



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

# INSIGHTS

NOVEMBER/DECEMBER 2020

## Holiday Instant Catalog





It may have seemed like it was going to last forever, but we are quickly approaching the end of this historic year known as 2020. And you don't need me to tell you, it has been quite a year.

In the lottery industry, we faced complications and uncertainties unlike any we have seen before. And yet, through those challenges, we've also seen the incredible dedication and inventiveness of our staff, and of our vendor and retailer partners. More importantly, we've adjusted our ways of doing business – in both our internal and consumer-facing processes – to

help maintain public health while continuing to generate the much-needed revenue for important causes in our jurisdictions.

To accomplish this, we've introduced new safety protocols across our industry, often shifting to a work-from-home setup for many employees. We've kept ourselves connected and informed, by moving our educational and networking events online.

We've continued to move our industry forward, building on existing initiatives like cashless and in-lane sales. We've launched and grown fledgling sports betting programs. We've kept our players interested, by creating exciting new games, with attractive prize structures. And we've introduced safe, practical ways for players to cash in on their winnings.

We've also continued to make responsible gambling initiatives a priority. Right now, for example, for the third year in a row, 100% of U.S. and Canadian lotteries are participating in the annual Responsible Gambling Holiday Lottery Campaign, conducted by the National Council on Problem Gambling and McGill University's International Centre for Youth Gambling Problems and High-Risk Behaviors.

Our industry has a lot to be proud of this year; those accomplishments listed above are just a few of the many. And while some of our organizations experienced some rough patches, I believe we're poised to come out the other side more successful than ever.

On a personal note, I hope you and yours are staying safe and healthy. I wish you the best for the holidays and hope you find time for a well-deserved break. Let's get ready to take on 2021 and whatever may come our way.

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Director, Montana Lottery  
NASPL President



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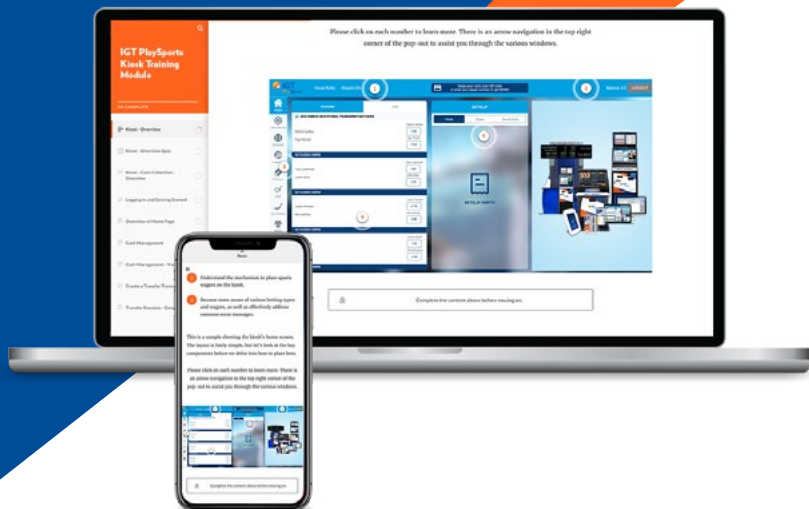
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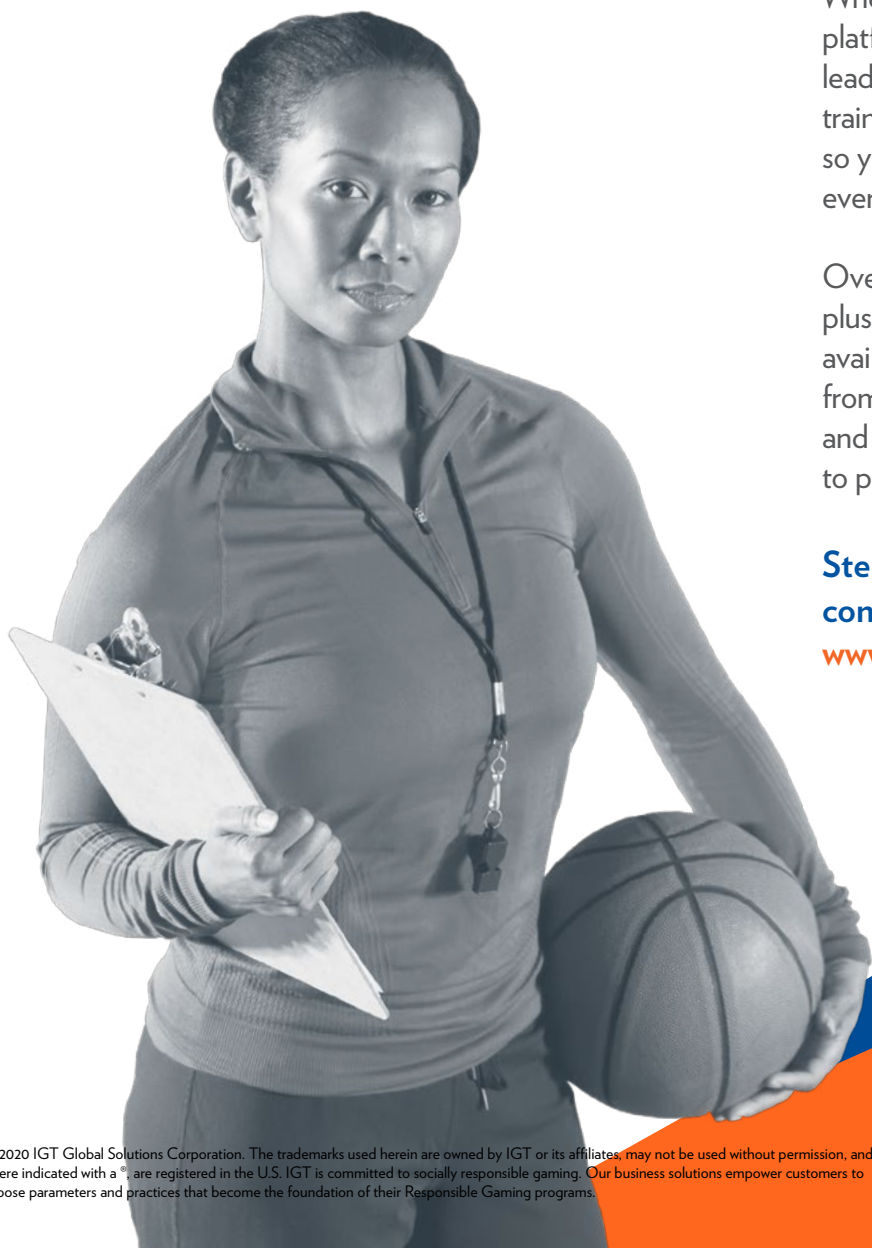
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# Big Things Happen When Small Things Work Together

## Strategic Product Enhancements

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Reimagine Next

# Focusing on Sports Integrity

By Mackenzie Whitacre



The Tennessee Education Lottery Corp. (TEL) joined the Global Lottery Monitoring System (GLMS) this fall, becoming both the organization's first U.S. member and its first regulator-only member.

"We are honored to welcome the Tennessee Education Lottery Corp. as our first U.S. member, paving the way for more U.S. lotteries joining GLMS for their sport integrity services," said GLMS President Ludovico Calvi. "TEL brings a unique U.S. footprint into the GLMS community of members, and its membership shows a clear commitment to promote transparent and socially responsible betting operations, in line with the highest standards of sport betting integrity."

The Tennessee Lottery is no stranger to being unique, especially when it comes to sports betting. When the Volunteer State officially started taking sports bets on November 1, at 12:01a.m. CT, it became the first sports betting model in the U.S. limited by legislation to online and mobile sports wagering only, with no retail activity authorized. The framework allows wagering on sporting events via the internet, mobile device or other telecommunications platforms. Customers must be 21 or older to play and must be physically located in Tennessee at the time the wager is placed.

Unlike other lotteries that have implemented sports betting, TEL serves only as the regulator, not as an operator. Therefore, the Lottery and its board are tasked with approving, licensing and regulating the operators, vendors and suppliers that run the state's program.

"This Sunday will represent the culmination of an enormous amount of work and due diligence to bring

online-only sports wagering to Tennessee, the only state in the nation to do so," said TEL President and CEO Rebecca Paul Hargrove, right before launch. "As the regulator, today also represents the beginning of a new stage as we establish and support a responsible and competitive program here. We will continue to work with all licensees, registrants and applicants to protect the consumer, promote fairness in sports and regulate this new Tennessee industry that provides critical funds to the state and local governments."

This is where the partnership with GLMS comes in.

Established on a global scale in 2015, GLMS acts as an integrity body for the lottery industry, aimed primarily at detecting and analyzing suspicious betting activities that could impact the integrity of sport competitions. The organization also facilitates the sharing of sports betting information, as part of the collective efforts of its members in ensuring worldwide sports integrity. In this capacity, GLMS engages with its members in the areas of education, prevention and legal services, and involvement in topical projects and relevant policy-making initiatives.

Following the 2018 repeal of Professional and Amateur Sports Protection Act, which prohibited U.S. sports betting outside of Nevada except where grandfathered in, more and more jurisdictions are getting in on the action. There are currently 19 states, plus the District of Columbia, with active sports betting programs; eight of these are operated and/or regulated by lotteries. Six additional states and the territory of Puerto Rico have recently passed bills to get the ball rolling. And to the North, the

Canadian government is expected to remove the ban on single-game wagering, expanding the nation's current sports betting offerings.

With this rapid development of the North American market – with no end in sight – GLMS launched a new operational hub at the Loto-Québec premises in Montreal, Canada, earlier this year. (Loto-Québec and the Ontario Lottery and Gaming Corp. are both GLMS members as well.) This new center of operations, which will primarily target North American jurisdictions and sports, positions GLMS to strengthen its commitment to analyzing, detecting, preventing and reporting irregular and suspicious betting patterns across the continent.

"GLMS is a stronger organization today, with a distinctive, 'glocal' approach – leveraging on truly global operations and local intelligence and expertise," said Calvi.

Adding the Tennessee Lottery to its membership will benefit GLMS's partner jurisdictions around the world and add tremendous value to safeguarding a culture of integrity in an increasingly global sports wagering marketplace, the organization said.

And for its newest member, the feeling is mutual: "TEL is proud to become a member of GLMS in our oversight role for the licensing and regulation of online sports wagering in Tennessee," said Hargrove. "Integrity is at the heart of everything we do as we establish and support a responsible and competitive sports wagering program. GLMS's position in the global marketplace will be a critical asset to the TEL's work to protect the customer, promote fairness in sports and regulate this new industry in our state." ●



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## Making A Difference

# Stephanie Weyant

Deputy Executive Director for Marketing and Product Development, Pennsylvania Lottery

For many people who work in the lottery industry, there's no better job in the world. There's the satisfaction of doing something good for society and of meeting the unique challenges of a commercial operation within the confines of government. Oh, and it can be a lot of fun too! Stephanie Weyant likes lottery so much that she couldn't wait to come back after a short time away, now serving as the Pennsylvania Lottery's Deputy Executive Director for Marketing and Product Development.

"Stephanie makes a difference in our business, every day," said Executive Director Drew Svitko. "She embodies our core values and is committed to our mission to help generate funds which improve the lives of older Pennsylvanians. She is a seasoned professional and a great leader with a strong work ethic, positive attitude and contagious smile. It's a true honor and joy working with someone like Stephanie, whose passion, commitment and drive motivate us all."

A dedicated state employee throughout her 20-year career, Weyant was a member of the Pennsylvania Department of Revenue's Press Office from 2000 to 2010. For the last three years of that tenure, she led the Department with an emphasis on communications for the Lottery division. In 2010, she joined the Lottery staff as Deputy Director of its fledgling New Media Division. "Our division



laid the foundation for iLottery," she noted, creating an interactive infrastructure to get ready for the future. That included developing a mobile-friendly website and mobile app, and spending a great deal of time building an online community with its VIP Players Club and in social media. "We knew that a community of engaged players in an online forum were going to be important – they would someday be the first people who would naturally play online when we were ultimately allowed to sell in that space."

Weyant returned to the Lottery in 2016 after spending three years as Communications Director for the legislature's House Appropriations Committee. She now oversees four Lottery divisions with a total of 25 employees: products, marketing, new media and research. It's a "small

but mighty" team that works closely with the Lottery's vendors as well.

She jumped right into the planning for iLottery, which was approved in October 2017 and began in May 2018, and is instrumental in its success. Choosing to launch iLottery with unique internet instant games, rather than online versions of Scratch-Off or draw products, was a nod to the concerns of retailers. "We knew we had to prove that iLottery was going to help them, not hurt them," Weyant explained. "We didn't want to come out of the gate with games that looked just like the products they were selling." That strategy of crawl-walk-run has served the Lottery well, and additional measures such as an affiliate program and Web Cash give retailers opportunities to earn direct revenues from iLottery.





“She embodies our core values and is committed to our mission to help generate funds which improve the lives of older Pennsylvanians.”

- Drew Svitko



Some retailers are still a little skeptical, even today. “We just have to keep doing things to make sure that they understand that we support them, and that we are driving players into brick and mortar retail through cross-promotions. It’s incumbent upon us to keep them involved, keep them engaged, and keep proving to them that we are still very much invested in retail.”

In her spare time, Weyant has a passion for travel, something that obviously had to be put on hold this year. In another life she might be a travel agent, or a travel blogger/photographer; she loves to research destinations for herself and for friends. With her husband Scott, she particularly enjoys the Caribbean, and the couple has tried to visit a different island each year. They also spend time with friends and family, and with their two dogs – a German Shepherd named Kila and a rescued Shih Tzu named Bella.

Weyant has a bachelor of humanities in communications from

Pennsylvania State University. She’s a member of the Pennsylvania Public Relations Society, and has served a previous term as President.

***Pennsylvania is a very gambling-rich state. How does the Pennsylvania Lottery compete?***

When we ask ourselves this question, one thing we talk about a lot is how the Lottery has many competitors, but it’s not always obvious ones. We are competing with other forms of entertainment for discretionary income, things like movies, eating out, social gaming and apps. We also compete with other consumer packaged goods companies for retail space. One of our strengths is our brand, which is fun and entertaining. The Pennsylvania Lottery is one of the oldest lotteries, and we are coming up on 50 years here soon. There’s a lot of trust and equity in our brand that’s built over many, many years, and that’s not lost on us. Keeping that public trust and staying true to our brand gives us a

competitive advantage. We also try to compete by staying relevant. One of the things I credit Drew with is our strategy of being a “CRUMmy” lottery – convenient, relevant, ubiquitous and modern. It’s a catchy way for all of us to remember that those elements are what really drive our growth. We have to be convenient for players and retailers and relevant in our products and how we sell them. And we have to be everywhere, and be modern. If we do those things, I believe that we can compete in a competitive market no matter how you define competition.

***In your time working with the House Appropriations Committee, what did you learn about how legislators view the Pennsylvania Lottery?***

I learned so much working for the legislature in those three years, especially working for the committee that is primarily responsible for the state budget, and I think it helps me in the job I’m in now. It gave me a different perspective. I learned

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our relief from a legislated profit margin requirement. They know we need their help to grow Lottery sales and profits. Overall, I think we have a good relationship with our legislature.

***When the pandemic hit, how did you handle iLottery, knowing it would become front and center?***

We talked at great lengths about what to do. We needed to be respectful of our retailers, especially considering that the majority of them were still open as essential businesses. So we decided to focus on creating more awareness of iLottery, turning up the volume on our iLottery advertising by spending more, rather than changing the messaging in any way or encouraging it as a “safe play” alternative to retail. And while we definitely saw a surge in online play, it was not nearly enough to make up for the drop at retail, because retail is still the majority of our business. But when you are in a situation like that, every little bit helps, because at the beginning we had no idea where the bottom was in retail sales. We were very fortunate to have the online option. And as the months wore on, even though online sales started falling from the peak, it’s still at a higher level than it was pre-pandemic, which is great to see. Scratch-Off ticket sales at retail have since soared by almost 30%, but of course we don’t know what the next few months will bring as the pandemic worsens again.

***Do you have any advice for other lotteries that may be seeing legislative interest in legalizing online sales in the 2021 sessions?***

I really think that now’s the time. If the pandemic taught lotteries anything, it’s that we have to be diversified, and we have to be online. So now is the opportunity to make that case. One of my favorite quotes is “luck is what happens when preparation meets opportunity.” We work in the luck business, so lotteries need to be prepared in terms of getting their digital foundation in



how important it is to communicate with legislators and to make sure they know our position on bills they may be considering that impact the Lottery in any way. But the reason why the Pennsylvania Lottery has received a lot of support in recent years, allowing us to grow, is that

our profits are dedicated entirely to programs for seniors. As our senior population grows, the demand for services sometimes outpaces what Lottery funding can provide. That’s why we’ve been given approval to do more things, like sell online and add Keno, and why they keep renewing

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place. And opportunity is now, when the need to be diversified is clear. There are so many successful case studies that lotteries can use to help make their case for iLottery, and we all can help each other. One more thing – in addition to building digital engagement with customers, it's very important to clean up whatever player database you have, so you have the most accurate information as possible. Those are going to be some of the first players you reach out to when you do go online.

**Is there anything you wish the Pennsylvania Lottery, or lotteries in general, could do differently?**

I wish that all lotteries could sell online, without it being such a big deal! It's 2020 after all – what business isn't online? I think that players expect the same from their lottery, and it should be just a natural progression of our industry. The two key things that seem to hold up regulators and legislators are concerns about responsible gambling and the impact on retailers. And those are the two areas where we can confidently reassure anyone who has

doubts and defuse the myths. With respect to responsible gambling, you have far more controls online than you do in the retail space, where play is mostly anonymous. We recently received our iCAP certification from the National Council on Problem Gambling. That's something that we can proudly share with our stakeholders, to show that we are following industry best practices for online play. You'll never convince everyone, but with everything that's going on right now, this is one of the best opportunities to push for iLottery.

**What do you enjoy most about your current role?**

It has to be the people I am fortunate enough to work with. They make it fun. Sure, it's a lot of hard work, and it can be very stressful at times, but we have a great team and we laugh a lot. I have a great counterparts in retail operations (Eric Grubbs) and administration/finance (Dan Coyne), and of course my boss Drew, and we love to challenge each other. And in addition to the 25 talented, creative and dedicated employees in my division, I love working

with our vendors and my colleagues in other lotteries. It's wonderful to meet those folks at conferences, ask questions and share best practices. The lottery is one of the best places to work in state government! Twenty years ago I started in state government as an intern in the press office at the Department of Revenue doing lottery check presentations and now I am in the executive office at the Lottery helping to shape its future – that is pretty cool. ●



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\* SOURCE: LAFLEUR'S MAGAZINE, NOVEMBER/DECEMBER 2019

# Hoosier Lottery Consumer Segmentation Deep Dive Results in Rich Robust Illustration of Players



**Robert Tharp**  
Senior Director, Product and Analytics,  
Hoosier Lottery

Consumer preferences, habits and expectations are rapidly changing. How we consume media is evolving faster than ever. People are presented with an ever-increasing volume of information. As a result, messaging must be succinct, while still resonating with consumers. It must be delivered at the right time, through the right channel and in a cost-effective manner. The best way to address these challenges is to understand your population through clustering based on behaviors, attitudes and beliefs. The process of clustering a population is called segmentation and is an exercise most lotteries have done at some point in the past. Given the rapid evolution of consumers and the marketplace over the last few years, the Hoosier Lottery made the decision in 2019 to refresh our understanding and utilization of this science.

A segmentation study is a significant investment in terms of financial cost, as well as the energy and time it takes to develop, execute

and ultimately implement decision making. To fully leverage the investment and the wealth of insights it brings, we set a goal early on of making this an organizational effort, not just a research or marketing effort. The desired outcome was a finished product that was more than just a lengthy presentation of charts, tables and heatmaps. We wanted a study that was deeply insightful and meaningful to as many areas of the business as possible while still meeting the traditional needs of a segmentation study.

To accomplish our goal, there were three foundational requirements outlined in the planning phase:

1. The finished product must be actionable and meet the needs of the organization as we continue to evolve our player-geared marketing and communications efforts.
2. We wanted to understand the behaviors and attitudes of all

consumers – not just lottery players – to unlock a greater ability to connect with them in new ways.

3. We didn't want just a report, but a body of work that allowed many areas of the business to understand and personally connect with the various segments.

To ensure actionability, we involved a broad spectrum of stakeholders in the project from start to finish. We held meetings with several internal departments to explain the purpose and benefits of the project. We also took this opportunity to ask each area how they might leverage market segmentation, and how we could use this opportunity to help them fill in knowledge gaps about our consumers to help them meet their objectives. We also deeply involved our advertising and creative agencies from the beginning to ensure the segmentation study was aligned with their needs to continue to drive proper messaging, as well as





## QUANTITATIVE Overview of Hoosier Lottery Consumer Segments



spend efficacy. This included everything from questionnaire design to participation in subsequent workshops and, ultimately, the rollout to the broader organization.

Another change we made was how we looked at the population. Lotteries typically have a good understanding of their players at a transactional and lottery behaviors level – we are no different. To enable the development of more tactical strategies, we opted for a segmentation approach that would help us understand players beyond what they play, how often they play or how much they spend. We wanted a segmentation that helped us understand them more broadly as consumers and citizens of Indiana.

With lottery and gaming attitudes being a secondary component of segment definition and not necessarily the driving force, we were able to develop segments that are more well-rounded and more actionable from product, distribution and communications perspectives. We identified segment characteristics

***We identified segment characteristics much deeper than traditional “player” and “non-player” segmentation. The result was identifying segments that share life-values, thoughts and attitudes.***

much deeper than traditional “player” and “non-player” segmentation. The result was identifying segments that share life-values, thoughts and attitudes.

To encourage long-term engagement and successfully leverage the power of segmentation over time, it is imperative that process and value must be embraced both within the organization and by external stakeholders. The best way to do this is to engage each area in the process from beginning to end and ensure we are defining value. There were several steps taken over the course of the project to solicit input from across the organization, to ensure we were meeting as many of the needs of those areas as possible, and ultimately, to create personal connections through understanding of the various segments.

After the data collection was completed, we dedicated a full day to a workshop attended by representatives from many areas of the organization, including our outside partners. This started with a review

of the differentiating characteristics of each of the clusters followed by everyone taking a portion of the survey to understand what cluster they fell into. After familiarizing everyone with the different clusters, we completed an exercise where we developed personas for each segment, including a vision of what they look like. This included details about their consumer preferences, what they might look like demographically and how the Lottery might factor into their lives. Developing these detailed personas through interactive and fun activities drove deep understanding of the different clusters and led to developing the segment names used across the organization today.

To further bring each segment to life, we invested in video journals for each segment to connect the personas to actual consumers. These were four-day online explorations where members of each segment shared various aspects of their lives through images and film. They were assigned exercises with built-in questions and probes designed to enable respondents to heighten awareness of why they do what they do or think what they think. It was a great way to put a face to each segment, add context and create that personal connection to representatives of each segment.

After the large collective effort to define, name and bring each segment to life, we committed to understanding how the insights would interact with our organization. We presented to larger and broader audiences a high-level overview of our segments, what characteristics they held and how this information could help us all better understand and reach our players and potential players.

### Turning Research Into Action

Of course, the value of a segmentation study is not realized when the research phase is completed and

rolled out. The value of a segmentation study is realized when the learnings are put into action. Our segmentation project allowed us to establish a strategic and analytical approach to maximize efficiencies and increase sales within individual markets. Utilizing data, including segmentation combined with sales and market data, we identified opportunities to customize media and messaging. Some specific examples of how we are leveraging our segmentation include:

- Maximize media efforts through a hyper-localized planning approach. Our agency has developed a Strategic Media Analysis and Reporting Technology (SMART) approach which integrates sales and segmentation data to inform media decisions. Deeper insights allow more customized strategies for primary and secondary audiences based on their behaviors, attitudes and purchasing patterns.
- Drive efficiency of media spending through annualized efforts. We were able to develop and secure mass media campaigns all at once to leverage spending and secure inventory at competitive rates. Another benefit was the ability to secure upfront inventory for omnichannel retailer promotions.
- Continue to use player, sales and digital platform data to personalize brand experiences and drive engagement. Segmentation has been integrated into a data management platform – a database used to inform media decisions to deliver more relevant and personalized experiences for our players. It is evaluated with every campaign to better inform media and messaging decisions.

- Connect Field Sales personnel more closely with campaign objectives. Aligning player and retailer facing groups with the understanding of what our consumer segments look like increases organizational awareness of how communication and marketing efforts are geared toward different groups. It also gives Field Sales staff a common language to provide feedback to areas like Marketing and Product Management about what they are seeing and hearing, which in turn helps those areas balance their offerings and messaging across the population.

Hoosier Lottery now has a rich and robust illustration of who our players are and what defines them. While expanding a segmentation study to include all consumers and far corners of the business operation does increase the scope of the effort and time taken to complete, it is well worth the investment. Injecting an institutional understanding of how consumers are clustered based on behaviors, attitudes, beliefs and lottery play ultimately enables a more cohesive plan for growth and efficiency by increasing organizational knowledge and nimbleness in our decision-making. ●



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Executive Director, Massachusetts  
Council on Gaming and Health

**W**hether you celebrate Thanksgiving in October or November, this is the time of year to show gratitude for everyone in your life and for all that you have, especially during a world-wide pandemic. One of the ways to do this is to be grateful for your career in the lottery industry and for the significant responsible gambling tools now available to share with players to keep their gambling safe and healthy.

## Celebrating the Right Players

Thanks to a long-standing partnership between the National Council on Problem Gambling (NCPG) and McGill University's International Centre for Youth Gambling Problems and High-Risk Behaviours, there is an annual Holiday Campaign to remind people that while lottery products are appropriate gifts for adults, they are not for children. An early win can lead to a big problem later. Kids' brains aren't developed, and age restrictions are important for good, scientific reasons. Research shows that 2 to 4% of kids can be clinically diagnosed as people with gambling

problems, and some worry that with the surge of video gaming, this is rising.

Further, kids are particularly attracted to scratch tickets over other lottery products. This is the perfect time to remind industry marketers that tickets should be designed for adults. There is no reason to use Frosty, Santa, reindeer or elf images on tickets that are particularly attractive to kids, especially when there are so many other beautiful ticket designs to choose from – wreaths, bells, Christmas trees, etc.

For the past three years, NASPL has had 100% of its member lotteries sign on to the Holiday Campaign. It's great to see the same collective effort this season. Partnering lotteries can use prepacked graphics or create their own messaging. For more information on the campaign, click [here](#).

Campaigns like this unite the lottery field and demonstrate a commitment to responsible gambling. They serve as a reminder that playing the lottery is a form of healthy, adult entertainment for most, but can be harmful to others. Helping to mitigate risk is a common denominator that is laudable.

## Positive Play

In 2017 Drs. Richard Wood, Michael Wohl, Nassim Tabri and Kahlil Philander wrote about a new concept: Positive Play. Their research helped the field of responsible and problem gambling to approach gambling in a way that allows you to see why most people can and will play in a positive way, and what keeps their gambling in a healthy space. The Positive Play Scale depicts where players score on four subscales: Honesty and Control, Pre-Commitment, Personal Responsibility and Gambling Literacy. What has been fascinating is that regardless of the jurisdiction, most people score lowest on gambling literacy. Also interestingly, Americans tend to score much lower than Canadians on average.

This is strong evidence that lotteries can help their players remain healthy by providing knowledge and debunking myths to help people improve their gambling literacy. Think about how you can explain the odds of winning, or how a game works, to someone who is only lured in by the ad or the ticket design. Determine the best way to explain why a big

jackpot won't improve your chances of winning. Enlighten players to not use a lucky penny or special technique to scratch tickets because those techniques are superstitions and have no way to sway whether they win or lose. Explain that there is not a "system" that will give players an edge. Encourage players to make their lottery play a part of their budget and show them how to set spend, win and loss limits. And maybe most importantly, discourage them from putting lottery before other things in life – family, work, health, home, and household and daily necessities should always come before their lottery play.

### Technological Advancements

There are so many technological tools and approaches to responsible gambling. Below is just a small sampling of options that are now available. Look at how a software package for your staff designing tickets, or an app for your corporate social responsibility team, can be tremendously helpful. For more information on technological interventions and tools, seek out members of NASPL's Responsible Gaming Committee.

-**Playscan** ([playscan.com](https://www.playscan.com)) is a tool that detects and communicates risky gambling behavior and communicates risky gambling to at-risk or problematic players and gambling operators.

-**Gamgard** ([gamgard.com](https://www.gamgard.com)) objectively applies psychology to game design, balancing the fun and excitement of a game with a responsible level of risk. It is used by gaming operators, gambling regulators and game developers.

-**GamBan** ([gamban.com](https://www.gamban.com)) is an application that will block access to thousands of gambling websites and is available across all platforms with live technical support.



### Common Brands and Fellow Collaborators

Finally, the biggest tool out there to effectively build your responsible gambling program is your network of friends and colleagues. Whether you are looking for a universal brand to tie together your RG efforts, such as GameSense (Andrew White at NASPL can provide more information on bringing the GameSense program to your lottery) or you simply need some feedback on your RG plans (White can also provide more information on the NASPL RG Verification Program in conjunction with NCPG), there are people who have been there and done that.

Reach out to the NASPL RG Committee to find out what worked for others. Commit to evaluating your RG programs and infrastructure, and to hiring your local

academic who has worked on RG studies by using someone else's questions and data as a baseline. Even think about asking colleagues how they've worked RG into their focus group questions about new products and promotions. There is no singular best way to do this and your lottery needs to be comfortable with your approach. Start small, ask questions, and get started on this important and necessary part of your business.

A healthy, sustainable player base helps us all.

The very definition of gratitude is "readiness to show appreciation for and to return kindness." We encourage you to do just that. Be open to the possibilities of all the RG tools can do for your lottery, and show kindness back to your players, staff and communities by implementing these tools. ●



**LOTO  
QUÉBEC**

# **Cinquante ans au Québec – Fifty Years In Québec**

Canada's first lottery has come a long way since its debut, and is one of the leading lottery and gaming organizations in the world today.

**By Patricia McQueen**

**A** lot happens in 50 years, and Loto-Québec has done its best to keep pace as the world changes – from an initial launch with its first drawing in March 1970 to its 2020 status as an innovative developer and operator of an expansive selection of lottery, sports betting, casino and bingo products, most available through multiple channels to meet consumer demands. Yet it remains true to the consumers who have supported the organization over the decades, even still offering one of those original passive draw games today, La Mini, albeit in a modernized format.

Loto-Québec currently offers some 20 different lottery products available at more than 8,500 retailers throughout the province. Some of those games are also available online; online lottery sales began in 2012 (online casino games were offered beginning in December 2010). The organization also operates four casinos, two gaming halls featuring electronic gaming in various forms, and a video lottery network with just under 9,800 machines in bars and brasseries geographically distributed according to socio-economic data. It also runs networked games in more than two dozen bingo halls and nearly 20 Kinzo halls. Bingo and Kinzo halls are social entertainment venues where gaming revenues flow to non-profit organizations.

All of this activity is done with responsible gambling top of mind. In 1997, a corporate division focused on responsible gambling was established, devoted to raising awareness about problem gambling and its prevention. This division was the precursor to the Fondation Mise sur toi and, ultimately, the Corporate Office of the Vice-President for Responsible Gambling, Communications and Social Responsibility. In 2000, the organization helped create the International Centre for Youth Gambling Problems and High-Risk Behaviours at McGill University, which co-sponsors the worldwide

annual Lottery Holiday Campaign along with America's National Council on Problem Gambling. And in 2009, Loto-Québec was awarded Level 4 certification in the World Lottery Association's Responsible Gaming Framework; it has retained that highest level of achievement in the years since.

**“Lotteries today talk a lot about entertainment, and I think that’s really what Loto-Québec, with its broad-based portfolio, has managed to develop – a full entertainment portfolio that continues to grow and evolve.”**

So it's a big organization. And a big organization does things in a big way. Loto-Québec's 50th anniversary party was going to be a year-long celebration throughout 2020 across all of its business sectors, explained Lynne Roiter, who has served as President and Chief Executive Officer since August 2016.

Then came March 2020 and the official declaration of a worldwide pandemic. At the time, Loto-Québec was the only North American lottery to actually suspend retail sales of all of its products, not just those sold in bars, casinos and gaming halls. While online sales continued, retail sales of lottery were suspended March 20, following the closure of casinos and gaming halls on March 13 and video lottery on March 15. Retail lottery activities were restored beginning in early May, but online sales increased exponentially during the shutdown and remained strong even as retail sales began coming back. Casinos and gaming halls reopened over the summer. In October, however,

there were more facility closures as conditions worsened once again.

While the pandemic will forever be an important footnote for 2020 operations of every company, in addition to triggering potentially permanent changes to future consumer behavior, it doesn't diminish the accomplishments of the past.

### **Games Galore**

That history makes Loto-Québec what it is today. Lottery players can choose from a plethora of different types of games available at retail, including national and provincial jackpot games, daily games, scratch tickets, hybrid instant-win and draw games, sports betting, and even some unique products.

One of the latter is the aforementioned La Mini, launched as a 50 cent passive game in 1970 and still available as a 50 cent passive game. Its only nod to the modern era came in 2016, when it first started printing through the gaming system terminals. La Mini is still offered because it has very loyal followers, explained Roiter. “People really identify with that ticket. It has a niche audience and it more than pulls its weight. People would feel that we deprived them of something if we take it away.”

In fact, the idea of game stability is what leads to such a diverse portfolio. “Brands that developed strong followings were allowed to evolve, modernize and respond to today's reality, and they grew with us,” said Roiter. There's a big advantage to that. “Lotteries today talk a lot about entertainment, and I think that's really what Loto-Québec, with its broad-based portfolio, has managed to develop – a full entertainment portfolio that continues to grow and evolve.”

While many of the company's products have deep roots, others are more recent developments. For example, in 2011 Lotto Poker was its first venture into what it calls Quick



Play games: games that combine an animated instant component with a numbers draw. Lotto Poker is still the flagship of this category, but two others also remain in the market.

Scratch tickets don't dominate lottery sales across Canada as they do in the United States, but there have been some interesting developments. Loto-Québec has offered \$100 games, for example, and is stepping up the use of games tied to special interests with social media components. And in August 2019, its first scratch 'n' text game, Animo, was introduced. Each \$2 ticket, featuring different animals with funny expressions, had three play areas; one included a code for a player to text to a phone number. The prize was revealed in the form of an animated GIF in a reply text. If a player chose not to participate this way, the animated reveal would simply appear on a retailer's customer display terminal upon validation. Animo was well received by consumers, performing better than projected for a niche product.

One of Loto-Québec's more unusual product lines relies on

television – there are three scratch tickets linked to television productions.

For the highly-rated prime time game show *La Poule aux Oeufs d'or*, launched in 1993, weekly scratch tickets are distributed to all retail sales locations. These tickets are removed from sale at the end of each week and replaced with the tickets for the following week's show. Built

around the French version of the "Goose That Laid the Golden Eggs" fable, the show typically runs each fall, takes a break for the holidays, and resumes early in the new year, continuing its run through June. About 40 shows are presented annually. One prize on each scratch ticket is a chance to be an in-studio contestant; there is also a play-at-home component.



The game show *La Poule aux Oeufs d'or*.



Célébration is a high-end (\$25) Christmas multitiered scratch ticket with cash and merchandise prizes linked to draws throughout the month of December every year. Several spots in the January televised gala event are up for grabs for a chance to win million-dollar cash grand prizes. As with La Poule aux Oeufs d'or, there is a play-at-home portion on each ticket.

To a lesser extent, Roue de Fortune (Wheel of Fortune) has a television presence through a live wheel spin, also aired on television, offered as one of the prizes on the scratch ticket.

“We have a very strong television presence, and these shows are still extremely popular,” said Roiter. “We manage to keep them fresh and original, while keeping their strong brand recognition. The variety show that is Célébration is the most-watched show in Québec.” She attributes some of the success to the strong arts and culture presence in the province. “There’s a whole atmosphere about it that just fits into Québec and our culture.”

### Innovative History

Of course, not every game Loto-Québec has tried was successful enough to stay in the market for the long haul, but every effort is important in terms of what can be learned for the next generation. In addition, some efforts to utilize emerging technologies by necessity ended as the environment shifted.

For example, in 2000, Loto-Québec launched a lottery game played with a CD-ROM – players would purchase a scratch ticket with a CD, and play an extended game at home. Several different themes were introduced, beginning with Trésors de la tour (Treasure Tower); a few American lotteries also offered the game. It was an attempt to use the technologies of the day to provide more active entertainment with a



Mini terminals in multi-lane environments.



lottery game, forward thinking that continues to be a hallmark of the company ever since.

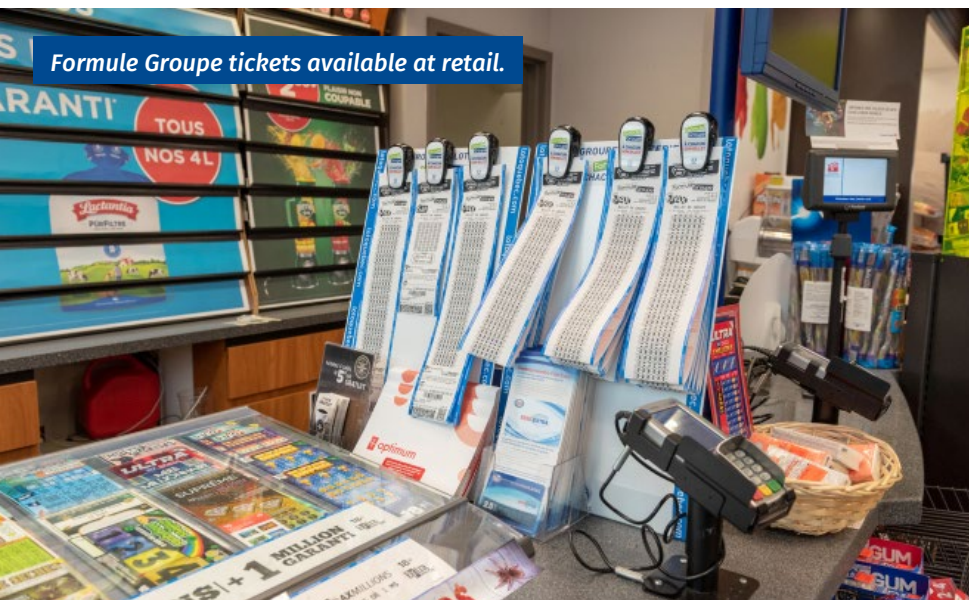
Indeed, the desire for innovation leads to a close relationship with innovation hubs and universities in Québec, along with a very strong internal IT department for all of its business activities. “It’s important to attract young graduates from these universities, and our relationships with these organizations lets students know that they can have interesting careers at Loto-Québec, as we are in the forefront of digital

development in the province,” noted Roiter.

Certainly technology is not limited to just games, but also in innovations that help both retailers and players. Loto-Québec actually pioneered in-lane lottery sales technology when it introduced mini terminals at cashier checkout points in 2009. These small units are connected to the lottery system via an in-store wireless network, but have enabled sales in multilane environments. Today, 1,500 of these terminals are in service.

Then there is Formule Groupe (group play), where players actually purchase ticket fractions. Although retailers had already been offering this option to players, simply by writing down names of who purchased what share, Loto-Québec formalized the procedure at retail in 2010. The retailer prints out a ticket with multiple segments, and players purchase one or more of those segments, sharing any prizes based on their participation. It was a winning solution for everyone – simple for retailers to manage and providing actual tickets for players to be excited about while they can participate in fun new ways. “It’s a very popular form of play, and

Formule Groupe tickets available at retail.



represents a very important part of our market,” said Roiter, adding that improvements are always in the works. An online version of Formule Groupe was added in 2014.

### Online Success

Speaking of online, Loto-Québec has been very active on that front as well, launching an online casino in December 2010 and following that with online sports betting in March 2012; lottery games were added to the platform beginning August 2012. The organization is in a unique position compared to other lottery and gaming operators, noted Roiter. Unlike most, Loto-Québec operates all of its casinos, rather than contracting to third parties. That means that all of the customer information is retained across activities; the challenge is to make good use of that information.

“We cannot look at our online offers in silos,” she emphasized. “We recognize that one customer might buy a lottery ticket from a retailer, play online, and go to a casino. He’s still the same person doing business with us. So it’s really important for us to create synergy between our different offers.”

That means customers should see familiarity between products across

industry segments, and related products should be grouped to encourage trial. For example, game themes that might be on both a scratch ticket and on a slot machine. And because Loto-Québec offers betting on live sports, virtual sports and eSports, why not link them together? Similarly with paper scratch tickets, eScratch and eInstants, and other logical product groupings.

Even though online revenues soared with the onset of COVID-19, Roiter knows that the retail network will continue to be extremely important for lottery sales going forward. You can’t underestimate the synergy between games on different platforms, growing the whole pie for everyone. Retail-purchased Web Cash has become a popular way of funding online accounts, eliminating any card fees players may see from their own banks, and providing retailers with sales commissions for every Web Cash purchase.

A fairly recent development is the ability to set up sports betting play slips on Loto-Québec’s mobile app, making it easy for players to choose their bets at their leisure, then scan their device at retail to produce the tickets – again earning the retailers commissions. Roiter noted that – this year aside – there is some differentiation between online

and retail sports betting, and both formats have been growing. “They are complementary, as players look for different things.”

### Moving Forward

Catering to those differences, understanding every consumer, and creating a true omnichannel environment are the keys to the future. For Loto-Québec, there is much work to be done. It means building strong second-chance offers on scratch games, and building a loyalty program that doesn’t just let players enter promotions they are looking for, but that encourages trial across product lines. It means digging ever deeper into data analytics to understand those players, in order to take advantage of synergies across multiple verticals. It means installing new retail terminals and increasing the number of self-service touchpoints – technology will play a key role.

And the games. “Everyone’s waiting for that magic product that is going to be as big as lottos were,” said Roiter. “I don’t think that product exists. You have to evolve with what you have, while not being afraid to try new things. We can always learn from things that aren’t successful.” She noted that everyone – in Canada and the United States – is looking at their big lotto games. “But you have to be very careful when you mess with them, because they still generate a lot of money. You certainly don’t want a product like that to die.”

Letting that happen is clearly not something in Loto-Québec’s playbook, but challenges remain. Fifty years of success will hopefully lead to 50 more, as it continues the strategy of evolving existing products as technology advances. “It’s all fundamental to our growth,” said Roiter. ●

# 50 ans



*On en a fait du chemin!*

## An Anniversary Pivot

**A**cross Loto-Québec’s many subsidiaries, 50th anniversary activities and celebrations were planned monthly. Because the organization was actually founded in December 1969 (even though the first lottery draw wasn’t until March 1970), the parties started in December 2019 and were to continue through this December, with a big event planned for September and one final bash in March 2021.

A mural was created that showcased, month by month, all the significant achievements over the decades throughout the organization. They were displayed at Loto-Québec’s offices and at each of its casinos and gaming halls. Each month’s achievements would be revealed at the appropriate time. At each monthly unveiling, people involved in some of the activities listed would be invited to attend the party, to speak about their experiences.

There was a very special 50th anniversary lottery ticket planned, with a similar theme applied to a slot machine game as well. There were special surprises along the way, and everyone was invited to celebrate.

The monthly celebrations went off as scheduled for the first three months before the pandemic put everything on hold. Even though lottery sales restarted

and the casinos eventually reopened, it wasn’t the right time to celebrate publicly with well-attended events. “We saw very quickly that a party in September was not going to be, but we decided not to cancel our celebrations, just postpone them,” explained President and Chief Executive Officer Lynne Roiter. “We’re going to have a super-related birthday bash next year. It will be worth the wait.”

In the meantime, the organization created a special internal website for its employees, celebrating with them even as most began working from home. “We unveiled the months on our mural virtually on that internal website, and it really generated a lot of nostalgia and pride in everything that Loto-Québec has accomplished. It was a very good motivating experience.”

She added that the organization is where it is because of those employees. “We are here today because of one principal reason – the strength of our employees, past and present. They are a pillar, not only of what we’ve become but ultimately also of where we are going to go.”

There is a time capsule being assembled, so that 50 years from now a new generation of employees and players can look back at 2020. What will it contain? That was easy, mused Roiter. “A little bottle of Purell and a face mask!” ●



# Fifty Years of Green for the Garden State

Since its debut in 1970, the New Jersey Lottery has sent more than \$29 billion to the state of New Jersey.

By Patricia McQueen

**The New Jersey Lottery has always been a model of efficiency. As the third-oldest lottery in the United States, it was built on the daily and draw games that were a hallmark of the early lotteries in big urban centers. Historically, it has returned more than 30% of its sales to the state, benefiting education and institutions until new legislation effective July 2017 (the Lottery Enterprise Contribution Act) made it a wholly-owned asset of the New Jersey pension system.**

As such, all of its revenues now go to strengthening the Teachers' Pension and Annuity Fund, the Public Employees' Retirement System, and the Police and Firemen's Retirement System. "It was important to the fiscal well-being of the State of New Jersey to make this transition," explained Executive Director Jim Carey, who has led the Lottery since July 2018. "There are a lot of people in New Jersey whose retirements depend on their state government pensions. We're proud to be a guaranteed source of income for the pension system and to continue benefiting education by supporting teachers."

The Lottery began on December 16, 1970, created after voters overwhelmingly approved the idea of a lottery with an 81.5% majority. The first lottery ticket was sold to then-Gov. William T. Cahill.

There have been too many significant developments over the years to mention them all here, but New Jersey takes credit for the launch of the country's first computerized lottery numbers game – Pick-It, which allowed players to select their own numbers and was introduced in May 1975. The game was renamed Pick-3 12 years later.

In 1986, a major innovative change included the introduction of LOLA – the first Lottery On-Line Accounting system in the country – and a weekly settlement Electronic Fund Transfer System (EFT). The innovations streamlined retailers' accounting work regarding instant

tickets, while also providing settlement banking services.

In 2004, the Lottery introduced Cyber Slingo, the pioneering internet lottery game, which added an online play component to a Scratch-Off ticket for the first time.

And in 2013, a 15-year contract was signed with Northstar New Jersey, making that privately-operated company the sales and marketing arm of the New Jersey Lottery. It was only the fourth lottery to significantly outsource these functions.

### Livestream Central

One of the most important achievements in the New Jersey Lottery's 50 years began in 2011. That was the year it became the first lottery in America to livestream its drawings on the internet. It was a

decision forced by necessity, but one that has developed in-house experience for a number of livestreamed events and promotions over the past nine years. "We have a difficult situation where we are in two of the four largest media markets in the country, but those markets aren't actually in New Jersey," explained Carey. As a result, it's often difficult to compete for attention with New York and Pennsylvania.

Although televised drawings resumed in 2015, the livestreams continued to show the draws on the Lottery's feed and on its Facebook page. On July 1, 2020, New Jersey's contracts with its broadcast partners ended and New Jersey went back to livestreaming only for drawings – offering more flexibility and a cost savings as well.

The in-house studio has served the Lottery well over the years. "Building our own studio has been important because it's something that has made our lives easier," noted Carey, adding that employees no longer have to be present at separate studios owned by the state or a local news station. They can quickly conduct midday and evening drawings.

But it's not just about the drawings. Livestreams have been used for the Lottery's Million Dollar Replay grand prize events, beginning in 2015. Semi-finalists were able to





# New Jersey Lottery At a Glance

	Scratch-Off Sales	Draw Game Sales	Total Sales	Total Prizes	Net to Beneficiaries
<b>FY2020*</b>	\$1,880,025,494	\$1,335,365,872	\$3,215,391,366	\$1,966,146,826	\$1,015,000,000
<b>FY2019</b>	1,864,790,213	1,617,555,984	3,482,346,197	2,086,629,181	1,105,000,000
<b>FY2018</b>	1,852,303,108	1,447,399,643	3,299,702,751	1,991,568,091	1,030,296,012
<b>FY2017</b>	1,839,632,803	1,347,277,090	3,186,909,893	1,927,302,259	994,000,000
<b>FY2016</b>	1,842,420,120	1,447,426,594	3,289,846,714	2,001,693,206	987,000,000

\* All FY2020 numbers are unaudited.

### Current games:

**Scratch tickets:** Between 45 and 60 new games per year; \$1, \$2, \$3, \$5, \$10, \$20, \$25 and \$30

**Terminal games:** Powerball, Mega Millions, Pick-6, Jersey Cash 5, Pick-3, Pick-4, Cash4Life, Fast Play, Quick Draw (Keno), Cash Pop

participate through social media if they couldn't attend the events live. And of course, livestreams took center stage everywhere in 2020 as a way to continue customer engagement in a world where in-person events were not possible.

There was a concern this year that if the Lottery's headquarters was totally shut down by the State of New Jersey, access to the studio would be eliminated and the drawings would have to be conducted at a backup site. That site does not have a studio, so there would be no way to broadcast the drawings live. Players would be disappointed, of course, but safe and secure drawings would continue.

### Meeting Challenges

The pandemic certainly introduced new challenges to the New Jersey Lottery, as it has to everyone, everywhere. But New Jersey has always faced some unique circumstances. The Lottery is a very mature business, competing for players who have a lot of other options to spend their leisure dollars, most noticeably the casino resorts in



Atlantic City. Those facilities added online casino gaming in late 2013, and sports betting, live and online, began in the summer of 2018. And of course there are all the non-gaming entertainment activities in the area, given the proximity of two of the largest metropolitan markets in the country. "So we have to have things that are really going to catch the attention of players, and that are fun and different," said Carey.

A perfect example of "fun and different" is the Super 50 Scratch-Off ticket, the Lottery's largest ticket ever, with a whopping 50 chances to win on each \$10 ticket. "It was our best-selling Scratch-Off ticket



in history in terms of speed and velocity. Players loved it. It attracted casual players who thought the idea of a gigantic lottery ticket was a lot of fun, and it attracted our core players to a ticket that was a lot of fun.” Carey noted that the game set records even though it was released on March 1, just a few weeks before the state had to shut down non-essential activities.

The \$10 price point was chosen for the game because there has been a lot of sales growth at that level. New Jersey has also done well with \$30 tickets, while players are moving away from \$1 and \$2 games.

On the draw side of the equation, there was excitement in late 2018 when the largest Pick-6 jackpot seen in New Jersey in more than 15 years was won at \$29.5 million. That players love big jackpots is not a novel idea, and last summer the Lottery made changes to its Jersey Cash 5 game, adding two numbers to the field (players now select five of 43 balls) and increasing the starting jackpot from an estimated \$75,000 to a guaranteed \$100,000. “We’ve seen several jackpots over \$1 million and sales are up significantly since then,” said Carey. “Players follow jackpots, and that was a lot of fun to see.”

While the two national games, Powerball and Mega Millions, have lagged lately, they still have tremendous brand recognition across the country. “When we see some bigger jackpots, I think we’ll see sales bounce back. I think better days are ahead for both games.” Of course, Carey’s opinion might just be colored by the fact that New Jersey has had three big jackpot winners this year alone – two with Mega Millions and one with Powerball. “That’s a lot of fun!”

### Growth in Retail

The Lottery’s newest draw game, Cash Pop, was launched as a companion to Quick Draw (Keno) in social spaces on September 30, 2019. Quick Draw had launched in July 2017. “These are very, very core



pieces of our strategy for increasing sales of the New Jersey Lottery going forward,” said Carey, adding that the ultimate goal is to develop the market in social spaces, adding new lottery retailers along the way.

After all, the Jersey Shore is more than 100 miles of coastline packed with restaurants, bars and tourists, especially in the summer, and the Lottery with its partner Northstar have been focused on expanding that market with games like Quick Draw and Cash Pop.

Of course, those efforts abruptly

ended earlier this year, when everything shut down as New Jersey was an early epicenter of the pandemic. But Carey is confident that once things return to normal, or even a new normal, the Lottery will be successful in securing new social environments for the two games.

In the meantime, the Lottery has shifted its marketing and sales strategy, encouraging players already familiar with the games to play them at traditional retailers instead. Carey loves the fun graphics utilized in Cash Pop, and thinks they are more easily viewed in a regular retail environment than in Quick Draw’s huge matrix. Promotions this fall have moved the needle on Cash Pop, and it seems to be gaining some traction.

Other than social spaces, there’s not a lot of room for the Lottery to find more retailers in the densely-populated state that already has close to 7,000 retailers. “Our retail network has a very broad reach across the state – we’re everywhere,” noted Carey.

And while the New Jersey Lottery already has great partnerships with some of the largest supermarket chains in the state, and is just starting to add vending machines into Walmart stores, in-lane sales are being closely watched as other lotteries go down that path. “In-lane sales are something that intrigue us and we will consider the opportunities in the future. We’ve got a lot of great retailers and we’d like to create opportunities for those retailers to sell more tickets for us.”

### Northstar Developments

The addition of Quick Draw in 2017 was one big reason why the state’s contract with Northstar New Jersey was renegotiated in 2018. When the current administration took office under Gov. Phil Murphy in January 2019, the contract was amended with new income targets. Ever since, “we’ve been working hard to create a much better and much stronger working relationship,

improving transparency and keeping the relationship going in a way that is effective for both parties,” said Carey.

That paid off big time when the pandemic hit. “We worked very carefully, hand in hand with Northstar to make sure that the Lottery continued operating in a way that was safe for our customers, our retailers, and the employees of both organizations. I think that we worked very well with Northstar to implement all the new procedures.”

He noted that after the initial downturn in April, sales through the summer were great, especially Scratch-Offs and the New Jersey-only draw games. “That was the result of a lot of hard work by the Northstar team, led by Chief Operating Officer Adam Perlow,” who took that position in July 2019.

Although as noted, the goal of expanding Quick Draw and Cash Pop into more bars and restaurants – a big part of Northstar’s business plan for FY21 – suddenly had to take a back seat to more important considerations that no one could have foreseen.

### Anniversary Celebration, Modified

Fifty years of operation means there’s more than a single birthday party, more than an anniversary game and a few promotions. So as 2020 dawned, there was a plan to celebrate all year long, engaging with players at every level. It was such an ambitious campaign that a party planner was hired to coordinate it all.

Kickoff events were held in January at the Bridgewater Mall in North Central New Jersey and at the Wild West Casino in Atlantic City. Designed to shine an initial media and player spotlight on the anniversary, these events featured the Lottery’s new CASHNADO, a giant prize globe where players could grab confetti and turn it into cash and scratch prizes.

Also in January, there was a significant second chance promotion



with Pick-3, the Lottery’s oldest game. Players were eligible to win \$40,000 in additional prizes. That was followed in February with a multiplier family of Scratch-Offs that offered the largest family prize pool in its history. Then in March came the Lottery’s biggest-ever Scratch-Off ticket, as described earlier. All three efforts were supported individually with an anniversary themed advertising campaign, “The Fun Has Just Begun.”

While the pandemic canceled plans for other in-person events scheduled over the spring and summer, the Lottery was already underway with digital engagement opportunities for players. Members of its VIP Club were offered a 50/50/50 promotion, with 50 winners of \$50 in Scratch-Offs each week for 50 weeks, with different

contests each week. A yearlong “Tell us your Lottery story” campaign produced hundreds of stories submitted through the website. And on Throwback Thursdays, the Lottery posted photos and stories celebrating key events from its history on social media.

In July and August, a small “50th Golden Summer” advertising campaign highlighted summer Scratch-Offs, using the anniversary tie-in as a way to re-establish Lottery visibility as the state began to ease the initial pandemic restrictions.

In October and November, commemorative coins were distributed to retailers, given free to players with any Scratch-Offs purchase. A fall celebration via Facebook Live was held on October 16, and on December 16, the actual 50th anniversary of the day lottery





New Jersey Lottery

July 3 at 3:02 PM

More happy winners! We're awarding 50 VIP Club members \$50 of Scratch-Offs WEEKLY to celebrate our 50th! Join the VIP Club and select Sweepstakes & Opt-In drawings to enter for the chance to win! Who would you share your stack of Scratch-Offs with?!



sales began, another Facebook Live event is planned, featuring lots of surprises and chances for players to win prizes.

### The Next 50

While its anniversary promotions really ramped up digital engagement as people stayed home, the New Jersey Lottery also had most of its staff working from home. Some tasks still had to be performed on-site, such as running the draws and getting claims paid to winners. “All of our staff worked very hard to make sure that the Lottery continued to operate even as most of us worked remotely,” praised Carey.

Every lottery is having to adjust its strategies going forward, as society recovers from an unprecedented

time of upheaval that is still changing the way consumers think and act, especially when it comes to retail activities. The New Jersey Lottery had to abandon the launch of a new raffle game last spring, and all the big plans to expand into social spaces with Quick Draw and Cash Pop have to be restarted.

So while the Lottery’s first 50 years were a \$29 billion resounding success, everyone will have to dig deep to keep the momentum going over the next 50 years. “Even though New Jersey has always been a competitive environment, the landscape has expanded significantly in the last couple of years,” said Carey. “We’re going to have to work a lot harder to stay relevant and be competitive with those other options. And we’re going to have to look to Northstar

and the rest of the industry for innovations that will help distinguish us from that competition. We’ve always been a top-performing lottery, and we want to stay that way.” ●





**NASPL**  
**DESKCON** 2020  
**LIVE FROM YOUR OFFICE**

NASPL's first-ever virtual annual conference provided the substance the industry needs to keep moving forward.

It wasn't the October celebration in Vancouver that we expected it to be when we started 2020, but NASPL's annual conference was still held this fall – albeit in a new virtual format. More than 1,300 individual registrants watched some or all of DeskCon live during the week, with as many as 500 attendees watching sessions at any given time. By all measures, NASPL's first virtual event was a success, and it couldn't have happened without the support of the industry and the hard-working members of the NASPL staff who quickly re-imagined the association's educational mandate in the face of a pandemic.

While every aspect of DeskCon was recorded and is available for viewing on the [NASPL Matrix](#), what follows is a brief recap of the sessions that were held the week of October 26. If you missed them live, be sure to watch the replays for more in-depth commentary!

DeskCon kicked off with featured speaker Graeme Newell, whose interactive presentation titled **Neuroscience Insights Into the Crazy Ways Our Brains Make Money Decisions** explained the inner caveman in us all. Fully 85% of decisions are made by our instinctual/subconscious brain, with just 15% made by our conscious brain. "Our caveman brains haven't adapted to modern times," he said. "The way we spend is still being impacted by our caveman brains in a big way, especially in times of fear. Subconscious brains don't know things aren't real. So optimize your message on a caveman level." That means:

*Think like a caveman*, because emotion defies reason. Most of us spend based on instinct, not

### Neuroscience Insights



reason, and our brain is hard-wired to prioritize immediate threats.

*Think safety first*, and make sure your customer feels safe in their own skin. Messages of authentic reassurance will resonate.

*Build powerful stories*, like a reason why you are in business. A story makes a product more valuable, and that's also hard-wired in our caveman DNA. Most of our emotional drivers are about people, not lifestyle, so marketing and messaging needs to appeal to that "people instinct." Newell praised Walmart as an example, a company that shifted its message from "Always low prices" to "Save money, live better." "Walmart went from a product-focused company to a purpose-focused company."

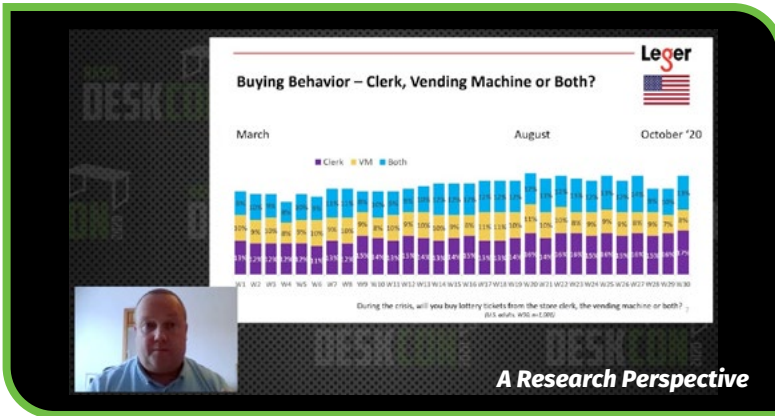
*Show your authentic customer focused mission*, an uplifting message about your customers' lives. "Lotteries have done so much to help society – you need to show that communities are your priority, not dollars, and make sure customers understand what those dollars do for them."

Newell concluded his presentation by saying that lotteries really have an opportunity to make people rally around community. "The more we can

make this a social enterprise, the better it will be." And in response to a viewer question about how to overcome minimal interest in low jackpots to trigger spending, he said, "Instinctive brains are really bad at doing math. So look for opportunities to make it more fun and dynamic."

What would a NASPL event be without a good research session – especially in a year that has seen unprecedented upheaval in all aspects of business and society? Simon Jaworski, President of Leger's U.S. office, gave an overview titled **A Research Perspective: How Has Lottery Survived and Adapted During the Pandemic? And Where Does It Go From Here?** He detailed some of the trends being seen in the research. Not surprisingly, many consumers have sampled scratch tickets for the first time this year. After all, they were looking for something entertaining and affordable, given that so many other options disappeared during pandemic restrictions. Casino and sports bettors in particular started spending more on lottery, and those are also the groups who embrace higher price points.

Surveys also asked important questions about Powerball and Mega Millions as these games



have struggled of late. Players generally want to see higher payouts for lower-tier wins. About half of players would still only play once or twice a week even if additional draws were added. Core players are much more interested in a \$5 game. And if Powerball expanded to other countries, while 80% of players would remain loyal to the game, half of lapsed players wouldn't continue to play.

Responsible gambling – and new ways to look at player behavior – also was highlighted at DeskCon. First, there was **Positive Play Strategy: A Case Study From the Hoosier Lottery**. Positive Play is a way to measure what players are doing and how they respond to RG messaging. Presenter Dr. Richard Wood, whose company GamRes developed the Positive Play Scale (PPS), noted that it's important to study the 98% of “positive” players instead of the 2% of problem gamblers in order to learn behaviors and programs that can keep minor problems from becoming major ones. “Historically the number of problem gamblers is very small, so it's hard to measure the impact of gambling or responsible gambling programs on them.” By focusing instead on 98% of

players using the standardized PPS, research is more likely to uncover the RG programs and messaging that work.

The PPS uses four sub-scales: the way players perceive personal responsibility and their extent of gambling literacy, plus how honest they are with themselves about their gambling behavior and whether they have a pre-commitment to consider how much time and money they spend gambling. Because the PPS is standardized, results can be compared over time and across jurisdictions.

The Hoosier Lottery launched Positive Play in 2017, and has done annual surveys with its MyLottery members ever since, explained Katie Carlson, Director of Corporate Social

Responsibility & Compliance. The goal is to use PPS to optimize the Lottery's RG strategies, much as the program is intended: To establish benchmarks, identify the strengths and weaknesses of an RG strategy, to segment players in order to tailor RG approaches to different types of players, and to monitor changes over time. “It's a way to connect with our segmented players in different ways.”

Another session looked at responsible gambling in the context of the relationships between gambling operators and sports. In a session titled **Gambling and Sports: As Long as There Has Been Currency, There Has Been Gambling**, Ken Averill, a GameSense Advisor at Encore Boston Harbor, explained how sports sponsorships are always attractive to companies of all kinds. They increase awareness among a desired target audience, televised sports events reach millions of people globally, and the exposure of a company's logo leads to increased visits and loyalty to that company. For sports teams, such sponsorships provide new sources of revenue.

Averill gave a short history of sports, including sports scandals, and noted that as





**Gambling and Sports**

sports betting grows, it is important to emphasize responsible gambling. Especially among college students who are twice as likely to have gambling problems compared to the national average. Later in the session, he was joined by Chelsea Turner, Director of Responsible Gambling for the Massachusetts Council on Gaming and Health, and they identified all the ways that regulated online gambling actually provides unique RG opportunities not available elsewhere, such as knowing your players, robust age verification, spend history and limits, easy access to RG information and financial literacy tools, etc.

Speaking of sports sponsorships, the Arizona Lottery has a great relationship with NASCAR, the first major sport to return after the pandemic shut things down last spring and one of the first sports that started allowing spectators once again. That relationship was explored in the session **Race for the Win: Leveraging Experiential Prize Partnerships in a COVID-19 World.**

Julie Giese, President of Phoenix Raceway, explained that NASCAR has always been unique in allowing racing fans to get close to the action, mingling

with drivers and wandering around the field. While out of necessity there hasn't been that level of interaction this year, it is still a sport that engages fans like no other. And more importantly, "NASCAR fans and lottery

players are the same people," noted Arizona Lottery Executive Director Gregg Edgar.

In preparation for the NASCAR Championship Weekend at Phoenix Raceway, held November 6-8, the Lottery released a \$2 progressive Fast Play ticket that offered second chance prizes including a VIP experience at the championship event. Sales for the game took off, noted Chris Rogers, the Lottery's Deputy Director, Marketing and Products, adding that because

of the pandemic, there is a lot of pent-up demand for big events.

Edgar encouraged lotteries to find new ways to get involved with sports. "Don't be afraid to ask sports sponsors for what you want to do!" That was echoed by Giese. "Opportunities for lotteries with NASCAR are whatever you want them to be," she said. "Fans are very brand loyal to NASCAR, and any other brands that support the races."

The Arizona Lottery led another session during DeskCon, **Innovative Partnerships: Walmart and the Arizona Lottery**, about a first-in-the-nation lottery customer service center inside a Walmart store. The Lottery needed a customer



**Race for the Win**

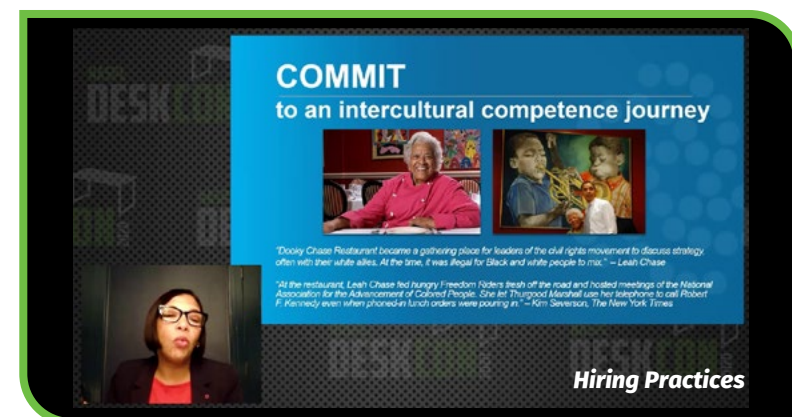
service center to cover the northwest part of the state, and Walmart was looking for ways to innovate and better serve its customers, explained Raynie Hosto, the Lottery's Deputy Director, Customer Service and Sales. So last May, the Lottery opened its customer service center in the leased-space area in front of a Walmart store in Kingman, Ariz., taking over the store's existing lottery operations, including the vending equipment already in place.

Lottery officials see this as a “win-win-win” situation, and that in addition to providing good sales, the new service center “has provided the Lottery with great knowledge about the challenges retailers face,” said Hosto. It was the Lottery’s first venture into actually owning a service center inside a retail store, and they spent a lot of time to make sure they put their “best foot forward for Walmart.”

Joining Hosto for a discussion and Q&A period was Anne Johnson, Director, Retail Services Team, Lottery & Automated Kiosk, for Walmart Stores Inc., who has worked tirelessly with lotteries in the expansion of vending machines to Walmarts across the country.

The Kentucky Lottery presented **Keys to a Successful Innovative Game Launch**, a detailed case study providing insights into what helped Fast Play significantly exceed expectations after it launched last year. First and foremost, they conducted research with players through focus groups and online panels. They learned that Fast Play would be a good name for the product, but the word “progressive” wasn’t easily understood. So instead, explained Erica Williams, the Lottery’s Director of Terminal Generated Games, the concept was dubbed Rolling Jackpot. It was also felt that the launch should include a family of games, rather than using several different names for games in the new product line.

Keys to the game’s success were extensive training for both sales reps and retailers, “coming soon” teasers at POS prior to launch and extensive POS at launch, and considerable traditional and digital media, plus PR



support for nearly eight weeks. Jackpot and winner awareness are regular ongoing components of Fast Play support. The results? With only slight cannibalization of scratch sales, Fast Play sales were 45% above the Lottery’s sales quota. Williams sees even more opportunities in social environments, as players look for things to do between Keno and Cash Pop games. Above all, “It’s not only important for the players to get excited about a new game,” she said. “You need to get your sales reps and your retailers excited about it!”

Closing out the DeskCon conference program was an important session titled **Hiring Practices: Hiring Those That Represent Our Customers**. The presentation by Dr. Katrice A. Albert of the Third Eye

Consulting Group, LLC, came at a time when almost a third of NASPL’s member lotteries are led by women or people of color. In fact, seven of the 11 members on the association’s current Executive Committee are women or people of color – almost two-thirds.

Hiring diverse top talent “should be a long game,” said Albert, one that promotes diversity, equity and inclusion. She believes that igniting forward momentum, and charting a course towards diversity and inclusive excellence, includes five major components:

- 1) **Future proofing** – nurturing and advancing diverse top talent.
- 2) **Digging deeper** – expanding cultural intelligence, becoming more equity-minded.



3) **Fueling evidence-based practices** – making a rigorous approach to diversity, equity and inclusion.

4) **Sparking voices** – enhancing and growing the purposes of all employees and customers.

5) **Amplifying reach** – leveraging partnerships and relationships for this inclusive excellence initiative.

**NASPL Awards**

Scattered throughout DeskCon week were announcements of all the 2020 NASPL award winners. Although they couldn't accept their trophies in person, lotteries were eager to submit entries for the annual NASPL Batchy and

Hickey Awards. Awarded Best of the Batch was the Minnesota Lottery's Minnesnowta Google Maps Location promotion. A full listing of the 2020 winners appears on page 62.

Honoring the industry's hard-working employees, the Ott Brown Scholarship Award and the Powers Awards were also announced at DeskCon; winner profiles begin on page 42.

And finally, there were a plethora of entries for the Buddy Roogow Innovation Awards for the best new instant and best new draw games. That is typical on the instant side, where there were 13 entrants this year. But the six entries for the best new draw game more than doubled the typical number of entries in

recent years. It's a good indicator that lotteries have been successful in trying new things.

The judges narrowed down the field of instant ticket entries to two finalists – British Columbia Lottery Corp. for Battleship, and the Georgia Lottery for Georgia Jackpot Scratcher. The award went to BCLC's Battleship. Finalists for the best new draw game were the Connecticut Lottery for Fast Play Progressive, and the Georgia Lottery for Cash Pop. The judges selected Georgia's Cash Pop as the winner. Be sure to review the [video](#) of what went into these games' successes if you missed the live presentation or need to take notes! ●

# IN-LANE SALES: OPTIMIZING CONSUMER AND RETAILER SOLUTIONS



One of the most anticipated DeskCon sessions was an in-depth update and discussion on the in-lane sales projects that everyone in the industry is watching with keen interest. Indeed, the session triggered an active question-and-answer period with viewers.

Paul Riley, Vice President of Retail Innovation and Partnerships for IGT, who also serves as the Chair of the NASPL API Tech and Retailer Subgroup, started things off with a short summary of the NASPL API initiative. The goal was to appeal to national retailers, and the API has already facilitated both the QUICKTICKET and Receipt Ticket currently in market.

Although the Texas and Arizona lotteries are leading

the charge in the U.S., Ontario Lottery and Gaming has actually had two in-lane solutions in place, including its own version of QUICKTICKET, since 2017.

The Arizona Lottery launched its QUICKTICKET on Sept. 7 at Dollar General stores, immediately providing 120 new retailers for the Lottery. More chains were on track to follow with QUICKTICKET, including Kroger, CVS and Circle K. “We need growth through retail,” said Executive Director Gregg Edgar, noting that some of these chains are new to lottery in Arizona.

An ambitious two-pronged approach is happening in Texas, with both QUICKTICKET and Receipt Ticket.

Ryan Mindell, Texas Lottery Operations Director and Chair of

the NASPL API Working Group, noted that QUICKTICKET is now in about 1,500 Dollar General stores and has been selling “very well.” As a result, the chain is looking for other ways to be involved with lottery, such as new ways to redeem tickets, selling scratch tickets, etc. The H-E-B grocery chain has been testing Receipt Ticket, which allows sales and validations through the store’s regular cash registers; Kroger is another chain interested in this solution.

Reaching lottery customers in these big chains, as they check out, is a “no-brainer,” said Edgar, given that otherwise, the vast majority of consumers never even see lottery as a purchase option. Stephanie Martinez, Business Centers Operations



Manager for H-E-B, added that the advantages for the direct integration of the Receipt Ticket include improved customer experience, reduced transaction time and reduced errors. It also makes the stores more efficient, and they can even up-sell to consumers.

OLG has had QUICKTICKET longer than anyone, and Adam Caughill, OLG's Director of Retail Lottery Innovation, noted that the product reduces lines at customer service desks. And this year, when many of those desks were shut down due to the pandemic, customers discovered QUICKTICKET in-lane – helping with impulse purchases. Still, he emphasized the need for education. “QUICKTICKET was totally new to players, so there was a lot of education to do in the stores.”

Trust also plays a role when there's a totally new way to play, noted Martinez. Being first to implement Receipt Ticket in the U.S. meant that the store had to get customers to trust the product. “But they do trust H-E-B, so they were willing to trust us.”

The discussion then turned to how to measure success of these projects. “We got focused on sales per lane at the beginning,” said Caughill. “But we learned to look at the overall impact on sales in a store.” That includes not only incremental sales in-lane, but also increased sales at the customer service desk, just by having lottery more visible in the store.

For H-E-B, success is “not measured by sales, but in growing a new customer base for lottery and offering redemption” at the stores' business centers,

**NASPL API Activity - Specification**

- **v1.0 – Multi-Jurisdictional Games Wagering**
  - Complete and Published. Hosted on NASPL Matrix.
  - Accessible via formal Request (No Sharing, No Implementing)
  - Working with Retailers For Adoption/Implementation
- **v2.0 – Support for InLane Redemption**
  - Requested by Retailers; Implementation optional
  - Published Jan 2019
- **v3.0 – To Be Determined**
  - Instant Tickets??? (Redemptions, Sales)
  - QuickTickets/QuickCards???
- **New Working Group Participants** →

Logos for participating retailers: BLACKHAWK, POLLARD, mpi, JACKPOCKET, Lottery, tapentive, Lazio.

**NASPL Standard API Lottery Ticket Printed on Retailer Receipt Paper**

Step 1: Customer selects Quick Pick hangtag card and presents for scanning

Step 2: Clerk scans card at register (or hits POS button) and accepts payment

Step 3: Lottery ticket printed on POS receipt printer

Step 4: Winning tickets are cashed at the store Lottery terminal

explained Martinez, adding that customers have been excited to see lottery offered in-lane.

“When we talk about metrics, we have to talk about it as an in-teractive process,” added Edgar. “In-lane can fundamentally restructure our relationships with all retailers.”

Indeed, what can't be measured in dollar terms is the importance of meeting retailers' needs, noted Riley. Especially with the pandemic, in-lane options help these large stores meet customers' needs as a one-stop-shop. And everyone agreed that lotteries and retailers should keep working together to find new solutions and new

products – although it's important to keep it simple for both customers and cashiers. “Simplicity is our friend,” emphasized Edgar.

Still left to consider is how to get instant tickets in-lane, since those games provide the majority of lottery sales in most American jurisdictions. Some solutions are already out there, and there are numerous ongoing discussions about the challenges, from how to choose selected games to showcase, to single ticket activation, to changing the fundamental look of instant tickets. “It would be a huge win for lottery if we can figure this out,” said Riley. ●



# NASPL DESKCON 2020

LIVE FROM YOUR OFFICE



## POWERS AWARD WINNERS

During DeskCon 2020, NASPL announced the winners of the prestigious Powers Awards and Ott Brown Scholarship.

The Powers Awards – named in honor of the late “Father of U.S. Lotteries” Edward J. Powers – are presented each year in recognition of the extraordinary contributions made by lottery and vendor employees through outstanding job performance.

***NASPL congratulates this year’s winners, each nominated by their lottery’s senior leadership.***



**EMMANUEL S. BAILEY**

*President and Chief Executive Officer, DC09LLC*

Far from the stereotypical executive, Emmanuel rolls up his sleeves and is hands on in all aspects of the business. He is the point person who ensures that the DC Lottery is running efficiently at all times, and that their business remains viable for the long term future. He leads the charge on developing high-level strategy initiatives and revenue-generating programs, while also ensuring that day-to-day requirements are met. Whenever there is an issue, E.B. is on the case to ensure it gets fixed quickly to limit any impact on Lottery operations.



**RICK BARNHILL**

*General Manager, Scientific Games - South Carolina*

Rick has been working to support the South Carolina Education Lottery since its inception in 2002. During his tenure overseeing warehouse operations and managing logistics for the Lottery's instant ticket program, he has led a substantial increase in distribution, while continuing to meet every scheduled launch. And most importantly, he has accomplished all of this with a smile on his face and a "We'll make it happen" outlook.



**J. MIKEL BOLAND**

*Senior Operations Manager, IGT - Florida*

In his position with IGT, Mikel has worked alongside the Florida Lottery for over a decade. In the past year, he has been instrumental in navigating the Lottery's gaming system conversion, and he and his team have become the onsite subject matter experts for the new systems. Mikel not only assists with day-to-day operations, he understands the Lottery's mission and makes sure that the entire IGT team is ready to help in their goal to streamline processes and make systems more user-friendly to retailers, players and staff.



### **ALLISON BRUEMMER**

***Information Technology Manager, Missouri Lottery***

Starting last year, the Missouri Lottery embarked on a major project to update its mobile app to improve functionality, enhance player analytics, improve security function, and integrate an existing loyalty club. Allison worked very closely with the various groups working on the project, both internal and external, serving as part business analyst, part IT specialist and part business manager for the duration of the project. Without her hard work, the successful launch could not have been completed.



### **SYLVIA BUZZELL**

***Lottery Games & System Specialist and Acting Director of Marketing & Sales, Vermont Lottery***

Sylvia has been with the Vermont Lottery for 27 years. In addition to her responsibilities of working with the gaming system and vendors, she has also been serving as Acting Director of Marketing & Sales. In this capacity, Sylvia handles all release testing and instant ticket game design, and also leads the Lottery's marketing efforts.



### **LORI DENTON**

***Regional Vice President, Scientific Games***

As a Regional Vice President at Scientific Games, Lori has led cross-functional teams to develop and launch new products, create go-to-market strategies and manage the Arizona Lottery's complex portfolio. She has been instrumental in helping the Lottery reevaluate their instant ticket product line to increase Scratchers sales – which are the driving force behind their record sales this past year despite the current pandemic. She has become a valued partner, and an integral part of the Arizona Lottery team.



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INSPIRING THE  
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Save the date: Oct 16-20, 2022





## **RITA FINOCCHIARO**

***Inside Sales Representative, Connecticut Lottery Corporation***

It is rare that you find an employee who has been with an organization for almost 35 years, yet performs with the passion, energy and excitement of a new hire. Rita is that employee. She handles the Lottery's busiest, highest volume, and most demanding retailers – and never compromises on quality of work and attention to detail. She takes the perspective of her years of experience and adapts that knowledge into creative solutions, making her a role model for the entire sales department.



## **EDIE FRAKES**

***Vice President of Marketing, Kentucky Lottery Corporation***

Among her broad range of responsibilities, Edie oversees the development and marketing of a portfolio of over 50 games, and she assures that all marketing projects and advertising campaigns are designed to meet the Lottery's overall goals and objectives. During the recent pandemic, she has not only helped the Corporation effectively navigate uncharted territory while protecting their brand – she's made sure to take care of her team as well.



## **JOSHUA FREDETTE**

***Program Manager - Lottery Technology Projects, Trifecta Consulting Group - Massachusetts State Lottery Commission***

Josh led the team that developed the Lottery's mobile Keno to Go and All or Nothing apps. The app launch has led to rapid adoption by their customer base and helped draw in new players. He also managed the team that developed and deployed a new Lottery website, designed to optimize the customer experience and allow engagement on mobile platforms. Both of these major projects helped usher the Mass Lottery into a new era and sets them up to quickly pivot into future capabilities.



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**JULIE GILMORE**

*Information Technology Administrator, New Mexico Lottery Authority*

Julie wears many hats for the New Mexico Lottery. She is directly responsible for IT infrastructure and network management, as well as scheduling, testing and contract compliance with their central gaming system provider. Over the past year, she has managed major projects including software and hardware upgrades, gaming system releases, an email system conversion and an annual external audit. She also handles daily requests such as database queries and desktop support. And thanks to Julie's management of the Lottery's disaster recovery plan, their operations didn't miss a beat due to COVID-19.



**WILLIAM GRIFFIN**

*Deputy Commissioner of Sales, Michigan Lottery*

For more than 30 years, William has helped develop, refine and teach the sales techniques that have led to the Michigan Lottery's success. He helped develop several of the Michigan Lottery's standard practices, including SBO week, quarterly sales incentives, cashless sales incentives, incentive qualifiers and keno promotions. His strong leadership, remarkable sales skills and friendship have left an indelible mark on both the Michigan Lottery and his colleagues.



**RUSS HARBEN**

*Deputy Director Operations, Arizona Lottery*

In his first year in the position, Russ has led the Lottery's efforts to finalize their Back Office Transformation System; managed all operational aspects of the conversion of their warehouse and distribution contract; and been an integral member of the leadership team. He brings structured leadership and a can-do mentality that drives success through challenging times. And his vendor experience and data-centric analytical approach has brought tremendous insight to the expansion of the Lottery's business.



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See Back for Details.

Match any of YOUR NUMBERS to any of the WINNING NUMBERS, win prize shown. Get a "5X", "10X", "20X" or "50X" symbol and win 5, 10, 20 or 50 TIMES the prize respectively. Get a "TICKET" symbol, win ALL 15 prizes shown.

**WINNING NUMBERS**

**YOUR NUMBERS**

**WIN UP TO \$0,000,000**

**WILLY WONKA Golden Ticket** SCIENTIFIC GAMES

**LOOMPA LOOMPA Bonus**

enter the EVERLASTING MILLION SECOND CHANCE PROMOTION for a chance to win a trip to Las Vegas where you could win \$1 MILLION a year!

Match any of YOUR NUMBERS to any of the WINNING NUMBERS, win prize shown. Get a "5X", "10X", "20X" or "50X" symbol and win 5, 10, 20 or 50 TIMES the prize respectively. Get a "TICKET" symbol, win ALL 15 prizes shown.

**WINNING NUMBERS**

**YOUR NUMBERS**

**WIN UP TO \$0,000,000**

**WIN UP TO \$0,000,000**





### **CLAIRE JONES**

**Director of Human Resources, South Carolina Education Lottery**

Claire serves as the HR Director, but she has also acted as an intelligence strategist in developing operational plans at each phase of the pandemic. She coordinated all departmental efforts in implementing operational plans to ensure that the latest guidelines and advice from health care professionals were communicated to lottery employees. And she also led the entire organization in formulating and executing a transitional claims redemption process. Her hard work and dedication directly contributed to the Lottery's successful efforts, especially this year.



### **FLORA JONES**

**Director of Operations, Hoosier Lottery**

Flora has been a part of the Hoosier Lottery team since its beginning in 1989. Her knowledge, experience and attention to detail are unmatched. Flora ensures that players get paid, retailers become and stay licensed, supplies are plentiful, offices are maintained, and the fleet of vehicles are licensed and insured. During the pandemic, her responsibilities doubled, but she didn't blink an eye. She is seen as a rock for the Hoosier Lottery, and continues to be a cornerstone in maintaining the organization and championing Hoosier dreams.



### **JOAN KOTAL**

**Information Technology Manager, Texas Lottery Commission**

Joan has been a driving force in modernizing the technology, project management and information security landscape of the Texas Lottery Information Resources Department. Among her recent accomplishments, she led an almost complete conversion at Lottery headquarters to a telecommuting environment, while also leading the virtually overnight development of the new Claim Appointment Booking System app – both in quick response to the pandemic. Her forward-thinking planning consistently helps keep the Texas Lottery running effectively.

# We've been busy.



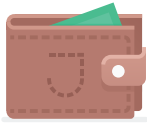
## \$16,000,000 in Winnings

It's official. Jackpocket players have hit the \$16 million mark in prize payouts!



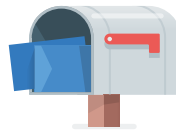
## Live in Arkansas

Arkansas is now a Jackpocket state. That brings our total number of states to nine—with more on the way!



## Sightline + Jackpocket

We've partnered with Sightline, the leading mobile commerce platform for gaming, to accept more payment types than ever before.

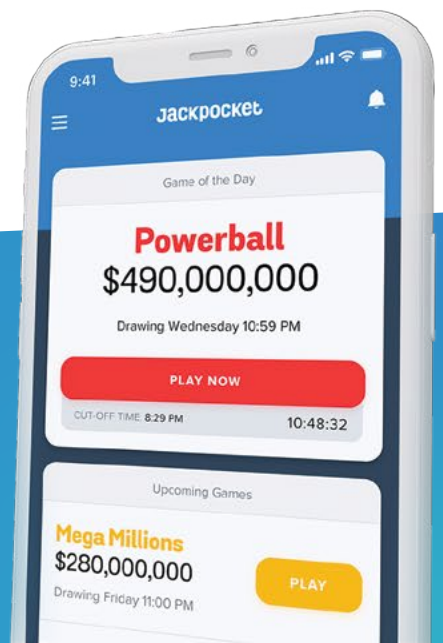


## Scratchers Feature

We launched a scratch ticket delivery feature in Texas! Our players can get scratch games mailed right to their door.

# Jackpocket

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New Jersey • Ohio • Oregon • Texas • Washington, D.C.





### **JAMIE KYLE**

***Inside Sales Representative, Connecticut Lottery Corporation***

Jamie is the ultimate model of dependability and reliability. In her 20 years with the Lottery, she is that one person who always knows what needs to be done. Her poise and unruffled demeanor bring calm and stability to the Inside Sales Department. During times of high call volume, she is skilled and professional, keeping up with orders while always being mindful of properly managed inventory. Her positive and meaningful actions directly impact the record sales and continued success of Connecticut Lottery.



### **JOE LAPINSKI**

***Account Development Manager, IGT - Texas***

Joe is responsible for and ensures the delivery of every aspect of the robust and complex IGT Lottery Operator contract. The Texas Lottery is a complex customer for IGT, both geographically and in scope. Joe's experience, expertise and deep understanding of the Texas Lottery allow him the ability to work seamlessly with Lottery staff toward their common goals, helping set new records for sales and revenue along the way.



### **PAMELA MOGENSEN**

***Purchasing and Retail Contracts Manager, Minnesota State Lottery***

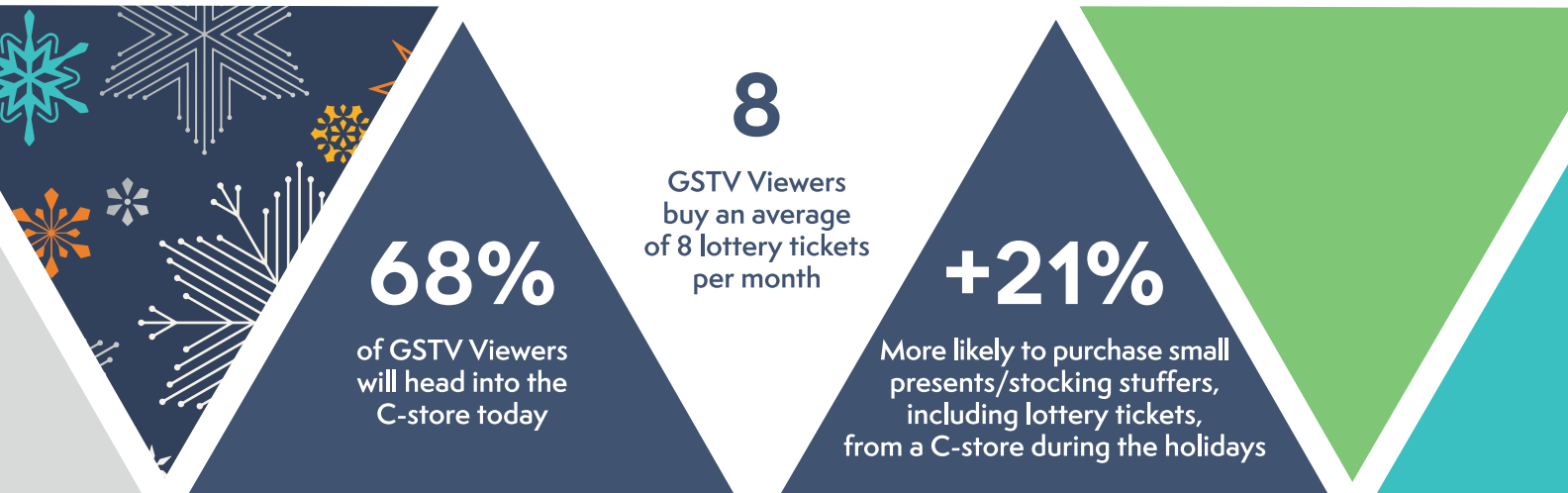
While challenging in normal times, Pamela's responsibilities became even more complex during the pandemic. When the Minnesota Lottery was forced to send nearly its entire staff home, she handled the Lottery's rapid transition to remote work by creating numerous innovative electronic workflows on the fly. Pam expedited a move to digital signatures for retail contracts and internal approvals, and she was an invaluable resource to other departments attempting to transition to remote work. She also deftly utilized emergency authorities and creative solutions to cut red tape and get the Minnesota Lottery what it needed to succeed during a pandemic.

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Source: Nielsen Media Impact, Dec 2019; GSTV Nielsen/Lieberman/Mfour/, Placed Ad Effectiveness Studies, 2006-2019; Nielsen TV Brand Effect, 2017; YouMe 2017 Online Ad Awareness; GSTV Audience Insights Study, July 2018; Nielsen DPB Cinema Fusion to GfK MRI Doublebase 2019, A18+; NACS 2013 Retailer Survey.



### **STEPHEN ORTIZ**

*Director of Sales and Marketing, Kansas Lottery*

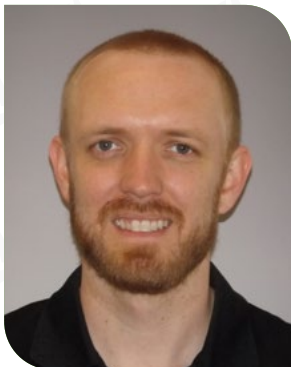
Since the previously separate departments of Sales and Marketing were combined under Stephen's leadership, the accomplishments of the new division have been tremendous. He has overseen the rollout of the Lottery's brand-new vending machines; increasing district manager presence at retail locations; and the creation of new, better and exciting instant games. The morale and performance of the whole division has been much improved, thanks largely to him.



### **DOUG PARKER**

*Vice President of Human Resources, Georgia Lottery Corporation*

Doug used his wisdom and creativity to be a guiding force for leading the Lottery's internal team through COVID-19. He goes above and beyond daily to serve the Georgia Lottery and its employees in a manner that encompasses compassion, confidentiality, kindness and strength. As the business adapted to an uncertain environment during unprecedented times, Doug's work and that of the Human Resources team was invaluable. And his dedication and commitment to the organization and its employees has never been more evident.



### **DEREK POPPE**

*Drawing Manager - Investigator, Washington's Lottery*

In his role, Derek is responsible for compliance with national drawing standards and the administration of in-state drawings. He is also the Lottery's scratch ticket security expert, Internal Control System manager, MUSL Rule 2 Administrator, and Subject Matter Expert for scratch and for draw games – all while also acting as lead investigator for lottery criminal cases and subsequent prosecutions. His positivity, unique skill set and drive have made him a favorite among the staff of Washington's Lottery, and among the greater lottery industry nationwide.

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### **SHALYN PROCTOR**

*Chief Financial Officer, Virgin Islands Lottery*

Shalyn has been a part of the Virgin Islands Lottery for five years. In her position as CFO, she prepares and manages the budget for the Lottery, and oversees the management of all financial activities. Shalyn also maintains all financial transactions and reporting, prepares statements and status updates, and oversees the coordination of independent auditors.



### **BARRY RILEY**

*Executive Producer, Cash Explosion TV Game Show, Ohio Lottery*

The Ohio Lottery is unique in offering a weekly televised game show, known as Cash Explosion. Over the past year, Barry has led the Cash Explosion team through a variety of unique challenges that have showcased his ability to adapt and innovate. When the pandemic forced a suspension of in-studio production, he and his team pivoted to offer “behind the scenes” episodes, a Cash Explosion app promotion, and a new play-at-home version allowing contestants to participate via Zoom.



### **STEPHEN SCHELB**

*Instant Game Research Analyst, Wisconsin Lottery*

Stephen has consistently been a source of dependability, with an outstanding quality of work throughout his 15 years with the Wisconsin Lottery. He is skilled and experienced in the design, execution and analysis of a variety of marketing research disciplines, and regularly uses these skills to improve Lottery products and operations. He is responsible for the research and analysis behind the development of the state’s instant scratch tickets – a product line that achieved record sales for the ninth consecutive fiscal year – and he directly contributed to Wisconsin being one of the most successful Crossword states.



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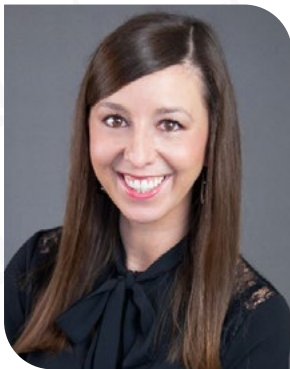
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MUSL Compliance  
Game Verification  
Fraud Detection  
RNG Audit



### **DENNIS SCHMITZ**

***Operations Manager, IGT - Wisconsin***

Dennis has been an integral leader at the IGT Wisconsin site for over 15 years. He is involved with daily operations and project deliveries, as well as being ultimately responsible for the warehouse instant ticket pick-and-pack operations. Dennis has assisted in two complex system conversions, and he is the IGT Wisconsin leader on all ongoing technology initiatives, including their most recent expansion into Walmart.



### **AMBER SEALE**

***Chief of Brand Management, Florida Lottery***

Since her arrival at the Florida Lottery more than two years ago, Amber has worked relentlessly to make positive and efficient improvements to the way the Lottery shares educational success stories and encourages responsible gaming. Her commitment, expertise, energy and determination have provided a blueprint for brand management that will serve as a model for the Lottery's advertising and marketing strategies for years to come.



### **PAUL STAPLETON**

***General Manager, IGT - Virginia***

In his role, Paul manages day-to-day support and operations, strategic partnerships with all aspects of the business, corporate coordination, and more. During this year in particular, his dedication to quality and responsive service has been proven to survive any challenge – including the far-reaching impacts of the COVID-19 public health emergency. Paul can always be counted on for responsive, relevant and direct information – no matter the issue, large or small. And he is viewed as a key and valued member of the Lottery team.



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### **CHRISTIAN TEJA**

***Assistant Executive Director, Communications, Mass State Lottery Commission***

During the past year in particular, Christian has taken a critical leadership role for the Mass Lottery. He is leading the team serving as the bridge between their new digital engagement efforts and traditional marketing and retail team, as the Lottery aggressively transitions to a digital engagement strategy. He has also been an all-star through the challenges presented by the pandemic, handling all aspects of communication – from internal messages to the team, to shaping clear information for the public and the press. His ability and willingness to think outside the box have been vital during this period, and the Lottery wouldn't have gained its high achievements without his contributions.



### **ROBERT THARP**

***Senior Director, Product Development and Analytics, IGT – Indiana***

As analytical lead, Robert has developed strategies and tactics to support the Hoosier Lottery's retail sales organization in transformative ways. For instance, he has taken special care of their Fast Play category of games, partnering with the sales team to develop strategies to gain retail traction, while also providing strategic insight into the category's growth potential. During the pandemic, Robert has successfully navigated challenges with inventory management, game development, launch management and retail analytics, partnering with the operational team to support retailers with the right inventory, at the right time.



### **JENNIFER THOMAS**

***Special Assistant to the Chief Operating Officer, DC Office of Lottery and Gaming***

Jennifer is the tireless individual who keeps the DC Lottery team energized, the detail-oriented professional who keeps a keen watch over projects, and the dedicated colleague who keeps the team on a steady course. Unbelievably dedicated to the Lottery's overall success, she worked hard to help launch GambetDC, Washington DC's world-class sports betting platform. She also recently served as the point person on the Lottery's newly established Responsible Gaming framework.



**ROB WESLEY**

*Director of Digital, Virginia Lottery*

Through the extra challenges presented by the pandemic, Rob spearheaded the project to begin providing online sales on July 1 – the first day such activity was legal in the state – shortening the launch lead time by nine months. This early launch is expected to help generate over \$20 million in additional lottery profits this fiscal year, and it would not have been possible without Rob’s leadership and commitment.



**OTT BROWN NASPL SCHOLARSHIP**

This award represents what was most important to its namesake, the late Ott Brown: creating opportunities for people to learn and grow. In that spirit, this scholarship allows the worthy recipient to participate in an upcoming NASPL Lottery Leadership Institute at no cost.

**NASPL congratulates this year’s winner!**



**MONIQUEA MAJORS**

*Field Sales Representative, Oregon Lottery*

Moniquea has served as Oregon Lottery Field Sales Representative for over 12 years, managing business relationships with their retail partners. As a respected member of the Lottery’s Diversity, Equity, and Inclusion Committee, she embodies outstanding leadership qualities, possessing a tireless desire to address and raise awareness about issues of diversity, equity, and inclusion within her public and private life. In addition to her Lottery career, Moniquea is the founder of PDX Women of Color, a group dedicated to creating meaningful experiences for the self-expression of black and brown women, to be inspired to grow personally and thrive professionally.

# NASPL 2020 AWARD WINNERS



**Radio Advertising – Instant Games**

**Idaho Lottery**

Holiday Scratch Games – Holiday Giftopia

**Radio Advertising – Draw / Monitor Games**

**Loto-Québec**

Dream Cruise

**Radio Advertising – Corporate / Beneficiary**

**South Carolina Education Lottery**  
Tiny Stories – Meet Tina

**Print Advertising – Retailer Signage / Merchandising**

**Missouri Lottery**

Scratchers as Gifts – Cash Globe

**Print Advertising – Outdoor**

**Minnesota State Lottery**

Vikings Snapchat Filter

**Print Advertising – All Other**

**Maryland Lottery & Gaming**  
Rose Gold Scratch-Offs Full Page Spread

**Corporate Communications – Employee / Player Newsletter**

**Colorado Lottery**

Annual Review

**Corporate Communications – Retailer Newsletter**

**Kentucky Lottery Corporation**  
The Quarter Retailer Magazine

**Responsible Gambling – Print**

**Wisconsin Lottery**  
Dogs Around Poker Table

**Responsible Gambling – Television**

**Minnesota State Lottery**

Gambling Bossing You Around?

**Responsible Gambling – Radio (Tie)**

**North Carolina Education Lottery**

Understanding the Odds

**Ontario Lottery & Gaming**

OLG PlaySmart – Zoey’s Ad

**Responsible Gambling – Digital**

**Ontario Lottery & Gaming**

OLG PlaySmart Behind the Jackpot – Lottery Odds

**New Media – Social Media**

**Georgia Lottery Corporation**

Cash Pop Launch

**New Media – Websites / Microsites**

**Florida Lottery**

Player’s Guide

**New Media – Other Digital Advertising**

**Georgia Lottery Corporation**

ATL United – Kick to Score

**Multicultural Advertising**

**Texas Lottery Commission**

Lucha Libre Social Video

**Hickey – Special Events Promotion**

**Minnesota State Lottery**

Minnesnowta Google Maps Location

**Hickey – Audio/Visual Presentation**

**Texas Lottery Commission**

Luck Happens Livestream – Black Pumas

**TV Advertising – Instant Games (Tie)**

**New York Lottery**

Park Ranger

**Ontario Lottery & Gaming**

\$50 Classic Extravaganza – Nice

**TV Advertising – Draw / Monitor Games**

**South Carolina Education Lottery**

Tiny Stories – Cat Mandu

**TV Advertising – Digital Games**

**Ontario Lottery & Gaming**

Digital Lottery – BBQ

**TV Advertising – Corporate / Beneficiary**

**Arizona Lottery**

A Whole Lotto Good

**Special Category – Public Service Presentation**

**Missouri Lottery**

Play It Forward – Hannah

**Special Category – TV or Radio Fitting No Other Category**

**Missouri Lottery**

Scratchers as Gifts – How Santa Got His Groove Back

**BUDDY ROOGOW INNOVATION AWARDS**

**Best New Instant Game**

**British Columbia Lottery Corporation**  
Battleship

**Best New Draw Game**

**Georgia Lottery Corporation**  
Cash Pop



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## MISS THE SHOW?

**No need to worry! DeskCon 2020 presentations and NASPL Awards announcements are now available to view!**

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These sessions – as well as 2020 NASPL Awards entries – are also available on the NASPL Matrix.

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# Journey to a Top-Performing eInstant Game

A new fast play eInstant game is breaking sales records in Kentucky and Georgia by fulfilling a specific experience that players want – and it’s not what you might expect.



**A**s the adoption of digital lottery play gathers momentum in North America, accelerated by the need for social distancing with the coronavirus crisis, the market has enormous room for growth. One fast play eInstant game released this year, Ruby 7s, has proven its ability to boost sales by attracting and entertaining players in droves. But it took a few twists and turns in the design studio to get there.

Lottery eInstants have come a long way from the earliest days when a consumer had to go to a retailer to purchase a code, enter that code into a website on a desktop computer to play a single game, and then return to the retailer to claim a prize.

Across nearly two decades of advances in digital technology and delivery, game designers everywhere have continued to push the envelope, producing games with increasingly sophisticated graphics

and complicated mechanics. As a result, the trend in recent years has been toward ever-more immersive digital play experiences.

But when it comes to what’s selling today in the core category of fast play Instant Win, players want games that feel familiar – and paradoxically, that means staying true to the retail product.

This player insight was one of several that informed the making – and remaking – of Ruby 7s, a new



IGT PlayInstantWin title that has, after an extended period of development, quickly become a top-five game across sales, average spend, total transactions and unique player count.

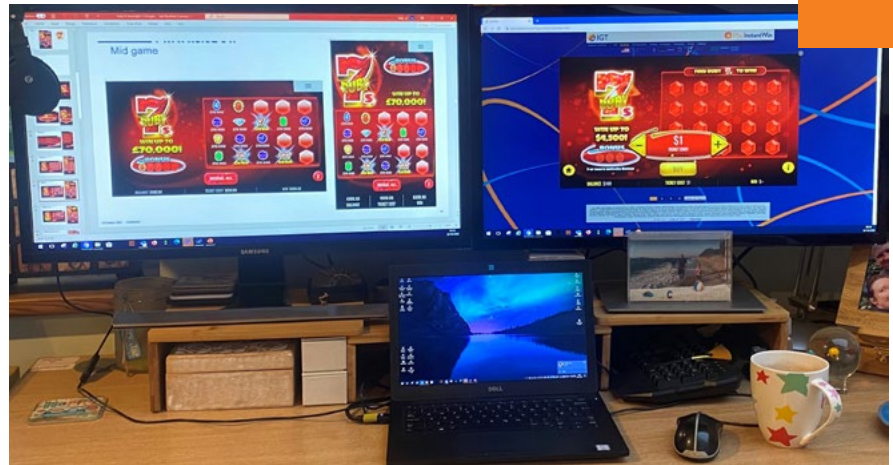
Launched first in Georgia on May 5 this year, Ruby 7s immediately became one of the Georgia Lottery Corp.'s (GLC) best-selling Diggi Games ever, and its launch day was one of the GLC's highest sales days in the eInstant space. Four months on, the game is still played by 40% of the GLC's monthly online players, when it's more typical to see eInstant games drop after subsequent new game launches.

The Kentucky Lottery Corp. introduced Ruby 7s to its Instant Play lineup on July 1, and it became the most successful game launch in terms of sales in the Lottery's history. In the first five weeks, Ruby 7s attracted 356% higher sales than the average game launch in the past two years.

As in Georgia, Ruby 7s remains among Kentucky's top-selling games, and both lotteries keep it in the top row of games promoted on their app and website, so players can easily access it. "The Kentucky Lottery is pleased by the strong launch and ongoing performance of Ruby 7s," said Mike Purcell, Senior Vice President of Marketing and Sales for the Kentucky Lottery. "The game is bright and easy to understand, tapping what we've seen as a Kentucky player affinity for games that include the number 7. It also offers strong bonus rounds to hold consumer interest."

### **The Path to Ruby 7s**

"The whole industry went through a learning curve with digital games, because certainly, in the early days, digital players weren't necessarily retail players," observed Gavin Horricks, IGT Product Manager. "Today, because a higher



**“...familiarity between games and channels is more important today than it was 10 years ago.”**

**- Gavin Horricks**

proportion of sales are online, people are just playing in the channel that's most convenient at the time. It has created a new scenario where there's cross-fertilization, and familiarity between games and channels is more important today than it was 10 years ago."

A recognition of this shift drove the original internal brief that put the game on IGT's product roadmap last year, and this insight has only become more relevant with the pandemic, when more players are at home and looking for the retail game experience online. "We had good knowledge of the markets where this game would be launching first," said Horricks. "Our Business Development Team identified key requirements which would make this game a success, and also some of the issues that could prevent it from performing as well as it has."

Horricks, who has worked on IGT PlayInstantWin products for 20

years, noted that "flashy graphics alone don't necessarily make game play satisfying. When you get halfway through a game and you've got no chance of winning due to the design – when players realize there's no way they can collect enough symbols to win – they're not satisfied. We design games to keep players satisfied and in the game until the end."

### **Knowing What to Keep and What to Leave Out**

Although there was no instant ticket to serve as a model, Ruby 7s looks similar to an instant ticket and "scratches" like one. Players understand immediately that the goal is to find 7s. If players uncover a Ruby 7 symbol, they win the corresponding cash amount, and if they find two or three, they win double or triple the amount, respectively. Beyond fidelity to an instant ticket experience, the magic of interactive technology does have its place, giving Ruby 7s' game-play something extra: Players who collect enough rubies enter one or more bonus rounds to spin a series of animated wheels for guaranteed additional prizes.

Typically, after IGT assigns a development slot to a new PlayInstantWin title, a single producer oversees the game from the initial request through to sign-off

from Quality Assurance (QA). In the case of Ruby 7s, there was much longer development time than usual, and two producers shared the work: Carlo Bush brought the concept to the green-light stage before handing over production to Jo Mills, who had previous success with games like EmotiCollect.

Reflecting on the discarded concepts and changes to both theme and mechanics required to reach the game's final design (see Figure 1), Horricks notes that the studio learned to adhere to the original brief in order to maintain an easier and more intuitive player experience – and resist the temptation to layer in complexity where it might not add to the game's success. For example, players can find it difficult to pick out symbols quickly on top of very complex backgrounds. Internal reviewers rejected several concepts for being too busy or not close enough to a physical product. “With this game, we connected the producers and the larger team more directly with the market requirements they were trying to meet, and we continue to apply these lessons,” said Horricks. After four rounds of refinement, the design cleared concept review, but the de-cluttering process wasn't over yet.

### Testing and Refining

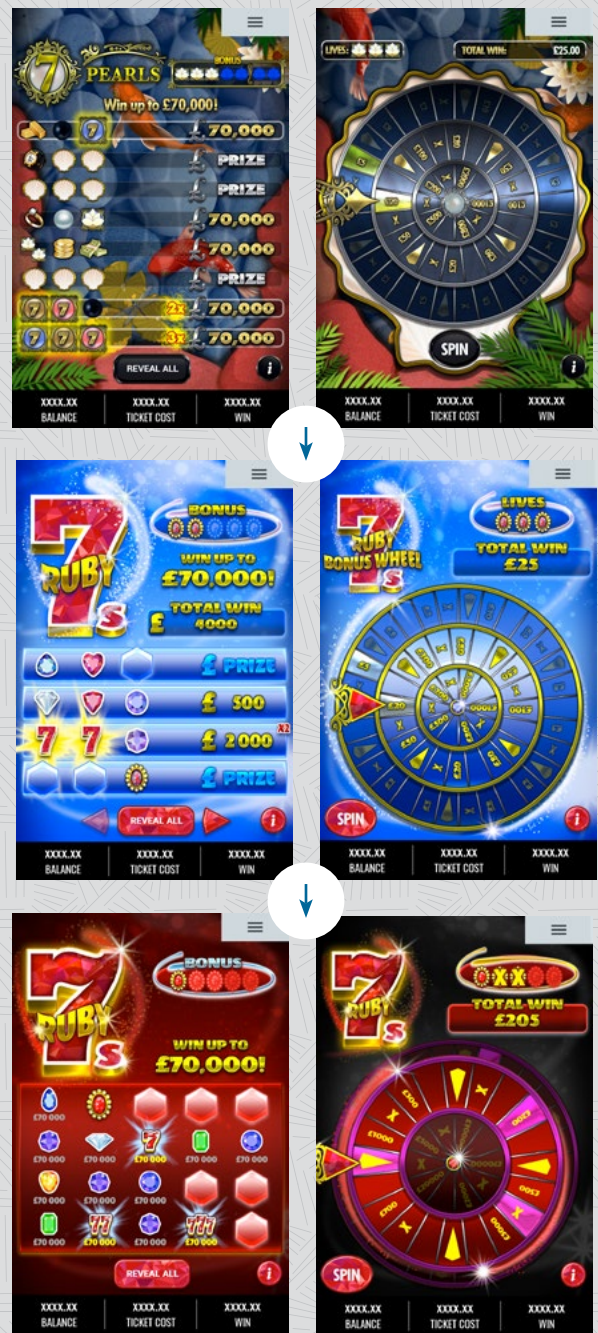
Just prior to releasing the game, IGT performed player tests and made further changes after judging the game mechanic to be too complicated. “Again,” said Horricks, “where you might normally try to pack as much as possible into a game – let's have two bonus features, let's have six different ways of winning and an accumulator – we learned to interpret the brief literally. Some popular games are complex, with lots of different ways of winning, but Ruby 7s wasn't that. It was about simplifying everything down to bring together the right concept for the North American market, the intended primary market for this game.” Even so, the game's appeal has carried over to customers in international markets, where Ruby 7s will launch in 2021.

As the game moved through development, a new animation tool gave Ruby 7s an increased frame rate and smoother graphics. Finally, before the game entered QA testing, the studio redesigned the bonus game to remove some re-spins on the wheel, another refinement that made a big improvement in player satisfaction.

Following the game's success in Kentucky and Georgia, IGT is developing a slate of new games that apply the insights from building Ruby 7s. And with the growing brand recognition for original games like Ruby 7s, the company is now actively engaged in developing physical instant tickets based on PlayInstantWin titles – a reversal of the usual sequence.

“Instant tickets and eInstants are core lottery products designed to appeal to a broad spectrum of players,” said Horricks, “and we will continue to ensure that in a changing world, players will always have the best choice of content from our customers.” ●

Figure 1



Ruby 7s progressed from a “Find the 7s” concept to a record-breaking instant win title through a series of steps that refined the game mechanic and removed noise and clutter. Originally, the game did not look close enough to a physical instant ticket. Early designs featured pearls and a background with a freshwater pool and fish, as well as a “charm” theme – all judged to be too busy. Further refinements led to the use of rubies as a theme, tapping into the popularity of other gem-themed games, as well as changes to the row mechanic and bonus chest. The London design studio completely reworked the bonus wheel mechanic and further improved the user experience. Finally, designers “tuned” the game for color and brightness, then added floating and shimmering background effects.

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# Twenty 20s – The Fast Play Game of the Decade

By Kylie Reagan, Product Manager, INTRALOT Inc.

Consumer behaviors have been rapidly changing over the last decade, even more so since the COVID-19 pandemic began, accelerating and propelling market changes across sectors years ahead of schedule. For lottery, players are purchasing via self-service terminals at an increasing rate and are turning away from the traditional big multi-state jackpot games. So where must the market go? That is a question that would take far more than a few hundred words to answer. Instead, let us look at one product that should be a focus for lotteries as we navigate through this new reality.

Fast Play, we have all been screaming from the top of our lungs for the last few years, and the trends during COVID-19 have turned our causal presentations into clear marching orders. Fast Play continues to see a rise in purchasing as players become more aware of the product line, especially after realizing the ability to purchase on self-service terminals with the click of a button. While other games have suffered through the pandemic, scratch and Fast Play have excelled and grown. What is the reason for this? I believe it is twofold.

First, as an industry we provide entertainment and a belief that one day “I could win.” The difference currently is that players are

interested in a win NOW rather than next Thursday or Friday. The ability to know if a ticket is a winner immediately, almost instantaneously, is tremendously more appealing given the circumstances. Also, Fast Play (and scratch tickets), provide smaller, conceptually more attainable wins. Would a \$500 million

dollar jackpot be incredible and life altering? Absolutely, no one would argue that. But for the many hoping to take home a few extra hundred or a thousand dollars right here and now, well, you can see the appeal and belief in the possibility.

Secondly, Fast Play and instant games offer an immediate diversion,



\*Ticket examples only. Tickets are VOID.

and we know we all need that distraction, including our players, given the year that has been 2020. The pandemic has enhanced the need and desire for instant gratification, entertainment and excitement well beyond our previous understanding. Your favorite team may not be playing, and you may not be able to see your favorite band live in concert, but you can go to your local supermarket when you pick up your weekly groceries and purchase a Fast Play ticket at the self-service terminal at the end of the checkout lane. Easy, entertaining, and the chance to pay for “Mulan” on Disney+ to keep your children busy so you get a second of peace and quiet to yourself.

As a product category, Fast Play has grown at an astounding rate in 2020. INTRALOT has seen this same immense success, most

**The pandemic has enhanced the need and desire for instant gratification, entertainment and excitement well beyond our previous understanding.**

recently with our \$20 Twenty 20s: A numbers-themed game with a rolling jackpot component that excites and entices players. Currently, the game runs in five INTRALOT jurisdictions. Of note, the Idaho Lottery saw

resounding success in its very first jackpot run, with sales greater than both Powerball and Mega Millions for multiple weeks in a row. The game quickly grew to have the highest jackpot of any Fast Play game and brought in over \$3.1 million during its first, historic run in the Idaho market. However, this success is not unique to Idaho but is a product of the game, category and consumer trends toward this type of product.

So, while it is difficult to detail every single way the lottery industry is changing in a post-COVID world, it is clear that as an industry we must focus our attention on Fast Play and players’ ability to play easily from the self-service terminals they are naturally turning towards – and provide them with that excitement and winning feeling they, and we, all deserve. ●

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INSIGHTS  
SPECIAL  
FEATURE

# Holiday Instant Catalog



It's that special time of year again for the *Insights* annual Holiday Ticket Catalog. This feature includes a gallery of holiday tickets from every North American lottery that offers instant games, as well as some general information including game type, price point, odds of winning and top prize. Be sure to check our March/April 2021 issue for a review of how these games performed in the market. Enjoy the creative works of our members. NASPL wishes everyone a wonderful holiday season!

# Arizona Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Cheer	SG	Symbol Find	\$1	3,360,000	1 in 4.15	\$500
Gnome For The Holidays	IGT	Key Number Match	\$2	2,160,000	1 in 4.10	\$10,000
Christmas Crossword	PBL	Crossword	\$3	2,040,000	1 in 3.18	\$20,000
Santa's Giftbag	PBL	Key Number Match	\$5	1,920,000	1 in 3.77	\$50,000
25 Days of Winning	PBL	Symbol Find	\$10	1,560,000	1 in 3.17	\$100,000

# Arkansas Scholarship Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Fun	SG	Tic Tac Toe	\$1	1,560,000	1 in 4.68	\$3,000

# British Columbia Lottery Corp.



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Tripler	PBL	Match 3 w/Multiplier	\$1	1,500,000	1 in 3.3	\$10,000
Christmas Gifts	PBL	Match 3 w/ Instant Win	\$1	1,500,000	1 in 3.3	\$10,000
Merry & Bright	IGT	Key Number Match w/Bonus Area	\$2	800,000	1 in 3.3	\$20,000
Paws of Cash	PBL	Match 3	\$2	800,000	1 in 3.3	\$20,000
Winter Winnings	PBL	Symbol Match w/Bonus Area	\$3	800,000	1 in 3.5	\$50,000
Money Wreath	PBL	Key Number Match, Match 3, Bonus Area	\$3	750,000	1 in 3.5	\$50,000
Season's Greetings X10	PBL	Key Number Match w/Multiplier	\$5	800,000	1 in 3.3	\$100,000
\$500 Frenzy II	IGT	Match 3 w/Multiplier	\$5	800,000	1 in 3.3	\$100,000
Gifts of Gold (National ticket)	PBL	Key Number Match, Symbol Match	\$10	500,000	1 in 3.08	\$250,000
Holiday Gift Pack VIII	PBL	Multiple Game Plays	\$20	385,000	1 in 2	\$150,000

# California Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Cheer	PBL	Symbol Find	\$1	22,000,000	1 in 4.11	\$1,000
Peppermint Payout	SG	Key Number Match	\$5	18,000,000	1 in 4.73	\$250,000
Merry & Bright	SG	Key Number Match	\$10	12,000,000	1 in 3.3	\$1,000,000
2021	SG	Key Number Match	\$20	9,000,000	1 in 3	\$5,000,000



# Colorado Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Reindeer Riches	SG	Symbol Match	\$1	3,120,000	1 in 4.09	\$5,000
Holiday Magic	SG	Key Number Match	\$2	1,200,000	1 in 4.05	\$10,000
Merry Money	SG	Symbol Match	\$3	720,000	1 in 3.2	\$35,000
Season's Greetings	SG	Key Number Match	\$5	1,200,000	1 in 3.71	\$100,000
\$250,000 Holiday Luck	SG	Key Number Match	\$10	720,000	1 in 3.64	\$250,000

# Connecticut Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Cash	SG	Key Number Match	\$1	1,363,400	1 in 3.54	\$1,000
Holiday Bonus	SG	Key Number Match	\$2	1,007,200	1 in 3.56	\$10,000
Snow Me the Money	SG	Key Number Match	\$2	1,000,000	1 in 3.83	\$20,000
Winter Double Win	SG	Extended Play	\$3	1,000,000	1 in 4.16	\$30,000
Merry Money	SG	Key Number Match	\$5	1,016,500	1 in 3.54	\$50,000
Winter Winnings	SG	Key Number Match	\$10	1,000,000	1 in 3.87	\$100,000

# Delaware Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Merry & Bright	SG	Key Number Match w/Doubler	\$1	360,000	1 in 4.95	\$500
Holiday Ca\$h	SG	Symbol Find	\$2	210,000	1 in 4.58	\$1,000
Snow Magic	SG	Count Up (Symbols)	\$3	150,000	1 in 3.67	\$2,000
Gifts of Green	SG	Key Number Match w/Auto Win	\$5	150,000	1 in 3.60	\$5,000
Merry Money	SG	Key Number Match w/Multiplier and Auto Win	\$10	150,000	1 in 3.78	\$10,000

# D.C. Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Snow Bank	SG	Reveal Symbol	\$1	240,000	1 in 4.48	\$1,000
Holiday Magic	SG	Key Number Match	\$2	160,000	1 in 4.68	\$4,000
Make It Rein	SG	Key Number Match	\$5	180,000	1 in 3.62	\$25,000

# Florida Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
\$10,000 Holiday Cash	SG	Key Number Match	\$1	23,040,000	1 in 4.88	\$10,000
National Lampoon's Christmas Vacation	SG	Key Number Match w/Bonus	\$2	21,600,000	1 in 4.41	\$50,000
\$1,000,000 Money Tree	SG	Key Number Match	\$5	16,320,000	1 in 4.00	\$1,000,000
Holiday Cash Blowout	SG	Key Number Match	\$10	20,040,000	1 in 8.88	\$500
200x The Cash	SG	Key Number Match w/Bonus	\$20	9,000,000*	1 in 2.96	\$5,000,000

\*Quantity of holiday pulse. Total quantity of 30,000,000.

# Georgia Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Bonus Buck\$	SG	Symbol Find	\$1	8,640,000	1 in 4.43	\$5,000
Merry Money!	SG	Key Number Match	\$2	7,200,000	1 in 3.71	\$30,000
WINTER Winnings	SG	Symbol Find	\$3	3,600,000	1 in 3.76	\$150,000
\$25, \$50 or \$100 holiday edition	SG	Key Number Match	\$5	5,760,000	1 in 5.15	\$100
Holiday Jumbo Bucks 50x the Money	SG	Key Number Match	\$10	6,240,000	1 in 3.31	\$750,000
Holiday Jumbo Bucks 100x the Money	SG	Key Number Match	\$20	2,400,000	1 in 3.06	\$1,500,000

# Hoosier Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Tis the Season	IGT	Symbol Find	\$1	6,000,000	1 in 4.55	\$1,000
Deck the Halls	IGT	Key Number Match	\$2	3,240,000	1 in 4.29	\$10,000
Candy Cane Cro\$word	IGT	Crossword	\$3	3,240,000	1 in 3.99	\$40,000
Merry Multiplier	IGT	Key Number Match	\$5	3,240,000	1 in 3.75	\$100,000
Holiday Cash Blowout	IGT	Symbol Find	\$10	2,160,000	1 in 9.86	\$250

# Idaho Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Reindeer Riches	IGT	Match 3	\$1	840,000	1 in 2.22	\$1,000
Gnome for the Holidays	IGT	Key Symbol Match	\$2	480,000	1 in 3.56	\$10,000
Candy Cane Cashword	IGT	Crossword	\$3	540,000	1 in 3.29	\$30,000
Rebel Without a Claus	IGT	Key Number Match	\$5	420,000	1 in 3.50	\$50,000
Holiday Sparkle	PBL	Key Number Match	\$5	420,000	1 in 3.20	\$50,000
Merry Money	PBL	Key Number Match	\$20	231,000	1 in 3.12	\$200,000



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Cash	SG	Match 3	\$1	13,920,000	1 in 4.48	\$500
Fro\$ty the Doughman	SG	Symbol Match	\$2	4,560,000	1 in 4.4	\$20,000
Peppermint Payout	SG	Number Match	\$3	3,000,000	1 in 3.98	\$50,000
Holiday Cash Bonus	SG	Number Match	\$5	4,800,000	1 in 3.63	\$100,000
\$250,000 Holiday Fun	SG	Number Match	\$10	2,040,000	1 in 3.22	\$250,000
\$1 Million Merry & Bright	SG	Number Match	\$20	2,040,000	1 in 2.87	\$1,000,000

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# Iowa Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Gnome For The Holidays	IGT	Key Number Match w/Tripler	\$1	1,816,500	1 in 4.31	\$1,000
Freezin' Greetings	IGT	Match 3	\$1	1,862,700	1 in 4.08	\$500
Snowball Cash	PBL	Key Number Match and Count Up	\$2	945,000	1 in 3.81	\$5,000
Holly Jolly Luck	SG	Symbol Find	\$2	1,342,200	1 in 3.72	\$10,000
Season's Greetings Bingo	PBL	Bingo	\$2	1,485,000	1 in 3.34	\$25,000
4 Corners Holiday Crossword	PBL	Crossword	\$2	1,635,450	1 in 3.33	\$20,000
Elfin Fun	SG	Symbol Find	\$3	1,255,900	1 in 3.51	\$30,000
\$30,000 Holiday Crossword	PBL	Crossword	\$3	2,126,500	1 in 3.55	\$30,000
Holiday Riches	PBL	Key Number Match	\$5	1,006,860	1 in 3.85	\$50,000
\$50,000 Holiday Crossword	PBL	Crossword	\$5	1,600,560	1 in 3.53	\$50,000
Merry & Bright	PBL	Key Number Match	\$10	881,880	1 in 2.8	\$100,000
\$100,000 Holiday Crossword	PBL	Crossword	\$10	879,600	1 in 3.3	\$100,000
Holiday Wishes	PBL	Key Number Match w/Match 2	\$20	377,445	1 in 2.64	\$25,000

# Kansas Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Lucky Times 10	PBL	Key Number Match	\$1	1,800,000	1 in 3.18	\$1,000
Holiday Lucky Times 20	PBL	Key Number Match	\$2	1,200,000	1 in 3.2	\$10,000
Holiday Lucky Times 50	PBL	Key Number Match	\$5	600,000	1 in 3	\$25,000
Holiday Lucky Times 100	PBL	Key Number Match	\$10	300,000	1 in 2.53	\$75,000

# Kentucky Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Lights	SG	Key Number Match	\$1	4,320,000	1 in 4.80	\$2,500
Holiday Lights	SG	Key Number Match	\$2	2,400,000	1 in 3.93	\$10,000
Holiday Lights	SG	Key Number Match	\$5	2,520,000	1 in 3.51	\$50,000
Holiday Lights	SG	Key Number Match	\$10	1,440,000	1 in 3.05	\$100,000

# Loto-Québec



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
7 chanceux de Noël	PBL	Prize Match	\$1	2,000,000	1 in 4.0	\$7,777
Cadeau Surprise	PBL	Symbol Match	\$2	4,000,000	1 in 4.0	\$9,950
Mots Cachés des fêtes	SG	Crossword	\$3	2,350,000	1 in 3.4	\$25,000
Bingo des fêtes	SG	Bingo	\$3	2,000,000	1 in 3.7	\$25,000
Calendrier de l'aveant	PBL	Symbol Match	\$10	800,000	1 in 2.1	\$1,000
Richesse des fêtes	PBL	Key Number Match	\$10	1,900,000	1 in 3.08	\$250,000

# Louisiana Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Gifts	SG	Reveal Symbol	\$1	1,920,000	1 in 4.74	\$500
Snowball Buck\$	SG	Reveal Symbol, Win All	\$2	960,000	1 in 4.59	\$15,000
Jumbo Bucks - Halloween/ Holiday	SG	Key Number Match w/Doubler	\$3	1,200,000	1 in 3.83	\$30,000
Stocking Stuffer	SG	Key Number Match w/Doubler	\$5	960,000	1 in 4.10	\$100,000



# Maine Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Fun	SG	Key Number Match	\$1	1,680,000	1 in 4.50	\$250
Holiday Fun	SG	Key Number Match w/Doubler	\$2	840,000	1 in 4.12	\$20,000
Holiday Fun	SG	Key Number Match w/5X Multiplier	\$5	840,000	1 in 3.70	\$100,000

# Maryland Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Luck	PBL	Key Number Match	\$1	4,080,000	1 in 4.63	\$1,000
Holiday Luck x2	PBL	Key Number Match	\$2	2,520,000	1 in 4.06	\$10,000
Peppermint Payout x3	IGT	Key Number Match, Extended Play	\$3	3,120,000	1 in 3.80	\$30,000
Holiday Luck x5	PBL	Key Number Match	\$5	3,120,000	1 in 3.80	\$50,000
Holiday Luck x10/Winter Luck x10	PBL	Key Number Match	\$10	3,120,000	1 in 3.34	\$100,000

# Massachusetts Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
\$10,000 FroSty the Doughman	SG	Key Number Match	\$1	10,080,000	1 in 4.83	\$10,000
\$50,000 Winter Winnings Cashword	SG	Crossword/Extended Play	\$2	6,048,000	1 in 4.39	\$50,000
\$100,000 FroSty the Doughman	SG	Symbol Find	\$3	10,080,000	1 in 4.67	\$100,000
\$1,000,000 FroSty the Doughman	SG	Key Number Match w/Bonus	\$5	13,104,000	1 in 4.15	\$1,000,000
Holiday Winnings Blowout!	SG	Key Number Match	\$10	16,128,000	1 in 8.88	\$500

# Michigan Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday \$50's	PBL	Key Number Match w/Bonus	\$1	14,100,000	1 in 4.77	\$3,000
Merry Multiplier	PBL	Key Number Match w/Bonus	\$2	9,000,000	1 in 4.46	\$30,000
Peppermint Payout Deluxe	PBL	Key Number Match w/Bonus	\$5	5,400,000	1 in 3.91	\$300,000
Holiday Gold	PBL	Key Number Match w/Bonus	\$10	3,600,000	1 in 3.64	\$500,000

# Minnesota Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holly Jolly Jackpot	PBL	Match 3	\$1	3,600,000	1 in 3.81	\$5,000
Holiday Tripler	PBL	Match 3	\$2	2,400,000	1 in 3.89	\$10,000
Full of \$500s Holiday Edition	PBL	Key Number Match	\$5	3,000,000	1 in 3.98	\$500
\$13,000,000 Holiday Blowout	PBL	Symbol Find	\$10	1,920,000	1 in 9.92	\$100

# Mississippi Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Sleight Bill\$	IGT	Match 3	\$1	2,400,000	1 in 4.89	\$5,000
Holiday Treasures	IGT	Key Number Match	\$2	2,400,000	1 in 4.1	\$20,000
Holiday Cash	IGT	Key Number Match	\$5	2,400,000	1 in 3.53	\$100,000
Winter Winnings	IGT	Key Number Match	\$10	1,920,000	1 in 3.41	\$200,000

# Missouri Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Santa Paws	PBL	Symbol Reveal	\$1	9,120,000	1 in 4.74	\$1,000
Cashing Through the Snow	IGT	Key Number Match	\$2	5,280,000	1 in 4.44	\$25,000
Jingle Bell Tripler	PBL	Extended Play Number Match	\$3	4,080,000	1 in 3.81	\$50,000
Holiday Cash (Clear Play)	PBL	Key Number Match	\$5	3,720,000	1 in 3.59	\$100,000
Happy Holidays	SG	Key Number Match	\$10	2,160,000	1 in 3.24	\$200,000
Merry Multiplier	SG	Key Number Match	\$20	1,080,000	1 in 2.97	\$300,000

# Montana Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Merry Christmas	SG	Key Symbol	\$1	120,000	1 in 4.16	\$1,000
Happy Holly Days	SG	Key Number Match	\$2	140,000	1 in 4.19	\$12,000
Holiday Magic	SG	Key Number Match	\$5	160,000	1 in 3.77	\$75,000

# Nebraska Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Jolly Jackpot	IGT	Symbol Find	\$1	768,000	1 in 3.84	\$50
Jollier Jackpot	IGT	Coordinate (Grid)	\$3	360,000	1 in 3.63	\$30,000
Jolliest Jackpot	IGT	Key Number Match	\$5	312,000	1 in 3.68	\$50,000

# New Hampshire Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Merry Money	SG	Key Number Match	\$1	1,080,000	1 in 4.72	\$500
Frosty Fun	SG	Count Up, Key Symbol Match	\$2	1,200,000	1 in 4.37	\$20,000
Granite Holiday Multiplier	SG	Key Number Match	\$5	1,000,000	1 in 4.17	\$100,000
\$200,000 Bonus*	SG	Key Number Match	\$10	960,000	1 in 3.46	\$200,000

\*Pulsed holiday scene in first 1/3 of game, then regular.

# New Mexico Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday \$25	SG	Key Number Match	\$1	660,000	1 in 4.69	\$25
Holiday Doubler	SG	Key Number Match	\$2	480,000	1 in 4.00	\$500
Candy Cane Crossword	SG	Crossword	\$3	480,000	1 in 3.96	\$30,000
Happy Holidays	SG	Key Number Match	\$5	360,000	1 in 3.69	\$500

# New York Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Snow Me The Money	IGT	Match 3	\$1	15,840,000	1 in 4.37	\$500
Winner Green Cashword	PBL	Crossword	\$3	14,400,000	1 in 4.06	\$60,000
\$500,000 Gold & Silver	SG	Key Number Match w/Scratch My Back	\$5	8,880,000	1 in 3.93	\$500,000
\$600 Surprise	SG	Key Number Match	\$10	18,000,000	1 in 3.65	\$600

# New Jersey Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Happy Holidays	SG	Key Number Match	\$1	6,600,000	1 in 4.58	\$2,000
Happy Holidays	SG	Key Number Match	\$2	6,600,000	1 in 4.30	\$10,000
Happy Holidays	SG	Key Number Match	\$5	3,600,000	1 in 4.22	\$100,000
\$1,000,000 Spectacular	SG	Key Number Match	\$10	8,100,000	1 in 3.93	\$1,000,000

# North Carolina Education Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Luck X10	SG	Key Number Match	\$1	5,280,000	1 in 4.77	\$5,000
Holiday Luck X20	SG	Key Number Match	\$2	4,320,000	1 in 4.43	\$20,000
Holiday Luck X30	SG	Extended Play	\$3	2,640,000	1 in 4.07	\$75,000
Holiday Luck X50	SG	Key Number Match	\$5	3,840,000	1 in 4.09	\$150,000
Holiday Countdown	SG	Match 2	\$20	1,200,000	1 in 2.98	\$1,000,000

# Ohio Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Cash	SG	Match 3	\$1	17,200,000	1 in 3.99	\$500
Jingle Jackpot	SG	Key Number Match	\$2	5,800,000	1 in 3.81	\$20,000
Holiday Cash Drop	SG	Reveal Symbols w/Legend	\$3	5,000,000	1 in 3.72	\$50,000
Holiday Lucky Times 10	SG	Key Number Match w/Bonus Multiplier	\$5	6,000,000	1 in 3.64	\$250,000
\$500,000 Holiday Money	SG	Key Number Match w/Bonus	\$10	4,000,000	1 in 3.4	\$500,000
Merry Millions	SG	Key Number Match w/Bonus	\$20	2,600,000	1 in 3.03	\$1,000,000

# Oklahoma Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Stocking Stuffer	SG	Key Number Match	\$1	1,251,000	1 in 4.14	\$3,000



# Ontario Lottery & Gaming



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Stocking Stuffer	PBL	Match to Win, Match 3	\$2	2,000,000	1 in 3.45	\$35,000
National Lampoon's Christmas Vacation™	PBL	Key Number Match w/Doubler	\$3	3,500,000	1 in 3.79	\$75,000
Merry Money Multiplier	PBL	Key Number Match w/Multipliers	\$5	2,800,000	1 in 3.59	\$100,000
Holiday Gift Pack	PBL	Word Game, Pattern Game, Match All, Line Win, Match 3, Match to Win	\$10	2,100,000	1 in 3.16	\$50,000
Gifts of Gold	PBL	Key Number and Symbol Match	\$10	1,500,000	1 in 3.23	\$250,000
24 Days to Celebrate	PBL	Match 3	\$20	1,200,000	1 in 3.22	\$250,000

# Oregon Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Merry Slothmas	SG	Match 3	\$1	3,600,000	1 in 4.05	\$1,500
Deck the Halls	IGT	Key Symbol Match	\$2	1,400,000	1 in 3.80	\$10,000
Winter Magic	PBL	Key Symbol Match	\$5	1,251,600	1 in 3.72	\$50,000
Reindeer Riches	IGT	Key Number Match	\$10	518,400	1 in 3.36	\$75,000
Holiday Party	PBL	Key Number Match	\$20	237,000	1 in 3.37	\$150,000

# Pennsylvania Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Oh, Snap	SG	Find, Win All	\$1	13,800,000	1 in 4.51	\$5,000
Cash Kringle	SG	Key Number Match w/Bonus	\$2	10,800,000	1 in 4.39	\$20,000
Santa's Workshop	SG	Count Up, Instant Win	\$3	8,400,000	1 in 4.21	\$50,000
Holiday Gifts	SG	Key Number Match w/Auto Win, Multiplier, Win All	\$5	13,200,000	1 in 3.96	\$250,000
Tree-Mendous Winnings	SG	Key Number Match w/Auto Win, Multiplier, Win All	\$10	8,400,000	1 in 3.59	\$500,000
\$1,000,000 Merry Money	SG	Key Number Match w/Auto Win, Multiplier, Win All	\$20	6,000,000	1 in 3.29	\$1,000,000

# Puerto Rico (Lotería Electrónica)



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Brilla la Navidad	SG	Symbol Match	\$2	600,000	1 in 3.84	\$10,000

# Rhode Island Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Cash	IGT	Key Number Match	\$1	1,000,000	1 in 4.58	\$2,000
Deck the Halls	IGT	Key Number Match	\$2	500,000	1 in 3.98	\$5,000
Season's Greetings	IGT	Key Number Match	\$5	500,000	1 in 3.59	\$30,000
Winter Cash Blast	IGT	Key Number Match	\$10	300,000	1 in 5.31	\$500

# South Carolina Education Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Merry Money	SG	Match 3	\$1	1,440,000	1 in 4.77	\$5,000
Stocking Stuffer	SG	Key Number Match	\$2	1,680,000	1 in 4.42	\$30,000

# South Dakota Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Winter Bucks	PBL	Key Number Match	\$1	450,000	1 in 4.98	\$500
Candy Cane Tripler	PBL	Key Number Match	\$2	210,000	1 in 4.60	\$2,000
Holiday Fun	PBL	Symbol Match	\$3	210,000	1 in 4.51	\$100
Holiday 7s Multiplier	PBL	Key Number Match	\$5	180,000	1 in 4.67	\$25,000

# Tennessee Education Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Cheer	SG	Key Number Match	\$1	2,880,000	1 in 4.19	\$500
Merry Multiplier	SG	Key Number Match	\$2	2,160,000	1 in 4.17	\$20,000
Winter Jumbo Bucks Seasons	SG	Key Number Match	\$3	1,440,000	1 in 3.65	\$75,000
Holiday Magic	SG	Key Number Match	\$5	1,440,000	1 in 4.00	\$100,000
\$200,000 Happy Holidays	SG	Key Number Match	\$10	720,000	1 in 2.90	\$200,000
\$500,000 Holiday Riches	SG	Key Number Match	\$20	600,000	1 in 3.07	\$500,000

# Texas Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Tic Tac Snow	IGT	Tic Tac Toe	\$1	9,000,000	1 in 4.54	\$500
Gifts Galore	PBL	Key Number Match	\$2	7,200,000	1 in 4.29	\$2,000
Winter Words	IGT	Words Extended Play	\$3	5,040,000	1 in 4.02	\$20,000
Holiday Bucks	SG	Key Number Match	\$5	7,200,000	1 in 4.28	\$50,000
Merry Magic	PBL	Key Number Match	\$10	5,520,000	1 in 3.85	\$100,000

# Vermont Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Cozy Cash	PBL	Match 3	\$1	840,000	1 in 4.2	\$500
Holiday Cash Drop	PBL	Key Number Match	\$2	400,000	1 in 4.11	\$1,000
Naughty or Nice	PBL	Symbol Reveal	\$5	270,000	1 in 3.99	\$5,000
Jingle Bell Bucks	PBL	Key Number Match	\$5	270,000	1 in 4.48	\$5,000

# Virginia Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Ca\$h	IGT	Symbol Reveal	\$1	6,000,000	1 in 4.41	\$1,000
2021	IGT	Symbol Reveal	\$1	4,320,000	1 in 4.64	\$2,021
Holiday Gold	IGT	Key Number Match	\$2	3,840,000	1 in 4.32	\$20,000
Frosty Bingo Multiplier	IGT	Bingo	\$3	4,800,000	1 in 3.82	\$40,000
Holiday Luck X15	IGT	Key Number Match	\$5	6,000,000	1 in 3.83	\$100,000
\$38,000,000 Blowout	IGT	Key Number Match	\$10	5,280,000	1 in 9.35	\$500
Money	IGT	Key Number Match and Symbol Reveal	\$20	2,880,000	1 in 3.58	\$2,000,000

# Washington's Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Gnome for the Holidays	SG	Match 3	\$1	1,800,000	1 in 3.91	\$5,000
Naughty or Nice Crossword	SG	Crossword	\$5	1,200,000	1 in 3.58	\$50,000
Jolly Jingle Jackpot	SG	Key Number Match	\$5	1,260,000	1 in 3.38	\$50,000
Reindeer Riches	SG	Multiple (Large Format Ticket)	\$10	540,050	1 in 3.12	\$200,000

# Western Canada Lottery Corp.



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Holiday Wishes	PBL	Match 3	\$1	1,200,000	1 in 3.70	\$10,000
Frosty \$50's	PBL	Match 3	\$1	1,200,000	1 in 5.40	\$50
Gingerbread Dough	PBL	Key Number Match	\$2	800,000	1 in 3.98	\$25,000
Jingle Paws	PBL	Tic Tac Toe	\$3	750,000	1 in 3.50	\$50,000
Christmas Treats	PBL	Number Match	\$3	900,000	1 in 2.99	\$50,000
Candy Cane Crossword	PBL	Crossword	\$4	900,000	1 in 3.00	\$75,000
O' Christmas Tree	PBL	Key Number Match	\$5	700,000	1 in 3.31	\$100,000
Holiday Treasures	PBL	Number Match	\$5	750,000	1 in 2.83	\$100,000
Gifts Of Gold	PBL	Key Number and Symbol Match	\$10	600,000	1 in 3.08	\$250,000
Player's Choice Mega Pack	PBL	Various - 10 Different Tickets	\$20	750,000	1 in 1	\$1,000,000
Christmas Countdown	PBL	Symbol Match	\$30	250,000	1 in 2.99	\$300,000

# West Virginia Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Midnight Money - Gift Tag	IGT	Symbol Find	\$1	1,440,000	1 in 4.76	\$100
Spooky - Jolly	IGT	Symbol Find	\$2	1,080,000	1 in 4.31	\$200
Wicked - 'Tis The Season	IGT	Key Number Match	\$5	480,000	1 in 3.86	\$500
Money Bags - Prize Inside	IGT	Key Number Match	\$10	720,000	1 in 3.76	\$5,000

# Wisconsin Lottery



Game Name	Vendor	Game Type	Price Point	Quantity Ordered	Odds	Top Prize
Snow Much Fun	PBL	Symbol Find	\$1	1,440,000	1 in 4.2	\$100
Cozy Crossword	PBL	Crossword	\$3	1,200,000	1 in 3.5	\$30,000
Winter Fun!	PBL	Key Number Match	\$5	1,200,000	1 in 4.2	\$500
Holiday Bucks	SG	Symbol Find	\$10	480,000	1 in 3.7	\$50,000
Cookie Dough Countdown	PBL	Match 3	\$15	480,000	1 in 2.9	\$100,000



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Holidays  
and a  
Joyous  
New Year

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# A Year of Contrasts

The effects of a pandemic on sales sent lotteries scrambling for understanding, while other factors also influenced results reported in fiscal 2020.

By Patricia McQueen

In our annual analysis of lottery results, we have always cautioned that circumstances in each jurisdiction play a big role – not all lotteries are equal in terms of available games, player base and the competitive environment. That caution has never been more important than in fiscal 2020. The global pandemic has affected consumer-facing businesses across the continents, with early hot spots giving way to more widespread impacts almost everywhere. And that meant dramatically different experiences in retail, not to mention giving a sudden advantage to lotteries able to offer game sales online.

When their sales plummeted last March after the first North American economic shutdowns started taking place, lotteries had no idea what was in store for the months ahead. As it turned out, when almost all other gambling and entertainment options suddenly vanished from the marketplace, lotteries became the only game in town. In addition, people weren't spending money on traveling and vacations. Driven primarily by instant tickets and daily numbers games (which had their strongest gains in years), many lotteries set new sales records in fiscal 2020 after all. Despite the pandemic. Despite sagging sales by the two national games, which hurt considerably from the lack of a single jackpot over \$500 million after fiscal 2019's nearly \$1.5 billion Mega Millions jackpot.

In total, sales of traditional lottery products in the United States edged past \$82.8 billion, marginally above fiscal 2019's \$82.7 billion. One new lottery is included in the mix, as the Mississippi Lottery opened for business in late November 2019.

Not surprisingly, lotteries operating casino games and video lottery terminals took a big hit, as many venues were shut down for months. And even though major sports were canceled during the spring and early summer, affecting the latter part of most lotteries' fiscal years, the sports betting category posted strong growth from a limited base as new lotteries joined the mix.

Therefore, the grand total sales for American lotteries in fiscal 2020 – traditional sales plus net revenue from gaming and sports – were just over \$89.6 billion, a 1.5% decline from the previous year.

No matter what each year brings, lotteries contribute a massive amount of revenue to their beneficiaries – including education, the environment, economic development, cities and towns, senior citizens and veterans. In fiscal 2020, more than \$23.7 billion was transferred to these programs. That was down more than 5% overall from the previous year due to several contributing factors, including the drop in casino gaming revenues operated by some lotteries, the \$4.3 billion sales decline in the two profitable national games, and the incredibly strong performance of instant tickets, which typically have higher prize payouts than most draw games.

Canada's results differ in several ways. Most importantly, their fiscal years end March 31, so lotteries there were just starting to see the impacts of the pandemic as their years ended. Loto-Québec actually suspended retail sales for a few weeks beginning March 20, although online sales continued. Like the U.S., Canada was also following a year of a tremendous performance in national games, Lotto MAX in particular. However, big declines were averted by adding a second weekly drawing to that game in May 2019, and total sales of Lotto MAX grew by 3.3%. Finally, instant games have never been as strong in Canada as they are in the United States, so they didn't provide the same underlying growth north of the border.

Overall in Canada for fiscal 2020, the four lotteries that report sales were down 1.6% in traditional products, to C\$7.5 billion. (Loto-Québec began reporting only gross gaming revenue for all product lines in fiscal 2019.) Declines in net revenue from video lottery in the Atlantic provinces brought total sales across the four lotteries to just under C\$8.0 billion, down 1.8% from the previous year. Altogether, Canada's five lotteries sent C\$3.3 billion to their governments for the causes they support.

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

### Room at the Top

The New York Lottery has always been one of the largest in the world, and remains the North American leader in revenues with \$7.7 billion in traditional game sales and \$9.7 billion in total revenues when net win from gaming is included. Those numbers were down by more than 5% compared to fiscal 2019, and that performance relative to other states was likely at least partly an artifact of its March 31 fiscal year end. Gaming revenues were hit hard when New York's casinos closed in mid-March, and traditional lottery products also ended their year on a downturn when the state was one of the first to shut down non-essential activities.

That, combined with strong growth by some of America's other large lotteries, means that those lotteries are closing in on the perennial leader. The Florida Lottery closed the gap on the traditional side with \$7.5 billion in sales, a 4.9% gain, jumping past California to be second in traditional sales, barely \$200 million behind New York. Texas Lottery sales of \$6.7 billion, a 7.2% increase, sent it to the third spot nationally. Both Florida and Texas experienced almost 15% growth in sales of instant tickets, helping drive their results.

Sagging to fourth in terms of sheer sales dollars was the California Lottery, which faced some particularly difficult challenges in the wake of pandemic shutdowns. With \$6.6 billion reported in fiscal 2020, its sales were off more than 10% from

the previous year. Rounding out the top five was the Massachusetts Lottery at \$5.2 billion, down 4.5% from fiscal 2019.

In terms of percentage increase in sales, the Oklahoma Lottery led the country with a 10.8% increase over fiscal 2019, coming in at almost \$267.8 million. The state also led the country in terms of percentage increase in instant ticket sales – a whopping increase of almost 46% over the previous year. Certainly the pandemic had a major influence in that result: Oklahoma is home to more tribal casinos than any other state, so people clearly turned to lottery tickets as a way to stay entertained when there was little else to do as those facilities closed. But according to Executive Director Jay Finks, other contributing factors were the Lottery's first \$20 game, introduced in December 2019, and the addition of 108 7-Eleven stores in the metro Oklahoma City area last February. It was the only major retailer in the area that wasn't selling lottery.

Just behind Oklahoma was the Michigan Lottery, which had an outstanding year both in retail and online, yet more proof that the addition of online sales isn't a death knell for retailers. Overall sales in Michigan were up 9.4%. As noted earlier, the Texas Lottery was impressive with the strongest overall growth among the largest lotteries, a 7.2% gain. Rounding up the top five by percentage increase in total traditional sales were Kentucky and South Carolina, at 6.5% and 6.3%, respectively.

Of the 45 American lotteries that were operating in fiscal 2019, just under half, 21, increased their traditional sales in fiscal 2020. Among the others, most declines were under 5%, except for North Dakota and Wyoming, down 31% and 34.8%, respectively. These two lotteries are the only ones that don't offer instant tickets, so they are

# United States Sales Summary

(Dollars in millions)

	FY19	FY20	Increase (Decrease)	Percent Change
Instants	\$51,485.8	\$55,456.0	\$3,970.2	7.7%
Pulltabs	226.0	208.2	(17.8)	-7.9%
iLottery elstants	218.7	415.4	196.8	90.0%
Powerball	4,921.0	3,014.7	(1,906.3)	-38.7%
Mega Millions	5,305.9	2,860.1	(2,445.8)	-46.1%
Lotto America	73.8	57.2	(16.7)	-22.6%
For Life games *	459.2	569.7	110.5	24.1%
All other lotto games	3,628.2	3,407.8	(220.4)	-6.1%
Daily numbers (2-5 digits)	10,855.6	11,481.2	625.6	5.8%
Monitor games	4,714.1	4,419.1	(295.0)	-6.3%
Daily keno	62.4	63.3	0.9	1.5%
Terminal-based instant games	572.0	657.1	85.2	14.9%
Raffles	37.5	38.5	0.9	2.5%
Hybrid instant/draw games	34.1	21.6	(12.5)	-36.6%
All other games	118.3	175.0	56.7	47.9%
Total draw games	30,782.0	26,765.3	(4,016.7)	-13.0%
<b>Total traditional games</b>	<b>82,712.5</b>	<b>82,845.0</b>	<b>132.5</b>	<b>0.2%</b>
Electronic gaming machines (net)	7,260.4	6,074.5	(1,185.9)	-16.3%
Table games (net)	963.2	656.6	(306.7)	-31.8%
Sports betting (net)	45.0	76.5	31.5	70.1%
<b>Grand total sales</b>	<b>\$90,981.1</b>	<b>\$89,652.5</b>	<b>(\$1,328.5)</b>	<b>-1.5%</b>

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

entirely dependent on draw games, especially Powerball and Mega Millions. When those games do well, these two lotteries are often the leaders in percentage growth; when they don't, there may be results like these. It's the choice made by leaders in those states.

All this is clear evidence that local circumstances, especially involving the pandemic, have a big say on what happens from lottery to lottery.

## The Games

There were numerous story lines that led to fiscal 2020 results, but the most impactful was the relative performance of the instant ticket and national game categories.

In terms of the sheer magnitude of sales volume, 2020 was the year of instant tickets. Remarkably, sales grew by 7.7%, adding almost \$4 billion to the category and improving market share among traditional lottery games from 62.2% to 66.9%.

All but five lotteries increased instant ticket sales in fiscal 2020. Twenty-two reported double-digit growth in instant ticket sales, led by Oklahoma (+45.8%), Montana (+37.9%), West Virginia (+25.8%) and Michigan (+23.1%).

That total growth almost offset the decline in the country's two big national games, Powerball and Mega Millions. Combined, the two draw games dropped by \$4.3 billion in fiscal 2020, or 43%. It's worth noting

that there was no noticeable difference between lotteries that were outside the standard July-June year, as there sometimes is if tremendous jackpots are offered in the fringe months. The combined market share of the two games dropped from 12.4% of traditional sales in fiscal 2019 to just 7.1% in fiscal 2020.

For the period from July 1, 2019, to June 30, 2020, there wasn't a single jackpot offered at over \$500 million. Only three even approached \$400 million: a Mega Millions jackpot last December at \$375 million, a January Powerball jackpot of \$396.9 million, and a \$414 Mega Millions jackpot in early June. The recent history of frequent jackpot wins, unlucky for game momentum,

## Canada Sales Summary

(Canadian dollars in millions; excluding Québec)

	FY19	FY20	Increase (Decrease)	Percent Change
Instants	\$2,252.2	\$2,259.4	\$7.2	0.3%
Pulltabs	141.1	123.4	(17.6)	-12.5%
Lotto 6/49	1,157.2	1,006.8	(150.5)	-13.0%
Lotto Max	1,838.2	1,898.5	60.2	3.3%
For Life games	126.2	117.3	(8.9)	-7.1%
All other lotto games	271.0	266.6	(4.4)	-1.6%
Daily numbers (2-4 digits)	192.0	198.1	6.1	3.2%
Spiel games	548.7	548.7	(0.0)	0.0%
Sports betting	480.6	452.0	(28.6)	-6.0%
Club Keno	321.0	321.1	0.1	0.0%
Daily keno	97.9	99.9	2.1	2.1%
Hybrid instant/draw games	164.9	150.6	(14.2)	-8.6%
All other games	75.6	98.6	23.0	30.5%
Total draw games	5,273.3	5,158.2	(\$115.1)	-2.2%
<b>Total traditional games</b>	<b>7,666.6</b>	<b>7,541.0</b>	<b>(125.6)</b>	<b>-1.6%</b>
Electronic gaming machines (net)	428.2	409.2	(19.0)	-4.4%
Table games (net)	2.0	2.0	(0.1)	-2.5%
<b>Grand total sales</b>	<b>\$8,096.8</b>	<b>\$7,952.2</b>	<b>(\$144.6)</b>	<b>-1.8%</b>

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

combined with the impacts of the pandemic that reduced starting jackpots for both games, and this was the result.

Among other regional products, there are two major games in the For Life category. Lucky for Life was sold in 26 jurisdictions during the fiscal year, while Cash4Life was sold in nine. Oregon has its own in-state Win for Life, so in total 36 lotteries offered a game of this type in FY20. Looking at the totals, sales in the category were up 24.1%, but what matters are the details. Cash4Life went from two drawings per week to daily drawings in July 2019, which triggered an overall sales increase of more than 48%. Lucky for Life saw an overall decline of 3.7% in sales, more than holding its own compared to the performance of more traditional jackpot lotto games.

In fact, Lucky for Life sales were very jurisdiction-dependent, with sales changes ranging from up by 8% to down by more than 16%.

In-state lotto games generated \$3.4 billion in sales across the country, down 6.1%, but there were bright spots. The category in Arizona, Colorado, Idaho, Kentucky, Massachusetts, Michigan, Nebraska, New Mexico, Tennessee and Wisconsin all grew by double digits as one or more games had significant jackpot runs or new games were introduced. It's proof that players still chase jackpots even at the lower levels of in-state games, and that new games sometimes catch player interest.

The largest single category of draw games in the United States is comprised of daily numbers games, from two to five digits. They were

strong performers as a group, likely benefiting from the same pandemic phenomenon as instant games – players looking for entertainment as lottery retailers stayed open. Together, these games brought in almost \$11.5 billion in sales, up 5.8% from fiscal 2019 and picking up market share, from 13.1% to 13.9% of total traditional games. Several states saw double-digit growth in one or more of these games, including Arizona, Arkansas, District of Columbia, Georgia, Iowa, Kentucky, Louisiana, Michigan, Missouri, Nebraska, New Hampshire, New Mexico, North Carolina, Ohio and South Carolina.

The most dramatic growth of any draw game category comes from terminal-generated instant games, often known as Fast Play, EZ Play and InstaPlay. Although still a small base,

with \$657 million in sales across 21 lotteries in fiscal 2020, the games keep expanding; two lotteries added the game during the year, Kentucky and Maryland. With those additions, and double-digit growth in eight jurisdictions as many are fairly new to the product, overall sales were up almost 15%.

One new game in the industry is Cash Pop – simplicity in choosing just a single number. Implemented as a five-times-a-day daily draw game by the Georgia Lottery, it made a big splash, generating \$33.8 million in sales and winning NASPL’s Buddy Roogow Innovation Award for Best New Draw Game. The Kentucky and New Jersey lotteries have introduced the game as a second monitor game on their keno networks.

Speaking of keno, as mentioned earlier sales suffered where the game is sold primarily in social environments such as bars, clubs and restaurants, which were closed for a time due to the pandemic. Keno sales were \$4.1 billion in fiscal 2020, down 7.7%. Additional monitor games brought in more than \$302 million in sales, up more than 18% as more lotteries introduced new games.

## Online Sales Shine

If consumers weren’t already shopping online before 2020, they were by midyear. In fact, they were doing everything online – shopping for everyday essentials, traveling virtually to destinations and attractions, meeting with colleagues on video conferencing platforms instead of face to face, and attending digital seminars and events.

And yet, barely a quarter of American lotteries are able to offer sales online in some fashion – 12 by June 30, 2020. For most of those lotteries, fiscal 2020 results were telling.

The first U.S. lottery to offer single-draw tickets online was Illinois in 2012; in fiscal 2020, online sales of its available draw games

were up almost 50% from the previous year, to \$86.2 million. The Georgia Lottery also began online sales in 2012, and sales there during fiscal 2020 were up almost 72% overall; eInstants almost doubled to \$81 million while available draw games grew nearly 50% to \$60 million. With more years to develop their markets, it’s perhaps not surprising that those two lotteries currently lead the industry in terms of online sales of draw games.

The North Carolina Education Lottery offers selected draw games online; sales jumped 83% there to reach \$25.3 million in fiscal 2020 to lead the group of online draw games by that measure.

Other lotteries offering some or all draw games online are Kentucky, Michigan, New Hampshire, Pennsylvania, Rhode Island and Virginia. Rhode Island just began last May with Keno and eInstants, while Virginia’s subscription-only offer became full-fledged iLottery last July 1. The New York Lottery continues to offer online subscriptions to select draw games. All online draw game sales are generally reported here in their respective game categories.

While the ability to purchase draw games online is a major improvement in convenience for players, online instant games, or eInstants, have the most entertainment value and typically provide product differentiation from their retail cousins. That said, lotteries have had success using similar game titles and themes in eInstant games and in retail instant tickets.

Lotteries have implemented eInstants in various ways – some focus on play value and high returns to players while others keep closer ties to the retail ticket model. They are also reported in different ways. Some lotteries report gross play, while others report net after prizes, before or after promotions and bonuses. Previously, this annual sales report grouped eInstants in the “instant” category, but beginning in

fiscal 2020 we have separated them into a new category to reflect their growing importance. Prior years’ data in the series has also been adjusted, both to reflect that new category and to revise the reported numbers in Pennsylvania’s thriving eInstant business. Pennsylvania’s eInstants are now reported as gross gaming revenue – sales minus prizes, promotions and bonuses. That is similar to the way Michigan’s eInstants are reported; these two lotteries have by far the most volume in eInstant sales.

The Michigan Lottery leads the way in eInstants, generating \$207 million in net revenues in fiscal 2020 (its year ended September 30), 88% higher than the previous year. Pennsylvania’s eInstant games brought in almost \$83 million in net revenues, up 82%. Georgia and Kentucky both report gross play, coming in at \$81 million and \$33 million, respectively – increases of more than 90% for each. New Hampshire’s \$10.7 million in eInstant net revenues was a huge increase over its first partial year, having launched in September 2018.

## Sports Betting

By the end of fiscal 2020, seven lotteries were operating sports betting; Oregon, New Hampshire, Montana and the District of Columbia were the newcomers, joining early starters Delaware, Rhode Island and West Virginia. It was tough for everyone in this fledgling industry, as major league sports were called off last spring. Lotteries pressing on with online/mobile sports betting found overseas and boutique sports to offer until the domestic product came back last summer.

The Delaware Lottery led these states in terms of net revenue generated, due to its successful retail parlay games during football season. But while others could rely on online and mobile sales all year, Delaware

currently offers only facility betting, and its casinos – housing the sports books – were shut down from mid-March through the end of the fiscal year.

Delaware sports betting brought in gross gaming revenue of almost \$24 million in fiscal 2020, followed by West Virginia at \$19.1 million and Rhode Island at \$18.7 million. With the other jurisdictions offering sales for only part of the fiscal year, in total the category produced GGR of \$76.5 million.

## Casino Gaming

As noted earlier, casino gaming took a big hit with the closure of casinos for a period of time, which varied by jurisdiction. Overall, gaming machine revenues were down 16%, while table game revenues were down almost 32%. At some properties, table games did not re-open at the same time as the gaming machine areas as casinos worked to implement the games with proper social distancing guidelines, contributing somewhat to these results.

Still, these activities generated tremendous revenues. Gaming machines brought in \$6.1 billion in total net win across eight jurisdictions: Delaware, Maryland, New York, Ohio, Oregon, Rhode Island, South Dakota and West Virginia. Table games, available in Delaware, Maryland, Rhode Island and West Virginia, produced net wins of \$656.6 million during the year.

Because New York's fiscal year ends March 31, its gaming machine revenues were only down 3.3%, but it will feel the biggest hit in fiscal 2021. The eight casinos offering the games remained closed until early September, meaning they were dark for more than five months.

The only jurisdiction that reported an increase in gaming machine revenues was South Dakota, where net win from video lottery terminals was up 2% to \$234.7 million, a new record. This despite some temporary

closures; most locations with video lottery remained open during the pandemic.

## Canada

As noted earlier, Canada's lottery product mix differs from that of the American market. Its two flagship lotto games, Lotto MAX and Lotto 6/49, dominate the portfolio, generating about 39% of total traditional lottery sales in each of the past two years. While Lotto MAX was up country-wide with the help of a second weekly draw and two record jackpots during the year, Lotto 6/49 sales fell by 13%. That decline was partly in response to Lotto MAX's changes, but also because there were far fewer large jackpots in Lotto 6/49 than in the previous year.

In fiscal 2019, Western Canada Lottery Corp. became the second Canadian lottery, after Ontario Lottery and Gaming, to add more options to its daily numbers games, now including Pick 2, Pick 3 and Pick 4. Combined, the three games grew by 1.3% across WCLC's participating lotteries in fiscal 2020, making the category one of the few that increased revenues for all Canadian lotteries that offered them. OLG was the clear leader among the four, with category sales up 3.4% and ticket sales accounting for the lion's share of daily game sales in Canada.

Instant games eked out a marginal increase across Canada, with total sales up 0.3% to nearly \$2.3 billion across the four lotteries reporting that metric. That said, it was a mixed bag, with some jurisdictions up a small amount and others down.

Canada's lotteries were pioneers in online sales in North America, with Atlantic Lottery and British Columbia Lottery Corp. both launching digital platforms in 2004. Today, players in most Canadian jurisdictions are able to play at least some lottery games online. For example, online players in Ontario have been able to play Lotto MAX and

Lotto 6/49 (with the accompanying Encore option) for several years. In fiscal 2020, online sales of those products were C\$30.1 million, an increase of 48% over the previous year. This fall, OLG's online service was expanded to include three other lottery games, so the future looks particularly bright.

Net revenues from online lottery products in Québec were C\$39.4 million in fiscal 2020, an increase of almost 38%. And in Atlantic Canada, most draw games are available online, along with a wide selection of eInstants; net revenues from the latter more than doubled in fiscal 2020 to C\$10.6 million.

## Looking Ahead

As 2020 wore on, lotteries tried to adapt to the changes in the marketplace, some likely permanent, due to the pandemic.

Instant tickets continued their upward climb in many jurisdictions, but in the United States, the national lotto games were still struggling to build jackpots. At this writing in early December, both Powerball and Mega Millions were climbing past \$250 million; Powerball hadn't reached that level since January, Mega Millions since June.

Casino gaming started coming back in late spring, but this fall facilities in some jurisdictions began closing again, further impacting lotteries offering those products. And in Canada, Manitoba temporarily halted retail sales of lottery products on November 20, deeming them non-essential as COVID-19 surged again. Players in the province still have the option of buying games online.

Online platforms will continue to take on more importance, given the unexpected boost provided by the worst public health crisis in 100 years. Fortunately for lotteries, the results to date clearly indicate that retail and online can coexist to increase the pie for everyone. ●

# Fiscal 2020 Lottery Sales and Revenues - United States

	..... Daily Numbers Games .....					
	Instants	Pulltabs	2-digit	3-digit	4-digit	5-digit
Arizona	\$848,409,616	\$8,052,108		\$14,380,588		
Arkansas	452,281,204			9,060,396	\$5,045,304	
California	5,009,037,325			157,578,583	31,921,681	
Colorado	490,695,434			13,403,086		
Connecticut	755,069,039			132,366,209	127,143,588	
Delaware	92,860,086			29,017,035	24,790,057	
D.C.	47,188,257		\$632,535	41,842,808	55,930,853	\$24,415,717
Florida	5,665,324,000		22,280,000	396,339,000	258,571,000	59,673,000
Georgia	3,427,570,727			537,169,497	337,190,587	8,351,295
Idaho	173,069,677	43,320,423		2,470,126		
Illinois	1,887,800,928			277,983,148	261,688,142	
Indiana	1,093,015,000			42,218,000	40,684,000	
Iowa	262,447,704	10,824,344		8,502,503	4,950,002	
Kansas	178,717,621	7,127,997		7,752,553		
Kentucky	741,063,000			167,322,000	50,917,000	
Louisiana	264,626,376			62,884,994	54,659,474	
Maine	251,855,183			5,805,905	4,505,263	
Maryland	860,603,739			251,674,780	333,716,018	
Massachusetts (2)	3,645,738,834	507,720		326,871,509		
Michigan	2,038,248,900	28,314,308		447,595,382	534,187,543	
Minnesota	519,348,731			18,928,387		
Mississippi	317,835,140					
Missouri	1,035,198,988	109,282,738		95,702,491	63,296,951	
Montana	25,562,372					
Nebraska	111,932,609			6,550,759		
New Hampshire	272,465,000			5,611,000	8,139,000	
New Jersey	1,880,025,494			408,630,141	261,493,194	
New Mexico	79,313,000			5,089,000	1,655,000	
New York	4,114,390,000			947,116,000	975,369,000	
North Carolina	2,089,213,000			400,508,000	185,155,000	
North Dakota						
Ohio	1,873,808,842			400,568,016	240,541,648	51,234,399
Oklahoma	198,279,748			6,190,229		
Oregon	149,831,274				1,730,474	
Pennsylvania	3,203,205,926		5,616,681	266,234,583	224,939,270	48,277,771
Rhode Island (2)	112,643,821			22,900,222		
South Carolina	1,582,212,492			255,323,392	122,941,783	
South Dakota	37,086,885					
Tennessee	1,556,235,000			71,900,000	44,312,000	
Texas	5,555,813,386			280,118,916	132,197,341	
Vermont	111,112,687			1,264,658	1,134,301	
Virginia	1,166,776,472			336,933,331	322,440,569	
Washington	619,682,535			20,830,078	15,240,282	
West Virginia	145,435,600			8,178,479	4,734,016	
Wisconsin (3)	512,986,222	755,460		23,878,443	14,789,542	
Wyoming						
<b>Total U.S.</b>	<b>\$55,456,017,874</b>	<b>\$208,185,098</b>	<b>\$28,529,216</b>	<b>\$6,514,694,226</b>	<b>\$4,746,009,882</b>	<b>\$191,952,181</b>

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## Fiscal 2020 Lottery Sales and Revenues - United States

	Lotto	Powerball	Mega Millions	Lotto America	For Life games	Daily Keno
Arizona	\$68,679,616	\$72,674,827	\$57,185,604			
Arkansas	8,027,906	20,530,932	16,863,474		\$2,971,144	
California	392,738,675	297,307,198	359,409,783			
Colorado	51,036,385	51,136,995	37,685,155		14,882,442	
Connecticut	62,119,489	49,674,757	38,486,731		17,436,848	
Delaware	3,995,466	14,738,159	11,205,982	\$2,626,776	2,893,822	
D.C.		5,810,411	4,741,010		1,903,090	
Florida	510,393,000	282,151,000	225,035,000		65,320,000	
Georgia	112,983,774	89,964,520	107,378,502		28,362,956	
Idaho	4,921,770	20,397,045	13,212,519	2,201,894	3,012,004	
Illinois	211,939,604	94,794,360	110,329,949			
Indiana	56,496,000	61,252,000	40,151,000		6,547,000	\$18,940,000
Iowa		36,428,043	20,433,854	6,751,811	5,335,530	
Kansas	10,554,131	23,691,169	15,981,876	5,323,436	5,232,604	
Kentucky	14,663,000	49,939,000	37,019,000		7,155,000	
Louisiana	31,665,387	57,184,920	38,088,888			
Maine	10,861,844	15,487,703	8,647,971	1,668,257	3,453,973	
Maryland	47,629,299	70,394,314	78,588,223		20,571,318	
Massachusetts	111,417,308	72,232,599	77,286,331		24,404,869	
Michigan	143,731,822	91,435,715	114,402,765		15,087,289	8,566,239
Minnesota	26,307,944	43,984,944	25,009,543	8,783,358	7,104,346	
Mississippi		11,831,916	10,109,350			
Missouri	49,747,231	58,353,712	43,076,897		8,225,273	
Montana	7,796,472	8,603,376	4,959,341	1,949,117	2,668,056	
Nebraska	19,968,268	25,345,290	15,235,451		4,043,148	
New Hampshire	10,898,000	23,960,000	17,512,000		5,550,000	
New Jersey	188,150,902	125,824,752	145,670,721		56,363,987	
New Mexico	8,134,000	16,779,000	11,491,000	3,663,000		
New York	291,867,000	250,740,000	300,124,000		122,247,000	29,630,000
North Carolina	78,015,000	101,327,000	75,350,000		20,362,000	
North Dakota	4,933,954	8,264,318	6,094,382	2,186,765	2,912,440	
Ohio	80,567,153	85,148,300	101,952,510		19,534,009	
Oklahoma	4,201,747	28,915,148	20,876,050	5,444,051	3,856,262	
Oregon	29,041,472	31,196,079	23,770,095		3,637,752	
Pennsylvania	253,869,672	139,818,104	108,383,373		25,596,322	
Rhode Island	3,816,929	17,945,735	11,943,934		4,853,934	
South Carolina	24,672,415	63,212,100	45,439,096		12,567,004	
South Dakota	2,879,970	8,857,993	4,586,433	1,904,849	2,824,716	
Tennessee	20,601,000	66,682,000	46,348,000	10,081,000	11,156,000	
Texas	253,904,403	213,762,692	231,913,230			
Vermont	4,378,936	6,393,328	4,312,425		1,775,364	
Virginia	43,905,642	76,072,327	89,763,948		27,400,930	
Washington	61,876,217	42,498,411	50,959,868			6,211,706
West Virginia	4,894,279	21,977,553	13,446,828	4,593,875		
Wisconsin (3)	70,614,338	53,256,019	34,646,788			
Wyoming	8,929,754	6,733,724	5,004,350		2,405,997	
<b>Total U.S.</b>	<b>\$3,407,827,174</b>	<b>\$3,014,709,488</b>	<b>\$2,860,113,231</b>	<b>\$57,178,189</b>	<b>\$569,654,430</b>	<b>\$63,347,945</b>

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## Fiscal 2020 Lottery Sales and Revenues - United States

	Monitor Games		Raffles	Terminal-based	Hybrid lotto/	iLottery
	Keno	Others		Instant games	Instant-win	eInstants (1)
Arizona				\$28,577,278		
Arkansas				16,662,501		
California	\$311,848,814					
Colorado						
Connecticut	115,450,010					
Delaware	8,545,356					
D.C.	6,653,818	\$9,005,169		10,009,055		
Florida				20,026,000		
Georgia	204,257,380			6,721,158		\$81,025,275
Idaho			\$2,500,000	12,497,033		
Illinois						
Indiana				17,103,000		
Iowa				16,279,705		
Kansas	11,523,376	5,236,598	3,850,760			
Kentucky	78,832,000	3,395,000		14,483,000	5,391,000	33,263,000
Louisiana						
Maine				10,765,740	1,059,469	
Maryland	259,195,345	230,287,609		31,201,280	6,027,647	
Massachusetts	978,708,872	7,415,601				
Michigan	524,688,825			87,808,152	6,347,501	207,008,672
Minnesota			6,999,330	12,101,625		
Mississippi						
Missouri	49,855,758					
Montana			3,600,000	5,602,669		
Nebraska						
New Hampshire	28,989,000			5,316,000		10,733,000
New Jersey	109,823,100	19,510,076		17,125,158	2,773,841	
New Mexico				929,000		
New York	695,169,000					
North Carolina	66,276,000					
North Dakota						
Ohio	439,420,979	20,089,770		158,671,128		
Oklahoma						
Oregon	93,417,823		2,499,890			
Pennsylvania	47,180,017	6,500,779	10,000,000	102,734,076		82,954,482
Rhode Island	69,826,851	1,155,938				447,344
South Carolina						
South Dakota						
Tennessee	13,485,000					
Texas						
Vermont				7,051,258		
Virginia			7,500,000	75,470,085		
Washington						
West Virginia	3,370,533					
Wisconsin (3)			518,164			
Wyoming			992,060			
<b>Total U.S.</b>	<b>\$4,116,517,857</b>	<b>\$302,596,540</b>	<b>\$38,460,204</b>	<b>\$657,134,901</b>	<b>\$21,599,458</b>	<b>\$415,431,773</b>

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## Fiscal 2020 Lottery Sales and Revenues - United States

	..... Traditional Games .....			EGMs (Net)	Table Games (Net)	Live Sports Betting (Net)
	Other	Total Sales	% Change			
Arizona		\$1,097,959,637	2.0%			
Arkansas		531,442,861	3.1%			
California	\$41,433,162	6,601,275,221	-10.6%			
Colorado		658,839,497	-3.1%			
Connecticut	5,868,754	1,303,615,425	-2.3%			
Delaware		190,672,739	-2.9%	\$306,840,847	\$40,764,240	\$23,964,289
D.C.		208,132,722	-2.3%			706,989
Florida		7,505,112,000	4.9%			
Georgia	33,864,615	4,974,840,286	4.2%			
Idaho		277,602,491	-3.6%			
Illinois		2,844,536,131	-4.5%			
Indiana	7,662,000	1,384,068,000	2.7%			
Iowa		371,953,494	-4.8%			
Kansas		274,992,121	-6.9%			
Kentucky		1,203,442,000	6.5%			
Louisiana		509,110,039	-2.8%			
Maine		314,111,308	4.9%			
Maryland		2,189,889,572	-0.3%	829,280,731	450,693,376	
Massachusetts		5,244,583,644	-4.5%			
Michigan		4,247,423,113	9.4%			
Minnesota		668,568,208	5.0%			
Mississippi		339,776,406	n/a			
Missouri		1,512,740,039	3.2%			
Montana	205,355	60,946,758	-0.5%			101,922
Nebraska		183,075,525	-4.7%			
New Hampshire		389,173,000	1.3%			5,244,995
New Jersey		3,215,391,366	-7.7%			
New Mexico		127,053,000	-11.5%			
New York		7,726,652,000	-5.9%	2,013,876,000		
North Carolina		3,016,206,000	5.5%			
North Dakota		24,391,859	-31.0%			
Ohio		3,471,536,751	3.3%	820,923,109		
Oklahoma		267,763,235	10.8%			
Oregon	2,013,468	337,138,327	-11.3%	797,498,371		8,620,945
Pennsylvania	31,308,535	4,556,619,591	0.2%			
Rhode Island		245,534,708	-6.7%	352,833,794	83,257,074	18,706,458
South Carolina		2,106,368,282	6.3%			
South Dakota		58,140,846	-7.7%	234,736,011		
Tennessee		1,840,800,000	1.6%			
Texas	36,317,815	6,704,027,783	7.2%			
Vermont		137,422,957	-1.3%			
Virginia	2,341,949	2,148,605,253	-6.3%			
Washington		817,299,097	1.7%			
West Virginia		206,631,163	3.3%	718,546,252	81,836,526	19,146,700
Wisconsin (3)	13,994,735	725,439,712	1.7%			
Wyoming		24,065,886	-34.8%			
<b>Total U.S.</b>	<b>\$175,010,388</b>	<b>\$82,844,970,051</b>	<b>0.2%</b>	<b>\$6,074,535,115</b>	<b>\$656,551,216</b>	<b>\$76,492,298</b>

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## Fiscal 2020 Lottery Sales and Revenues - United States

	Total FY20 Lottery Sales	Total FY19 Lottery Sales	% Change	FY20 Prizes Traditional Games	FY20 Total Transfers to Beneficiaries
Arizona	\$1,097,959,637	\$1,076,790,019	2.0%	\$737,910,188	\$226,143,664
Arkansas	531,442,861	515,493,507	3.1%	369,608,172	89,265,394
California	6,601,275,221	7,388,050,316	-10.6%	4,391,359,991	1,493,529,416
Colorado	658,839,497	679,779,611	-3.1%	424,559,649	142,425,505
Connecticut	1,303,615,425	1,333,911,000	-2.3%	822,000,000	350,300,000
Delaware	562,242,115	649,650,930	-13.5%	110,025,602	177,271,339
D.C.	208,839,711	213,062,244	-2.0%	123,039,671	39,200,000
Florida	7,505,112,000	7,151,236,000	4.9%	5,197,891,000	1,913,000,000
Georgia	4,974,840,286	4,776,008,522	4.2%	3,045,570,470	1,237,745,246
Idaho	277,602,491	287,912,936	-3.6%	185,846,788	55,500,000
Illinois	2,844,536,131	2,977,592,655	-4.5%	1,842,187,822	696,013,186
Indiana	1,384,068,000	1,347,756,000	2.7%	926,662,000	304,594,800
Iowa	371,953,494	390,895,550	-4.8%	236,317,005	81,529,332
Kansas	274,992,121	295,282,190	-6.9%	166,527,213	67,411,571
Kentucky	1,203,442,000	1,129,655,000	6.5%	801,241,000	278,486,000
Louisiana	509,110,039	523,967,428	-2.8%	277,915,172	179,159,426
Maine	314,111,308	299,451,696	4.9%	213,658,536	65,235,076
Maryland	3,469,863,679	3,957,317,077	-12.3%	1,361,853,301	1,056,814,858
Massachusetts	5,244,583,644	5,490,365,882	-4.5%	3,865,965,633	986,851,456
Michigan	4,247,423,113	3,884,161,198	9.4%	2,583,556,991	1,100,990,000
Minnesota	668,568,208	636,810,253	5.0%	423,638,506	155,978,051
Mississippi	339,776,406	n/a	n/a	198,262,909	70,779,760
Missouri	1,512,740,039	1,466,028,703	3.2%	1,062,489,795	321,900,000
Montana	61,048,680	60,465,134	1.0%	36,395,430	8,100,000
Nebraska	183,075,525	192,181,990	-4.7%	108,269,685	42,405,635
New Hampshire	394,417,995	384,366,497	2.6%	246,879,000	99,336,000
New Jersey	3,215,391,366	3,482,346,197	-7.7%	1,966,146,826	1,015,000,000
New Mexico	127,053,000	143,630,735	-11.5%	68,288,267	38,146,935
New York	9,740,528,000	10,290,550,000	-5.3%	4,624,529,000	3,376,811,000
North Carolina	3,016,206,000	2,859,624,739	5.5%	1,957,588,000	732,500,000
North Dakota	24,391,859	35,352,991	-31.0%	12,669,467	5,220,000
Ohio	4,292,459,860	4,419,402,768	-2.9%	2,259,250,682	1,127,128,000
Oklahoma	267,763,235	241,693,417	10.8%	166,692,905	65,149,704
Oregon	1,143,257,642	1,346,526,005	-15.1%	219,722,199	583,442,933
Pennsylvania	4,556,619,591	4,548,904,894	0.2%	2,929,060,063	1,141,800,787
Rhode Island	700,332,034	956,341,066	-26.8%	155,865,271	283,870,546
South Carolina	2,106,368,282	1,980,942,233	6.3%	1,424,228,888	477,908,917
South Dakota	292,876,857	293,232,375	-0.1%	36,147,227	128,430,862
Tennessee	1,840,800,000	1,812,604,761	1.6%	1,109,655,000	438,229,000
Texas	6,704,027,783	6,251,478,651	7.2%	4,442,357,644	1,683,729,110
Vermont	137,422,957	139,267,937	-1.3%	91,645,984	27,522,561
Virginia	2,148,605,253	2,293,564,569	-6.3%	1,318,103,063	595,362,718
Washington	817,299,097	803,277,937	1.7%	530,237,664	180,948,855
West Virginia	1,026,160,641	1,224,061,001	-16.2%	127,852,731	402,002,458
Wisconsin (3)	725,439,712	713,132,773	1.7%	453,266,756	270,798,070
Wyoming	24,065,886	36,932,160	-34.8%	13,779,288	3,327,838
<b>Total U.S.</b>	<b>\$89,652,548,680</b>	<b>\$90,981,059,547</b>	<b>-1.5%</b>	<b>\$53,666,718,454</b>	<b>\$23,817,296,009</b>

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## Fiscal 2020 Lottery Sales and Revenues - Canada

	Instants	Pulltabs	Daily Numbers		
			2-digit	3-digit	4-digit
British Columbia	\$278,861,991	\$22,880,778			
Ontario	1,416,857,703		\$24,822,861	\$73,045,742	\$74,639,273
Alberta	193,547,858		941,348	11,960,289	3,978,706
Manitoba	67,856,135		284,872	4,539,499	1,283,381
NW Territories	8,577,677		23,338	91,418	45,501
Saskatchewan	51,865,593		182,960	1,852,518	390,864
Yukon	3,313,032		7,618	32,939	9,290
<b>WCLC Total</b>	<b>325,160,295</b>		<b>1,440,136</b>	<b>18,476,663</b>	<b>5,707,742</b>

New Brunswick	65,226,725	14,075,614			
Newfoundland & Labrador	81,508,314	63,211,206			
Nova Scotia	78,712,452	17,248,235			
Prince Edward Island	13,084,930	6,008,627			
<b>Atlantic Lottery Total</b>	<b>238,532,420</b>	<b>100,543,681</b>			

<b>Canada (Excluding Québec)</b>	<b>\$2,259,412,409</b>	<b>\$123,424,459</b>	<b>\$26,262,997</b>	<b>\$91,522,405</b>	<b>\$80,347,015</b>
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### Gross Gaming Revenue and Proceeds\*

Quebec	\$163,434,000			\$25,245,000	
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	Lotto	Lotto MAX	Lotto 6/49	For Life	Spiel
British Columbia	\$33,758,779	\$300,769,928	\$159,218,060	\$24,320,887	\$80,973,563
Ontario	135,941,834	1,018,217,972	560,794,787	55,464,497	256,328,714
Alberta	49,407,461	314,512,588	141,533,292	21,272,595	98,241,915
Manitoba	9,249,654	70,143,924	33,883,783	3,351,962	22,811,542
NW Territories	505,953	4,363,438	1,833,720	282,989	1,177,845
Saskatchewan	11,252,333	66,483,816	31,798,949	3,990,543	23,109,621
Yukon	459,506	2,702,083	1,353,486	224,308	938,960
<b>WCLC Total</b>	<b>70,874,907</b>	<b>458,205,849</b>	<b>210,403,230</b>	<b>29,122,397</b>	<b>146,279,883</b>

New Brunswick	8,364,460	32,683,047	23,281,509	2,967,326	19,620,443
Newfoundland & Labrador	6,893,576	40,685,164	20,592,295	2,315,116	20,503,211
Nova Scotia	9,324,546	42,537,542	28,563,210	2,761,062	21,821,364
Prince Edward Island	1,491,172	5,369,963	3,918,902	312,608	3,127,310
<b>Atlantic Lottery Total</b>	<b>26,073,754</b>	<b>121,275,716</b>	<b>76,355,916</b>	<b>8,356,112</b>	<b>65,072,328</b>

<b>Canada (Excluding Québec)</b>	<b>\$266,649,274</b>	<b>\$1,898,469,465</b>	<b>\$1,006,771,993</b>	<b>\$117,263,893</b>	<b>\$548,654,488</b>
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### Gross Gaming Revenue and Proceeds\*

Québec	\$65,739,000	\$228,075,000	\$146,758,000	\$27,817,000	\$76,212,000
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**Notes:** All figures in Canadian dollars; Internet sales, where applicable, may be listed in "other" or in the specific game categories, depending on the types of games and the individual lottery; Atlantic Lottery net proceeds for PEI include revenues from operations at the racetrack entertainment centers and from the harness racing industry; Ontario net to government doesn't include the contribution from online lottery sales, as online operations are consolidated.

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

## Fiscal 2020 Lottery Sales and Revenues - Canada

	Hybrid	Club Keno	Daily Keno	Sports	Other
British Columbia	\$5,899,662	\$306,459,467		\$38,791,408	\$28,429,976
Ontario	105,493,645		\$89,232,888	282,820,942	14,162,051

Alberta	19,654,552	8,763,942		54,077,268	
Manitoba	4,872,259	1,769,136		20,928,540	
NW Territories	695,539	363,385		928,351	
Saskatchewan	4,389,073	2,553,561		12,369,249	
Yukon	340,840	1,197,235		398,333	
<b>WCLC Total</b>	<b>29,952,263</b>	<b>14,647,259</b>		<b>88,701,741</b>	

New Brunswick	2,623,740		3,101,287	11,467,697	14,716,605
Newfoundland & Labrador	2,687,105		2,391,623	8,311,538	18,071,288
Nova Scotia	3,556,079		4,607,364	19,251,692	20,035,812
Prince Edward Island	416,737		602,564	2,662,110	3,173,730
<b>Atlantic Lottery Total</b>	<b>9,283,661</b>		<b>10,702,838</b>	<b>41,693,038</b>	<b>55,997,434</b>

<b>Canada (Excluding Québec)</b>	<b>\$150,629,231</b>	<b>\$321,106,726</b>	<b>\$99,935,726</b>	<b>\$452,007,129</b>	<b>\$98,589,461</b>
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Gross Gaming Revenue and Proceeds*					
Québec	\$12,922,000		\$76,483,000	\$30,327,000	\$76,414,000

	..... Traditional Games .....		EGMs (Net)	Table Games (Net)
	Total Sales/GGR	% Change		
British Columbia	\$1,280,364,499	-0.4%		
Ontario	4,107,822,908	-1.4%		
Alberta	917,891,814	-3.0%		
Manitoba	240,974,687	-3.4%		
NW Territories	18,889,154	-5.6%		
Saskatchewan	210,239,080	-7.0%		
Yukon	10,977,630	-1.9%		
<b>WCLC Total</b>	<b>1,398,972,365</b>	<b>-3.7%</b>		

New Brunswick	198,128,453	2.0%	132,488,508	
Newfoundland & Labrador	267,170,436	-5.6%	120,642,355	
Nova Scotia	248,419,358	1.8%	123,430,380	
Prince Edward Island	40,168,652	3.5%	32,664,354	\$1,970,122
<b>Atlantic Lottery Total</b>	<b>753,886,899</b>	<b>-0.8%</b>	<b>409,225,597</b>	<b>1,970,122</b>

<b>Canada (Excluding Québec)</b>	<b>\$7,541,046,671</b>	<b>-1.6%</b>	<b>\$409,225,597</b>	<b>\$1,970,122</b>
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Gross Gaming Revenue and Proceeds*			
Québec	\$929,426,000	-2.8%	\$853,476,000

**Notes:** All figures in Canadian dollars; Internet sales, where applicable, may be listed in "other" or in the specific game categories, depending on the types of games and the individual lottery; Atlantic Lottery net proceeds for PEI include revenues from operations at the racetrack entertainment centers and from the harness racing industry; Ontario net to government doesn't include the contribution from online lottery sales, as online operations are consolidated.

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

## Fiscal 2020 Lottery Sales and Revenues - Canada

	Total FY20 Lottery Sales/GGR	Total FY19 Lottery Sale/GGRs	% Change	FY20 Prizes Traditional Games	FY20 Proceeds to Beneficiaries
British Columbia	\$1,280,364,499	\$1,286,019,788	-0.4%	\$735,029,356	\$291,437,768
Ontario	4,107,822,908	4,167,528,163	-1.4%	2,313,000,000	1,092,000,000
Alberta	917,891,814	946,227,345	-3.0%	484,494,964	311,772,006
Manitoba	240,974,687	249,539,731	-3.4%	130,007,751	61,879,051
NW Territories	18,889,154	20,014,087	-5.6%	10,853,920	5,509,216
Saskatchewan	210,239,080	225,999,170	-7.0%	111,914,298	63,598,458
Yukon	10,977,630	11,187,295	-1.9%	6,094,242	3,424,091
<b>WCLC Total</b>	<b>1,398,972,365</b>	<b>1,452,967,628</b>	<b>-3.7%</b>	<b>743,365,175</b>	<b>446,182,822</b>
New Brunswick	330,616,961	330,816,321	-0.1%		124,538,000
Newfoundland & Labrador	387,812,791	412,513,214	-6.0%		121,132,000
Nova Scotia	371,849,738	373,728,955	-0.5%		131,082,000
Prince Edward Island	74,803,128	73,275,780	2.1%		18,675,000
<b>Atlantic Lottery Total</b>	<b>1,165,082,617</b>	<b>1,190,334,269</b>	<b>-2.1%</b>	<b>449,731,167</b>	<b>395,427,000</b>
<b>Canada (Excluding Québec)</b>	<b>\$7,952,242,389</b>	<b>\$8,096,849,848</b>	<b>-1.8%</b>	<b>\$4,241,125,698</b>	<b>\$2,225,047,590</b>

### Gross Gaming Revenue and Proceeds\*

Québec	\$1,782,902,000	\$1,850,873,000	-3.7%	n/a	\$1,076,387,000
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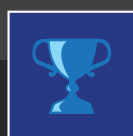
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\* Québec changed reporting on all games to a net basis (gross gaming revenue) in FY19.

# Welcome to the NASPL Matrix



NASPL Resource Index



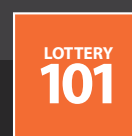
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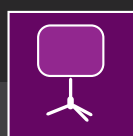
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# Stay Informed With Insights Direct



The pandemic has created real challenges for industries around the globe, and we've seen a lot of changes over the past several months. But one thing that hasn't changed is NASPL's commitment to keeping its membership informed, educated and connected.

That's why, last May, NASPL relaunched its free digital educational program, *Insights Direct*, with a brand new, continuous series of webinars covering the lottery industry's most important and timely topics.

All episodes of *Insights Direct* – complete with Q&A – are available to view on the NASPL Matrix, and new sessions are being added every month.

Read on to learn more about the issues explored in each of the latest installments of *Insights Direct*.

## **Cashless at Retail**

William Griffin, Deputy Commissioner of Sales for the Michigan Lottery, dives into the evolving topic of cashless payments at lottery retailers.

In this episode, Griffin discusses the percentage of cashless sales in Michigan, the breakdown of payment methods, and average spend per machine, as well as fee structure and retailer commission structure. Sales lift and increase in cashless transactions at airport machines is also explored, as is the issue of fraud.

## **Disclosure of Declines in Sales and Beneficiary Payments**

GASB instructor Janeen Hathcock, CPA, joins us with an update from the Governmental Accounting Standards Board. This session provides viewers with an understanding of projects in the various stages of GASB's due process. Hathcock explains their recent pronouncements and their effective dates, which proposals are out for public comment, their current technical agenda projects, and their pre-agenda research activities.

In a second session, Hathcock returns to provide participants with guidance on accounting for the declines in sales and payments to beneficiaries that many lotteries have faced in the 2020 fiscal year. This includes preparing effective disclosures for the financial statements' users.

## **Accounting and Audit – Practical Ethics**

CPAs and internal auditors are faced with complex decisions on a daily basis without realizing that many of them are actually ethical dilemmas. Although values and ethical issues pervade all social studies, this course, presented by Danny Goldberg, provides an opportunity to study these issues in greater depth.

Attendees can review general ethics issues for all CPAs; gain an understanding of the basic definition of ethics, how to apply it, and the difference between ethics and morals; learn more about the eight pillars of an ethical culture; study real life applications and case studies; and learn about the state of ethics and compliance in the workplace and how organizational values impact ethical leadership and misconduct.



## ***Tips and Tricks for Delighting Your Players on Facebook Live***

Perhaps now more than ever, the way we interact with players - and potential players - is changing. Elizabeth Kidd, Interactive Marketing Specialist for the Idaho Lottery, makes the case for one of lotteries' most accessible and economical options, Facebook Live.

In the past year, the Idaho Lottery has experimented with the format and found tremendous success when utilizing it properly. They saw substantial growth in followers, reach and engagement each week, and maintained that growth over time.

Kidd provides a step-by-step tutorial on hosting your first Facebook Live game and explains how timing, technology and teamwork come together to create something very entertaining and engaging for lottery players.

## ***Business Succession Planning and Crisis Management***

Is a crisis the time to change leaders? Or is it better to avoid such changes during the indefinite times?

Crisis management is a unique practice that is only necessary at the most dire of times. When it is necessary and practiced appropriately, it can save a company from the worst outcomes. This presentation by Danny Goldberg takes attendees through the basics of crisis management: Who does it well? Who should be in charge? What is the risk/compliance role in this process? And how will the organization be changed after such crisis?

Goldberg shares lessons from companies that mishandled crisis management, and explores other business continuity planning that should occur, based on key learnings from the current environment. He also explores how to handle crisis messaging in the social age, and how to deal with the pervasiveness of social media.

## ***Pandemic, Inc.: Eight Forces Driving Business Failure or Fortune in the Post-COVID-19 Economy***

Patrick Schwerdtfeger is a business futurist specializing in technology trends, including artificial intelligence, blockchain and disruptive innovation. In this session, he takes a look at doing business in a post-pandemic climate - with a focus on the gaming industry, professional sporting leagues and big retail sectors.

The content revolves around his eight-letter acronym, S-A-L-V-A-G-E-D:

S - Self-sufficiency

A - Analytics

L - Liquidity

V - Virtualization

A - Automation

G - Government

E - Exponential thinking

D - Decentralization

## ***Modernization of Cashing Lottery Prizes: Use of Mobile Technology***

Lottery players are asking for more options to claim their prizes, especially during the pandemic. The Ohio Lottery introduced a groundbreaking solution, allowing winners to claim prizes valued between \$50 and \$5,000 from the comfort of their homes. Beginning April 20, 2020, players began using the Ohio Lottery mobile app to scan their winning ticket and deposit their winnings into an approved bank account via automated clearing house. This is just one of many solutions the Ohio Lottery is exploring to offer alternative methods for players to claim their prizes.

This seminar - hosted by the Ohio Lottery's Financial Officer Greg Bowers and Chief Information Officer Maureen Hall, and Chris Abate, Management Supervisor of Website and Application Development at Marcus Thomas - showcases the actions taken to successfully launch the app and provide attendees with insights and lessons learned about setting up a mobile cashing platform.

# The Influencer's Guide to Making the Case for iLottery

In this informative episode of *Insights Direct*, NPi breaks down the pandemic's push for lotteries crossing the digital divide, providing best practices to address delicate stakeholder questions.

It's not a matter of if, but when, state lotteries will offer games online. Likewise, it isn't a question of either/or when it comes to retail lottery or iLottery. Rising retail sales alongside iLottery growth prove a common trend across online lotteries – that retail products and iLottery programs complement each other to bolster success.

In October, NeoPollard Interactive (NPi) leadership joined NASPL *Insights Direct* to share their experience helping lotteries make the case for iLottery. NPi's General Manager, Liz Siver, emphasized how the COVID-19 pandemic has highlighted the importance of migrating lotteries across the digital divide to the new world of iLottery to be where their customers are.

Due to the pandemic, conversations around iLottery are expanding, and so will the continental map of online lotteries. NPi's iLottery metrics during the pandemic are staggering, with a 98% increase in topline sales, 89% increase in deposits, 103% increase in net gaming revenue, 24% increase in new player acquisition, and a 79% increase in conversion rates.

## What are the best practices to study when educating stakeholders on the transition?

iLottery enables more stringent identity and age verification safeguards than retail. First, **know your customer** protocols involve identity and age verification using

three primary markers to confirm real-time registration eligibility: full name, birth date, and the last four digits of a social security number. Second, **geolocation** technology allows lotteries to confirm that all transactions occur within state boundaries. Third, the importance of having player protection tools in place to support **responsible gaming**.

"It's threaded through everything we do," Siver explained. "With the data we acquire, iLottery presents opportunities to enact more precise responsible gaming measures than what is currently available at the retail counter, including spending caps, strict age and I.D. verification, and wagering limits."

## It's not a matter of if, but when, state lotteries will offer games online.

NPi Director of Marketing, Julin Shaw, spoke on another hot topic – **game content** – and how to prepare for stakeholder questions. There are a variety of game content types, including custom retail games, eInstants, Instant Keno, and Instant Lotto. One example to support lotteries engaging their stakeholders is the digitization of retail scratch-off tickets. "When we digitize this, we take the exact design mirroring the retail ticket and leave the same play style and instructions in place."

These iLottery games include tried and true mechanics like number match, instant reveal, and match 3. This helps decision makers understand that gameplay is the same when delivered online.

Additionally, iLottery games **aren't casino games**. NPi's Senior Vice President of Government Affairs, Scott Bowen, explained how to draw a line on this point with stakeholders: "Every state is different; each struggle with the blurred lines between lottery and casino games." Bowen explained that the most important factors to consider are the state's legal distinctions when defining lottery and casino games, and how game outcomes are conveyed as pre-determined or randomly selected.

Lastly, Shaw discussed **omni-channel** strategies lotteries can employ to engage retail partners. Retailers are part of the lottery's fabric, and years of data demonstrates how iLottery doesn't cannibalize retail sales. Shaw presented the "4Ps" of omnichannel strategies with several examples to incorporate the retail network when introducing an iLottery program, including payments, products, promotions and partners. These strategies provide players with a fully-integrated lottery experience across brick-and-mortar and online channels. The crux of successful omnichannel strategies focus on facilitating greater convenience for lottery players – and retailers play critical roles in that experience.

**Considering iLottery? What's next?** The good news is there are many that have already transitioned. Reach out to colleagues and industry experts who can help craft an objective-specific strategy.

## **Problem Gambling 101**

This webinar, which includes a person in recovery, provides a comprehensive outline on gambling, the warning signs of problem gambling, the difference between problem gambling and responsible gambling, and some helpful tips to keep gambling healthy and safe.

The presentation – hosted by Jodie Neally, Outreach & Recovery Support Coordinator, and Ray Flurette, GameSense Supervisor, both from the Massachusetts Council on Gaming and Health – also contains an overview of some of the lottery industry’s safeguards such as age restrictions, the problem gambling helpline and voluntary self-exclusion, as well as some of the educational campaigns like Responsible Gaming Education Week, the NCPG-McGill Holiday Campaign and Problem Gambling Awareness Month.

Presenters also touch on some of the relevant data, including which types of gambling are more likely to cause harm, and which populations are more susceptible to developing a problem with gambling.

## **Responsible Gambling Innovations in an Online World**

Amy Gabrila, GameSense Advisor at MGM in Springfield, Mass., discusses the different risk factors associated with gambling online and show-cases some of the responsible gambling safeguards that are being considered.

For players, this includes age verification, time limits, spend and win limits, online text and chat, the helpline number, credit card limits, advertising standards, and voluntary self-exclusion. For operators, this involves employee training and a commitment to funding problem gambling research, education, training and prevention, as well as working and collaborating with experts in this field.

Further, brand confidence and trust are generally linked to a product’s success. Developing and implementing responsible gambling best practices in an online world can help to ensure that online gambling products are intended to be offered in a safe and healthy way.

## **Scientific Games Holiday Helpers Present “Instant Holiday Spirit”**

The Scientific Games Holiday Helpers stop by with some instant holiday spirit to get your lottery ready for the 2021 winter season with festive holiday games.

Learn more about the history and significance of holiday lottery games and what to expect in upcoming seasons. Find out what the top performing holiday offerings have in common. And share some merry laughs with familiar faces, as these instant game portfolio pros take you through strategic product enhancements and specialty, licensed and digital holiday products – all while they’re baking fruitcake, wrapping gifts, and sharing memories of top performers past.

## **Boosting Lottery Sales and Engagement With Additional Prizes**

As the lottery industry’s experiential prizing and customer service paradigms shift to adapt to the new COVID-19 reality, jurisdictions are exploring new ways to enhance games in order to engage players and improve sales. Key to this are the answers to two questions: Where should lotteries invest funds to make the biggest impact? And how can lotteries get players informed and interested?

As the Arizona Lottery looks back on record-setting sales in FY20, they have found that social and earned media messaging have been, and continue to be, central to their success in those efforts. In this session, Russ Harben, Shelby Alessi, and Mary Cimaglio take attendees step-by-step through their promotions and games development process.

## **And More!**

Additional episodes, hosted by and for specific NASPL committees and educational working groups, are available to view as well. These webinars cover topics like sports betting; consumer opinion tracking during the pandemic; MUSL Rule 2 modernization, collaboration and standardization; and key performance indicators and performance metrics.

**To learn more, visit [nasplmatrix.org](https://nasplmatrix.org)**

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