% look like? It takes the form of more resources in Missouri classrooms, and it's realized in more scholarship opportunities for post-secondary students. Here are just a few of the programs that have benefited from Missouri Lottery proceeds.

The Foundation Program: \$2.6 billion and counting. This program is the major source of basic state support for Missouri public schools. It includes teacher salaries, transportation and Early Childhood Special Education services.

University of Missouri Campuses: \$1 billion and counting. Lottery proceeds are used to help fund salaries, equipment, library purchases and institution-based financial aid at each of the four University of Missouri campuses. Missouri Lottery funding represents 11% of state funding for these universities.

A+ Scholarship Program: \$349.7 million and counting. The Missouri Lottery provides more than half of the funds for this program, which provides state-paid tuition assistance for students attending any eligible



public community college or technical school in the state. Scholarships were first added by the legislature as a Lottery funds recipient during FY 1995.

Community Colleges: \$215.5 million and counting. Over the years, Lottery proceeds have been used to help fund salaries, equipment, library purchases and capital improvements

at Missouri's community colleges.

Classroom Trust Fund: \$174 million and counting. These funds are distributed to each school district qualified to receive state aid based on average daily attendance. The funds can be spent at the discretion of the local school districts.

All in all, the Missouri Lottery represents \$300+ million each year that the state wouldn't otherwise have, with Lottery dollars earmarked solely for public education. Each and every Lottery staff member – 153.5 full-time employees – is responsible for providing more than \$2 million a year for Missouri students.

Read On for More

The staggering impacts these lotteries have had in their jurisdictions are repeated over and over across the industry, no matter what the good

causes are that receive lottery funds. Some lotteries are perhaps more fortunate in that they can tell stories of real projects and real people, and many lotteries are also able to use their own budgets in order to add value to an already significant impact in their communities. The following pages provide examples of some of these efforts. It's all important, and it's all here to help spread the word.

NASPL thanks the lotteries that were able to provide responses of any kind for this special issue, and we recognize that all lotteries have the same underlying drive – to raise money for good causes. A complete list of North American lotteries and their beneficiaries is at the end of this special Winning With Lottery Funding section, beginning on page 90. ■



Missouri Lottery proceeds benefit education, including public schools.

Show Me the Money



When it's hard to pin down exactly where lottery money goes, or even if a lottery has that luxury but just wants to do something different, there is another alternative that will surprise and delight people. Just ask the folks at the Massachusetts Lottery, whose proceeds are sent to the 351 cities and towns in Massachusetts. Think of that as 351 little "general funds" – it's not always easy to convey just what that

means. And with the Lottery sending a billion dollars to these beneficiaries annually in recent years, it wanted its ad agency, Connelly Partners, to come up with a way to show the magnitude of that in an impactful way.

In the Lottery's current campaign, the "State of Winning," the theme is all about Massachusetts having the best of the best – with championship-winning sports teams, acclaimed academic institutions and

renowned hospitals. "The State of Winning is the community's win," explained Director of Communications Christian Teja. "It's the players winning – about \$4 billion in prizes last year – and the retailers earning over \$314 million in commissions and bonuses." And, of course, that \$1 billion in proceeds to cities and towns.

"It's all well and good to talk about a billion dollars, but the issue is that people have no idea what a

billion dollars actually looks like,” noted Connelly’s Group Creative Director Sid Murlidhar. “Why are we burying the lead on this? We think the best thing we can possibly do is show people what a billion dollars looks like.”

So they set out to do just that. One day late last October, crews arrived in Boston’s Copley Square – a well-trafficked center of work, shopping, restaurants and tourism – in the pre-dawn hours and began building the ultimate conversation starter. They came with pallets of simulated \$20, \$50 and \$100 bills, along with cleverly constructed boxes to further simulate currency, saving the environment from too much wasted paper. When fully assembled, it would mimic exactly what it would be if real currency – some 30 million bills by one possible grouping of those denominations – were used for the entire creation.

Better still, the structure – weeks in the making in terms of design and

“It was this wonderful conversation with the residents of Massachusetts about where this money goes and what it can do.”

- Sid Murlidhar

pre-fabrication – was the exact shape and topography of Massachusetts. Right there, in a most unexpected place, rose an image of the Bay State that was 40 feet in length, 26 feet in width and 8 feet tall at its highest point. One billion dollars, for everyone to see.

It was surrounded by signage about the money the Lottery sends to cities and towns to help with the needs of every community and every resident. A corresponding digital experience let people explore exactly how much their own community receives with a dedicated website. The

structure took seven hours to build and was dismantled at the end of the day – it was designed to generate the most immediate reactions without becoming a distraction.

“We built this installation in the shape of Massachusetts, which added value to it and really made it authentic and ownable to Massachusetts,” said Murlidhar. By building it in Copley Square, people could watch the creation unfold, ask what was going on, and generally be amazed that it accurately represented one billion dollars. Their authentic reactions were captured on camera for the Lottery’s advertising campaign. “It was this wonderful conversation with the residents of Massachusetts about where this money goes and what it can do,” said Murlidhar.

Lottery officials were understandably pleased. “We think it really illustrated the enormity of a billion dollars, and the impact that the Lottery has on the 351 cities and towns in Massachusetts,” said Teja. ■



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Real People, Real Projects

While every lottery has a story to tell, regardless of whether a beneficiary is a “general fund” or something far more tangible, some lotteries are able to point to real projects funded by lottery dollars or real people who benefit from lottery-funded programs, such as scholarships and programs benefiting seniors and veterans.

At the World Lottery Summit coming up in Vancouver in October, a combined production of NASPL and the World Lottery Association, members of both organizations are invited to participate in the inaugural Play for Society project. The photo and video exhibition will showcase the worthy causes funded by lotteries around the world. The project will also serve as a public reminder that the funding of good causes is not just one of the basic criteria for NASPL and WLA membership and a common thread between all member organizations; it is the main objective of the entire lottery industry. For more information on this important project, visit worldlotterysummit.org.

The people, projects and programs summarized below are just a tiny fraction of what more than \$500 billion in lottery proceeds has accomplished since the modern lottery era in North America began in 1964.

NASPL thanks those lotteries who took the time to tell these stories for this roundup.

Arkansas Scholarship Lottery

ASL’s “This Is Winning” branding campaign is all about improving win belief. The goal is to showcase the many ways people are winning with lottery, especially scholarship recipients. “Our challenge is finding unique, interesting stories of players and students,” said Donna Bragg, ASL Director of Advertising and Marketing, “and then showing their happy faces as real winners.” She explained that it’s not hard to find students willing to step forward, but the Lottery does look for those whose stories really stand out.

One such student is Daveante Jones, an Ashdown, Ark., native who attended Southern Arkansas University (SAU) Honors College on a lottery-funded Arkansas Academic Challenge Scholarship. “To be able to get this scholarship meant everything to me and also my parents,” Daveante said. Receiving the scholarship meant he could focus more on pursuing his dreams and less on the burden of student loans. It also prevented his parents from having to get second jobs to help pay for his education. After graduating SAU with a bachelor’s degree in political science, Daveante attended the University of Arkansas School of Law, where he earned a Juris Doctorate degree, graduating cum laude in 2016. Today, Daveante practices law at a prominent Little





Rock law firm where he specializes in labor and employment. And it all started with a scholarship from the Arkansas Scholarship Lottery.

When Mary Helene Brady graduated from high school in Little Rock, she knew exactly what career path she would pursue at the University of Central Arkansas (UCA). Her parents, who were excited about her future, were very happy that Mary Helene was getting financial support from a Lottery-funded scholarship. “By having the Arkansas Academic Challenge Scholarship, it helped take the financial burden off my family and me so that I can focus on school,” Mary Helene said. Her strong desire to help others, and a family full of nurses, led her to study pre-nursing at UCA. “My dream is to be a nurse, and the Lottery scholarship is helping me to get there!”

“These are just two examples of people we have featured,” Bragg said. “ASL has raised more than \$914 million in proceeds for scholarships since our inception in 2009, and we have awarded more than 542,000 scholarships. So we certainly feel there are a lot of people winning – not to mention all the players who have won on lottery tickets.” She added that people relate to these stories, which has increased win belief in the Arkansas public, and in turn, helped boost sales.

British Columbia Lottery Corp.

BCLC is a provincial Crown corporation offering socially responsible gambling entertainment through more than 3,500 lottery retailers, 35 casinos and community gaming centres, three bingo halls and its online gambling website, PlayNow.com.

BCLC was founded 35 years ago with the purpose of giving back to British Columbians. Since then, BCLC has delivered more than C\$23 billion to communities, provincial programs and services, charities and major events. In fiscal year 2018/19, BCLC contributed C\$1.4 billion net revenue back to the Province of B.C., approximately one quarter of which was generated by its bricks-and-mortar lottery business.

In addition to supporting health care, education and community groups across B.C., the provincial government allocates C\$140 million of gambling revenue annually for its Community Gaming Grants program. These Grants help support 5,000 community organizations that deliver arts and culture, sport, environment, public safety, human and social services, and parent advisory councils.

One example of an organization that received a Community Gaming Grant in 2019 was the Clements Centre Society, one of the largest not-for-profit societies in the Cowichan Valley. It delivers community-based programs to nearly 200 adults in the Cowichan Regional District, on Vancouver Island, B.C. The Clements Centre delivers recreational activities, vocational training (where individuals are supported to set employment goals and find jobs) and a residential program to connect clients with suitable housing options.

California Lottery

California Lottery supplemental funding has benefited education in many ways, helping schools and communities throughout the state. Here are a few examples:



Sacramento City College: The school uses some of its Lottery funding to purchase disposable items used by students studying to become dental hygienists, such as gloves, bibs, gowns and masks. This also helps the greater community, because the students train in a clinic, where members of the public can receive free or reduced cost dental services performed by the trainees under supervision.

Cathedral City High School: The school was able to use Lottery funding to help purchase badly needed uniforms and equipment for the band. This was a must at this school, where a number of students come from homes below the poverty line.

Woodville Elementary School, Porterville: Many of these students are the children of migrant farm workers and do not have a lot of exposure to experiences outside their community. Thanks to Lottery funding the school is able to help purchase school supplies, which teachers use to help keep the students engaged. It is hoped that a good education will lead the kids to good careers and enriching lives.

Santa Teresa High School, San Jose: You can't always depend on the internet for accurate information, so the school uses part of its Lottery funding toward the purchase of updated textbooks. This is crucial, especially in a subject like history. Being able to reference reliable information may help students avoid repeating the mistakes of the past.

California State University, Sacramento: Students were nearly forced to drop out of a building and design competition because they did not have the funding to transport their entry (an actual house!) to the competition site in Orange County. The school was able to use some of its Lottery supplemental funding to



get the job done. This allowed the students to gain extremely valuable hands-on learning experience designing an energy efficient home, seeing it erected on site and staging the property in time for the judging. These are all things they can put on their resumes!

San Diego City College: The school uses its Lottery funding to help purchase supplies used in a good number of classes, including cosmetology, esthetics and photography. Having at least some school supplies provided for their use allows many more students to afford attending school. As a result, some older adults are gaining the opportunity to embark on entirely new careers.

Colorado Lottery

With every ticket sold, Colorado Lottery players help keep Colorado beautiful, because proceeds enhance, protect and improve parks, trails, open space and all 41 state parks in Colorado. Since 1983, the Lottery has returned more than \$3.4 billion to outdoor projects in Colorado through Great Outdoors Colorado and the Conservation Trust Fund (both funded solely by Lottery dollars), and Colorado Parks

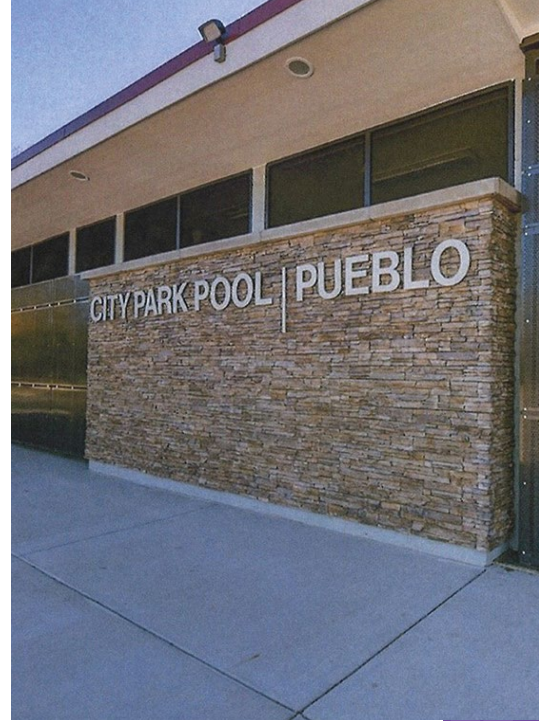


and Wildlife. Here are just a very few projects funded entirely, or in part, by Lottery proceeds.

City Park Pool House, Pueblo: After 57 years, the Pueblo City Park pool visitors have a new and modern pool house. The project was made possible with \$321,700 from the Conservation Trust Fund, so it was 100% funded by Lottery dollars. The new pool house adds an aesthetically pleasing element



Photo courtesy of Lauryn Wachs, The Nature Conservancy.



Colorado Lottery proceeds are used to fully or partially fund projects such as the Long View Trail (left), the Pueblo City Park pool house (top right), and the Crazy French Ranch project (above).

to Pueblo's most-visited amenity, its historic City Park. It includes well-lighted areas, new ADA accessibility, and new picnic tables and chaise lounge deck chairs. City Park is a destination park with numerous popular amenities that attract patrons from the city and throughout Southern Colorado. Adjacent to the popular Pueblo Zoo, accredited by the Association of Zoos and Aquariums, City Park and its pool have increased the number of annual visitors and encouraged the community to socialize, as well as improved health and wellness in the area.

Crazy French Ranch, Trinidad: Crazy French Ranch is recognized as a jewel of southern Colorado, with 19,200 acres of breathtaking landscape that includes grassy meadows, mountainsides of ponderosa pine, fir and aspen, rugged rock slopes, and steep ravines. The view includes much of the top of Fisher's Peak, which at over 9,600 feet is the highest point in the U.S. from Trinidad to the Atlantic Ocean. The land is a habitat of elk, mule deer, black bear, cougar and turkey, and has stunning views of the Sangre de Cristo Mountains, Spanish Peaks and Trinidad city lights. The Crazy French Ranch property, which until recently was privately owned, has the potential to substantially boost the area's economy and could become the state's 42nd park. A partnership between the City of Trinidad, the Trust for Public Land and The Nature Conservancy, this \$25.4 million project became official in February 2019 and was made possible with two major Lottery-funded grants: a \$7.5 million grant from Great Outdoors Colorado and \$7 million from Colorado Parks and Wildlife.

Long View Trail, Northern Colorado: A new trail in northern Colorado not only provides safe

transportation, but also connects non-motorized commuters and recreational users to 70 miles of existing trails. The Colorado Lottery funds helped three agencies complete the 4.4-mile Long View Trail project. Larimer County, the City of Fort Collins and the City of Loveland collaborated on the project that was made possible with \$2.3 million in Lottery-funded grants. Larimer County received \$999,550 from Great Outdoors Colorado, and the Conservation Trust Fund distributed \$680,000 to the City of Fort Collins and more than \$681,000 to the City of Loveland. The trail allows access through five public spaces, consisting of agricultural lands and wildlife habitat with views of the foothills and mountains. Starting in Loveland, the Long View Trail goes through the Sunset Vista Natural Area, Larimer County's Long View Farm Open Space, then to Fort Collins' Colina Mariposa Natural Area, Hazaleus Natural Area, and the Cathy Fromme Prairie Natural Area.

Kentucky Lottery

As a young boy in Salt Lick, Ky., Caleb Kilburn was fascinated by biology and chemistry and physics. But alcohol? "I didn't care for it. You could call me a goody two-shoes who didn't drink," he laughs. It's an odd premise for the young man who has now become the youngest master distiller in Kentucky's booming bourbon industry, but he directly attributes the help he received from the Kentucky Lottery in making his dream come true.

The 27-year-old Kilburn was worried as he was growing up that he'd eventually have to leave the state, because as he says, "economic opportunity was pretty tough back home in eastern Kentucky." While in middle school he learned about the KEES



scholarship program, funded entirely by Kentucky Lottery proceeds. The premise of the scholarship is simple – the better your grades and ACT scores, the more money you receive to stay home in Kentucky to go to college. "They told us about KEES before we even started high school, and the message was clear. If you performed in the classroom, you'd receive assistance to go to college."

The KEES program is one of five primary higher education initiatives funded by Kentucky Lottery proceeds. All told, since the programs began nearly 21 years ago, more than \$3.6 billion has been provided to help Kentucky kids realize the dream of higher education – and hopefully stay home after college to start their careers, raising the overall education level of the state's workforce. "KEES provided me with the financial flexibility to not have to worry in the ways I saw other students worrying. Instead of going out to get another job to make ends meet, I could spend time in the field actually learning," Kilburn said.

As the high-profile master distiller with Kentucky Peerless Distilling Company, Kilburn helps contribute to the state's bourbon economy which

generates \$8.6 billion each year and provides more than 20,100 jobs. It's the perfect situation for a young man who wanted to stay close to his family and friends at home, all while realizing his professional goals. "It's a dream come true to grow up in Kentucky – and end up here too."

Nebraska Lottery

About 25 cents of every dollar spent on Nebraska Lottery tickets goes to support good causes. Projects that use Lottery proceeds include protecting wildlife habitat, offering grants to Nebraska college students, improving facilities at the Nebraska State Fair, and providing treatment for problem gambling addiction.

Funds for environmental projects go to the Nebraska Environmental Trust. The Trust operates a competitive grant program that is open to government, organizations, businesses and individuals with good ideas for protecting the environment.

"We have projects going in all 93 counties," said Mark Brohman, the Trust's Executive Director. "Our dollars are very precious, and many states are envious that we have state lottery money available. We are very



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fortunate here in Nebraska.” Over \$319 million in Lottery proceeds has been transferred to the Nebraska Environmental Trust since 1993.

One organization that has received grant funding from the Nebraska Environmental Trust is the Bird Conservancy of the Rockies, which protects at-risk birds and their habitats. The conservancy runs a highly successful program to mark the nests of the tiny mountain plover so farmers can avoid them when preparing and planting fields. More than 80 farmers in western Nebraska have voluntarily participated in the program, which allows farm production to continue while protecting nesting birds.



Proceeds for education are used as determined by the Nebraska Legislature. Currently all education proceeds are transferred to the Nebraska Education Improvement Fund for activities such as grants for Nebraska college students, supporting innovative local educational practices and distance learning programs.

The Nebraska Opportunity Grant (NOG) program has been funded in part with Lottery proceeds since 2003. It is the State of Nebraska's only need-based financial aid program for post-secondary students. Over 105,000 NOG awards have been made using Lottery proceeds. Students that receive aid are Nebraska residents pursuing a certificate, associate or bachelor's degree at a Nebraska college or



North Carolina Education Lottery proceeds help fund much-needed new schools.

university. “Each year, the Nebraska Opportunity Grant reduces financial obstacles for thousands of Nebraska college students with ambition but modest means to pursue their educational goals without over-relying on student loans,” said Michael Baumgartner, Executive Director of Nebraska's Coordinating Commission for Postsecondary Education. “Lottery profits are critical to the program's growth and success.”

Another educational program funded with Lottery proceeds is the Nebraska Innovation Grant Program. Using 17% of the funds allocated for education, the Nebraska Department of Education offers competitive Innovation Grants for the development, expansion and investment in innovative best practices. Grant projects include personalized learning, career academies, after school design networks and digital ecosystem development. Since 1993, over \$337 million in Lottery proceeds has been raised for educational projects in Nebraska.

Promoting the work of the beneficiaries is a key mission for the Nebraska Lottery, and one way to accomplish this goal is targeted direct mail. Customized mailers have been

used to contact players that are not members of the Lottery's MVP Club Loyalty program. The mail pieces emphasize the benefits to Nebraska from Lottery proceeds. Each mailer includes an example beneficiary project from the area where the mailer is distributed along with information about joining the MVP Club and a coupon for a free Lotto play. Redemption rates for the mailed coupons have ranged from 5% to 12%.

North Carolina Education Lottery

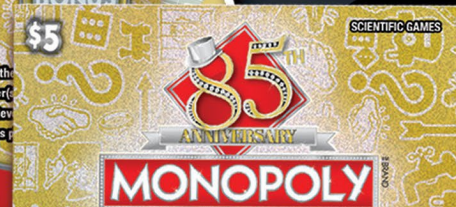
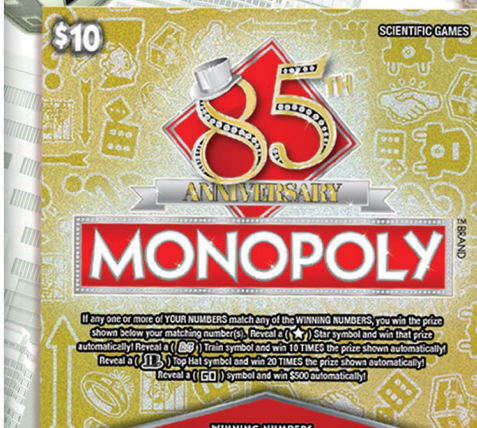
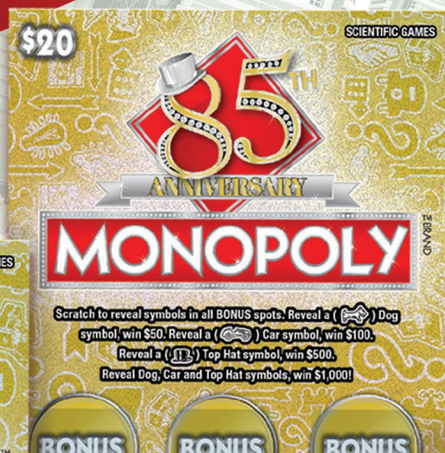
Many of North Carolina's small, rural counties face big challenges in affording new schools for their students, but a special program now meets that challenge with money raised by the N.C. Education Lottery. Lottery funds have always helped North Carolina counties in building and repairing new schools, but in 2017 a new program started that provided grants to “low wealth” counties that lacked the resources to build new schools on their own. Over the last three years, \$242 million in grants have been awarded by the Needs-Based Public School Capital Fund. Those grants, combined with \$250

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million in matching funds, will provide the money necessary to build 22 new schools or buildings, new spaces for more than 11,600 students.

Families in Jones County, one of the state's smallest counties, dreamed of a new school for decades. Last August, that dream came true when a state-of-the-art \$45 million school campus opened. The campus provides a place of learning for 60% of the students there. About 750 students went back to school in classrooms equipped with the latest technology for learning. A long, open corridor with glass walls extends across the front of the 123,000 square-foot building with three wings housing separately elementary, middle and high school students branching off to the rear. The campus also includes four science labs, four collaborative spaces, and six exploratory classrooms. "Lottery dollars help offset the shortfall for school construction needs," said Dr. Michael Bracy, Superintendent of Jones County, in a video showcasing the project. "Without it, this new school wouldn't be happening, and our students deserve it. They deserve the world."

Grants in other parts of the state will help build new elementary, middle and high schools; one will replace a school that is 94 years old, and another will provide space for an Early College of Applied Technology Academy for high schoolers on a community college campus.

Last year, another \$100 million in money raised by the Lottery was shared by all 100 counties, based on student population, to help build and repair schools. Together, the two funds supported 318 school construction or repair projects, including many cases where counties used money raised by the Lottery to pay off school bonds rather than relying on property taxes.

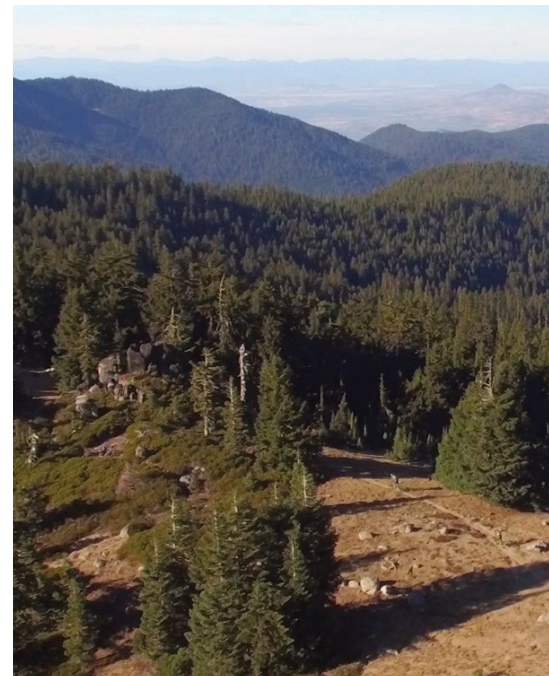


The N.C. Education Lottery currently raises more than \$700 million a year. Besides helping to build and repair schools, those monies also make college more affordable through scholarships and grants based on financial need, support school systems with the costs of school workers and transportation, and provide a free academic pre-school to four-year-olds through the NC Pre-K program.

Oregon Lottery

"Together, we do good things for Oregon." That is the tagline for the Oregon Lottery, whose proceeds support what matters to Oregonians. Lottery revenues help create jobs, fund public schools, maintain state parks, enhance watersheds and strengthen wildlife habitats; recently-added beneficiaries are Veterans Services and Outdoor School.

Lottery funding has helped restore and preserve more than 7,000 watershed projects across the state. Here are just two stories that show some of the ways environments have been repaired and preserved, not just for the benefit of the plants and animals living in them, but for all the people who care about the legacy of



Watershed projects funded by Oregon Lottery proceeds include Meacham Creek (top) and Ashland Forest.

natural beauty that Oregon provides us all.

Meacham Creek: Meacham Creek is a 37-mile tributary of the Umatilla River that used to meander freely across its floodplain, territory which now includes the Umatilla Indian Reservation. Its slow waters, frequent turns and overhanging branches made it the perfect habitat for salmon and other important wildlife. Salmon were so plentiful that the local people, including the Umatilla, Walla Walla, and Cayuse tribes, made



the twice-annual catch a central feature of their cultures as well as their diets. Along with elk, deer, roots and berries, salmon was considered an all-important “first food” of the native people. To the Confederated Tribes of the Umatilla Reservation, Meacham Creek represented their ancestry and a bygone way of life.

Since the early 1900s, a series of adjustments to the path of the creek were made to lessen the creek’s frequent natural flooding, which was disrupting the railroad. The creek revisions began to slowly change the watershed’s natural environment, and the resulting diminishing salmon population produced negative impacts that slowly spiraled up the food chain. Finally, after especially severe flooding in 1964, Meacham Creek was diverted away from the area and no longer supported salmon and other natural wildlife habitats.

All this changed recently when the Confederated Tribes of the Umatilla Reservation, working with the Oregon Watershed Enhancement Board (OWEB) and partially funded by grants from the Oregon Lottery, undertook a project to restore Meacham Creek to its original aquatic path. Using aerial photos from 1939 as a guide, workers with heavy equipment reestablished the original waterway. Eventually the creek was diverted back to its former course, free to flow across its floodplain.

Today, spawning salmon have returned to the creek, along with native plant species and other wildlife. The local people, in turn, have been able to re-establish a healthy, first-foods diet, following the practices of their ancestors and a way of life thanks to Meacham Creek’s return to the wild.

Ashland Forest Restoration: Sometimes you have to fight fire with fire. In Jackson County, they’ve taken this lesson to heart. Located just north of the California border, Jackson County experiences one of the highest occurrences of wildfire in Oregon. Its cities are especially vulnerable because they are often surrounded by densely forested areas. The same natural beauty that contributes to the livability of the region also means its most populated areas lie right next to material that

can fuel devastating wildfires. This is especially true for the city of Ashland, whose municipal watershed lies within the adjacent forest.

OWEB, with the help of Lottery dollars and in partnership with several partner agencies and private landowners, is taking steps to prevent wildfire disasters while restoring sensitive habitats and watersheds. By working together across public and private land boundaries, the Ashland All Lands Forest Resiliency Project seeks to accomplish the goals of reducing the risk of catastrophic wildfire to communities and landowners; protecting water quality and supply in the Ashland Municipal Watershed; and improving and protecting wildlife habitat, especially for threatened species such as Pacific fishers, spotted owls, and Coho salmon.

In total, 8,500 acres of public and private land will be treated in the forests adjacent to Ashland. Trees will be thinned and flammable debris removed, sometimes with controlled burns. These steps keep the forest open and healthy, and the reduced fire risk will help preserve the forest itself, its human and animal inhabitants, as well as the city of Ashland’s drinking water.

Pennsylvania Lottery

In FY 2019, Pennsylvania Lottery funds helped provide almost nine million meals served at senior centers and delivered to homes – more than 24,400 meals every day. Lottery funds provided for more than 33.6 million free transit rides and 3.3 million reduced-fare shared rides – more than 101,000 rides every day. Older people enrolled in the PACE and PACENET prescription assistance programs received more than 5.53 million prescriptions – nearly 15,200 every day. In addition, Lottery revenue (combined with the state’s

South Carolina Education Lottery scholarship recipient Brian Townsend with the Lottery's Director of Marketing Josh Whiteside.

slot revenue) helped support more than an estimated \$253.6 million in property tax relief for 531,995 households across Pennsylvania.

Lottery-funded programs touch and support lives. Judy Derr, a retired nursing home administrator and nurse trainer, lives in a senior community in Espy, a part of Bloomsburg in Columbia County. Judy likes the quiet cul-de-sac of small adjoining houses. "I feel very fortunate to get my own front porch, my own yard." She enjoys getting out into her community and contributing to it as a volunteer – she's been a Medicare enrollment counselor, and volunteered with Red Cross and with her local EMT.

Originally from Selinsgrove, Judy moved here a half-dozen years ago to be closer to her son. Retired for 10 years, Judy had a long and fulfilling career in nursing and related professions and saved for retirement, but a health crisis some years ago set her back financially. Even with her income, Judy notes she is now living paycheck to paycheck. She said that her son insists on helping her financially. "He pays my phone bill, my cable. He is a godsend," said Judy. "In one way, I'm grateful. In another way, it breaks my heart."

Lottery-funded programs have helped fill the gaps, where Judy and her son cannot, and so because of that, she has committed to become an advocate for the preservation



of the Lottery. She is enrolled in PACENET, a Lottery-funded program that offers low-cost prescription medication to qualified residents, age 65 and older. Judy is one of 300,000 Pennsylvanians who receive prescription drug benefits through PACE and PACENET.

Judy also counts on her Lottery-funded annual rent rebate and can tell you firsthand that the few hundred dollars she receives makes it possible to meet necessary expenses. "Having that money means I can put tires on my car, pay my dental bills," she said.

South Carolina Education Lottery

The South Carolina Education Lottery is proud to announce that two million lottery-funded scholarships and grants have been awarded to students in our state. And while the bulk of proceeds support scholarships in South Carolina, Lottery dollars also fund K-12 and community education programs, totaling a \$5.7 billion investment in education over 18 years.

"We are now seeing South Carolinians who have benefited from the Lottery's support of education

throughout their K-12 and college education who are staying in South Carolina to work and give back to their local communities,” the Lottery’s Director of Marketing Josh Whiteside said. “That’s why the Lottery was created, and that’s the message we are determined to get out.”

Sport sponsorship opportunities last fall provided a platform to share the stories of two such past scholarship recipients. The Lottery’s sponsorship of the Alabama vs. South Carolina and the Florida State vs. Clemson football games included an on-field game ball presentation prior to kickoff. Instead of the Lottery accepting the game ball, that honor was passed on to a deserving graduate and former Lottery scholarship recipient from each university.

At the Florida State vs. Clemson game, Brian Townsend accepted the game ball on behalf of the Lottery. He says his Lottery scholarship allowed him financially to attend Clemson. He is proud to represent Tigers everywhere, who have received more than 126,000 Lottery-funded scholarships and grants. Brian is a 2015 graduate and teaches 5th grade at Liberty Elementary School, where he was voted Teacher of the Year.

“The applause in the stadium was deafening when it was announced that a Lottery scholarship allowed the game ball recipients, one a high school coach and the other a fifth grade teacher, to graduate from college debt free,” Whiteside said. “Eighty thousand plus fans at those games left knowing the impact the Lottery was having locally.”

The Lottery also ran ads in football game programs at schools across the state emphasizing the number of scholarships awarded to students at those schools and listing all the different Lottery-funded scholarships available. “It’s surprising to us that

Good things happen when you play the Lottery. Like millions of dollars raised for education. Which means more teachers, more supplies and more Salisbury steak.

When you play, all of South Dakota thanks you.

THE SOUTH DAKOTA LOTTERY MAKES YOUR CHILD'S LUNCH.

SOUTH DAKOTA LOTTERY
GOOD FUN

Learn More at GoodFun50.com

The image shows a school lunch tray with a carton of 2% milk, french fries, and a meat patty. The background is orange.

Good things happen when you play the Lottery. Like millions of dollars raised for better roads. Which means you make it to work every day with a spotless shirt.

When you play, all of South Dakota thanks you.

THE SOUTH DAKOTA LOTTERY WON'T SPILL YOUR COFFEE.

SOUTH DAKOTA LOTTERY
GOOD FUN

Learn More at GoodFun50.com

The image shows a brown paper coffee cup with a black lid. The background is orange.

many of the students receiving these scholarships don’t realize they are funded by the Lottery. In 2020, we’re challenging ourselves to change that,” said Whiteside.

South Dakota Lottery

The South Dakota Lottery’s new beneficiary awareness campaign uses the tagline “Thanks A \$129 Million.” This is in reference to the \$129 million generated by the Lottery during


FY19 that improves the quality of life in South Dakota. The Lottery’s beneficiaries include the state’s General Fund, nearly half of which is spent on education in the state, and the Capital Construction Fund, which helps pay for needed infrastructure and developing natural resources.

The new campaign will focus on roads and schools, and we’ve used items that all our players can relate to, such as a school lunch or having a smooth road to drive on so you don’t spill your coffee. The campaign elements will include social media posts, billboards, TV/radio and point of sale items at retail locations.

Texas Lottery

When we think about “Winning with Lottery Funding” at the Texas Lottery, we immediately think of the 5.4 million students in Texas’ public schools and the more than \$24.6 billion in contributions that the Texas Lottery has sent to our state’s general education fund (the Foundation School Fund) since 1997. We also think of the tangible help our players have provided to veterans across the state just by purchasing one of our \$2 veterans-themed scratch tickets. Since 2009, the Texas Lottery’s contributions (\$125 million to date as of Dec. 2019) to the Texas Veterans Commission’s Funds for Veterans’ Assistance (FVA) are distributed in the form of grants to eligible charitable organizations, local government agencies and Veterans Service Organizations that provide direct services to Texas veterans and their families. With 1.7 million veterans calling Texas home, these programs provide financial assistance, transportation services, post-traumatic stress disorder counseling and housing assistance.

Specifically over the past ten years, these FVA grants have gone



Cody Nusbaum's mortgage-free home was provided by the Fund for Veterans Assistance, Texas Veterans Commission.

Our deepest thanks for their support to our hero!

to organizations like Operation Finally Home, which provides mortgage-free homes to returning veterans that are ADA-compliant and custom-built for their specific needs. FVA grants to The Amistad for Veterans Project have provided counseling and financial assistance to veterans and military family members experiencing unemployment, health crises and other financial difficulties. And grants to Meals on Wheels means veterans across Texas receive nutritious meals and the support they need to stay in their homes, while special Meals on Wheels programs like Mike's Place allow veterans with dementia and their caregivers a safe space within their community.

To date, the Texas Veterans Commission has awarded \$137 million in FVA grant funds to hundreds of organizations that have assisted over 311,000 veterans across the state of Texas. At the Texas Lottery, we are grateful to our players for continuing to purchase tickets that provide a positive, tangible impact for those who have given the most for our freedom.

West Virginia Lottery

West Virginia Lottery proceeds are used for a wide variety of good



West Virginia Lottery-funded PROMISE scholarship recipient Bailee Wiley.

causes involving seniors, education, tourism, and veterans. The West Virginia Legislature uses Lottery dollars to back School Building Authority and Higher Education Improvement bonds, provide vital senior services, help support the State's tourism industry, among a plethora of other good causes.

Two of the many good things that Lottery proceeds fund within

the West Virginia Bureau of Senior Services are the Lighthouse and FAIR programs. Both programs are entirely funded by Lottery proceeds.

Lighthouse is designed to assist those seniors who have functional needs in their homes, but whose income or assets disqualify them for Medicaid services. The Lighthouse Program, available in all 55 of West Virginia's counties, provides support in four areas: personal care, mobility, nutrition, and housekeeping.

Caring for a loved one with Alzheimer's disease or a related dementia can be very stressful, and caregivers need a regular break from the demands of the job. The FAIR (Family Alzheimer's In-Home Respite) Program offers relief to family caregivers and, at the same time, provides one-on-one attention and individualized activities for persons with a written diagnosis of Alzheimer's disease or a related dementia. FAIR gives caregivers the time to do things most of us take for granted – run errands, keep appointments, visit family and friends, shop for groceries, or even take a nap. FAIR clients (family caregivers) can receive up to 16 hours of respite per week, based on need and availability.

Lottery proceeds also support a wide variety of education initiatives



and among them is the PROMISE Scholarship Program. The PROMISE Scholarship is a merit-based financial aid program for West Virginia residents. Students who achieve certain academic requirements are eligible to receive funds to help pay for college. Eligible high school graduates will receive annual awards up to \$4,750 to cover the cost of tuition and mandatory fees at public or independent institutions in West Virginia. To date, a total of 59,933 West Virginia students have benefited from the PROMISE Scholarship.

These are just three of the many programs, made possible by the West Virginia Lottery, that make a difference.

Wisconsin Lottery

Lottery proceeds fund property tax credits to Wisconsin homeowners, an impact that is real and tangible to every homeowner. In 2019, the Wisconsin Lottery provided \$271.2 million in tax relief to homeowners with the average property tax credit being \$184 per home. (The amount of the credit does vary throughout the state, depending on the tax rate of the school district.) The 2019 Lottery

credit is 15% higher than the previous year, due primarily to the Wisconsin Lottery having a banner year, because the credit returned to homeowners is based on Lottery profits. About 1,474,000 homeowners received the Lottery credit on their 2019 property tax bills.

Wyoming Lottery

The Wyoming Lottery Corp. supplements the state's revenue with quarterly state transfer dollars, creating an additional revenue stream for Wyoming. Every financial quarter, WyoLotto transfers revenue to the state treasurer, who disperses it to cities, towns and counties. Each municipality then decides how to best use those funds for local projects that benefit their residents. In Wyoming's way, the citizens believe fiscal decisions should be made locally, which is why each city, town, and county gets to make that decision for themselves. At this writing, WyoLotto has given back \$16,892,818 to the state of Wyoming since 2016.

Wyoming's Campbell County and the city of Gillette have received more than \$1 million from WyoLotto's state transfers and are putting it to

Staff at the Personal Frontiers treatment center celebrate additions to their facilities at a ribbon cutting, all made possible from additional Wyoming Lottery funds.

good use. Campbell County spent some of the money to help non-profit agencies with one-time expenses, including Personal Frontiers and Gillette College. Personal Frontiers is a non-profit substance abuse treatment center, empowering individuals and families in sustaining lifelong recovery while striving to meet their highest potential.

The city of Gillette used its money to help agencies that are not funded through optional 1% sales tax revenue, such as Energy Capital Economic Development, Gillette Main Street, and the Campbell County Predator Board.

These are just two examples of how WyoLotto gives back. We take pride in Wyoming's cities, towns, counties and residents. ■

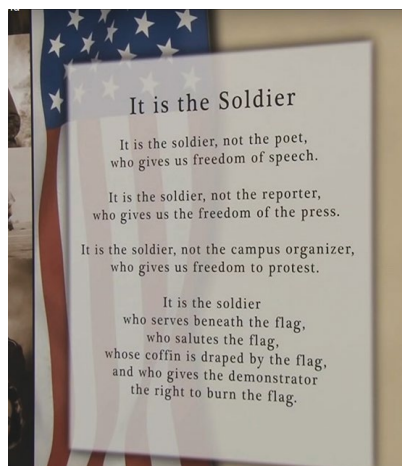
Why It Matters: Iowa Lottery Tells the Story of Its Proceeds Through a Different Lens

Last fall, the Iowa Lottery told the story of its historic impact to state programs by looking through the eyes of those involved in one of its most meaningful beneficiary causes. The project highlighting the Lottery's support for Iowa veterans and their families has garnered a huge response online, with hundreds of thousands of views and positive shares and interactions.

As calendar year 2019 progressed, Iowa Lottery executives were tracking the Lottery's cumulative proceeds total to state causes, and knew that the \$2 billion threshold was approaching. The Lottery estimated it would reach that historic milestone in late October or early November. In addition to highlighting that moment through traditional means including a news release, social media announcements and beneficiary advertising, the Lottery's External Relations team undertook a project to highlight the Lottery through a different lens.

The result is a powerful long-form video along with two shorter versions that address the impact of war on our veterans, and why it's so important that help be available to them. In the videos, two Iowa veterans share their own stories and talk about the unique role of the Iowa Veterans Trust Fund, which receives a portion of Iowa Lottery proceeds each year.

Mary Neubauer, the Lottery's Vice President of External Relations, said her team's goal with the video was to help people learn about the Lottery in a different way.



"The good accomplished by Lottery proceeds in Iowa is significant and makes a real difference in people's lives. That was our focus," she said. "We believe that our video has helped people see the Lottery as an organization with heart."

Neubauer and her team shot, edited and produced the video entirely on their own, filming it at a military museum in the Des Moines area that provided a backdrop of military uniforms and equipment from many different eras.

The Lottery posted the video online on Nov. 6, just days before the Veterans Day holiday. The long-form video has since been viewed more than 93,000 times on YouTube alone, and 30-second versions of it have been viewed nearly 600,000 times on other platforms that required a shorter format, including Connected TV, Google, Spotify, Facebook and Instagram TV.

Through the video, viewers learn that the Iowa Veterans Trust Fund was created to provide state assistance to qualified veterans and their families that is in addition to any federal benefits they may receive. Some of the categories for assistance through the IVTF include dental, vision or hearing assistance; individual or family counseling; emergency housing repairs; job training; and college tuition assistance. Since 2008, when a portion of its annual proceeds were first dedicated to the IVTF, the Iowa Lottery has raised nearly \$30 million for the trust fund.

Lottery tickets in Iowa made their debut on August 22, 1985. In the 34 years since, lottery players have won nearly \$4.5 billion in prizes while more than \$2 billion in proceeds has been raised for state programs. Lottery sales in Iowa through the years total \$7.9 billion. Lottery proceeds in Iowa have helped the state in a variety of ways over time, but today, they have four purposes: support for Iowa's veterans and their families through the Iowa Veterans Trust Fund; support through the Public Safety Survivor Benefits Fund for the family members of Iowa peace officers and fire fighters who die in the line of duty; resources for a variety of significant projects through the state General Fund; and backing for the Vision Iowa program, which was implemented to create Iowa tourism destinations and community attractions as well as build and repair schools. ■

Welcome to the **NASPL Matrix**



NASPL Resource Index



Awards



Responsible Gambling



Insights



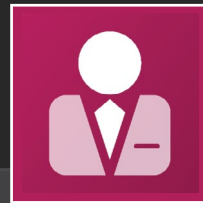
Lottery 101



Webinars



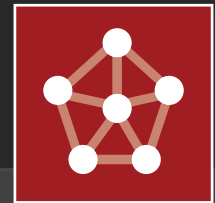
Presentations



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API

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The Extra Touch

The support lotteries bring to their beneficiaries and communities rarely end at the transfer of proceeds to good causes. Most lotteries take it upon themselves to find other programs in which they can participate, or have designed their own. In these cases, however, a lot depends on a lottery's finances, as funding for these efforts typically comes from advertising and marketing budgets. If they can swing it, though, they add the extra touch. Even participating as a sponsor in a community fair or festival means the communities benefit.

These initiatives can help a lottery that may not have beneficiaries that are easy to promote or identify, such as a "general fund" or an "education fund" which might allocate funds on an as-needed basis just like a general fund. In some cases, these programs are closely tied to a lottery's beneficiaries; in others, they are examples of broader participation in events for public benefit.

A few examples of these programs follow. While we again thank the lotteries who contributed, these are by no means the only lotteries that support these kinds of initiatives.

Arizona Lottery

We have 13 state-mandated beneficiaries that administer 18 different programs that are either entirely or partially funded by Arizona Lottery dollars. But we also have our Gives



Back program, which comes from our marketing budget. We work very hard to ensure that all additional Gives Back efforts are tied to our beneficiaries. The following examples are voluntary Arizona Lottery funding that supports what we are required to transfer by statute.

Arizona Lottery Speech, Language & Feeding Scholarships: In 2018 we began working with United Cerebral Palsy (UCP) of Central Arizona to help fund their efforts to get underinsured families the specialized therapies their children with CP need to overcome difficulties speaking and eating. These issues can signal other developmental delays that would otherwise go untreated, impacting the learning of these





children for years. This partnership dovetails with the Arizona Lottery’s ongoing support of Healthy Families Arizona, a program designed to help expectant and new parents give their children a healthy start on life, because providing intensive early intervention is proven to maximize outcomes for young children.

Arizona Lottery Medical Scholarship: In 2019, we learned of a severe doctor shortage in the state, especially among specialty practices supporting underserved communities. Working with the University of Arizona (UA) College of Medicine, Phoenix, the Lottery donated \$25,000 to fully fund one year of medical school for a student who was committed to becoming a pediatrician practicing in an underserved community. In 2012, Arizona Lottery funds were used by the Arizona Board of Regents to build out this facility, which repurposed an historic high school campus into a state of the art medical education facility, housing both the UA Medical school as well as medical education programs for Northern Arizona University. The ensuing graduating classes of doctors

and other medical professionals are saving countless lives and keeping Arizonans healthy for generations to come. All told, the Arizona Lottery has transferred more than \$225 million to build and maintain education infrastructure at Arizona public universities since 2010.

Canyon Field School Scholarships: Our decades-long support for the Arizona Game and Fish Department’s Heritage fund is augmented by the Lottery’s partnership with the Grand Canyon Conservancy. This funding allows hundreds of students from underserved communities to attend the Canyon Field School free of charge to experience walking the rim and hiking the backcountry; visiting historic buildings and archaeological sites; and learning about the geology of one of the eight wonders of the natural world. This STEAM-based (science, technology, engineering, art and math) learning experience was made possible for these students through a \$50,000 grant in FY20. Since 1993, The Arizona Lottery has generated nearly \$414 million for the Heritage Fund, educating children about Arizona’s unique and iconic

wildlife and landscapes, as well as purchasing more than 18,000 acres of habitat to protect and preserve them for future generations.

The Human Services Campus Homeless I.D. Project and St. Joseph the Worker: We support programs, administered by the Department of Economic Security, that operate homeless emergency and transitional shelters, rapid-rehousing and rental assistance in a comprehensive effort to reduce homelessness in Arizona and to mitigate its effects on our communities. Working to enhance basic programs, the Arizona Lottery has teamed up with the Human Services Campus, donating \$50,000 to fund and expand their Homeless I.D. Project. This program provides critical replacement identification and documentation services to empower the homeless to rebuild their lives and end their homelessness. These services include acquiring Arizona state ID and driver’s licenses, birth certificates, social security cards and replacement legal immigration documents. In fact, 15,000 IDs have been provided by the Homeless I.D. Project to their clients over the

past two years. This Lottery funding is also helping to connect these newly-documented homeless with jobs, through the Human Services Campus's St. Joseph the Worker program, helping them with resume preparation or job applications, job searches, hygiene and transportation to and from interviews, along with the transportation and other expenses involved with keeping steady employment. In fact, over 3,000 people found jobs last year with the help of St. Joseph the Worker.

Atlantic Lottery

Every year, 100% of Atlantic Lottery's profits are returned to its shareholders, the four Atlantic Canadian provinces. In 2018-19, that totaled C\$422.2 million in added general revenue to support and benefit local communities.

In addition, Atlantic Lottery directly supports festivals and events throughout the year that celebrate the unique spirit and cultures that exist within the region. In 2019-20, Atlantic Lottery's Community Festival and Events Program provided support to 142 events across the region worth C\$517,600, plus in-kind marketing and promotional support of an equal value. These events, held in large cities and small seaside villages across Atlantic Canada, attracted a total attendance of more than 1.2 million people this year.

"During the past five years, Atlantic Lottery's sponsorship program has invested more than C\$1.7 million to support more than 650 events into community-focused festivals and events," said Karen Aucoin, Atlantic Lottery's Brand Manager, Corporate and Sponsorship.

"It's special for us to be a part of these events, which bring people together for a great experience and help to build pride in our region. Atlantic



Lottery's support has a huge impact for the organizers, helping to make local events sustainable and bringing communities to life."

British Columbia Lottery Corp.

BCLC is committed to supporting communities in the province, and has a proud tradition of supporting community celebrations dating back to Expo '86, the 2010 Olympic and Paralympic Winter Games, and the 2015 Canada Winter Games. Most recently, BCLC was an official partner of the 2019 IIHF World Junior Championship hosted in Vancouver and Victoria from Dec. 26, 2018 - Jan. 5, 2019.

In addition to sponsoring national and provincial and community events, BCLC is focused on giving back to its home community of Kamloops. For more than 26 years, BCLC has been a proud sponsor of Music in the Park, Canada's longest-running free music festival. Providing residents and tourists alike with exceptional performances from talented local and international artists, Music in the Park has become a long-standing tradition that brings the Kamloops community together in support of the Kamloops Food Bank, local businesses and their community.

Jeff Squires, Chief Executive Officer of Whitecap Entertainment. The company produces the Cavendish Beach Music Festival in Prince Edward Island, an event Atlantic Lottery has partnered with for the past 11 years.

For 26 years, BCLC has been a sponsor of the longest-running free music festival in Canada.



Each year, local governments that host a gaming facility receive a 10% share of the net income those facilities generate – and in 2018/19 that totaled C\$98.4 million to fund community projects and initiatives. For example, the City of Burnaby, which hosts Grand Villa Casino, uses a portion of its provincial gaming revenue to support a number of festivals and events throughout the community. One event supported that received funding is the Giro Di Burnaby, the fast and exciting professional criterium cycling race which is part of the larger BC Superweek Pro Cycling Series. This event brings the streets of Burnaby Heights to life, and features pro men’s and women’s teams from around the world.

Colorado Lottery

It’s easy for the Colorado Lottery to showcase specific projects funded by its beneficiaries, primarily parks, trails, open spaces and recreation projects across the state. Some of



those projects are included in the previous section, but the Lottery doesn’t stop there.

For 29 years, we have recognized excellence in the use of Lottery funds for community and conservation projects with the Starburst Awards. More than 320 projects statewide that have been funded by Lottery proceeds – ranging from ranches, trails, water parks, land acquisition, educational programs, fairgrounds, and baseball fields – have won these awards, which are based on creativity of the project, economic and social impact on the community, and

whether the project achieved its goal.

Using a part of our marketing budget to make the plaques, posters and ticket giveaways at the awards presentations, the Starburst Awards are a great way for the Lottery to further reach Colorado’s communities and get the proceeds message out to the public.

Hoosier Lottery

As also noted in the Hoosier Lottery profile in this issue, most Hoosier Lottery proceeds go towards keeping vehicle excise taxes low for Indiana residents. In addition, pension funds receive Lottery revenue every year – \$30 million annually to the Teacher’s Retirement Fund and another \$30 million to support the pension funds of police and firefighters throughout the state.

In the past couple of years, Executive Director Sarah Taylor and her team have been visiting with people who receive these funds – retired teachers, police and firefighters.



When attending these meetings, the Lottery provides Mega Thanks coupons for free Mega Millions tickets and a gift basket full of goodies that might include Lottery hats, mugs and shirts, plus free tickets. It's a way to personally thank them for their service, and these extra efforts help reinforce the good the Hoosier Lottery does in the state.

Idaho Lottery

Every day, somewhere, some way, when people participate in the Idaho Lottery, someone is benefiting. Whether it is the player themselves with a winning experience, the corner store retailer who's earned a commission for selling and cashing winning tickets, or Idaho's public schools and the State's permanent buildings who benefit from Lottery proceeds, there's always a winner of the Idaho Lottery.

Most people know that each summer the Idaho Lottery returns their annual dividend to the People of Idaho. In July 2019 we returned a record \$60 million. To date since beginning in 1989, we've returned \$906 million. That's just \$94 million shy of a billion dollars. Beyond the dividend, though, the Idaho Lottery is finding ways to get dollars to where it's needed most, in classrooms and elementary libraries around the state.

For nearly two decades, we have offered Scratch for Schools, a program where principals, teachers and staff compete for cash for their classrooms. This program has returned over \$1.2 million for individual classroom needs – things like playground equipment, audio book learning tools and technology needs. Last year's program alone returned nearly \$90,000.

New last year, we introduced Classroom Wish List. This program allows schools to propose small projects, from which the Lottery chooses



one each month, and VIP Club members donate their points to help fund the project. This program has awarded over \$10,000 for projects like a classroom kitchen, a 3D printer and a water filtration system.

The program everyone was reading about last fall is called Bucks for Books. The Idaho Lottery has partnered with the Idaho Commission for Libraries to raise funds through voluntary point donations by Lottery VIP Club members. We also partnered with Barnes & Noble Booksellers on this program. To fund the program, during the month of September we asked our VIP Club members to donate their points instead of using them to enter sweepstakes to win additional prizes or to buy purchasable items from the Lottery's store. Generous players let us raise over \$30,000 to support the program, and individual awards ranging from \$1,000 to \$3,000 were distributed in November to a total of 12 elementary schools throughout the state.

"The Idaho Lottery was created specifically to benefit public education in the State of Idaho," said Jeff Anderson, Idaho Lottery Director.

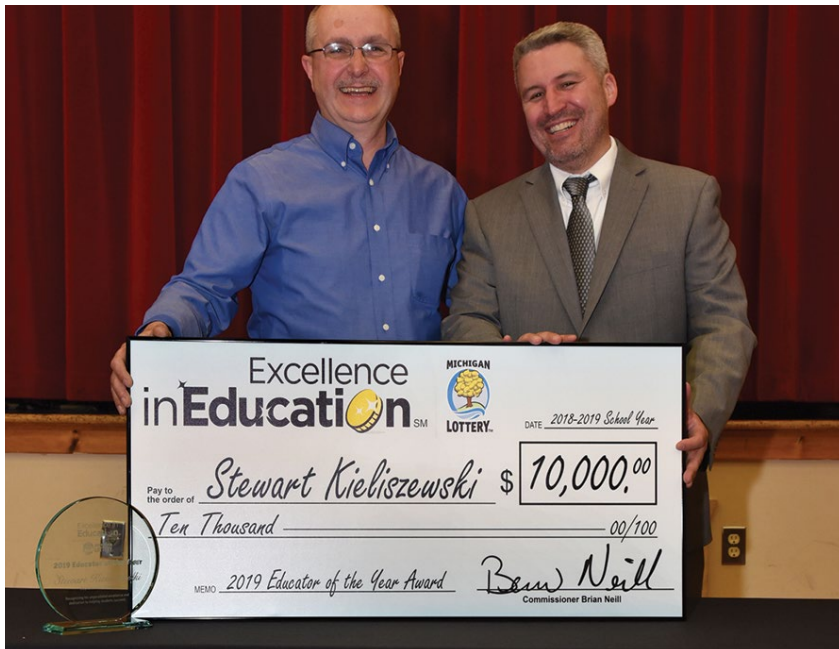
"Supporting elementary school libraries and youth literacy through our Bucks for Books program is yet another way we further our mission of benefiting public schools."

Michigan Lottery

The Michigan Lottery was founded in 1972 to help provide funds for the state's public schools. Over the past 47 years, it has provided more than \$23.4 billion for education, including a record \$1.07 billion in FY 2019. In 2014, the Lottery decided that it wanted to raise its visibility with the public and with educators as a key supporter of education in Michigan. The result was the Excellence in Education program, which honors some of the state's outstanding educators during the school year and is capped each school year with one of the weekly winners being named as the Lottery's Educator of the Year.

We receive 500 to 600 nominations each year. Anyone may nominate an educator and nominees are not limited to teachers alone. In past years, we have recognized a librarian, a speech therapist, vice principals,

Excellence in Education SM



and principals as well as teachers.

In the first five years of the Excellence in Education program, the Lottery has honored 170 educators from across the state. The 34 winners of the weekly award each receive a plaque, a \$1,500 cash prize, and a \$500 grant to their classroom, school or school district. The weekly winner selected as the Educator of the Year receives a \$10,000 cash prize.

The program year begins in late July when the Lottery announces that the nomination period for Excellence in Education awards has opened for the upcoming school year. Sometime in May a school-sponsored event is used to surprise the weekly winner chosen as Educator of the Year. This announcement marks the end of the program year.

Michigan Lottery Commissioner Brian Neill with 2019 Educator of the Year Stewart Kieliszewski.

To boost the program's impact, we have teamed up with four TV stations in the state's biggest media markets (Detroit, Grand Rapids, Lansing and Saginaw). Each station airs a 60-second video segment about each weekly winner. The Lottery pays for the segments to be run as ads; however, the segments are scheduled for the start or end of evening newscasts and are introduced as if they are news segments. The stations typically air the segments the next day as part

of their morning newscasts. This approach guarantees public visibility of the program and the Lottery.

We further boost the media impact of the program by posting full videos of the TV interviews on our YouTube channel, issuing a news release to all the media outlets in Michigan about each winner, and posting the news release on our website. The news release and video segment also are used on the Lottery's social media sites.

Although the Lottery has not done any specific market research to measure the impact of the program, it has been well-received by the educational community and the overall awareness of the program appears to have grown each year. The Michigan Lottery sees Excellence in Education as a success, and the program is an effective use of marketing dollars to enhance and improve the Lottery's image with the public and underscore its support for public education.

New Jersey Lottery

Sometimes it's not just lotteries who go the extra mile. New Jersey Lottery revenue directly benefits retailers who earn significant amounts of money in commissions and bonuses, and they often return bonus money into their community. Once such recent example is the Stop and Shop in Clifton, N.J.

The store earned a \$2,000 bonus for selling a winning Jersey Cash 5 ticket last fall, and donated the entire amount to support the Passaic County Sheriff's Department's turkey drive. The drive helps families in need have a happy Thanksgiving. "Congratulations to the Clifton Stop & Shop for selling this winning ticket and becoming a lucky Lottery store," Lottery Deputy Executive Director Jerry Guarino told the media during the check presentation in November.

“We are excited to have them as a valued partner who extends the benefits of a winning ticket to the community at large, showing how even those who don’t play the Lottery still win.”

Ohio Lottery

At the Ohio Lottery, we believe that great students and teachers are worth celebrating. Our mission is to support education by offering entertaining gaming experiences. Profits from the sale of Ohio Lottery games – more than \$1.15 billion in fiscal year 2019 – are sent monthly to the state’s Lottery Profits Education Fund. These funds are dispersed by the Ohio Department of Education under the direction of the Ohio General Assembly. Since its founding in 1974, the Ohio Lottery has generated more than \$25.6 billion for the State of Ohio.

In 2007, the Ohio Lottery developed the Partners In Education Program to further its vision of strong communities and schools. Partners in Education, which is funded within the Ohio Lottery’s marketing budget, supports the agency’s corporate social responsibility efforts, providing another touchpoint to help customers and the general public understand our mission.

We encourage those with a direct connection to our schools to nominate teachers as “Teacher of the Month” and students as “Academic All-Stars” during the school year, September through May. Innovative, inspiring teachers, who help students succeed, are among our Teacher of the Month nominees. Students recognized as Academic All-Stars are characterized by their academic performance, leadership and community involvement.

“Recognizing students and teachers who are working hard both inside and outside the classroom brings



us great joy,” says Molly Fanta, Coordinator for the Partners in Education program. “We take pride in acknowledging dedicated teachers and students, and look forward to growing the program.”

All nominees submitted from participating regions are entered into a random drawing. Up to nine teachers and nine students win awards each month. Schools with eligible entries are entered into a drawing at the end of the school year for the School of the Year award. The school receiving the School of the Year Award may receive a gift card and trophy, along with a variety of autographed merchandise from major and minor league sports teams that can be used for fundraising purposes only.

Ontario Lottery and Gaming

OLG has a long history of supporting local events that bring people together and strengthen communities. Our Community Sponsorship Program has been bringing worthwhile local events like fairs and festivals to life for decades for all Ontarians. In Sault Ste. Marie, the home of one of its head office locations, OLG sponsors community events year-round. Rotaryfest in the summer features both a parade and

The Ohio Lottery’s Partners in Education program honors both teachers and students.



free live entertainment while the Bon Soo Winter Carnival, of which OLG is the presenting sponsor, showcases a fireworks display, bum slides and the famous Polar Bear swim. In Toronto, its second corporate office location, OLG sponsors numerous events ranging from the TD Toronto Jazz Festival with free live entertainment to Pride Toronto, where 120 employees participated in the Pride Parade. These are just a few examples of the 150 OLG-sponsored engagements of 2018-2019, amounting to C\$3.2 million in corporate and lottery-sponsored festivals and events.

South Carolina Education Lottery

Lotteries and even retailers are generous with their budgets to often go above and beyond. But last fall, more than 1.2 million South Carolina taxpayers were on the receiving end of an unusual gift from the state itself. \$50 tax rebate checks were mailed to those taxpayers, with the revenue coming from the \$1.5 billion



Mega Millions jackpot won by a South Carolina player in October 2018.

A year ago, Gov. Henry McMaster proposed handing the \$61 million in taxes from that lottery windfall back to taxpayers, and legislators agreed to that proposal last April, adding an extra \$6 million to ensure that every rebate was \$50.

Virginia Lottery

The Virginia Lottery takes every opportunity to remind Virginians, players and non-players alike, that all lottery profits go to K-12 education. It's not always an easy message to convey. The path that leads from buying a lottery ticket to a local school district is complicated, winding through Virginia's General Assembly and Department of Education. Some people see the chronic underfunding of schools and conclude that the

Lottery isn't doing enough, even though Lottery funds make up just 10% of total education funding in Virginia. And of course, many people simply don't know what happens to Lottery profits.

That's why the Virginia Lottery's Public Affairs and Community Relations team has come up with a variety of programs and methods to help educate Virginians about why they have a lottery. Here are some examples.

One program designed to reinforce the Lottery's commitment to education is "Thank a Teacher." The initiative, timed to coincide with National Teacher Appreciation Week, involves special thank-you cards sent by students and adults to current Virginia K-12 teachers. Each card has a special code that can be entered by the teacher in a drawing for a Virginia-themed vacation. The cards have three designs, created by an elementary school student, a middle school student and a high schooler. Each design is selected in a competition earlier in the year. Thank a Teacher has been a big success in the three years since it began, generating more than 100,000 thank-yous. Not only do the three winning students get their design on thousands of thank-you cards statewide, but they

each receive a \$150 gift card and their school's art department receives \$2,000 from the Lottery.

Another effective public education tool is the use of infographics. One infographic shows specific education programs funded, at least in part, by lottery dollars. Those programs include Special Education, At-Risk Students, Career and Technical Education, Early Reading Intervention, School Breakfast, Textbooks and English as a Second Language. Another infographic illustrates the journey of dollars spent on lottery tickets from point of sale to local public schools. ■

Designs by these Virginia students won the "Thank a Teacher Art Contest," to be featured on thousands of thank-you cards.



Where the Money Goes

Arizona

- General Fund
- University Bond Fund
- Tribal College Dual Enrollment Fund
- Healthy Families Arizona
- Healthy AZ
- Court Appointed Special Advocates
- Abstinence Education Program
- Heath Start Program
- Supplemental Nutrition Program for Women, Infants, and Children
- Homeless/Transitional Services Program
- Arizona Biomedical Research Centre
- Internet Crimes Against Children Enforcement Fund
- Division of Problem Gambling
- Victims' Rights Program
- Local Transportation Assistance Fund (Mass Transit)
- Arizona Competes Fund Heritage Fund (Game and Fish)

Arkansas

- College scholarships and grants

Atlantic Canada

- Provincial governments of New Brunswick, Newfoundland & Labrador, Nova Scotia and Prince Edward Island

British Columbia

- Provincial government

California

- Public schools (includes K- 12 Programs, Community Colleges, California State University System, University of California)

Colorado

- Great Outdoors Colorado
- Conservation Trust Fund
- Colorado Parks and Wildlife
- Building Excellent Schools Today Program

Connecticut

- General Fund

Delaware

- General Fund

District of Columbia

- General Fund

Florida

- Educational Enhancement Trust Fund (includes education funding and scholarships)

Georgia

- Lottery for Education Account (includes HOPE Scholarships and Pre-K Programs)

Idaho

- Public Schools
- Permanent Building Fund

Illinois

- Common School Fund
- Capital Projects Fund
- Specialty Cause Tickets (includes support for veterans, Special Olympics, police memorials, homelessness prevention, and the fight against breast cancer, HIV/AIDS, and multiple sclerosis)

Indiana

- Lottery Surplus Fund
- Police and Firefighters' Pensions Fund
- Teachers' Retirement Fund

Iowa

- General Fund
- Iowa Veterans Trust Fund
- Public Safety Survivor Benefits Fund
- Vision Iowa program

Kansas

- General Fund
- Economic Development Initiatives Fund
- Correctional Institutions Building Fund
- Juvenile Detention Facilities Fund
- Veterans Benefit Funds
- Problem Gambling Grant Fund

Kentucky

- College scholarships and grants

Louisiana

- General Fund (earmarked for education)

Maine

- General Fund
- Outdoor Heritage Fund

Maryland

- General Fund
- Maryland Stadium Authority
- Baltimore City Schools
- Veterans Trust Fund
- Education Trust Fund
- Local Aid and Impact Grants
- Small, Minority- and/or Women-Owned Businesses
- Problem Gambling Fund

Massachusetts

- Cities and Towns

Michigan

- School Aid Fund (K-12)

Minnesota

- General Fund
- Environment and Natural Resources Trust Fund
- Game and Fish Fund
- Natural Resources Fund
- Problem Gambling Prevention and Treatment
- Other State Programs

Mississippi

- State Highway Fund
- Education Enhancement Fund

Missouri

- General Fund (earmarked for education)

Montana

- General Fund
- STEM Scholarship Program

Nebraska

- Nebraska Education Improvement Fund
- Nebraska Environmental Trust Fund
- Nebraska State Fair
- Compulsive Gamblers Assistance Fund

New Hampshire

- Education

New Jersey

- Teacher's Pension and Annuity Fund
- Public Employees' Retirement System
- Police and Firemen's Retirement Systems

New Mexico

- Education (includes Legislative Lottery Scholarships)

New York

- K-12 Public Education

North Carolina

- Education (includes Pre-K program, college scholarships and grants, non-instructional support, school construction, and Local Education Agency transportation)

North Dakota

- General Fund
- Compulsive Gambling Prevention and Treatment Fund
- Multi-Jurisdictional Drug Task Force Grant Fund

Ohio

- Education (includes K-12, vocational, and special education programs)

Oklahoma

- Education Trust Fund

Ontario

- Provincial government

Oregon

- State Parks
- Watershed Enhancement
- Job Creation
- Public Schools
- Outdoor School
- Veteran Services

Pennsylvania

- Benefiting Older Pennsylvanians (includes local services, senior centers, meals, low cost prescription assistance, free and reduced-fare transportation, care services, property tax and rent rebates)

Puerto Rico

- Lease and Home Improvement Grant Program for Elderly People with Low Income
- Municipal Equity Fund
- Special Fund for the Development of Minor Categories and Special Olympics
- Compulsive Player Assistance Program
- Fund for Remediable Catastrophic Disease Services
- University of Puerto Rico Scholarship Fund
- Olympic Committee
- Olympic Athletes Housing Complex
- Chess Teaching Program
- General Fund

Québec

- Provincial government

Rhode Island

- General Fund

South Carolina

- Higher Education Programs
- K-12 Program Appropriations
- Other Community Education Appropriations

South Dakota

- General Fund
- Capital Construction Fund
- Problem Gambling Services

Tennessee

- Tennessee HOPE Scholarship
- Tennessee HOPE Access Grant
- General Assembly Merit Scholarship
- Aspire Award
- Tennessee Hope Foster Child Tuition Grant
- Duel Enrollment Grant
- Wilder-Naifeh Technical Skills Grant
- Tennessee Promise Scholarship and Mentoring Program
- Tennessee Reconnect
- Step Up
- Helping Heroes Grant
- Tennessee Math and Science Teacher Loan Forgiveness Program
- After Schools Program (LEAPS)
- Energy Efficient Schools Initiative
- Middle College Scholarship

Texas

- Education
- Fund for Veterans' Assistance
- Other state programs

Vermont

- Education

Virgin Islands

- Pharmaceutical Assistance Program
- Public Schools
- GERS Retirees Bonus Program
- Local Non-Profit Organizations
- Horse Race Commission
- Office of Veterans Affairs

Virginia

- K-12 Public Education

Washington

- Washington Opportunity Pathways (includes college scholarships and grants and early childhood programs)
- Stadium and Exhibition Center
- Economic Development
- General Fund
- Problem Gambling

Western Canada

- Provincial governments of Alberta, Manitoba and Saskatchewan, and territorial governments of Northwest Territories and Yukon

West Virginia

- Schools and Education
- Senior Citizens
- Tourism and State Parks

Wisconsin

- Property Tax Credits

Wyoming

- Cities, Towns and Counties

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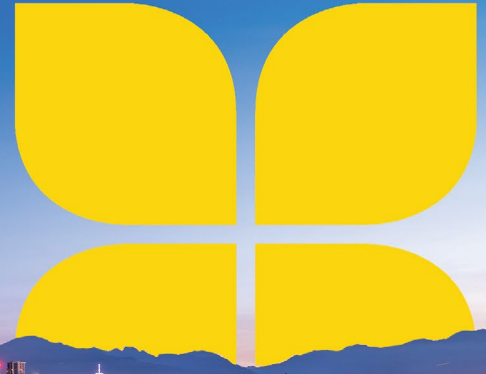
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2020 CALENDAR

March 2020
NCPG PROBLEM GAMBLING
AWARENESS MONTH

March 3-5, 2020
PGRI SMART-TECH MIAMI AND
WOMEN IN LOTTERY LEADERSHIP
SEMINAR
Eden Roc Hotel
Miami, Florida

March 10-12, 2020
NEW HORIZONS IN RESPONSIBLE
GAMBLING CONFERENCE
JW Marriott Parq Vancouver
Vancouver, British Columbia
Hosted by BCLC

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

May 18-21, 2020
LA FLEUR'S 2020 DC CONFERENCE
George Washington University
Washington, DC

June 15-18, 2020
NASPL 2020 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

July 24-25, 2020
34TH NATIONAL CONFERENCE
ON GAMBLING ADDICTION &
RESPONSIBLE GAMING
Hyatt Regency Washington
on Capitol Hill
Washington, DC
Hosted by the National Council
on Problem Gambling

September 22-24, 2020
PGRI LOTTERY EXPO NYC
Venue TBA
New York City, NY

October 26-30, 2020
WORLD LOTTERY SUMMIT
Vancouver Convention Center
Vancouver, British Columbia
Hosted by BCLC

November 16-19, 2020
LA FLEUR'S 2020 AUSTIN CONFERENCE
AT&T Hotel & Conference Center
Austin, TX

December 2020
NCPG/MCGILL UNIVERSITY RG
LOTTERY HOLIDAY CAMPAIGN

2021 CALENDAR

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

July 26-30, 2021
NASPL PROFESSIONAL
DEVELOPMENT SEMINAR
Hilton Omaha
Omaha, NE
Hosted by the Nebraska Lottery

September 28-October 1, 2021
NASPL 2021
Kansas City, MO
Hosted by the Missouri Lottery

2022 CALENDAR

April 11-14, 2022
NASPL LOTTERY LEADERSHIP
Hyatt Regency Cleveland Arcade
Cleveland, OH
Hosted by the Ohio Lottery

July 25-29, 2022
NASPL PROFESSIONAL
DEVELOPMENT SEMINAR
Indianapolis, IN
Hosted by the Hoosier Lottery

September 20-23, 2022
NASPL 2022
Milwaukee, WI
Hosted by the Wisconsin Lottery

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