

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

# INSIGHTS

SEPTEMBER/OCTOBER 2020



Conference  
Preview &  
NASPL Awards  
Entries!

THE NASPL ANNUAL CONFERENCE

IS GOING  
VIRTUAL

OCTOBER 26-30, 2020



### **And just like that, autumn has arrived.**

**H**ere in Big Sky Country, that means cooling temps, festive flavors and a kaleidoscope of fall colors. For the lottery industry, it means it's time for the annual NASPL Conference.

This year, to continue to provide educational opportunities and promote industry development in a safe but effective manner, we're going completely virtual – with DeskCon 2020.

For the first time ever, NASPL is pleased to introduce a weeklong, fully digital program, streaming straight to your office. We have an

exciting curriculum planned, with engaging speakers and timely topics. And we'll also be honoring outstanding industry individuals and recognizing the most creative and successful new games, marketing strategies and advertising with the annual NASPL Awards.

We'll certainly miss seeing our members and contributors in person. However, this new platform provides us the opportunity to make this event easily accessible to our entire membership – all with a click of the mouse.

Registration is FREE, simple and convenient. Scheduling conflict? Not a problem. All sessions and presentations will be available on the NASPL Matrix to view or revisit at your convenience.

Most importantly, DeskCon 2020 will cover the issues most relevant to our industry right now, including responsible gambling; diversity and inclusion; successful game launches and innovative prize structures; optimizing consumer and retailer solutions; and, of course, adapting and evolving successfully through the pandemic. For a complete conference preview, check out page 38.

Also in this issue, we welcome our newest contributor, Marlene Warner, Executive Director of the Massachusetts Council on Gaming and Health. Marlene has more than two decades of experience in focused responsible gambling efforts; before becoming the Mass Council's Executive Director in 2011, she worked as their Program Director for ten years. We're very excited to have her on board to lend her expertise.

Here, and in her upcoming bi-monthly *Insights* articles, Marlene will provide guidance on significant RG topics. See page 18 for her advice to lotteries on conducting responsible gambling in the “new normal” brought about by COVID-19.

So grab a pumpkin spice latte (or the fall beverage of your choice) and read on. And I hope to “see” you all on October 26, for the kickoff of DeskCon 2020.

Til then,

**Angela Wong**  
Director, Montana Lottery  
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### **CIRCULATION:**

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

7757 Auburn Road Unit #7  
Concord, OH 44077

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In this Issue



**6 Up Front**

Industry news and updates.

**10 Making a Difference: James Teichroew**

Manager, Telecom and Retail Services, Western Canada Lottery Corp.

**16 Research Corner: The Road to Prize Structure Optimization**

By Maureen Watson, Research and Consumer Strategist, Virginia Lottery, and Ryan Walters, Scratch Games Manager, Virginia Lottery

**18 Responsible Gambling in a “New” Normal: Changing Realities in 2020**

By Marlene Warner, Executive Director, Massachusetts Council on Gaming and Health

**20 Progress Report: American Sports Betting**

No one could predict the tumultuous events of 2020, but lotteries continue to expand into sports betting to meet the demand.

By Patricia McQueen

**24 Golden Years in California**

Legislative relief can go a long way, and California is a shining example of how removing certain restrictions can trigger unprecedented growth in both sales and revenues to good causes.

By Patricia McQueen

**32 First in Many Ways**

Delaware may be a small state, but its lottery has had a big influence on the expanded role of lotteries in the gaming industry.

By Patricia McQueen



**NASPL DeskCon 2020 Preview**

**38 The NASPL Annual Conference Is Going Virtual**

Like everyone else this year, NASPL has adapted to a new reality, and you won't want to miss our great virtual event!

By Mackenzie Whitacre

**40 Time to Shine**

Complete listing of the NASPL 2020 Awards Entries and Judges.



**NASPL 2020 Associate Members**

**64 Executive Q&As**

Interviews with executives from our top level Associate Members.

**71 Lessons Learned From the Pandemic**

Associate Members share thoughts about what the industry can learn from the global pandemic.

**82 Associate Member Profiles**



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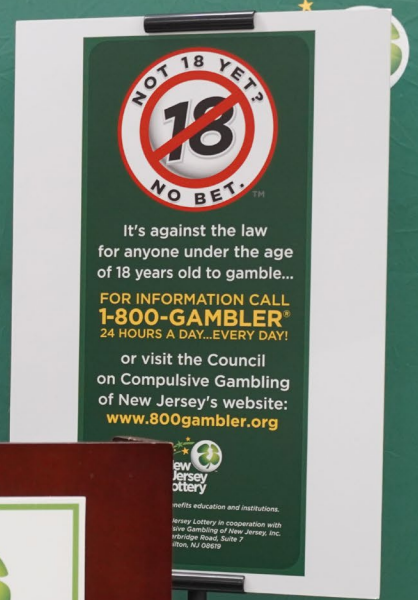
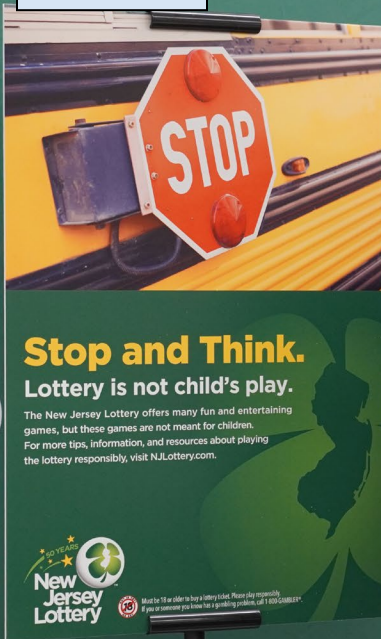
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\*Based on CY 2019 Weekly Per Capita Instant Game Sales



# Helping Keep Gambling Safe in the Garden State

By Mackenzie Whitacre

New Jersey Lottery games provide fun and entertainment for players while also generating essential revenue for education and state-supported institutions. However, the Lottery is aware that for some individuals any form of gaming can be a problem. As a result, the New Jersey Lottery promotes and encourages responsible play with several important initiatives, including the “Not 18 Yet? No Bet” campaign.



This annual “Not 18 Yet? No Bet” awareness campaign, in partnership with the Council on Compulsive Gambling of New Jersey (CCGNJ), reminds residents and retailers that New Jersey law prohibits the sale of lottery tickets to or by anyone under the age of 18.

In a campaign kickoff event hosted by a New Jersey Lottery retailer, Jerry Guarino, Deputy Executive Director of the New Jersey Lottery, and Neva Pryor, Executive Director





**SHORTLISTED**

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## **“The Lottery continues to be a great partner in promoting the importance of responsible gambling and in publicizing the Council’s helpline number.”**

**- Neva Pryor**

of CCGNJ, renewed their organizations’ commitment to responsible play and the prevention of underage gambling.

“The Lottery has a longstanding commitment to promoting responsible play and discouraging underage gambling of any kind,” Guarino said. “We have an active partnership with the Council and support their efforts to prevent underage gambling.”

To help get the word out, the Lottery developed a “Not 18 Yet? No Bet” brochure, in both English and Spanish, that contains information about the major types of teen betting and ways to recognize signs of a gambling problem in minors. It also provides important contact information for those seeking individual advice and assistance.

The brochures are available at more than 7,000 Lottery retailer locations, at all Lottery-sponsored exhibits and events, and may be downloaded from the Lottery’s website. The “Not 18 Yet? No Bet” message and the 1-800-GAMBLER Helpline number are continually flashed on digital messaging screens at all retailer locations as well.

Additionally, the Lottery provided the CCGNJ with additional “Not 18 Yet? No Bet” brochures, along with supplies of pens and pencils imprinted with the message “You Must Be 18 or Older to Play the NJ Lottery,” for distribution to students who attend the Council’s school lecture series.

“The Council is expanding its community and school-based outreach programs. One of our focuses is preventing the onset of gambling addiction among adolescents and young adults, so the New Jersey Lottery’s message and support is particularly important,” said Pryor. “The Lottery continues to be a great partner in promoting the importance of responsible gambling and in publicizing the Council’s helpline number.”

The alliance between the New Jersey Lottery and CCGNJ doesn’t end with the “Not 18 Yet? No Bet” campaign. The Lottery has had a representative on the CCGNJ’s Board of Directors since June 1999; the Council’s problem gambling helpline number is printed on every Lottery ticket, brochure and sign; the Lottery’s website directs visitors to the Council’s site, which provides free information and guidance to anyone who may have or need advice about a gambling problem; and the Lottery adheres to advertising and marketing policies that encourage responsible play and promote the services available through CCGNJ.

The New Jersey Lottery participates in a number of additional responsible gambling initiatives as well.

The Lottery has adopted formal codes of conduct that address responsible gambling and problem gambling awareness, including a Corporate Social Responsibility

Policy; Responsible Gaming and Consumer Internal Controls; and a Marketing Code of Conduct. Their administration includes a Responsible Play Manager as well.

Additionally, the Lottery provides responsible gambling training for staff members, retailers and sales clerks, and contributes funding for problem gambling services in the state.

In March, the Lottery recognizes Problem Gambling Awareness Month, in an effort to educate the general public and health care professionals about the warning signs of problem gambling and to raise awareness of the help that is available both locally and nationally.

And every winter, the New Jersey Lottery partners with the National Council on Problem Gambling and the International Centre for Youth Gambling Problems and High-Risk Behaviors at McGill University to participate in the Responsible Gambling Holiday Lottery Campaign, communicating the risks of underage lottery play during the holiday season. In 2019, the Lottery was a Level 3 participant in the campaign, engaging at the highest standard of involvement.

For these efforts and more, the New Jersey Lottery has been awarded Level 4 certification in the World Lottery Association’s Responsible Gaming Framework. This is the WLA’s highest level of responsible gambling achievement, recognizing the Lottery’s planning, development, implementation, and continuing improvement of responsible gambling programs and initiatives. ●



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## Making A Difference

# James Teichroew

Manager, Telecom and Retail Services, Western Canada Lottery Corp.

Never has technology been so important as it is in 2020, when businesses across the globe shifted to remote work environments. IT teams had to make the transitions seamless, and ensure that network infrastructures were up to the task. Lotteries had the additional complication of managing their retailers, including critical technology and networking issues. And in the thick of all that was James Teichroew, Manager, Telecom and Retail Services, for Western Canada Lottery Corp.

“James is a valued team member at WCLC, and he and his team are critical to the support of our retail network – a crucial pillar of our business,” said Nicholas Douville, WCLC’s Director of Infrastructure and Operations. “The responsibility of that network is significant: Almost 5,000 retailers spread over nearly six million square kilometers, operating on behalf of six governments and five partner organizations. Yet, even given his demanding workload, James is always upbeat and ready to take on the next challenge. He is a trusted resource and valued colleague for many of us throughout the organization.”

A seasoned WCLC veteran, Teichroew has over 20 years of service to the organization. WCLC is primarily a sales and marketing company, managing lottery games in Alberta, Manitoba and Saskatchewan, plus the Yukon, Northwest Territories and Nunavut. It works

closely with each jurisdiction’s individual gaming agencies: Alberta Gaming, Liquor and Cannabis; Saskatchewan Lotteries; Manitoba Liquor & Lotteries Corporation; Lotteries Yukon; and NWT & Nunavut Lotteries.

Teichroew began in 1998 as a security officer and quickly moved into computer operations. In 2004, he joined the quality assurance team, first as an analyst and then advancing to a supervisory role in 2011, and finally as an acting manager in 2017. The quality assurance team is vital to the quality and integrity of products and services prior to rolling them out to the production environment. “Anytime there was a new game or game update, a new sales channel, or a new infrastructure or system change, we were heavily involved in that,” noted Teichroew.

His new role began last year, in which he manages WCLC’s internal telecommunication systems and also oversees daily operations at retail. “Essentially we oversee the life cycle of a retail location, from implementation, hardware/logistics management, acquisition of network accesses, maintenance and support, and decommissioning,” he explained. He is also in charge of planning and budgeting for strategic initiatives impacting retail, including advancements in retail hardware and network technologies.

While work keeps him delving into networks and technology, in his spare time Teichroew always liked

nothing better than to be outdoors. Of course, this year he’s taken on a new appreciation for the home front and has been taking on home improvement projects. But hiking, bike riding and exploring have always been tops on his “things to do” list with his wife Leslie; that is, when he wasn’t spending time helping his son with his passion for sports, particularly hockey and lacrosse. He spent several years volunteering as a hockey coach, and continues to serve on the board of a local community club, which offers sports, senior programs and an activity center. He also has a black belt in taekwondo and has served as an instructor.

Teichroew holds certificates in project management from Red River College and in management and administration, with honors, from the University of Manitoba CIMA program.

### **What are the biggest challenges that come from serving several different governments?**

Understandably the governments of each province and territory have their own mandates and constraints, depending on the people they represent, the economy, and other external factors. Those differences do have an impact not only in the projects that we choose to do, but even in how we operate. From my perspective, whether you are managing a departmental budget or doing higher-level activities like defining long-term corporate



“He is a trusted resource and valued colleague for many of us throughout the organization.”

*-Nicholas Douville*





strategies, we always have to be cognizant of the environment that these governments are working in, and making sure that our efforts and services are bringing value to everyone. We need to continuously monitor our activities, and work with our corporate leaders and executive team to ensure that our efforts are being appropriately directed. For example, each jurisdiction will have different retail strategies, which are determined by their gaming agencies, and our role is to support and provide whatever they need.

**With more than two decades at WCLC, what would you say have been the most significant changes in the industry over the years?**

Working in IT as I do, it's remarkable the speed at which technology changes. Not only the tools that we use to do our jobs, but also the technology that consumers can access. I was in quality assurance for 15 years, and at the beginning we just supported a couple of systems and a small catalog of draw games. Now, we support more systems and a broad user base, with new technology tools that help us manage our test environment and our infrastructure. Productivity tools like Outlook and our mobile devices help us stay in contact at all times and allow us to absorb a lot more of what's going on. But that only gets you so far – as technology changes, you constantly have to look at your processes and strategies to make sure that you are getting value for what you are doing. Technology isn't just a one-shot solution, where you'd paint yourself into a corner and realize that the pace and level of output was not sustainable.

At the consumer level, it's incredible that almost every person in North America has a networked computing device at their hand at all times. How do we take advantage of that and get our message out there, especially when so many social platforms have such a short life cycle? I really respect the work that marketing people do to develop these



strategies, because you only have someone's attention for 30 seconds before they move on to something else. Our minds can only consume so much content, so it's a struggle to see how we operate in such a digital and content-heavy environment. For lotteries, the speed at which the world moves means that when there is public acceptance of doing something in a new way, you have only one chance to do it right. It's no wonder lotteries are careful about taking any big new steps.

**How has WCLC adapted during the pandemic, and what changes do you see going forward?**

Obviously we weren't alone in being impacted with the pandemic. The biggest change was the way we enabled pretty much everybody to work remotely from home. We already had remote access ability and policies in place for those who needed it, but with the pandemic we really mobilized our team to provide that across the organization. As a 20-year employee, I couldn't believe how quickly and how successfully we rolled out remote working environments.

While it wasn't exactly "business as usual," our mandate to sell lottery continued. Initially there was a lot of uncertainty as we looked to our governments for guidance, and we did have a few retailers voluntarily decide to temporarily stop selling lottery. My department was instrumental in facilitating that, as we run the tech support hotline for retailers and manage network access for all retail sites. We helped them go through the process of shutting down lottery, and then got them back up and running when the time came. We have definitely seen an impact on our draw game sales, but with Manitoba allowing online sales along with a concurrent increase in instant product sales, that helped offset the retail decline.

We have seen retailers implement new social distancing guidelines and things like plastic shields, but generally speaking we didn't change the retail experience with respect to lottery. That said, we had already been working on some new strategic initiatives such as letting players build playslips on their mobile devices, producing a barcode to scan at retail. The pandemic has clearly





indicated that there is an increased need for these types of things, to make the retail lottery experience more seamless and able to take advantage of mobile technologies.

**Are there any new technologies in retail that you are excited about for the lottery industry?**

The gaming agencies I work with are the ones who directly recruit and manage retailers, and I'm still in the process of thoroughly understanding

the retail world. I do think the ability to offer mobile enhancements is important, as I mentioned, but we do have one interesting project underway. We're refreshing the lottery play centers provided at retail with digital versions, what we are calling interactive play tables. They include a touchscreen display where players can get all the lottery information they need, from how to play to winning numbers to sports data and everything in between. We

are continuing with the Lotto Spot brand for these new units, which is also the name of our mobile app. It's all part of our rebranding project and refreshing the look at retail. They are really eye-catching displays that draw in consumers, much like you'd see at some restaurants where you can create your own order on a self-service kiosk. There's a lot of potential for these digital units to add features as we go along.

**Is there anything you wish WCLC, or the lottery industry in general, could do differently?**

Earlier I mentioned how working remotely has been one big outcome of the pandemic. That's a real fundamental shift, and I don't think we had the luxury of debating it – it just was the reality. But I think it was a direction in which we were already heading, albeit slowly, and it has the impact of changing our corporate culture. Instead of focusing so much of our resources on our offices, on keeping the lights on, so to speak, we can focus more of our talent on innovation and strategic development. Finding new ways to support our infrastructure and our operations.





And while I don't think this is an area where the industry has necessarily been lacking, I think this change in our culture has helped to focus on transparency, and on using technology to deliver more support and engagement from our executive team to our team members. Now, the frequent communications, staff updates and surveys that have come during the pandemic are very positive steps to avoid siloing and help set us up to be successful as we go through the next few months and beyond.

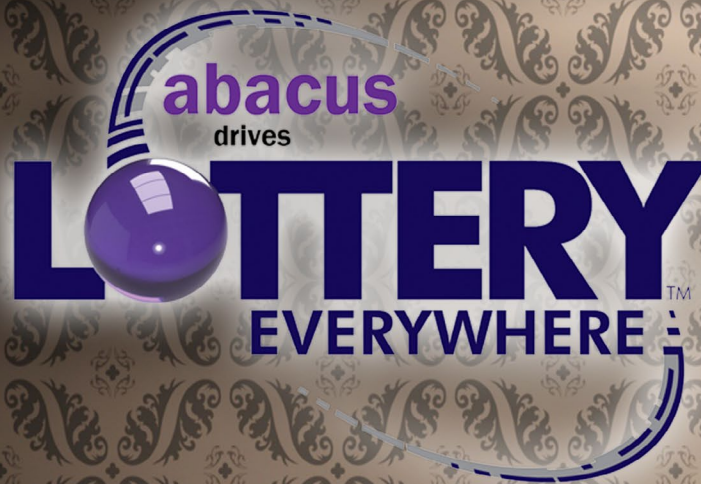
**What has kept you at WCLC all these years?**

It really comes down to the people – the personal and professional relationships that I've built over the years. We have a lot of great people who work here, really contributing to our success. When you keep that in mind, it helps you through the rough patches. After all, things don't always go according to plan. By focusing on people and relationship-building, you can ride the roller coaster and introduce a little levity in times of stress.

I have also loved the opportunities that have presented themselves. Opportunities for advancement, for training, mentoring and coaching. The environment is always changing, and the challenges keep it interesting. ●



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# The Road to Prize Structure Optimization



**Maureen Watson**  
Research and Consumer Strategist,  
Virginia Lottery



**Ryan Walters**  
Scratch Games Manager,  
Virginia Lottery



Over the past year, we have conducted a thorough analysis of our Scratch performance metrics. We wanted to understand what propelled the best-selling themes, playstyles, bonus features, prize offerings and product mix. During our review, we recognized an opportunity to better understand what our players considered a meaningful win. We began working closely with our research team to maintain a dialogue with our players via our monthly tracking study and meaningful-win research.

Our goal was to answer these two questions with our meaningful-win research:

- When are players satisfied and extremely satisfied with a win, and how much do they reinvest?
- At what point does a win become so meaningful that a player talks about it?

We conducted this research via an online methodology; a separate survey was used for each price point offered in our scratch portfolio. The survey(s) included hypothetical store-visit scenarios during which respondents were told they “purchased” a [price point] Scratch and then were shown a “winning amount.” We followed up with satisfaction, recommendation and reinvestment questions after each “winning amount.” Each price point had its predetermined winning amounts, and they were shown to the respondent randomly.

We ensured survey respondents were Virginia adults 18 and older and made sure the respondents represented an equal distribution of age and gender. Respondents must have played a scratch game in the past 12 months, and we included a subgroup of frequent scratch players for each price point. Frequent players were

defined as having played that specific price point Scratch in at least the past month.

We found that satisfaction began with a win that was close to double the initial investment. When it came to reinvestment, we found that reinvestment levels increased as prizes increased. Players didn’t double their original investment until they reached higher levels of satisfaction. However, willingness to talk about a win with family and friends began not long after achieving some degree of satisfaction with the winnings.

Below are the takeaways (by Scratch price point) from our research.

- Satisfaction for \$1 Scratchers began at \$2. Players reinvested double the initial investment amount starting with a \$5 win. The largest increase in word-of-mouth promotion was found





## Research Results

### Meaningful Wins



when the prize amount increased from \$15 to \$20.

- Satisfaction for \$2 Scratchers began at \$4. Players reinvested double the initial investment amount starting with a win between \$12 and \$15. The largest word-of-mouth gain was found when the prize amount increased from \$15 to \$20.
- For \$3 Scratchers, satisfaction began at \$6. Players reinvested double the original investment amount with wins between \$20 and \$25. An increase in prize amount from \$15 to \$20 resulted in the greatest likelihood of word-of-mouth promotion.
- Satisfaction for \$5 Scratchers started at \$10. Players would discuss a \$5 Scratcher win at the \$20 to \$35 prize levels, but double reinvestment began when winnings reached \$50 to \$75.
- Satisfaction for \$10 Scratchers started at \$15. Players reinvested double the original investment amount with wins between \$75 and \$100. Winning between \$20 and \$50 drove the largest word-of-mouth gain.
- For \$20 Scratchers, satisfaction

began at \$30. The majority of players would discuss a win starting at \$40 and reinvest double the amount of their initial investment with a \$300 win.

- For \$30 Scratchers, satisfaction began at \$40. The majority of players would discuss a win starting at \$50 and reinvest double the amount of their initial investment with a \$600 win.

We found that a large percentage of our players were satisfied with relatively low wins (between two and five times their initial investment) and extremely satisfied with wins that were 10 to 20 times their initial investment. More importantly, the results highlighted key wins within each price point; these are shown at the bottom of the illustration above. These were the wins for which the satisfaction jump was the largest. In addition, these are the prize levels at which our players' reinvestment levels begin to increase.

We have used our meaningful-win research to adjust our prize structure funding allocations to optimize the winning experience.

We have seen early success with

a few games such as the \$5 Did I Win? Scratcher and the Ca\$h Cha\$er family of games. Did I Win? launched in April during the onset of the pandemic and ended with a 114% index. To improve the winning experience, we gave it a top prize of \$75,000, which is slightly lower than average. The game also featured overall odds of 1 in 2.98, providing our players with more favorable overall odds than our typical \$5 Scratchers.

Our Ca\$h Cha\$er family of games launched in June and featured standard top prizes, but the prize-funding allocations focused on those meaningful-win ranges. Here are the 12-week indices for the tickets in that family:

- \$1 \$500 Ca\$h Cha\$er: Index 102%
- \$2 \$15,000 Ca\$h Cha\$er: Index 104%
- \$5 \$150,000 Ca\$h Cha\$er: Index 109%
- \$10 \$500,000 Ca\$h Cha\$er: Index 106%

Overall, the research was productive. We look forward to further integrating our findings into game development. ●





# Responsible Gambling in a “New” Normal: Changing Realities in 2020



**Marlene Warner**  
Executive Director, Massachusetts  
Council on Gaming and Health

It is an understatement to say that 2020 has been a tough and strange year. Whether you think about the pandemic, the economy, civil unrest, in-school or online learning for your kids, or simply the environmental anomalies thrown at us, many people are feeling anxious and/or overwhelmed. And in these times many people are drawn to simpler and more reliable ways to distract themselves from these challenging realities.

I believe that’s why we have seen people returning to their favorite comfort foods and forms of entertainment, such as favorite hobbies, well-worn books, puzzles, predictable movies, hiking and biking. Many people have also adopted pets to help cope with these times. In addition to these ways to pass the time and escape the world around you, some people have also played lottery to distract themselves. When the rest of the world feels chaotic, it feels good to go back to things you can rely upon, including purchasing a ticket at your local convenience store from the friendly clerk, or playing your grandkids’ birthdates and your wedding anniversary on the weekly numbers.

Lotteries around the world are currently in the process of pitching their products to returning players with these new realities – trying to increase sales while keeping their players safe. Here are some ideas on how to conduct responsible gambling amidst the “new” normal.

Don’t you hate that term? I’m ready for our old normal back.

## Health and Wellness First

If you haven’t been doing so already, it is important to remind players and staff that you care about them and

have their best interest in mind. It may seem simple but can have huge implications for the trust they’ll have in a lottery and the value they’ll put on their relationship with the lottery. Remind people to follow the health guidelines that the CDC and others are promoting. Promote responsible gambling by reminding people that they should social distance when purchasing tickets in a store, and to wear masks when walking inside to purchase tickets. It would also help to make hand sanitizer or wipes available. And at least temporarily, take away the pencils by the playslips at all lottery agents that are often left behind and reused; any other items that might be touched by others in the process of purchasing lottery tickets should be disposed of properly.

In addition to these safety measures, it is important to work collaboratively with your local health officials to offer the contact information for local physical and mental health resources for players through your lottery’s website, retailers and sales agents, and for your employees through your in-house communications channels.

Additionally, reminding players to balance their gambling with other types of leisure activities is a great responsible gambling tip.

## Cash Is Out, Cashless Is In: Safety for Everyone

It is undeniable – people are reluctant to hold, handle or offer cash in these times. With that current reality, many lotteries are promoting and seeking approval to have a cashless system for purchases. What is key here is that players have the money to back the plastic or electronic payment that they are using. Lotteries can promote debit card use and educate players how to make

sure they don't go over into overdraft. They can also promote applications such as PayPal that can pull from a bank account that must have sufficient funds to be used. Further, there should be no promotion of credit cards or buying lottery products on credit.

If credit is allowed for online lottery purchases, responsible gambling safeguards could include pop-up educational messages, time limits, spend and win limits, age verification, voluntary self-exclusion, prominent display of the Helpline number on all web pages, and a limit of one credit card per player.

### **Money Highs and Lows**

With historic job losses, many businesses folding, and the stock market fluctuating, many people are hurting financially. On the other side, many are receiving higher than typical amounts in the way of federal and state unemployment checks, stimulus checks and found money that is not being spent on entertainment, gas and vacations. Never has it been more important to remind players that no matter what amount of money is coming in, they should set financial goals and stick to a budget. It is easy for people to see an extra \$600 in their account and assume they should gamble to see if they can make it into \$1,200. It is harder, but more important, to remind people through casual conversations, stickers on terminals, and digital/social media messaging that if they enjoy lottery play, they should make it a part of their expenses in their monthly budget. You could even offer a downloadable sample budget on your website.

And, as you are aware, it only takes one ticket to win. Reminding players about this and offering many other responsible gambling tips, particularly when the jackpot is high, is an easy way to help players keep their gambling spending in check.

### **Remote Training and Connections**

There is no time like the present to train your staff on responsible gambling techniques and problem gambling information. One of the silver linings of most people working remotely is that they've gained time in their schedules not spent on commuting to work and to various meetings or meetings before meetings. Take advantage of that newfound time. Offer, either as a live meeting or as a downloadable video, a responsible gambling training program. Use your local affiliate of the National Council on Problem Gambling (NCPG) to come in and give you a realtime snapshot of current resources and gambling and gaming trends. Use the NASPL Matrix to download videos

for your staff and retailers. Check out the recent online NASPL RG presentations, "Problem Gambling 101" and "Responsible Gambling Innovations in an Online World," both part of the Insights Direct webinar series and available on the NASPL Matrix. And plan to attend the upcoming seminar "Gambling and Sports: As Long as There Has Been Currency, There Has Been Gambling" on Oct. 28, as part of DeskCon, the association's new virtual conference.

### **Now Everyone Knows How to Zoom**

Have you ever wanted to bring in a researcher to lend expertise to your gaming format but couldn't afford it because she lives in Australia? Or hoped to have staff attend a conference on responsible gambling but you didn't have the travel budget? Possibly you wanted to do a responsible gambling audit of all your products and receive constructive feedback? Everyone has learned how to do things differently and via remote/electronic formats. Now is the time to access those people you had once thought it would be great to offer an outside RG perspective to your work. And many of the "talking heads" in the field are also sitting at home instead of traveling and are dealing with short budgets, so they'll be happy to receive your call!

### **Use Your NASPL RG Committee and Verification Program**

If you are not sure where to start, reach out to the Chair of the NASPL Responsible Gambling Committee and Director of the Oregon Lottery, Barry Pack. He will help to get you started. And if you have been putting off starting the NASPL/NCPG Responsible Gambling Verification Program, there is no better time than the present. As Mark Twain once said, "The secret to getting ahead is getting started." Lots of people are here to help! ●



**"The secret to getting ahead is getting started."**

**- Mark Twain**



# AMERICAN SPORTS BETTING

*No one could predict the tumultuous events of 2020, but lotteries continue to expand into sports betting to meet the demand.*

««« By Patricia McQueen





Last January, the future looked bright for sports betting in the U.S., still in relative infancy after the repeal of the Professional and Amateur Sports Protection Act in May 2018. Three lotteries had launched their sports programs in 2018, and by the end of 2019, two more had begun operations, with three gearing up to start this year.

By September, the future still looked bright, it's just a future pushed out a little bit as 2020 now will be remembered as a year to forget. For this new American era of sports betting, the global pandemic had a double whammy on the fledgling operations – a sudden lack of sports on which to bet, and the closure of most of the retail outlets that offer sports bets. That said, those lotteries with online sports betting operations managed to pick up sports from around the world to keep their players engaged.

So here's what's been happening. First, the newcomers. New Hampshire launched its online/mobile service last December 30, and had planned to open its first sports book in March. Not surprisingly, that was delayed until August.

The Montana Lottery launched its facility-based operation as planned the week of March 9 – it was only days later that things got shut down. The DC Lottery postponed for about two months the launch of the first part of its sports betting program, an online/mobile service, finally going live at the end of May; its first licensed arena sports book opened at the end of July. In late September, the Tennessee Education Lottery approved a first group of sports betting operators, with a tentative November launch for their online/mobile platforms (the Lottery serves as regulator only).

Among the earlier adopters, the Delaware Lottery's sports betting is currently confined to facility-based play – full sports betting at the state's three casinos, which were closed for a time, and football parlays sold at retail. West Virginia has both casino-based sports books



and online/mobile betting, but only two of its five facilities were live with online/mobile bets during the start of the pandemic last spring when the casinos closed. Rhode Island was able to continue with its online/mobile sports betting during the shutdown of its two casinos, and the Oregon Lottery's exclusively online/mobile program continued operations.

What were the most popular sports during the American major league hiatus? Russian table tennis was prominent, as was soccer from various parts of the world and the hockey-based Scandinavian bandy. MMA fighting was another top sport. Bettors in some jurisdictions could find many more options, such as Aussie rules football, rugby, darts, handball, snooker and pool. But lotteries held the line at marble racing, pitched as a potential sport by some.

Now for more details about the newest lottery-run sports betting jurisdictions.

### **New Hampshire**

New Hampshire's sports betting regulations allow for online/mobile wagering, up to ten sports book locations, and retail parlay cards. While online/mobile betting opened for business last December 30, it wasn't until mid-August that the state's first sports book, The Brook in Seabrook, finally opened. It was a facility that already served as a charitable gaming hall for that arm of the

Lottery's operations. Another sports book opened in early September, Filotimo Casino & Restaurant in Manchester.

Total New Hampshire sports handle in 2020, through August, was just shy of \$106 million, with \$7.8 million in gross gaming revenue. After a low point in April, it roared back over the summer, with \$27.5 million in handle in August alone (\$1.3 million in GGR).

The myriad of international sports presented last spring were not big revenue generators by any means, but they served another important purpose during that time. "It was very helpful to keep our customers active and interested," said New Hampshire Lottery Executive Director Charlie McIntyre.

He was surprised at the effort it took to launch a physical sports book. "These are very complicated, and take a lot of time and a lot of energy." But he noted that DraftKings has been a great partner to help the Lottery learn the business, which includes all the necessary controls in place to handle a large amount of money, including big bets being placed – differentiating the sports operation from a traditional lottery retailer, which is mostly small ticket purchases.

### **Montana**

When Sports Bet Montana debuted last March, about 130 locations had kiosks up and running that first week. Sports wagering licenses

can only be granted to facilities with liquor licenses for on-premise alcohol consumption. Then in short order, American sports came to an abrupt end, and those shiny new kiosks were in places that were shut down in the state's shelter-in-place orders. Some six weeks later, a phased reopening shone the light on just how important Montana's sports betting legislation is.

"The law was intended to benefit businesses and the state at the same time," explained Montana Lottery Communications Manager Jennifer McKee. The locations offering the sports betting kiosks (a number up to about 250 in September) receive 6% of total sports handle; through late September, \$6.2 million in handle had generated \$372,000 for the retailers, with about \$90,000 for the state. "This was exactly how it was meant to work. This was a really challenging situation for businesses, and they received most of the benefit of Sports Bet Montana at a time when they needed everything they could get. It has been very satisfying."

Montana's biggest challenge is communicating to players that while there is a mobile app with all the sports information they could ever need, they can only actually place bets within the confines of the retail location. Because internet wagering is illegal in the state, mobile devices must connect directly with the Lottery's network in each location. That was a source of a lot of confusion, as players thought their app wasn't working when they tried to place bets outside a sports location.

Perhaps because of the familiarity of the video gaming machines located at these same types of facilities, most sports bets have actually been placed at the self-service kiosks rather than the mobile app. It may be as the social aspect of getting together in a sports bar eventually comes back, more players will be using the app as they engage with friends in a group.

### **District of Columbia**

The DC Lottery was planning to launch its online/mobile GamBet in March, the first of its three different sports betting operations, when word came that major league sports were canceling or postponing their games. So DC took the opportunity to refine the platform and do further testing for what is one of the most complicated geo-location challenges of any gaming operator. The Lottery is tasked to not only offer its own product – GamBet online/mobile and retail products – but also to regulate two different types of licensed private operators, and they all must adhere to the strict rules regarding where mobile bets may be placed.

For the Lottery's own online/mobile system, bets cannot be placed within the boundaries of the federal enclave, nor can they be placed inside a two-block exclusivity zone around any of the city's major stadiums that hold sports betting licenses. And that presents a communication challenge similar to what Montana has faced, as players complain the app isn't working when they are simply not in an authorized area. A robust customer care center helps to answer player questions, and social media is also used to provide additional information about the system. "It's a collective team effort between INTRALOT and our communications staff," noted Executive Director Beth Bresnahan.

GamBet went live on May 28 with a few international sports like soccer. Through the end of August, it had generated \$3.1 million in handle and \$457,166 in gross gaming revenue; more than two-thirds of that handle was bet in August as major league sports were in full swing again.

The District's first stadium sports book, a Class A private operator, opened on July 31 – William Hill is licensed to run sports betting at Capital One Arena. In its first month of operation using kiosks in a

temporary setting, handle exceeded \$9.1 million, with GGR of \$7.7 million. That GGR is taxed at 10%.

The Lottery is working through a number of other license applications, including the first Class B private operator licenses for sports bars and other locations. Its own GamBet retail operation is now planned for a debut next summer; given all the retail disruptions caused by the pandemic and other factors, it made sense to hold off the installation of all-new terminals until next year.

### **More to Come**

Another newcomer to the lottery sports betting ranks is expected to go live in November, as the Tennessee Education Lottery has conditionally approved licenses for Betfair Interactive US LLC (FanDuel); BetMGM, LLC; Crown TN Gaming, LLC (DraftKings); and Tennessee Action 24/7 (Action 247). Pending final approval, they will be the first of what could be many online/mobile sports betting operators soliciting Tennessee players – there is no limit to the number of operator licenses that may be awarded.

In West Virginia, the state's two greyhound tracks finally launched their first online/mobile sports betting systems around the first of September, coinciding with the reopening of their casino sports books. That means that all five of the state's casinos are now up and running with both onsite and online/mobile sports action.

The Delaware Lottery is moving down the path of adding online/mobile sports betting as an option for players. As a small state with a limited population, such a system in Delaware will always be a challenge, but the pandemic has clearly indicated there is opportunity.

Certainly 2020 has been a year of unprecedented world events, but lotteries continue to forge ahead to provide much-needed revenues for the good causes they support, and for their retail partners that need revenues as never before. ●



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Match any of "YOUR NUMBERS" to any of the three "WINNING NUMBERS," win that prize. Uncover a **READY!** symbol to automatically win that prize. Uncover a **READY!** symbol to automatically win 2 times that prize.

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1985 Throwback Ticket

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## **Legislative relief can go a long way, and California is a shining example of how removing certain restrictions can trigger unprecedented growth in both sales and revenues to good causes.**

**By Patricia McQueen**

**A**pproved by 58% of state voters in 1984, the California Lottery began operations in October 1985 with a single game – a Scratchers ticket called California Jackpot. After 35 years, it is clear that California really did hit the jackpot with its new lottery. From inception through FY20, ticket sales were \$118.6 billion, \$67.4 billion was returned to players as prizes, nearly \$8.0 billion was earned by retailers through commissions, and most importantly, more than \$37.6 billion was raised for education in the state.

“We are proud of our essential mission that was established when the California Lottery began 35 years ago – to maximize supplemental funds for public education,” said Lottery Director Alva Johnson. “We thank our dedicated employees, retailers and vendor partners who all have contributed to our success.”

The numbers are impressive indeed, but only in the last decade has the California Lottery really started reaching the sales potential that comes from having the largest population base in the country. From FY10 through FY19, annual sales increased by a factor of 2.4, from slightly more than \$3.0 billion to almost \$7.4 billion. In FY10, it ranked just seventh in sales among American lotteries, but by FY19 had shot up the ranks to be second, behind only New York in sales of traditional lottery products. That performance improvement far and away led the nation during that time period.

And it wasn't just in sales. Lotteries exist to raise money for good causes, and in California, annual revenues to education increased by 72% over those nine years – from \$1.09 billion in FY10 to \$1.87 billion in FY19. Again, its nine-year annual gain was on the leading edge of lotteries across America during that time span.





*For its 35th anniversary, the California Lottery released a modern version of the scratch ticket that started it all.*



What triggered these impressive results? It's pretty simple, actually. "We were able to achieve this growth after gaining relief from prize payout restrictions with the passage of legislation in 2010 (AB 142, Hayashi)," explained Johnson. By allowing the Lottery to offer higher prize payouts for some games, both sales and contributions to education increased. "More prizes attract more sales, therefore increasing the monetary amount that goes to schools in the state. The legislative change definitely helped our mission."

While sales and revenues to education are key industry measures, there are at least two significant other achievements to point out. California was the first lottery in the U.S. to obtain the highest Level 4 Certification in the World Lottery

Association's Responsible Gaming Framework. "Seven other states have also since been certified, so we're honored to be trendsetters in this area," said Paula Negrete, Deputy Director of External Affairs, who runs the California Lottery's responsible gaming program.

That commitment to responsible gaming means that its exceptional growth has been developed in a responsible way with a never-wavering commitment to minimizing problem gambling. "Since our recertification in 2018, we continue to incorporate responsible gaming principles in several aspects of business operations, including game development, advertising and marketing, and finding new ways to promote the state's Problem Gambling Helpline," Negrete added.

Then there is the development and implementation of a 20-year Facilities Master Plan. "We are incredibly proud of this achievement and the dedicated effort and work over a lengthy period of time," said Johnson. At its inception in 1985, the Lottery began operating out of a number of leased and aged facilities that did not reflect the organization's brand. Beginning in 2012, it acquired and moved into its own facilities, ensuring business continuity, operational flexibility and consistent branding. "This plan will ultimately save money for the State of California and prioritizes our ability to be environmentally conscious." For example, the Lottery's headquarters building in Sacramento, seven district offices and its Southern Distribution Center are all LEED



certified; the Lottery also has eight facilities that are zero net energy buildings – meaning they produce as much energy as they consume.

## Scratchers Soar

The 2010 legislative change allowed the Lottery, which was generally considered to lag its peers because of the payout restrictions that didn't allow it to keep up with industry best practices in the instant game category, to send Scratchers sales through the roof. In fact, category sales tripled from FY10 to FY19, as strategic decisions to expand price points combined with strong game designs and new play styles.

“We continually evolve and analyze our Scratchers portfolio, challenging our past performance, looking at success across the industry, and working closely with our vendor partners in order to stay relevant and offer a diverse and exciting game selection for our players,” explained Sharon Allen, Deputy Director of Sales and Marketing.

California typically launches 52 Scratchers games annually, which provide an exciting influx of new product each month. This variety keeps consumers engaged and encourages more play, while building a brand expectation to see “what’s new and what’s next” throughout the year. Research is used to determine key game features that appeal to specific segments, whether it’s increasing the size of \$1 tickets to offer more play area for the most loyal players or providing fresh editions and new price points of perennial favorites for extended play players.

“With the aim of maximizing profits and funds for our public schools, the higher price point introductions after the 2010 statutory

change were strategically planned over a five-year period after the prize payout restrictions were eliminated,” said Jim Hasegawa, Deputy Director of Business Planning and Research. First, the \$5 category needed to be more firmly developed with multiple facings, and then the Lottery’s first \$10 game was launched in the fall of 2011. After the \$10 category was well established and popular, the first \$20 game was introduced in 2013. Finally, as part of the 30th anniversary celebration in 2015, the first \$30 game was introduced that fall. This strategy has allowed for long-term sales growth. Currently, \$10 and \$20 games account for about half of Scratchers sales, while the more profitable \$3 and \$5 games still comprise about one-third.

While new price points were added, robust research and product planning has allowed California to develop Scratchers for every player segment. Different games appeal to different types of players, and it’s important to have a variety of product offerings to meet customer needs. Some games that appeal to core players are not well-liked by less frequent, casual players. However, there are some themes, such as Monopoly or the new Pac-Man tickets, that hold strong appeal to both of these types of players. “We have also built and cultivated some player segments, such as those who prefer to spend a little time enjoying the experience of extended play games such as Crossword, Bingo and Loteria,” said Allen, noting that extended-play Scratchers now represent more than 40% of instant sales.

“California consumers are diverse and cutting-edge,” she added. “And we continue to focus on these California nuances with greater diversification in our product portfolio.” Utilizing market research, data



## California at a Glance

	Scratch Ticket Sales	Draw Game Sales	Total Sales	Total Prizes	Net to Education
FY2020*	\$5,009,037,325	\$1,592,237,896	\$6,601,275,221	\$4,391,359,992	\$1,493,529,416
FY2019	5,170,791,532	2,217,258,784	7,388,050,316	4,715,592,673	1,870,747,284
FY2018	5,077,397,175	1,888,394,938	6,965,792,113	4,476,580,353	1,700,936,606
FY2017	4,576,028,713	1,657,439,710	6,233,468,423	3,963,453,360	1,545,525,482
FY2016	4,351,826,436	1,923,770,852	6,275,597,288	3,955,791,373	1,587,416,599
FY2015	3,915,381,412	1,609,469,181	5,524,850,593	3,501,745,873	1,391,719,026
FY2014	3,288,922,307	1,745,739,117	5,034,661,424	3,082,376,405	1,349,601,063
FY2013	3,010,119,929	1,435,754,111	4,445,874,040	2,652,095,102	1,284,370,779
FY2012	2,755,381,647	1,616,110,099	4,371,491,746	2,560,306,589	1,320,726,555
FY2011	2,002,090,072	1,436,487,926	3,438,577,998	1,904,787,955	1,128,551,245
FY2010	1,661,288,086	1,379,671,780	3,040,959,866	1,611,371,074	1,089,747,218

\* All FY2020 numbers are preliminary and subject to adjustment pending final inter-agency reporting.

### Current games:

**Scratch tickets:** About 52 new games per year; \$1, \$2, \$3, \$5, \$10, \$20 and \$30

**Terminal games:** Powerball, Mega Millions, SuperLotto Plus, Fantasy 5, Daily 3, Daily Derby, Hot Spot

### Vital statistics:

**Number of employees:** 909

**Number of licensed retailers:** 23,165 as of 7/1/2020

**Vending equipment:** More than 6,000 ITVMs at over 5,700 retailers across California. Over 1,000 retailers are fully self-service.



and insights, new game concepts are developed that will appeal to more types of players, whether it's a new price point, custom California theme, or licensed properties with cross-over appeal to casual players.

### More Than a Scratch

While Scratchers dominate the Lottery's product line, accounting for about 70% of total sales each year, there is a lot more in the product mix, and there is a renewed focus on the entire portfolio.

One factor that is always a consideration when looking for new draw games in particular is the unique requirement that all prizes must be pari-mutuel. "That does make communication of the prizes in a new game more difficult," said Hasegawa. Yet offering pari-mutuel non-jackpot prizes in the big multistate games, as opposed to

the set prizes in other jurisdictions, hasn't dampened any enthusiasm for those games in California. In fact, more Mega Millions and Powerball tickets are sold there than in any other state. The Lottery joined Mega Millions in 2005 and Powerball in 2013; the first day of sales of that game broke its national single-day sales record.

The two national games have struggled of late, unable to reach the lofty jackpots consumers (and the general media) have come to expect. Yet they are key to any lottery's portfolio, since they provide significant profit contributions, and California is no exception. "We are exploring new marketing strategies that will help combat jackpot fatigue and bring interest and excitement to the games, regardless of the jackpot size," said Allen. That includes highlighting the ritual, fun and anticipation of the draw, and trying

to help reset consumer expectations of what constitutes an exciting high jackpot.

Other games are important to the overall portfolio as well. "We have a strong dedicated player base for our daily games – Daily 3, Daily 4, Fantasy 5 and Daily Derby – along with SuperLotto Plus and Hot Spot, all of which offer potential for continued growth," noted Allen. Over the past three years, for example, there has been a strategic focus on Hot Spot, which has increased sales substantially.

### Marketing and Retail Engagement

That's part of the proof that marketing works. One of California's overarching marketing strategies is to continue to change consumer perceptions of the products, particularly Scratchers, positioning them





as fun and entertainment rather than pure gambling. It's a fundamental change in the Lottery's creative approach to focus on the entertainment value, instead of using the "win" and big extravagant prizes as a motivator to play. "This marketing pivot is based in ongoing consumer research efforts that reveal an opportunity to appeal to more consumers by shifting the brand positioning," said Allen. "We are also continually improving our communications plan to reach consumers more effectively in the cluttered and fragmented media environment."

One big challenge facing all lotteries is that it is becoming increasingly difficult to find winners who are open to publicity. Winner awareness is important for building transparency and trust by demonstrating that winning can happen to anyone. California shares winner stories on its website, in email spotlights and on social media, and also promotes winner awareness on digital in-store monitors located in

each of the Lottery's 23,000+ retail locations.

Regardless of whether big winners want publicity, other retail efforts can help drive home the message that people do, in fact, win the lottery. For example, California's Millionaire Made Here and Lucky Retailer programs highlight retailers who sell winning tickets. In addition to physical signage, through its gaming system the Lottery provides customized winner awareness messages to retailer monitors. These messages indicate that a winning ticket was sold at that specific location, both alerting retailers and players and encouraging word-of-mouth promotion.

Other retail efforts include a focus on improving Scratchers order fulfillment, which was impacted by the pandemic. But beyond that, new strategies will help create more impact at retail and connect more with the casual player for whom lottery products are not always top of mind. For example, there was dedicated

point-of-sale signage produced for last year's holiday season, placed in the greeting card aisle to promote Holiday Scratchers. "We are also looking at more traditional lottery tactics such as jackpot signs, menu boards and playcenters, and how we can be more relevant to today's consumer – within the parameters of our regulations," said Allen. That includes providing a more personalized player experience via the Lottery's mobile app for the 2nd Chance loyalty program and other enhancements that remind a player of the current jackpots when they are in a lottery retail location.

### **Enter the Pandemic**

Clearly the California Lottery has been running on all cylinders. Then came 2020 and a global pandemic, which continues to reshape the consumer marketplace by accelerating consumer change and shifting shopping behaviors. It has also emphasized the focus on the

**“ The Lottery will continue to be successful in the near term, but implementing significant change takes time, and we are planning now for the future to avoid becoming the next Blackberry, Blockbuster or Kodak. - Alva Johnson**

importance of effective and nimble marketing tactics.

As most lotteries are reporting, a significant drop in sales during March was followed by recovery in the ensuing months. California followed a similar pattern, but ran into ticket distribution issues as demand came roaring back. “Unfortunately, our ability to ship ticket inventory to retailers could not keep pace with consumer demand due to social distancing requirements in our two distribution centers,” explained Johnson, which resulted in ticket shortages at retail.

Although these distribution challenges are not completely resolved, California has implemented several solutions to meet consumer demand for the timely refill of Scratchers orders. To date, the Lottery has reduced and delayed new game releases, simplified Scratchers orders, modified and added workstations, provided overtime for warehouse staff and added new warehouse positions. “The entire department has worked tirelessly to respond quickly to the challenges brought on by COVID-19,” Johnson praised. “We are proud of our collective efforts; we have remained responsible and sensitive to the seriousness of the pandemic while remaining dedicated to our mission.”

Operationally, telework became the new way of doing business as California implemented shelter-in-place orders. District offices were initially closed to the public, but over the summer the Lottery implemented a secure drop box system for claimants to turn in their winning tickets and claim forms, successfully securing their prize payments. Other

modifications include suspended field activities, postponed release dates for new games, and the development of a robust social distancing protocol to provide a safe work environment.

Through it all, the health of employees, vendors, retailers and players remains at the top of the Lottery’s priority list, accomplishing its mission while maintaining safety for everyone.

### **Anniversary and Beyond**

Because of COVID-19, the Lottery’s 35th anniversary celebration won’t look like it might have otherwise, but it is still significant and includes a nod to the impacts of the pandemic.

On the game side, there is a commemorative throwback Scratchers ticket that pays homage to that very first California Lottery Scratchers game released in 1985, California Jackpot. The 2020 version is getting a shimmering 21st century makeover with a nostalgic feel, although it has the same \$1 price point and \$5,000 top prize of the original. California Jackpot will have marketing support on the Lottery’s website, social media and through email newsletters to over four million registered players.

It’s also a time to honor employees. “We are leveraging our anniversary to celebrate key Lottery team members who have gone above and beyond during these challenging times,” said Johnson. “After our organization transitioned to teleworking, we knew strong communications would be key to successfully adjusting our operation as a team. We’ve been using our internal

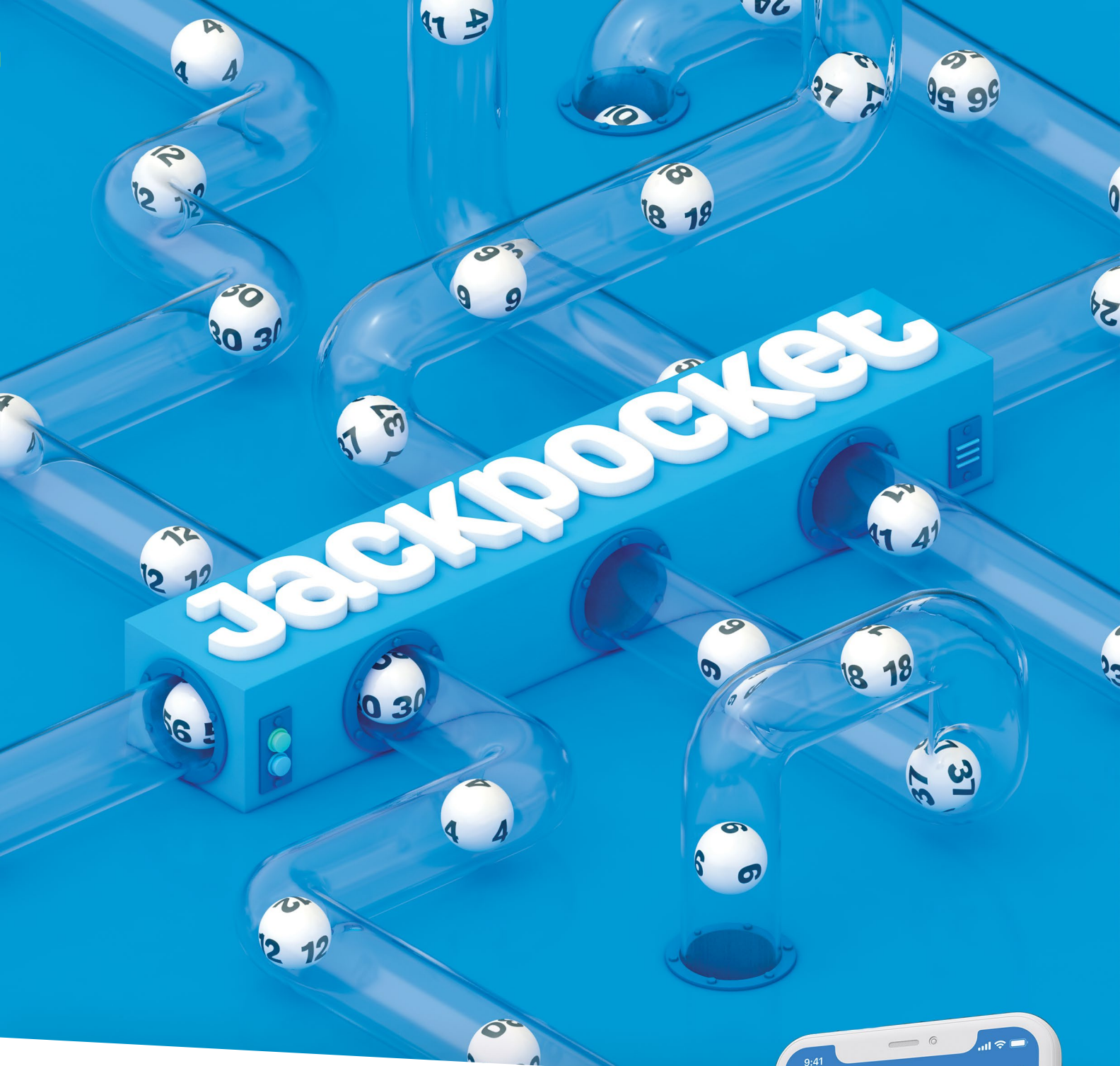
communications tools to spotlight employees and teams that have shown continued dedication to our mission, who are working hard, and who have played a key role navigating through the pandemic.”

Moving ahead, everyone recognizes that these challenging and unprecedented times have thrown a wrench in just about every aspect of business and life. “Addressing each challenge that comes in such a rapidly evolving environment is important to us, and we address each associated challenge as an opportunity to improve in a meaningful and lasting way,” said Johnson. But because California has been so successful in recent years in terms of revenue growth and maximizing funds for education, the bar has been set very high – and that adds to the challenges of maintaining that growth.

There are certainly new opportunities, such as the potential for in-lane sales – something everyone is evaluating as the early adopters pick up speed. And California’s strategic look to the future has set in motion systems and procedures that will improve with time.

The biggest challenges, though, come from the need to adjust to the rapidly changing demands of consumers, accelerated by the pandemic. “We have to adapt, or we will be disrupted by others who see the opportunity,” said Johnson “The Lottery will continue to be successful in the near term, but implementing significant change takes time, and we are planning now for the future to avoid becoming the next Blackberry, Blockbuster or Kodak.” ●



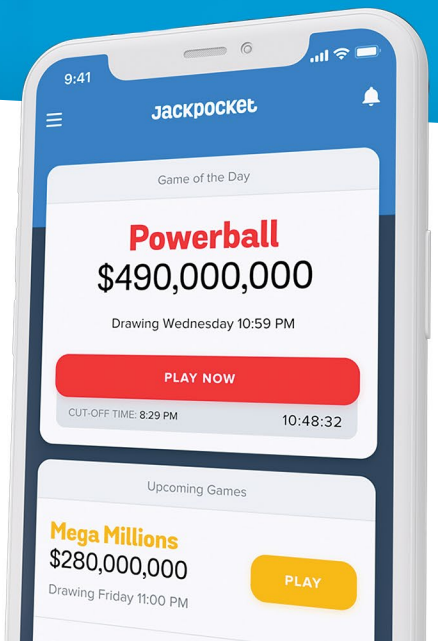


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# ***FIRST IN MANY WAYS***

***DELAWARE MAY BE A SMALL STATE, BUT ITS LOTTERY  
HAS HAD A BIG INFLUENCE ON THE EXPANDED ROLE  
OF LOTTERIES IN THE GAMING INDUSTRY.***

***BY PATRICIA MCQUEEN***





In October 1975, Delaware became the lucky 13th American state to launch a lottery when ticket sales began. Well, that's the date considered its official startup – in fact it followed an aborted effort earlier that year to begin with LOTTO Superfecta – a weekly game based on the result of live horse racing at the state's racetracks. It was the same idea as the New Hampshire Sweepstakes, which launched the

modern era of American lotteries in 1964. But unlike New Hampshire's game, Delaware's didn't catch on as it failed to produce winners.

After a reboot, the Delaware Lottery launched again with Diamond Dollars, a nod to another of the state's nicknames besides the more common First State: The Diamond State. Diamond Dollars was typical of early lottery games – a passive game drawn weekly, and officials traveled around the state to hold the drawings in different cities and towns each week. In February 1976, the Lottery's first instant game was introduced, Diamond Instant Dollars.

In the 45 years since that beginning, the little Delaware Lottery became a giant contributor to state coffers thanks to the ability to offer video lottery terminals and table games in addition to its traditional lottery products. The Lottery is

currently the fifth largest source of revenue to the General Fund, behind personal income taxes, corporate franchise taxes, abandoned property, and gross receipts taxes (the state has no retail sales tax). In total, the Lottery has sent \$5.6 billion to the state over the years, helping pay for services that otherwise would require additional tax dollars.

"The growth of the Delaware Lottery, and indeed the entire lottery industry, over the last 45 years has been nothing short of phenomenal," said Director Vernon Kirk, who has been with the Lottery since the beginning and was named to his current position in 2011. "There is a tendency to focus on a lottery's contributions in dollars, and that is certainly up front. But beneath the surface is the true story, and that is all the good causes that those dollars help support. In Delaware the Lottery's net profits are not

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dedicated but are deposited into the General Fund and become part of the state's budget. So who benefits from our contributions? Public health, public safety (police, firefighters and other first responders), education and environmental protection, to name just a few. And let's not forget supporting our communities through the hundreds of small businesses that sell our products and earn commissions. Good causes indeed."

Delaware was the first American lottery to try sports betting, with a short-lived football parlay product in late 1976. In 2009, it became the first lottery to oversee sports betting at casinos, when it launched parlay bets on professional football games at the state's three racetrack casinos as part of its administrative and regulatory oversight of those casinos. Parlays were expanded to select retail locations in 2012 as part of sweeping legislation called the Delaware Gaming Competitiveness Act, which also authorized online gaming. "It gave us authority to branch out, which garnered a lot of good publicity even if only a modest amount of additional revenue at the time," said Kirk. "It was really exciting."

That meant another first for Delaware as it launched online casino gaming in 2013, and the most recent first was full-scale sports betting. The Delaware Lottery was the first lottery or gaming operator in the country to implement such betting after the repeal of the Professional and Amateur Sports Protection Act in May 2018.



### A Different Traditional View

All that expanded gaming means that Delaware is fortunate to have the video lottery and table games that make up the lion's share of revenues, so there is much less reliance on the traditional lottery games that are the mainstay of most jurisdictions. But that in no way means that other products don't get the attention they deserve – far from it. In particular, Delaware's instant games have shown strong growth in recent years, following industry trends. "They are phenomenal," exclaimed Barbara Miller, Assistant Director, Traditional, Sports and Keno. She attributed some of the increases to higher price points, an area where Delaware has been a little behind its peers – its \$25 tickets haven't been around very long, for example. "We have put a little more focus in our \$10, \$20 and \$25 price points, and that has definitely helped us."

A plan to start a campaign for the Lottery's Play3 and Play4 games last

March was postponed briefly due to the pandemic but was implemented during April after considerable debate about whether to proceed at all. According to Miller, the campaign worked, triggering increases in those important games, which outsell all other traditional draw games in Delaware. "We have had record sales for Play3 and Play4 in recent months," she said. Also supporting Play3 and Play4 is a social media promotion this fall where followers will submit their best hashtag in support of the two games, and the one with the most votes will be used for the remainder of 2020 across all of the Lottery's social media platforms. There is a second social media promotion scheduled this fall involving a player photo submission in support of Multi-Win Lotto and Keno.

Delaware's Keno game has been much more of a challenge to grow. It is available in less than a third of the Lottery's 600 retail locations, and never really accomplished a goal of bringing on new retailers. However, the Lottery had some success with





*Lottery and vendor staff have some fun at a new game launch event.*

growing the Keno network by offering Keno to non-monitor retailers. But Miller noted that there are core Keno players who love the game, so it's a steady producer.

Smaller still are another Delaware-only game, Multi-Win Lotto, plus the multistate games Lotto America and Lucky for Life. Then of course there are the big games, Powerball and Mega Millions, which have struggled of late, causing much discussion about ways to revive sales. Kirk is listening to those discussions but doesn't want to see any rash decisions being made, although he acknowledges that his view is different than most because Delaware doesn't rely on these games as much as most other jurisdictions.

Possible changes include increasing the number of weekly drawings or expanding the sales window on draw nights to allow later sales on the West Coast. "Powerball is our most recognizable brand, and we don't want to lose customers by overreacting to the drop in sales due to the pandemic," said Kirk. He

doesn't think changing the draw time will bring in that much more in sales and might actually hurt some Eastern lotteries where customers are used to cashing smaller winning tickets on draw nights. And especially with smaller lotteries, extra staffing costs for either later drawings or more drawings will offset any potential revenue gains.

"We have to protect our most recognizable brands," he emphasized. "We've been very unlucky with more frequent than normal (and as a result low) jackpots and I'd like us to be a little more patient. A good healthy jackpot run, with all retail locations open again, is what we need to breathe the new life back into these games."

### **Retail Strategies**

With some games doing well enough even during the height of the pandemic last spring, and most retailers staying open, a new challenge emerged – paying prizes. Historically, Delaware retailers could only pay prizes up to \$599, and there were three claim centers that paid prizes up to \$5,000 (Division of Revenue offices in Dover, Wilmington and Georgetown). Any prizes over \$5,000 had to be paid at Lottery headquarters in Dover. Well, the three Division of Revenue offices shut down, and while Lottery officials started encouraging people to mail in claims, they also decided to keep paying high-tier claims at headquarters on a walk-in basis. Not surprisingly, they got hammered with people wanting to claim their prizes.

That brought life to Miller's past efforts to allow retailers to pay prizes higher than \$599. There was a precedent – a select few retail locations were already allowed to pay winning sports parlay bets up to \$1,500 during football season. So everyone worked hard to get the

approval for retailers to pay prizes up to \$2,500, and at this writing all the policies and procedures were being finalized, with implementation expected later this fall. Only those retailers with sufficient sales volume will receive authorization to pay these higher prizes, but no matter how many qualify, it will definitely ease the prize-claim pressure on Lottery headquarters.

A small state such as Delaware necessarily presents challenges in expanding the retailer network as one path to increase sales. "We're touching pretty much everywhere, and we are a mature lottery," said Miller. But there are still ways to tackle new retail opportunities. "We always have to look at new products and new technologies that will help us grow our retail network." For example, some four years ago the Lottery added 44 Wawa locations for the first time through the use of fully self-service machines – Scientific Games' PlayCentral High Definition (PHD) units. They caused some controversy at the time, because existing retailers were concerned that Wawa would hurt their own lottery business, but those worries proved groundless.

Other locations have since added the PHD units – about 100 are now deployed across the state – and Lottery officials are working with Scientific Games on the smaller sized units developed for Walmart. "We've already had conversations with Walmart and others, and we hope to get new self-service machines into some of these big stores," said Kirk.

Both Kirk and Miller are closely watching the industry's in-lane sales developments, but Kirk noted that the Lottery's resources are currently spread quite thin to do much more than watch at the moment. "We'll get there eventually, but if we do much more right now, we will have to add staff, which is always a challenge." Delaware may have been first in a

few past initiatives, but he is happy to see these new retail technologies develop elsewhere before taking them on.

### **Marketing Pivots**

Another thing Delaware has been a little behind in is the development of a player loyalty program. Cost was always an issue for the small lottery, but in February 2019 Miller and her team chose the Collect 'N Win program from Alchemy3. Based on monthly drawings, it's not a true loyalty program where players earn points, but it is an important first step for Delaware. "This is a good fit for us because it's very easy to manage yet has created a lot of buzz for us with players," she explained. Best of all, it has room to grow – with more than 20,000 registered players to date and more signing up month after month.

Historically, lotteries have relied upon the summer event season for consumer engagement and marketing opportunities, but 2020 changed all that. Marketing shifted to digital and social media platforms as events were canceled, including many state fairs which have always been prime engagements for lotteries. In Delaware, however, the state chose to go ahead with its annual State Fair in late July, albeit with considerable restrictions; some of the usual big vendors were absent and the public still appeared wary.

As a result, the Lottery was offered more space than usual, and took four booths instead of two; half on one side of a broad aisle and half on the other. "Everything was done to promote safe and sanitary working conditions and social distancing," noted Miller.

Keys to accomplishing that goal were using a PHD in one section, keeping promotions simple with things like value packages for ticket purchases, and eliminating the big

spinning wheel common at lottery events around the country. The latter always attracts crowds at lottery booths, and that was one big no-no this year. Instead, the Delaware Lottery implemented its new ring light photo booth – purchased last winter in anticipation of a busy summer event season. While the State Fair was the only place they have been able to use it to date, the photo booth proved to be a big hit with attendees, who could get their photo emailed or texted to them right away. "They would post photos on social media, and we also had permission to use their photos in our promotional efforts, so we got some benefits that way," said Miller.

While lottery sales at the 2020 fair were only about a quarter of the sales in a typical year, it was an important step and perhaps an indicator of how future events might change in the wake of ongoing impacts of COVID-19. And the Lottery even has something to crow about! "We won the Director's Booth Award, our first blue ribbon," said Miller proudly. "That was pretty neat, even though we joked that we sure had a lot of competition!"

With other opportunities to engage with players eliminated, Miller's team made a first venture into the world of live social media promotions. Every Friday during June, the Lottery ran a 30-minute Facebook Live promotion. Players registered in advance, and their names would be randomly selected to spin a big prize wheel – they had to be watching live to spin the wheel. "It was so successful that we brought back the promotion in September, increasing it to twice weekly during the month and juicing it up with a prize punch and additional prize opportunities," she added. And to help kick off the Lottery's 45th anniversary, Delaware Governor John Carney was to appear in person on the Oct. 9 Facebook Live show.

### **Gaming Expansion**

Expanded gaming changed the Delaware Lottery forever when the video lottery program began in December 1995; table games were added in May 2010. Available only at the state's three racetracks, these products brought in \$427 million in net gaming revenue in FY19. As one of the industry pioneers in lottery-operated or -regulated casino gaming, Delaware had jumped out early in the race, but suffered when nearby Pennsylvania and Maryland started expanding their gaming options in 2006 and 2010, respectively. Delaware's gaming revenues peaked at \$635 million in FY07, and the addition of table games helped stem the decline that followed.

The 2012 Gaming Competitiveness Act was designed to offer the Lottery ways to, well, remain competitive in the region by allowing sports betting to expand beyond the three racinos and by authorizing online gaming. When iGaming was launched in 2013, "it was more groundbreaking than moneymaking," said Kirk, who noted that it remains a viable product despite the small population base.

There was one particularly significant achievement with iGaming, the creation of the Multi-State Internet Gaming Agreement – it allowed for the combination of Delaware's poker pools with out-of-state players, first in Nevada (2014) and then New Jersey (2017). That liquidity boost is what really makes online poker work for Delaware. "If you are a Delaware player, you are more likely to find the type of game you want, with the stakes you want, at any hour."

When Delaware launched football parlay cards in 2009, it was the only lottery doing so at the time, grandfathered in because of that long-ago effort with sports betting. (Oregon had ended its 18-year run with football parlays in 2007.) The 2012



legislation expanded those parlays to the retail network; currently about 110 retailers in Delaware offer the product, which seems to be the sweet spot. Parlay bets at retail became especially important to the Lottery after the PASPA repeal in 2018; they provide a steady source of revenue with a higher return than the full-scale sports betting at casinos that ensued. And fortunately, the retail parlay cards remain “wildly popular,” according to Kirk.

### Looking Ahead

Not surprisingly, FY20 results in Delaware will look quite different from FY19. Like many other lotteries, after an initial decline, instant sales took off during the pandemic. Most of its traditional lottery games increased, perhaps because the casinos were shuttered from mid-March until June 1 – there was no other game in town. When the casinos were cleared to open they did so cautiously, starting with a limited number of VLTs before gradually opening their table games, and then sports books once professional sports restarted.

Despite being authorized to offer both sports betting and traditional lottery games online, the Lottery has not yet taken those steps for a couple of reasons. One is the small population base in Delaware, but the “biggest concern early on was the impact on the retailers,” explained Kirk. “Retailers are the backbone of our industry, and even with all these technological advancements and other types of gaming products, we didn’t

want to do anything that would upset the apple cart.”

Now, however, he sees online lottery and sports betting as coming before long. So what has changed? “The pandemic shows we need to do this sooner rather than later,” but there’s more to it than that. Kirk noted that retailers have always been skeptical about evidence from Europe that online lottery sales don’t hurt retail business; in fact the whole pie grows. Now that there are a few years of great success in this country, that experience has helped considerably. “We can show that both sides really can benefit – players get more comfortable with our games online, then make impulse purchases of lottery when they are in stores.” And the Lottery’s commitment to retailers is unwavering. “We need to keep our retailers involved, to keep seeing what we can do to make their lives easier, because that helps them sell our products, and that’s good for everybody.”

Sports betting is a little more complicated, as the ability to place wagers online will no doubt impact the parlay cards at retail, which are the most profitable sports bets in the Lottery’s portfolio. Vendor fees are another factor to consider, with higher rates for mobile betting than currently envisioned.

“But we can’t hesitate much longer and need to move forward,” said Kirk, so the early planning stages of both iLottery and mobile sports are underway. “Yes, there’s still a finite number of customers in Delaware, but in this industry, if you are standing still, you are falling behind. We can’t sit still.” ●



**Delaware Lottery**

**CELEBRATING 45 YEARS**

Delaware didn’t have any real grandiose plans for its 45th anniversary celebration, which is a good thing given the pandemic. A highlight for players is a commemorative 45th anniversary instant ticket that was released on October 5, a family of games with price points at \$1, \$2, \$5 and \$10. Special promotions and events, to the extent possible, will be held in the coming months.

The biggest planned celebration is currently scheduled to take place next September – a two-hour cruise on the Spirit of Philadelphia exclusively for the Lottery’s dedicated retailers.



**THE NASPL ANNUAL CONFERENCE**

# **IS GOING VIRTUAL**

**OCTOBER 26-30, 2020**

*Like everyone else this year, NASPL has adapted to a new reality, and you won't want to miss our great virtual event!*

*By Mackenzie Whitacre*



**F**or the first time in its 33-year history, the annual NASPL conference will be held completely online.

Skip the travel pillow and airplane snacks. As you may have heard, this year NASPL's biggest educational event is only a click away. Beginning October 26, NASPL will be hosting DeskCon 2020, a week of daily virtual sessions featuring speakers and presentations covering the topics that matter most to the lottery industry today.

DeskCon 2020 is designed to be conveniently accessible, with live and pre-recorded sessions coming straight to your office. Each session will also be made available on the NASPL Matrix following the conclusion of the conference.

And registration is completely free – another first for the popular annual event.

### **Daily Educational Program**

In a year unlike any we've ever seen, it's no surprise that the pandemic will be an underlying theme for many of the issues explored during DeskCon 2020. But attendees can expect a full range of topics – from implementing successful game launches to creating successful retail partnerships; from creative prize structures to effective responsible gambling safeguards; and much more in between. Because after all, even though the novel coronavirus has forced us all to adapt to new ways of navigating our business, there is still business to be done.

The DeskCon 2020 educational agenda kicks off on Monday, October 26, with a deeply engaging interactive presentation from neuroscience researcher Graeme Newell. Highlighting the most recent findings from the science of behavioral finance, Newell will explain the ways we make money decisions with our subconscious

brain, and reveal the moments when consumers are most vulnerable to impulse decision making. With fun exercises and weird brain games, attendees can dive headlong into the fascinating and flawed ways consumers spend their money.

Day two delves into consumer and retailer solutions, with an updated look at the NASPL API Initiative and the most recent advances in the area of in-lane sales. An expert panel will examine the current successes, challenges, and future in-lane offerings, at a time when providing efficient, top-notch procedures for players and retailers is more important than ever.

Later, the Hoosier Lottery will provide an in-depth view of their Positive Play Strategy, and how they are using this approach to help their players enjoy the fun and entertainment of their games, while understanding the odds and setting time and money limits.

Wednesday will bring a full lineup of educational sessions, starting with an interactive presentation from a GameSense advisor, Ken Averill, exploring the history of gambling and the importance of responsible gambling safeguards for the health and safety of our players and retailers.

Later, Simon Jaworski, a leading expert in lottery and gaming research, will analyze the key industry trends occurring during the ongoing pandemic. Examining critical, timely questions, attendees will gain an improved sense of the ways lotteries have adapted during these unprecedented times, and how they move forward into the future.

And finally, Walmart is returning to the NASPL conference to show how their partnership with the Arizona Lottery is improving the player experience, making it easier for winners to redeem their prizes with a first-in-the-industry customer service office located inside a Walmart Supercenter.

Day four will focus on topics crucial to every lottery: successful

game launches and innovative prizes. The Kentucky Lottery will share what they learned from the strong launch of their new category of instant terminal games, and how they've applied these findings to subsequent game launches. And the Arizona Lottery will share the case study of a successful co-branded product launch – with longtime partner Phoenix Raceway – which includes an experiential prize structure in a COVID-19 world.

The DeskCon educational program will wrap up Friday with an important session on representative hiring practices, presented by national diversity and inclusion thought leader Katrice Albert, Ph.D.

### **NASPL Awards**

Throughout the week NASPL will also be recognizing outstanding industry individuals and honoring the most innovative and successful new games, marketing strategies and advertising campaigns.

As in previous years, the NASPL Batchy and Hickey Awards will be presented to lotteries for their superior advertising and business communication achievements, and for excellence in promotional and strategic marketing.

The always-exciting Buddy Roogow Innovation Awards are back too, recognizing the best new instant and draw games.

This year's conference will also include the presentations of the annual Powers Awards and Ott Brown Scholarship, celebrating of the significant contributions that individual lottery and vendor employees have made through exceptional job performance.

And there just might be a few surprises in store too! Check out the conference website for further details, and register today at:

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



**THE NASPL ANNUAL CONFERENCE**

# **TIME TO SHINE**

**OCTOBER 26-30, 2020**

## ***NASPL 2020 Awards Entries***

*The following pages provide a complete listing of all entries for the NASPL 2020 Awards, along with the judges tasked to make the most difficult decisions of all.*



## TV Advertising – Instant Games

**Arizona Lottery**  
**Beat the Heat Summer Blockbuster**  
 Arizona Lottery / OH Partners

**Arkansas Scholarship Lottery**  
**Get in the Game Razorbacks Ticket**  
 Arkansas Lottery / CJRW

**British Columbia Lottery Corporation**  
**Triple Millions**  
 FCB

**California Lottery**  
**Holiday Scratchers – Neighboring**  
 David&Goliath

**Colorado Lottery**  
**Powerwalk**  
 Cactus

**Connecticut Lottery Corporation**  
**Spoil the Ones You Love – Holiday**  
 Connecticut Lottery / Decker

**DC Lottery & Gaming**  
**Roaring Cash**  
 MDB Communications

**Florida Lottery**  
**On the Luck Out**  
 PPK

**Georgia Lottery Corporation**  
**Georgia Jackpot – I'm Jack**  
 BBDO Advertising

**Hoosier Lottery**  
**7s Scratch-Off Family – Meet the Sevens**  
 The Buntin Group

**Idaho Lottery**  
**Holiday Scratch Games – Joy Worth Sharing**  
 Mitchell+Palmer

**Illinois Lottery**  
**You Can't Hide Winning**  
 O'Keefe Reinhard & Paul

**Interprovincial Lotteries Corporation**  
**\$10 Royale – Lipstick**  
 FCB Toronto

**Kansas Lottery**  
**World Champion Chiefs**  
 JNA Advertising

**Kentucky Lottery Corporation**  
**Gold Rush Prospector**  
 Kentucky Lottery / Bandy Carroll Hellige

**Loto-Québec**  
**Monthly Lottery**  
 Loto-Québec

**Louisiana Lottery Corporation**  
**Saints – Play the Field**  
 Louisiana Lottery Corporation

**Maryland Lottery & Gaming**  
**Ravens Scratch-Offs – Heed the Caw**  
 GKV

**Michigan Lottery**  
**Lucky 7s**  
 SMZ

**Minnesota State Lottery**  
**Jan Cave**  
 Periscope

**Missouri Lottery**  
**Scratchers as Gifts – How Santa Got His Groove Back**  
 Barkley

**Nebraska Lottery**  
**Ignition**  
 Smith Kroeger

**New Hampshire Lottery Commission**  
**Play Your Way – Scratch Ticket**  
 GYK Antler

**New Mexico Lottery**  
**Scratcher Wonderland**  
 New Mexico Lottery

**New York Lottery**  
**Park Ranger**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**One Lucky Dog**  
 Wunderman Thompson

**Ohio Lottery Commission**  
**The Heist**  
 Hitchcock, Fleming & Associates

**Oklahoma Lottery**  
**\$250,000 Cash Explosion**  
 Oklahoma Lottery

**Ontario Lottery & Gaming**  
**\$50 Classic Extravaganza – Nice**  
 FCB Toronto

**Pennsylvania Lottery**  
**Cake**  
 9Rooftops

**South Carolina Education Lottery**  
**Tiny Stories – Bart**  
 South Carolina Education Lottery

**South Dakota Lottery**  
**Claw Machine**  
 Lawrence & Schiller / The Great Plains Motion Picture Company

**Tennessee Education Lottery Corporation**  
**Holiday Instant Games – Elf**  
 The Buntin Group

**Texas Lottery Commission**  
**It All Starts – Office**  
 THIRD EAR

**Vermont Lottery Commission**  
**The Giver**  
 Fuse Ideas

**Virginia Lottery**  
**Luxury Cruisin' Family Vacay**  
 Yebo

**West Virginia Lottery**  
**I Have Powers**  
 West Virginia Lottery

**Western Canada Lottery Corporation**  
**Player's Choice Mega Pack – Office Gift Exchange**  
 McCann / KIDDO Films

**Wisconsin Lottery**  
**Holiday – Bad Wrappers**  
 Wisconsin Lottery / Hoffman York

## TV Advertising – Draw/Monitor Games

**British Columbia Lottery Corporation**  
**One Million Guaranteed OMG Prize**  
 Pound & Grain

**Colorado Lottery**  
**Colorado 101**  
 Cactus

**Connecticut Lottery Corporation**  
**As Seen on TV – Fast Play**  
 Connecticut Lottery / Decker

**Idaho Lottery**  
**5 Star Draw – Diva**  
 Mitchell+Palmer

**Illinois Lottery**  
**Jackpot – State v. State**  
 O'Keefe Reinhard & Paul

**Interprovincial Lotteries Corporation**  
**Lotto Max – Villa**  
 FCB Toronto

**Kansas Lottery**  
**Holiday Millionaire Raffle**  
**Early Bird Season**  
 JNA Advertising

**Kentucky Lottery Corporation**  
**Keno Anywhere**  
 Kentucky Lottery / Bandy Carroll Hellige

**Loto-Québec**  
**La Mini Comic Strips**  
 Loto-Québec

**Louisiana Lottery Corporation**  
**Mascot Bunch**  
 Louisiana Lottery Corporation

**Maine State Lottery**  
**Fast Play – Fast Freddy**  
 Fuseideas

**Maryland Lottery & Gaming**  
**Fast Play – Alien**  
 GKV

**Michigan Lottery**  
**Fast Cash**  
 SMZ

**New Hampshire Lottery Commission**  
**Play Your Way – Powerball**  
 GYK Antler

**New Mexico Lottery**  
**Always a Big Jackpot**  
 New Mexico Lottery

**New York Lottery**

**Tofurkey**  
New York Lottery / McCann  
New York

**North Carolina Education Lottery**

**Free Fall**  
Wunderman Thompson

**Ontario Lottery & Gaming**

**Lotto 6/49 – Joy of Anticipation**  
FCB Toronto

**Pennsylvania Lottery**

**Keno – Double Your Fun**  
9Rooftops

**South Carolina Education Lottery**

**Tiny Stories – Cat Mandu**  
South Carolina Education Lottery

**South Dakota Lottery**

**Long Walk**  
Lawrence & Schiller / The Great Plains Motion Picture Company

**Tennessee Education Lottery Corporation**

**Tennessee Cash – Turtles**  
The Buntin Group

**Texas Lottery Commission**

**Pick 3 – Pick FUN**  
Texas Lottery Commission

**Virginia Lottery**

**Print 'n Play Rolling Jackpot Launch**  
Yebo

**Western Canada Lottery Corporation**

**Western Max – Winning Is Everywhere**  
McCann / KIDDO Films

**Wisconsin Lottery**

**Midday Draw – Two Opp**  
Wisconsin Lottery / Hoffman York

**TV Advertising – Digital Games**

**Georgia Lottery Corporation**  
**Diggi Dance**  
BBDO Advertising

**Kansas Lottery**

**Chiefs Play – On to the Big Game**  
JNA Advertising

**New Hampshire Lottery Commission**

**Play Your Way – iLottery**  
GYK Antler

**North Carolina Education Lottery**

**Online Play**  
Wunderman Thompson

**Ontario Lottery & Gaming**

**Digital Lottery – BBQ**  
Publicis Toronto

**Pennsylvania Lottery**

**Don't Judge a Phone by Its Cover**  
9Rooftops

**TV Advertising – Corporate / Beneficiary**

**Arizona Lottery**

**A Whole Lotto Good**  
Arizona Lottery / OH Partners

**Arkansas Scholarship Lottery**

**10-Year Anniversary Celebration**  
Arkansas Lottery / CJRW

**British Columbia Lottery Corporation**

**One BCLC**  
123 West

**Colorado Lottery**

**Ways to Play**  
Cactus

**Connecticut Lottery Corporation**

**I Got This**  
Connecticut Lottery / Decker

**Delaware Lottery**

**Happier Holidays – 2019 Holiday**  
OneMagnify

**Georgia Lottery Corporation**

**From ABCs to College Degrees**  
Providence Media Group

**Hoosier Lottery**

**30 Years of Giving Back**  
Hoosier Lottery

**Illinois Lottery**

**Illinois Is Full of Winners**  
O'Keefe Reinhard & Paul

**Louisiana Lottery Corporation**

**Feel Good**  
Louisiana Lottery Corporation

**Maryland Lottery & Gaming**

**Safety Dance**  
GKV

**Massachusetts State Lottery**

**State of Winning**  
Massachusetts Lottery / Connelly Partners

**Michigan Lottery**

**Thanks a Billion**  
SMZ

**Missouri Lottery**

**Play It Forward – Power of Perspective**  
Barkley

**Nebraska Lottery**

**Big Bright Map**  
Smith Kroeger

**New Hampshire Lottery Commission**

**New Hampshire Education**  
GYK Antler

**New Mexico Lottery**

**New Mexico Lottery Beneficiaries**  
New Mexico Lottery

**Ontario Lottery & Gaming**

**OLG – Feeling of Play**  
Publicis Toronto

**South Carolina**

**Education Lottery**  
**Passion Is Our Purpose – Sarah**  
South Carolina Education Lottery

**South Dakota Lottery**

**Slow Clap**  
Lawrence & Schiller / The Great Plains Motion Picture Company

**Tennessee Education Lottery Corporation**

**Beneficiary – Moment to Shine**  
The Buntin Group

**Texas Lottery Commission**

**Teachers**  
Texas Lottery Commission

**Virgin Islands Lottery**

**In This Together**  
JNR Media Solutions, LLC

**Virginia Lottery**

**Kevin's Education Message – July 4th Sponsorship**  
Yebo

**Washington's Lottery**

**More Than a Ticket**  
Wunderman Thompson

**Wisconsin Lottery**

**Beneficiary – Fall**  
Wisconsin Lottery / Hoffman York

**Radio Advertising – Instant Games**

**Arizona Lottery**

**Beat the Heat Summer Blockbuster**  
Arizona Lottery / OH Partners

**Arkansas Scholarship Lottery**

**Ultimate Fortune**  
Arkansas Lottery / CJRW

**British Columbia Lottery Corporation**

**Brand Campaign**  
DDB

**California Lottery**

**Holiday Shout-Outs – Yoga Instructor**  
David&Goliath

**Colorado Lottery**

**Oh Lottery**  
Cactus

**Connecticut Lottery Corporation**

**Dynamic Duos Play 2**  
Connecticut Lottery / Decker

**DC Lottery & Gaming**

**Roaring Cash**  
MDB Communications

**Delaware Lottery**

**Xtra Fun – Summer Collect 'N Win**  
OneMagnify





IGT's award-winning **GameTouch™ 20**. Recognized for global innovation with the **Lottery Product of the Year Award**, 12th Annual International Gaming Awards, 2019

# More Convenience, Less Contact

The cashless-enabled IGT **GameTouch™ 20** vending machine minimizes cash and ticket handling for instant and draw games. It facilitates in-store social distancing and allows players to avoid busy checkout lines – good for lottery players and good for retailers.

*Contact your IGT account manager to learn more about the products and services that support a safe experience for players, retailers, and their employees.*

**Florida Lottery**  
**Fastest Road to \$1M**  
 PPK

**Georgia Lottery Corporation**  
**Holiday Scratchers – Carolers**  
 BBDO Advertising

**Hoosier Lottery**  
**7s Scratch-Off Family – Meet the Sevens**  
 The Buntin Group

**Idaho Lottery**  
**Holiday Scratch Games – Holiday Giftopia**  
 Mitchell+Palmer

**Kansas Lottery**  
**Summer of Silverado**  
 JNA Advertising

**Kentucky Lottery Corporation**  
**Grandma Radio**  
 Kentucky Lottery / Bandy Carroll Hellige

**Louisiana Lottery Corporation**  
**Triple Tripler**  
 Louisiana Lottery Corporation

**Maryland Lottery & Gaming**  
**Skeeball Scratch-Off – Rollin**  
 GKV

**Massachusetts State Lottery**  
**007**  
 Massachusetts Lottery / Connelly Partners

**Michigan Lottery**  
**Lucky 7s**  
 SMZ

**Minnesota State Lottery**  
**Dwight Elephant Campaign**  
 Periscope

**Missouri Lottery**  
**Scratchers as Gifts – Kringle’s Back**  
 Barkley

**Nebraska Lottery**  
**Subconscious**  
 Smith Kroeger

**New Mexico Lottery**  
**Scratcher Wonderland**  
 New Mexico Lottery

**New York Lottery**  
**Nature Documentary**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**Be a Big Spinner**  
 Wunderman Thompson

**Ohio Lottery Commission**  
**Baker Family Christmas**  
 Fahlgren Mortine

**Oklahoma Lottery**  
**Winning Feels Like That**  
 Oklahoma Lottery

**Ontario Lottery & Gaming**  
**Cash for Life – High Hopes**  
 FCB Toronto

**South Carolina Education Lottery**  
**Tiny Stories – Family Reunion**  
 South Carolina Education Lottery

**South Dakota Lottery**  
**Christmas Story**  
 Lawrence & Schiller

**Tennessee Education Lottery Corporation**  
**Holiday Instant Games – Fun Is Calling**  
 The Buntin Group

**Texas Lottery Commission**  
**Monopoly – Purple Ones**  
 THIRD EAR

**Washington’s Lottery**  
**Seasons**  
 Wunderman Thompson

**Wisconsin Lottery**  
**Holiday – One Stop’in Shop’in**  
 Wisconsin Lottery / Hoffman York

**Radio Advertising – Draw / Monitor Games**

**Colorado Lottery**  
**Genie Logs**  
 Cactus

**Connecticut Lottery Corporation**  
**Making Plans – Fast Play**  
 Connecticut Lottery / Decker

**Florida Lottery**  
**Power Play**  
 PPK

**Georgia Lottery Corporation**  
**Cash Pop Easy**  
 BBDO Advertising

**Kansas Lottery**  
**HMR – To Me, From Me**  
 JNA Advertising

**Loto-Québec**  
**Dream Cruise**  
 Loto-Québec

**Maine State Lottery**  
**Fast Play – Fast Freddy**  
 Fuseideas

**Maryland Lottery & Gaming**  
**Fast Play – I Won**  
 GKV

**Michigan Lottery**  
**Fast Cash**  
 SMZ

**Nebraska Lottery**  
**Traffic Copter**  
 Smith Kroeger

**New Mexico Lottery**  
**Always a Big Jackpot**  
 New Mexico Lottery

**New York Lottery**  
**Cash4Life – Fly Fishing**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**Keeping Up With Keno**  
 Wunderman Thompson

**Ohio Lottery Commission**  
**Keno To-Go**  
 Hitchcock, Fleming & Associates

**Ontario Lottery & Gaming**  
**Lotto Max – Dreamcercize**  
 FCB Toronto

**Pennsylvania Lottery**  
**Cash5 With Quick Cash – Two Dollar Bill**  
 9Rooftops

**South Carolina Education Lottery**  
**Tiny Stories – Didgeridoo**  
 South Carolina Education Lottery

**South Dakota Lottery**  
**Don’t Be a Ted**  
 Lawrence & Schiller

**Tennessee Education Lottery Corporation**  
**KENO to Go – How Do You KENO?**  
 The Buntin Group

**Virginia Lottery**  
**Print ‘n Play Rolling Jackpot – Instantness**  
 Yebo

**West Virginia Lottery**  
**Powerball**  
 West Virginia Lottery

**Wyoming Lottery Corporation**  
**WyoLotto’s Powerball Saturdays Extravaganza Fun Time Explosion**  
 Warehouse Twenty One

**Radio Advertising – Corporate / Beneficiary**

**Connecticut Lottery Corporation**  
**Guitar Shop**  
 Connecticut Lottery / Decker

**Louisiana Lottery Corporation**  
**Feel Good**  
 Louisiana Lottery Corporation

**Maryland Lottery & Gaming**  
**Safety Dance**  
 GKV

**Massachusetts State Lottery**  
**State of Winning**  
 Massachusetts Lottery / Connelly Partners

**Michigan Lottery**  
**Thanks a Billion**  
 SMZ

**Missouri Lottery**  
**Play It Forward – First Glance**  
 Barkley

**New Mexico Lottery**  
**New Mexico Lottery Beneficiaries**  
 New Mexico Lottery



**IGA 2020**  
Lottery Product  
of the Year



# PhotonX

**The lightning-fast  
performing terminal.**

PhotonX is the most powerful and best-performing terminal, designed to revolutionize lottery and betting retail operations. Utilizing INTRALOT's patented Camera Technology as well as high-end processing, PhotonX enables flawless playslip reading, maintenance-free operation and built-in 4K multimedia capabilities.

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

**intralot**

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

**North Carolina Education Lottery**  
**Recognizing Commitment**  
 Wunderman Thompson

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

**South Dakota Lottery**  
**Good Things**  
 Lawrence & Schiller

**Tennessee Education Lottery Corporation**  
**Beneficiary – Season of Celebration**  
 The Buntin Group

**Washington's Lottery**  
**More Than a Ticket**  
 Wunderman Thompson

**Print Advertising – Retailer Signage / Merchandising**

**Arkansas Scholarship Lottery**  
**Razorbacks Ticket Store Takeover**  
 Arkansas Lottery / CJRW

**California Lottery**  
**Draw Games**  
 Alcone

**Colorado Lottery**  
**Proceeds Point of Sale**  
 Cactus

**Connecticut Lottery Corporation**  
**Spoil the Ones You Love – Holiday Point of Sale**  
 Connecticut Lottery / Decker

**Florida Lottery**  
**Monopoly Season**  
 PPK

**Georgia Lottery Corporation**  
**Pac Man Topper**  
 BBDO Advertising

**Hoosier Lottery**  
**7s Scratch-Off Family**  
 The Buntin Group

**Idaho Lottery**  
**Idaho Parks**  
 Mitchell+Palmer

**Louisiana Lottery Corporation**  
**Play the Field – Saints Counter Mat**  
 Louisiana Lottery Corporation

**Maryland Lottery & Gaming**  
**Jackpot – Dreamers**  
 GKV

**Massachusetts State Lottery**  
**So That We All Win**  
 Massachusetts State Lottery

**Missouri Lottery**  
**Scratchers as Gifts – Cash Globe**  
 Barkley

**New Hampshire Lottery Commission**  
**iLottery Phone DieCut Point of Sale**  
 GYK Antler

**New Mexico Lottery**  
**Thousandaires**  
 New Mexico Lottery

**New York Lottery**  
**Black Titanium Point of Sale**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**Big Money**  
 Wunderman Thompson

**Ontario Lottery & Gaming**  
**PRO-LINE PlayStand Focus Point of Sale**  
 BMR

**Pennsylvania Lottery**  
**Magnificent Millions Point of Sale**  
 9Rooftops

**South Carolina Education Lottery**  
**Palmetto Cash 5 – 10X Is Here to Stay**  
 South Carolina Education Lottery

**South Dakota Lottery**  
**Beneficiary**  
 Lawrence & Schiller

**Tennessee Education Lottery Corporation**  
**Tennessee Cash – Sloth Play Station Add-On**  
 The Buntin Group

**Texas Lottery Commission**  
**7s – Luck Has Your Number**  
 THIRD EAR

**Virginia Lottery**  
**\$100K Scratcher Replay Point of Sale**  
 Virginia Lottery

**Wisconsin Lottery**  
**Midday Draw Rocker**  
 Wisconsin Lottery / Hoffman York

**Print Advertising – Outdoor (Out of Home)**

**Arizona Lottery**  
**Beat the Heat Movie Poster**  
 Arizona Lottery / OH Partners

**Arkansas Scholarship Lottery**  
**Draw Game Digital RSS**  
 Arkansas Lottery / CJRW

**California Lottery**  
**LA Live Draw Games**  
 Alcone

**Colorado Lottery**  
**Lotto+ 3D**  
 Cactus

**Connecticut Lottery Corporation**  
**LIVE BIG**  
 Connecticut Lottery / Decker

**DC Lottery & Gaming**  
**Roaring Cash**  
 MDB Communications

**Delaware Lottery**  
**Spring Draw Games**  
 OneMagnify

**Florida Lottery**  
**Monopoly Season**  
 PPK

**Georgia Lottery Corporation**  
**Hope & Pre-K**  
 BBDO Advertising

**Hoosier Lottery**  
**Lucky Dog Scratch-Off**  
 Laughlin Constable

**Idaho Lottery**  
**5 Star Money Bus**  
 Mitchell+Palmer

**Loto-Québec**  
**La Mini Comic Strips**  
 Loto-Québec

**Louisiana Lottery Corporation**  
**Mascot Transit**  
 Louisiana Lottery Corporation

**Maryland Lottery & Gaming**  
**Jackpot – Dreamers**  
 GKV

**Massachusetts State Lottery**  
**All Jackpots Need Love**  
 Massachusetts Lottery / Connelly Partners

**Minnesota State Lottery**  
**Vikings Snapchat Filter**  
 Periscope

**Missouri Lottery**  
**Play It Forward – Hannah**  
 Barkley

**Nebraska Lottery**  
**Ticket to Tunes**  
 Smith Kroeger

**New Mexico Lottery**  
**Powerball – Always A Big Jackpot**  
 New Mexico Lottery

**New York Lottery**  
**Black Titanium – Coffee, Cologne, Credit Card**  
 New York Lottery / McCann New York

**Ontario Lottery & Gaming**  
**Bigger Spin Rickshaw Wraps**  
 FCB Toronto

**Pennsylvania Lottery**  
**Power Shot**  
 9Rooftops

**South Carolina Education Lottery**  
**Wonder Woman Instant Game**  
 South Carolina Education Lottery



# Smooth Transition

New Jersey's next generation of jackpot signage



This innovative **Add-On Sign** easily adds the FastPlay Progressive jackpot to existing signs.



**5-Game Jackpot Sign** includes dot-LED text panels and the FastPlay Progressive jackpot all in a 24" x 32" frame!

**Dispenser Jackpot Sign** mounts on top of dispenser boxes or vending machines.



**South Dakota Lottery**  
**Beneficiary Billboards**  
 Lawrence & Schiller

**Tennessee Education Lottery Corporation**  
**Minor League Baseball Outfield Signage**  
 The Buntin Group

**Texas Lottery Commission**  
**7s – Luck Has Your Number**  
 THIRD EAR

**Virginia Lottery**  
**YOYO Billboards**  
 Yebo

**Washington's Lottery**  
**Seahawks Scratch – Glow in the Dark**  
 Wunderman Thompson

**West Virginia Lottery**  
**West Virginia Lottery Bus Wrap**  
 West Virginia Lottery

**Wisconsin Lottery**  
**Holiday \$1 – A Gift for a Buck**  
 Wisconsin Lottery / Hoffman York

**Print Advertising – All Other**

**Colorado Lottery**  
**Conservation Logo**  
 Cactus

**Delaware Lottery**  
**Collect 'N Win Relaunch – Pop Art**  
 OneMagnify

**Florida Lottery**  
**Find Your Luck**  
 PPK

**Idaho Lottery**  
**30th Anniversary Coasters**  
 Idaho Lottery

**Louisiana Lottery Corporation**  
**Scratch Your Cake and Eat It Too – Mardi Gras Tickets**  
 Louisiana Lottery Corporation

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

**Missouri Lottery**  
**Play It Forward – Green Graduation Cap**  
 Missouri Lottery

**New Mexico Lottery**  
**Scratcher Wonderland**  
 New Mexico Lottery

**New York Lottery**  
**Black Titanium – Coffee, Cologne, Credit Card**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**North Carolina School Heroes**  
 Wunderman Thompson

**Ontario Lottery & Gaming**  
**Instant Crossword – Balloon, Armchair, Cake**  
 BBDO Toronto

**Pennsylvania Lottery**  
**Gus Holiday**  
 9Rooftops

**South Carolina Education Lottery**  
**Collegiate Programs – Clemson**  
 South Carolina Education Lottery

**Tennessee Education Lottery Corporation**  
**Martin Luther King Jr. Day**  
 The Buntin Group

**Texas Lottery Commission**  
**Monopoly Gemini Topper**  
 THIRD EAR

**Virginia Lottery**  
**Holiday**  
 Yebo

**Wisconsin Lottery**  
**Brewers Game Day Program – No Ball Like Powerball**  
 Wisconsin Lottery / Hoffman York

**Wyoming Lottery Corporation**  
**Cowboy Draw Jackpot – Winner in Douglas**  
 Warehouse Twenty One

**Special Category – Public Service Presentation**

**Colorado Lottery**  
**Crazy French Ranch Drone**  
 Cactus

**Idaho Lottery**  
**Bucks for Books**  
 Idaho Lottery

**Iowa Lottery Authority**  
**Highlighting Proceeds to Public Safety Survivor Fund**  
 Iowa Lottery Authority

**Kentucky Lottery Corporation**  
**Fueling Imagination, Funding Education – The Kentucky Lottery Story**  
 Kentucky Lottery Corporation

**Missouri Lottery**  
**Play It Forward – Hannah Barkley**

**New Mexico Lottery**  
**Healthy and Safe**  
 New Mexico Lottery

**Texas Lottery Commission**  
**Luck Happens Livestream – Black Pumas**  
 THIRD EAR

**Virgin Islands Lottery**  
**In This Together**  
 JNR Media Solutions, LLC

**Wisconsin Lottery**  
**Play It Safe, Stay Home**  
 Wisconsin Lottery / Hoffman York

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

**Arizona Lottery**  
**Million Dollar Giveaway**  
 Arizona Lottery / OH Partners

**Arkansas Scholarship Lottery**  
**This Is Winning Road Trip**  
 Arkansas Lottery / CJRW

**DC Lottery & Gaming**  
**Safe Bet**  
 MDB Communications

**Georgia Lottery Corporation**  
**Diggi All Online**  
 BBDO Advertising

**Illinois Lottery**  
**Essential Workers**  
 O'Keefe Reinhard & Paul

**Iowa Lottery Authority**  
**Thank You, Iowa**  
 Iowa Lottery Authority

**Kansas Lottery**  
**PlayOn App Campaign**  
 JNA Advertising

**Louisiana Lottery Corporation**  
**Lotto – Size UP**  
 Louisiana Lottery Corporation

**Maryland Lottery & Gaming**  
**Jackpot – Dreamers**  
 GKV

**Michigan Lottery**  
**Fast Cash**  
 SMZ

**Minnesota State Lottery**  
**Cupcake Cash**  
 Periscope

**Missouri Lottery**  
**Scratchers as Gifts – How Santa Got His Groove Back**  
 Barkley

**Nebraska Lottery**  
**Don't Pass It By**  
 Smith Kroeger

**New Mexico Lottery**  
**My Rewards – All Draw Games**  
 New Mexico Lottery

**New York Lottery**  
**Black Titanium Heavy Metal**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**Big Game Hunter Teaser**  
 Wunderman Thompson

**North Dakota Lottery**  
**Getting Ready**  
 KK BOLD

**Ohio Lottery Commission**  
**Origami – RV**  
 Marcus Thomas



# VIRTUAL BASKETBALL IS HERE



HEAD-TO-HEAD  
**ACTION**

PROVEN TO GENERATE  
**INCREMENTAL REVENUE**

**ULTRA-REALISTIC**  
GRAPHICS AND ANIMATIONS

**EBW B2B**  
AWARDS 2020  
Recognising the companies that  
power the gaming industry

**5x**  
WINNER

**Inspired Entertainment**  
Virtual sports supplier  
2016-2020

  
**INSPIRED**

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

**Oklahoma Lottery**  
**Winning Feels Like That**  
 Oklahoma Lottery

**Ontario Lottery & Gaming**  
**Winpossible – Raptors Champs**  
 The Hive Inc.

**South Carolina Education Lottery**  
**Tiny Stories – Chaz Dingus**  
 South Carolina Education Lottery

**South Dakota Lottery**  
**COVID – Thanks**  
 Lawrence & Schiller

**Tennessee Education Lottery Corporation**  
**Tennessee Lottery – Hope**  
 The Buntin Group

**Texas Lottery Commission**  
**Luck Happens Livestream – Black Pumas**  
 THIRD EAR

**Virginia Lottery**  
**Luxury Cruisin’ – YOYO**  
 Yebo

**West Virginia Lottery**  
**Alien – I Saw Nothing**  
 West Virginia Lottery

**Wisconsin Lottery**  
**Drumroll, Please**  
 Wisconsin Lottery / Hoffman York

**Corporate Communications – Employee / Player Newsletter**

**Colorado Lottery**  
**Annual Review**  
 Cactus

**Connecticut Lottery Corporation**  
**Chatter That Matters Newsletter – Winter 2019**  
 Connecticut Lottery Corporation

**Hoosier Lottery**  
**Spring FY20 Newsletter**  
 Hoosier Lottery

**Idaho Lottery**  
**Classroom Wishlist News**  
 Idaho Lottery

**Maryland Lottery & Gaming**  
**Maryland Lottery & Gaming Gazette – September 2019**  
 Maryland Lottery & Gaming

**Missouri Lottery**  
**Director’s Update – May 2020**  
 Missouri Lottery

**New Mexico Lottery**  
**Thankful for Players**  
 New Mexico Lottery

**New York Lottery**  
**November Newsletter**  
 New York Lottery / McCann New York

**Ontario Lottery & Gaming**  
**Did You Know? Newsletter – May 2020**  
 Ontario Lottery & Gaming

**Texas Lottery Commission**  
**Team News – Winter 2020**  
 Texas Lottery Commission

**Virginia Lottery**  
**Holiday Podcast**  
 Virginia Lottery

**Corporate Communications – Retailer Newsletter**

**Arkansas Scholarship Lottery**  
**Arkansas Scholarship Lottery Retailer Newsletter**  
 Arkansas Lottery / CJRW

**Delaware Lottery**  
**Ticket Talk #61**  
 OneMagnify

**Georgia Lottery Corporation**  
**March Newsletter**  
 Georgia Lottery Corporation

**Hoosier Lottery**  
**November 2019 Retailer Playbook**  
 Hoosier Lottery

**Idaho Lottery**  
**Wooh News – June 2020**  
 Idaho Lottery

**Kentucky Lottery Corporation**  
**The Quarter Retailer Magazine**  
 Kentucky Lottery / Bandy Carroll Hellige

**Louisiana Lottery Corporation**  
**July/August – Saints Play the Field**  
 Louisiana Lottery Corporation

**Maryland Lottery & Gaming**  
**Maryland Lottery Retailer Report – July-September 2020**  
 Maryland Lottery & Gaming

**Missouri Lottery**  
**Retailer Connection – April 2020**  
 Missouri Lottery

**New Mexico Lottery**  
**Best Practices – April 2020**  
 New Mexico Lottery

**New York Lottery**  
**COVID-19 Newsletter**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**Lottery Link Newsletter – March 2020**  
 North Carolina Education Lottery

**Ontario Lottery & Gaming**  
**OLG Lotto Post – March 2020**  
 Marshall Fenn

**Texas Lottery Commission**  
**Round-Up – September 2019**  
 Texas Lottery Commission

**Virginia Lottery**  
**November Playbook**  
 Yebo

**West Virginia Lottery**  
**West Virginia Lottery Progress Report – FY 2019**  
 West Virginia Lottery

**Western Canada Lottery Corporation**  
**Lotto Line – July/August**  
 Western Canada Lottery Corporation

**Wisconsin Lottery**  
**Retailer Print**  
 Wisconsin Lottery / Hoffman York

**Responsible Gambling – Print**

**British Columbia Lottery Corporation**  
**Myths Campaign**  
 123 West

**Colorado Lottery**  
**PlaySmart Brochure**  
 Cactus

**Delaware Lottery**  
**2019 Play Responsible Campaign**  
 OneMagnify

**Florida Lottery**  
**Player’s Guide**  
 PPK

**Hoosier Lottery**  
**Problem Gambling Awareness Month Outdoor**  
 Laughlin Constable

**Illinois Lottery**  
**Responsible Gaming**  
 Camelot Illinois

**Missouri Lottery**  
**Do the Right Thing – Retailer Responsibility & Integrity Program 2020**  
 Missouri Lottery

**North Carolina Education Lottery**  
**Driving Growth by Doing Good – 2019 Report to the Public**  
 North Carolina Education Lottery

**Ontario Lottery & Gaming**  
**OLG PlaySmart Connex EGM Stickers**  
 FCB Toronto

**Texas Lottery Commission**  
**It Only Takes One – Golf**  
 Texas Lottery Commission

**Wisconsin Lottery**  
**Dogs Around Poker Table**  
 Wisconsin Lottery / Hoffman York



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SOLUTIONS**



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& DISPLAYS**

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## Responsible Gambling – Television

**British Columbia Lottery Corporation**  
Segment 5  
123 West

**Florida Lottery**  
Player's Guide  
PPK

**Minnesota State Lottery**  
Gambling Bossing You Around?  
Periscope

**Missouri Lottery**  
888-BETS-OFF PSA  
Missouri Lottery

**North Carolina Education Lottery**  
Understanding the Odds  
Wunderman Thompson

**Pennsylvania Lottery**  
Problem Gambling Video – Foreclosure  
9Rooftops

**South Dakota Lottery**  
Cats  
Lawrence & Schiller

**Texas Lottery Commission**  
It Only Takes One  
Texas Lottery Commission

**Virginia Lottery**  
Play Responsibly PSA  
Virginia Lottery

## Responsible Gambling – Radio

**DC Lottery & Gaming**  
Responsible Gambling  
MDB Communications

**Florida Lottery**  
Player's Guide  
PPK

**Hoosier Lottery**  
Problem Gambling Awareness Month  
Laughlin Constable

**Illinois Lottery**  
Responsible Gaming  
Camelot Illinois

**Missouri Lottery**  
888-BETS-OFF PSA  
Missouri Lottery

**North Carolina Education Lottery**  
Understanding the Odds  
Wunderman Thompson

**Ontario Lottery & Gaming**  
OLG PlaySmart – Zoey's Ad  
FCB Toronto

**South Dakota Lottery**  
Keep the Fun Good  
Lawrence & Schiller

**Wisconsin Lottery**  
Runaway Train  
Wisconsin Lottery / Hoffman York

## Responsible Gambling – Digital

**British Columbia Lottery Corporation**  
Warning Signs Campaign  
Pound & Grain

**Colorado Lottery**  
Play Smart Social  
Cactus

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

**Florida Lottery**  
Player's Guide  
PPK

**Hoosier Lottery**  
Holiday Gift Responsibly  
Laughlin Constable

**Illinois Lottery**  
Responsible Gaming  
Camelot Illinois

**Loto-Québec**  
Falalalala!  
Loto-Québec

**Massachusetts State Lottery**  
Responsible Gifting  
Massachusetts State Lottery

**Missouri Lottery**  
888-BETS-OFF PSA  
Missouri Lottery

**New York Lottery**  
Don't Play With Fire  
New York Lottery / McCann New York

**North Carolina Education Lottery**  
Play Smart – Understanding the Odds  
Wunderman Thompson

**Ontario Lottery & Gaming**  
OLG PlaySmart Behind the Jackpot – Lottery Odds  
FCB Toronto

**Pennsylvania Lottery**  
Losses  
9Rooftops

**South Dakota Lottery**  
Lottery Snapchat  
Lawrence & Schiller

**Tennessee Education Lottery Corporation**  
Two Buddies – Reminders to Play Responsibly  
The Buntin Group

**Washington's Lottery**  
Responsible Gambling Social  
Wunderman Thompson

## New Media – Social Media

**Arizona Lottery**  
Virtual Holiday Party Giveaway Livestream  
Arizona Lottery / OH Partners

**California Lottery**  
Holiday Scratchers White Elephant – Lima Beans, Mug, Salami Sticks  
Quantasy

**Colorado Lottery**  
Colorado 101  
Cactus

**Connecticut Lottery Corporation**  
LIVE BIG  
Connecticut Lottery / Decker

**DC Lottery & Gaming**  
We Are One Instagram Campaign  
MDB Communications

**Delaware Lottery**  
Facebook Live Promotion  
OneMagnify

**Florida Lottery**  
Monopoly Season  
PPK

**Georgia Lottery Corporation**  
Cash Pop Launch  
BBDO Advertising

**Hoosier Lottery**  
30th Anniversary Celebration  
Hoosier Lottery / Laughlin Constable

**Idaho Lottery**  
Win Big in the Big Game  
Idaho Lottery

**Kentucky Lottery Corporation**  
Cash POP – Augmented Reality  
Kentucky Lottery/The Buntin Group

**Loto-Québec**  
Your Worst Phobias Are Back  
Loto-Québec

**Massachusetts State Lottery**  
Imagery That Tells a Story  
Massachusetts State Lottery

**Minnesota State Lottery**  
Vikings Scratch Game Campaign  
Periscope

**Nebraska Lottery**  
Facebook Ice Melt Video  
Smith Kroeger

**New Hampshire Lottery Commission**  
Thank You Campaign  
GYK Antler

**New Mexico Lottery**  
Hall-o-days 3D Player Promotion  
New Mexico Lottery

**New York Lottery**  
Make My Monday Series  
New York Lottery / McCann New York

**North Carolina Education Lottery**  
Multiply the Cards Facebook Live Event  
Wunderman Thompson





# WE WANT TO HELP YOUR STATE LOTTERY SELL MORE GAMES!

Our proven strategic, creative, and production capabilities can help your lottery create digital content campaigns to help grow your brand and bottom lines.

**Get your free prototype today.**

Contact Bill Hickman at [bill.hickman@tiltcp.com](mailto:bill.hickman@tiltcp.com).



## Creative + Production

- Lottery Brand Strategy
- Player Engagement
- Linked Game Campaigns
- Digital Content  
Creative + Production
- In-House Creative  
Team Support
- Independent and  
Minority Owned

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



**Ohio Lottery Commission**  
**Merry Millions Cornucopia Promotion**  
 Marcus Thomas

**Pennsylvania Lottery**  
**Keno Snapchat Filter**  
 9Rooftops

**South Carolina Education Lottery**  
**12 Days of Giveaways**  
 South Carolina Education Lottery

**South Dakota Lottery**  
**Beneficiary Snapchat**  
 Lawrence & Schiller

**Texas Lottery Commission**  
**Pick 3 – #1**  
 Texas Lottery Commission

**Washington's Lottery**  
**Golden Nugget Scratch**  
 Wunderman Thompson

**Western Canada Lottery Corporation**  
**Big Spin Winner Experience**  
 Western Canada Lottery Corporation / Bamboo Shoots

**Wisconsin Lottery**  
**WINsconsin**  
 Wisconsin Lottery / Hoffman York

**Wyoming Lottery Corporation**  
**WyoStrong**  
 Warehouse Twenty One

**New Media – Websites / Microsites**

**Arkansas Scholarship Lottery**  
**Retailer Information Page**  
 Arkansas Lottery / CJRW

**British Columbia Lottery Corporation**  
**BCLC Corporate Website**  
 British Columbia Lottery Corporation

**Connecticut Lottery Corporation**  
**Spoil the Ones You Love**  
**Holiday Landing Page**  
 Connecticut Lottery / Decker

**Florida Lottery**  
**Player's Guide**  
 PPK

**Hoosier Lottery**  
**Hoosier Lottery Website**  
 Hoosier Lottery / Laughlin Constable

**Illinois Lottery**  
**Winning Summer**  
 Flowers Communication Group

**Maryland Lottery & Gaming**  
**Fast Play Games Page**  
 GKV

**Massachusetts State Lottery**  
**State of Winning**  
 Massachusetts State Lottery

**North Carolina Education Lottery**  
**North Carolina School Heroes**  
 Wunderman Thompson

**Ohio Lottery Commission**  
**Keep It Fun Ohio**  
 Fahlgren Mortine

**Pennsylvania Lottery**  
**Pool Play Calculator**  
 9Rooftops

**South Dakota Lottery**  
**Christmas Story Landing Page**  
 Lawrence & Schiller

**Virginia Lottery**  
**Cash Chaser**  
 Virginia Lottery

**Wisconsin Lottery**  
**Holiday Microsite**  
 Wisconsin Lottery / Hoffman York

**New Media – Other Digital Advertising**

**Arizona Lottery**  
**Virtual Happy Hour Hangout Livestream**  
 Arizona Lottery / OH Partners

**California Lottery**  
**Love to Win Scratchers**  
 Circus Los Angeles

**Colorado Lottery**  
**Black Titanium**  
 Cactus

**Connecticut Lottery Corporation**  
**Digital Video Series**  
 Connecticut Lottery / Decker

**Florida Lottery**  
**Florida Lottery Chatbot**  
 PPK

**Georgia Lottery Corporation**  
**ATL United – Kick to Score**  
 Georgia Lottery / Aquimo

**Hoosier Lottery**  
**7s Scratch-Off Family – Save the Sevens**  
 Hoosier Lottery / The Buntin Group / Laughlin Constable

**Idaho Lottery**  
**5 Star Draw DreamTouch – Cucumber Dip**  
 Idaho Lottery

**Kentucky Lottery Corporation**  
**Alexa Scavenger Hunt**  
 Kentucky Lottery Corporation

**Massachusetts State Lottery**  
**Season Tickets – Tickets, Tickets**  
 Massachusetts State Lottery

**New Hampshire Lottery Commission**  
**Play Your Way – General Assets**  
 GYK Antler

**New Mexico Lottery**  
**Scratcher Wonderland**  
 New Mexico Lottery

**New York Lottery**  
**Black Titanium**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**Online Play**  
 Wunderman Thompson

**Pennsylvania Lottery**  
**Dr. Green Social Media Video**  
 9Rooftops

**South Carolina Education Lottery**  
**Beneficiary Infographic**  
 South Carolina Education Lottery

**South Dakota Lottery**  
**Instant Pac Man Rich Media**  
 Lawrence & Schiller / Phunware

**Virginia Lottery**  
**Holiday Influencers – Tyler Lane, Angelica Talan and Maria Luke**  
 Yebo

**Wisconsin Lottery**  
**Packers 2019 Homepage Takeover**  
 Wisconsin Lottery / Hoffman York

**Multicultural Advertising**

**Arizona Lottery**  
**Holiday Warrior**  
 Arizona Lottery / OH Partners

**California Lottery**  
**Dia De Los Muertos Flower Wall**  
 Alcone

**Delaware Lottery**  
**Collect 'N Win Summer Campaign**  
 OneMagnify

**Georgia Lottery Corporation**  
**Udi & Ximena Testimonials**  
 Matlock / BBDO Advertising

**New York Lottery**  
**Park Ranger**  
 New York Lottery / McCann New York

**Ontario Lottery & Gaming**  
**OLG Lunar New Year 2020 Integrated Campaign**  
 Diversity Communications Inc.

**Texas Lottery Commission**  
**Lucha Libre Social Video**  
 Texas Lottery Commission

**Virginia Lottery**  
**Holiday Scratchers**  
 Yebo

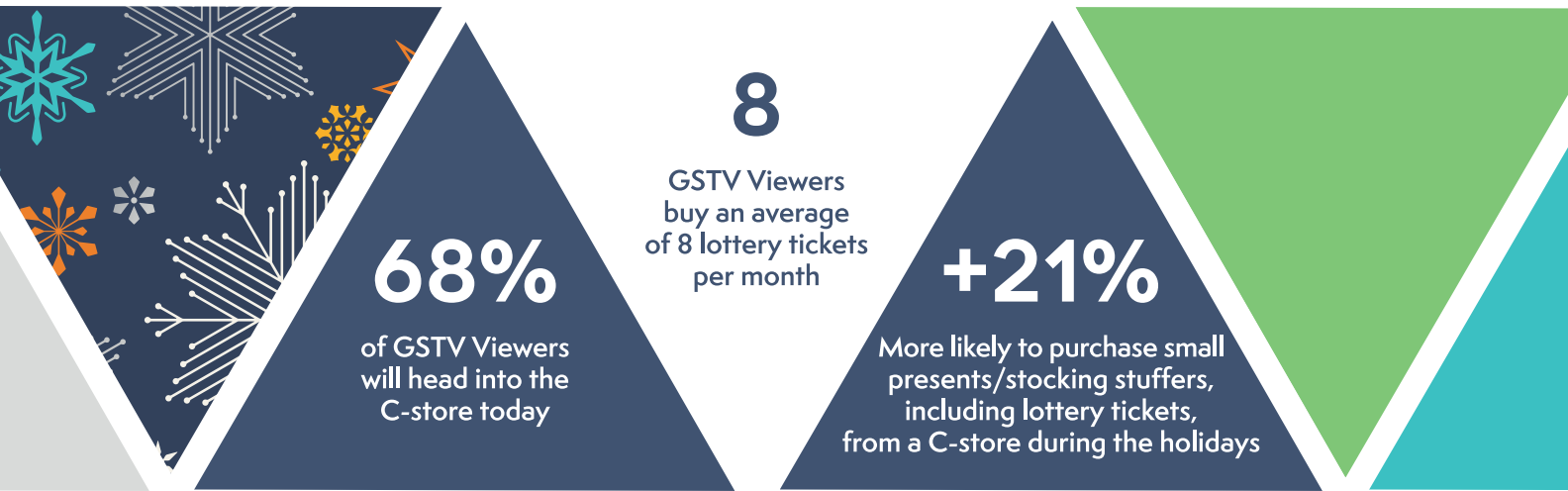


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Source: Nielsen Media Impact, Dec. 2019; GSTV Nielsen/Lieberman/Mfour/. Placed Ad Effectiveness Studies: 2006-2019; Nielsen TV Brand Effect: 2017; YouMe 2017 Online Ad Awareness; GSTV Audience Insights Study, July 2018; Nielsen DP8 Cinema Fusion to GfK MRI Doublebase 2019, A19+; NACS 2013 Retailer Survey.

**Hickey – Special Events Promotion**

**Arkansas Scholarship Lottery**  
**Get in the Game Razorbacks Ticket Event Activations**  
 Arkansas Lottery / CJRW

**California Lottery**  
**Made From Scratch Gift Shop**  
 Alcone

**Colorado Lottery**  
**2019 Runyon to the Res Event Recap**  
 Cactus

**DC Lottery & Gaming**  
**Roaring Cash Event**  
 MDB Communications

**Georgia Lottery Corporation**  
**Hawks Cash Pop Cash Shot**  
 Georgia Lottery / Aquimo

**Hoosier Lottery**  
**30th Anniversary**  
 Hoosier Lottery

**Idaho Lottery**  
**30th Anniversary World Record Event**  
 Idaho Lottery

**Illinois Lottery**  
**World's Largest Ticket**  
 O'Keefe Reinhard & Paul

**Iowa Lottery Authority**  
**Public Relations Media Event – Iowa Lottery Proceeds**  
 Iowa Lottery Authority

**Louisiana Lottery Corporation**  
**LOLA King Cake Promotion**  
 Louisiana Lottery Corporation

**Michigan Lottery**  
**The Big Spin TV Event**  
 SMZ

**Minnesota State Lottery**  
**Minnesnowta Google Maps Location**  
 Periscope

**New Mexico Lottery**  
**Hall-o-Days Claim Center Event**  
 New Mexico Lottery

**New York Lottery**  
**Knitcast**  
 New York Lottery / McCann New York

**North Carolina Education Lottery**  
**The Big Spin**  
 Wunderman Thompson

**Ohio Lottery Commission**  
**Cash Explosion Play@Home Show**  
 Ohio Lottery Commission

**Ontario Lottery & Gaming**  
**Lotto Max – Up Close Marquee Concert 2019**  
 Shed Creative Agency / Universal Music

**Pennsylvania Lottery**  
**Derby Cash Cornhole Events**  
 9Rooftops

**Texas Lottery Commission**  
**Luck Happens Livestream – Black Pumas**  
 THIRD EAR

**West Virginia Lottery**  
**State Fair Wheel Spin Promotion**  
 West Virginia Lottery

**Hickey – Audio / Visual Presentation**

**Idaho Lottery**  
**Do Good Program**  
 Idaho Lottery

**Louisiana Lottery Corporation**  
**Lottery Week Educational Videos**  
 Louisiana Lottery Corporation

**Maryland Lottery & Gaming**  
**Making of the Jackpot Dreamers Campaign**  
 GKV

**Texas Lottery Commission**  
**Luck Happens Livestream – Black Pumas**  
 THIRD EAR

**Virginia Lottery**  
**Keno Sell-In Video**  
 Virginia Lottery

**Best New Instant Game**

**British Columbia Lottery Corporation**  
**Battleship**  
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**Play On!**  
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**DC Lottery & Gaming**  
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**Georgia Jackpot Scratcher**  
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**Idaho Parks Scratch Game**  
 Idaho Lottery / IGT

**Iowa Lottery Authority**  
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 Iowa Lottery Authority

**Maryland Lottery & Gaming**  
**Rose Gold Scratch-Offs**  
 Pollard Banknote Limited

**Massachusetts State Lottery**  
**007**  
 Massachusetts State Lottery

**Minnesota State Lottery**  
**Full of 500's – Holiday Edition**  
 Periscope

**Pennsylvania Lottery**  
**Money Family of Games Scratch-Offs**  
 9Rooftops

**South Carolina Education Lottery**  
**Monopoly Rolling Cash Jackpot**  
 South Carolina Education Lottery

**Texas Lottery Commission**  
**Monopoly**  
 Texas Lottery Commission

**West Virginia Lottery**  
**Power Family**  
 West Virginia Lottery

**Best New Draw Game**

**Connecticut Lottery Corporation**  
**Fast Play Progressive**  
 Connecticut Lottery / Decker

**Georgia Lottery Corporation**  
**Cash Pop**  
 Georgia Lottery Corporation

**Hoosier Lottery**  
**Fast Play – \$10 Winfall**  
 Hoosier Lottery

**Idaho Lottery**  
**5 Star Draw**  
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**Montana Lottery**  
**Montana Cash With Max Cash**  
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Hoffman York

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9Rooftops

**Amy Colburn**  
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Warehousetwentyone

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**Sue Diamond**  
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Barkley US

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KK BOLD

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**John Nohe**  
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JNA Advertising

**Derrick Ogilvie**  
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**Leo Olper**  
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Third Ear

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OH Partners

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Director - Brand Management  
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Arkansas Scholarship Lottery

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Texas Lottery Commission

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Cactus

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**Don Feeney**  
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**Marlene Warner**  
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**Special thanks to all the  
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Save the date: Oct 16-20, 2022







The rest of this issue of *Insights* is dedicated to the NASPL Associate Members who help the association continue its mission of assisting lotteries through education, research and communications. These and other NASPL member services help lotteries fulfill their mandates of generating revenue for good causes. Read on to hear what our Associate Members have to say and to view their company profiles.

**NASPL would like to thank all of our 2020 Associate Members for their support during these unprecedented times.**

**Level I**



**Level II**





Level III



# intralot

## Strategies to Cope With a Rapidly Changing Environment

Chris Dimitriadis, Group Chief Executive Officer, INTRALOT, addresses key issues in the lottery industry and how the company is responding to current needs.



### What would you say is key to INTRALOT's vision of the future of the lottery industry?

**Dimitriadis:** Part of our corporate strategy is digital transformation – the use of new technologies as we navigate the fourth industrial revolution. In the lottery sector, this digital transformation has always been a prerequisite for having a future-ready lottery. Now, with the accelerating force of the pandemic, we realize that the future is now. We have perhaps violently landed into the future, and we are seeking new ways to do business and to satisfy the needs of our customers, of lottery players, and the citizens of the state as a whole. Because at the end of the day, lottery is about contributions to good causes, and we need to help lotteries maintain that, especially in the wake of COVID-19. The pandemic has hit everyone very, very hard.

By digital transformation, I mean the use of new technologies in order to create business value, and also to enable lotteries to create value out of data. One of the key aspects is the digital transformation of the retail sector, providing players with the

opportunity to shop with as many contactless and cashless experiences as possible. With the pandemic, people have become afraid of physical interaction. So, it may be using a mobile app to create a mobile play slip to be scanned by the retailer, and even an option to receive a digital ticket if the player prefers not to touch a traditional paper ticket. Cashless payment options are also critical. These aspects of digital transformation are hugely important for lotteries in order to increase both the perception of consumer safety and actual consumer safety within a retail store.

All of our equipment in the United States is currently capable of handling contactless play through ticket preparation apps, along with cashless payments using cards or mobile pay options. Some jurisdictions have already implemented these systems; for others, we are ready to quickly integrate with payment providers once decisions are made to go forward.

What we are doing as a company is to heavily invest in all these types of new technologies. We have created lottery solutions that are

highly adaptable, merging artificial intelligence, data analytics and even blockchain. Time to market is very important right now, and technology allows us to offer lotteries new paths to business innovation. That said, you can never expect regulation to run as fast as technological evolution, so we continue to demonstrate the value created from these technologies, and are keeping lotteries well informed. We are ready to explore their needs when they are ready.

### How can lotteries better serve players using these technologies?

**Dimitriadis:** At the end of the day, everything starts with the player. Rather than use technology in isolation, we first try to understand the needs of the player. To do that, we have developed a dedicated new service division at INTRALOT, Inc., in order to increase the quality of service provided to our customers all over the country. And at the same time, to better understand player needs and habits, so we can go back to the drawing board to see how we can provide added value to players – the users of the technology



– through new games and products for the lottery industry. So, we see technology as an enabler as we focus on the players.

We are looking at how to redefine our offerings through data analytics. For a number of years, especially in the United States, across industries there has been a huge discussion about data, and the value data can offer in creating new services and products. We are focusing on this in the lottery industry, and it's not just another technology or trend to be taken lightly. It's about generating information through the correlation of the right data sets, rather than the technology itself. The more we can create new and fun products for the players, and therefore greater value, the more lotteries can contribute to good causes.

#### **What about the expansion of iLottery?**

**Dimitriadis:** While retail transformation has been accelerated by the pandemic, so has been acceptance of online activities by a greater percentage of the population. Younger demographics have long been using newer technologies, but older generations have very quickly adapted to purchasing online and to communicating through technology in order to protect themselves. Even when the pandemic ultimately passes, consumer behaviors have fundamentally changed. Therefore, we need to think in a very innovative manner in order to be able to address the ongoing needs of society. It is a new normal.

At the same time, in some jurisdictions we have unfortunately seen an increase in unregulated gaming providers – the gray market. This development is another driver for regulators to consider allowing internet lottery and/or gaming as a way to keep consumers safe and to keep revenues from going to unregulated operators.

For these reasons, I think more jurisdictions will consider legalizing iLottery, because they need to support their lotteries so they can

continue generating important revenue for good causes. If an iLottery solution is developed according to global good practices and responsible gaming practices and standards, so that the players are protected, then this is a great way to maintain lottery operations through the pandemic and beyond.

#### **Sports betting was still in its infancy in the United States when the pandemic shut things down; how has that impacted INTRALOT and your customers?**

**Dimitriadis:** We have seen a great advancement in legal sports betting, and the adoption of online and retail sports betting solutions by lotteries, over the past two years. I believe this is a very responsible way for governments to offer sports betting, because lotteries are well experienced in how to protect players and how to achieve regulatory compliance. That's important for a highly regulated market like the United States.

When the pandemic interrupted major league sports, we continued to focus on providing our sports betting solutions to our customers that were scheduled to launch this year. We made sure they were comfortable with the new systems so they would be ready when major sports began again. In the meantime, we began investigating new solutions like eSports, a very popular form of online video game play among younger adults in particular. We have started integrating betting on eSports for our customers outside the United States.

We also took this opportunity to invest in a new generation of products, especially for the iLottery space, to help our lottery customers as much as we can during this terrible year. Fortunately, we've seen very good performance in the traditional lottery sector as players unable to find other forms of gaming and entertainment were able to continue purchasing their favorite lottery games.

#### **How important is cybersecurity as internet usage increases and digital technology advances?**

**Dimitriadis:** The more we depend on technology and especially on the internet, the more cybersecurity needs we have. The reality is that the global cyber threat landscape is expanding very quickly, and this is definitely going to be a driver for the adoption of new technologies. As an industry, we need to make sure that we have the appropriate cybersecurity framework in place. In the United States, the National Institute of Standards and Technology has developed a cybersecurity framework that consists of standards, guidelines and best practices to better manage and reduce cybersecurity risk. We need to adopt those standards in the lottery industry.

The most recent standards and recommended approaches to cybersecurity address the need to detect and respond to a cyber-attack, rather than to prevent it. This may sound strange, but it speaks to the fact that many companies and organizations are mainly focusing on prevention, when in fact the increasingly sophisticated attacks really make it mandatory to improve the ability to quickly detect, understand and respond to an attack, with the goal of getting business back to normal as quickly as possible. There has been much progress across industries, but we still see a lot of incidents – breaches of confidentiality, privacy, integrity and even business continuity.

Lotteries thus far have not been impacted by these types of external threats, but they are inevitable even in our industry. It is critical for lotteries to maintain their brands, so the most important thing is to have the appropriate response ready when such a cyber-attack happens. You have to keep everyone informed to show your players respect, while indicating you are doing everything possible to address the attack. Transparency is the responsible way of maintaining trust with your customer base. ●





## A Clear Commitment to Drive the Industry Forward

A simplified organizational structure positions IGT to continue to serve the needs of customers, invest in growth opportunities, and accelerate time-to-market with solutions for a post-COVID world. Jay Gendron, IGT Chief Operating Officer Lottery, discusses recent events and looks to the future.



**IGT maintains close communication with customers, and this was especially the case as the coronavirus pandemic unfolded. How were lotteries most challenged, and how did IGT partner with them?**

**Gendron:** When this pandemic unfolded, my team and I let our customers know they had our undivided attention to assist them in whatever challenges they were facing. I spoke with the directors of virtually all our lottery customers over the first few weeks to make sure they had everything they needed from IGT – not only locally, but also from corporate resources. Every state faced different challenges. Obviously, everyone's first priority was the health and safety of their employees. And after all the steps were taken to ensure that this was addressed, the priority was to ensure that we minimized any interruption to their business, especially given that lottery beneficiaries are reliant on those proceeds.

Probably the most significant challenge from the lotteries' perspective was the need to close claim centers to prevent people from congregating. There were concerns around the distribution of instant

tickets and making sure the warehouses in different states were able to receive inventory and get it out to the field. In close coordination with our customers, I think we struck the appropriate balance in making sure everyone was safe and maintaining their business operations.

**Can you talk about the efforts to support customers' business continuity as the situation developed? The feedback from many customers was that IGT was uniquely able to commit resources to that effort.**

**Gendron:** From the outset, at the direction of IGT's Chief Executive Officer Marco Sala, we created a COVID-19 Task Force consisting of six different working groups, with executive leadership and a universe of about 100 IGT people assigned to it. One of the working groups was specifically focused on ensuring business continuity. In the U.S., IGT has a primary and a backup data center for each of the states where we have facilities management responsibilities. Our team constantly worked through scenarios covering what would happen if any of those

data centers became unavailable because of the pandemic, and made sure we had as many levels of redundancy and backup in place as necessary to maintain our customers' operations.

We also immediately began close collaboration with Charlie McIntyre, President of MUSL at that time, and Gordon Medenica, head of the Mega Millions group, to address any issues that could be a factor in preserving their business operations. We mobilized an industry-wide working group to collaborate with other vendors and specifically with MUSL to ensure we had contingency plans in place to address draw procedure protocols. Through discussions with the leadership of the MUSL Executive Committee, we achieved the temporary ability to enact a workaround for specific areas of concern in the event it ever became necessary, which fortunately it never did.

The collective uncertainty of the pandemic and its potential impact on our customers' good causes created an environment where vendors and lotteries came together and collaborated for the benefit of the



industry at large. We also worked together internally even more closely, whether the issue was sales, technology, government relations, public relations, or health and safety – the circumstances tapped into the depth and breadth of IGT resources to provide a wide array of advice to our customers.

### **In July, IGT announced a new organizational structure. What has changed, and what do the changes mean?**

**Gendron:** In the five years since the merger between GTECH and IGT, we operated under a geographical structure. The new organization, primarily centered around two business segments – Global Lottery and Global Gaming – creates a stronger, more focused IGT. We have a very clear view in a stand-alone business unit of sales, market and player trends, operations, and so on – what’s working well and what the areas are for improvement. Combined with IGT’s B2C experience and our ability to share knowledge and technology across the organization, this structure will allow us to best serve customers’ changing needs. We can provide greater responsiveness, working with lotteries on what they see as the next step of their evolution, and then take all that information and bring it into our R&D funnel. We’ll use the strength of our balance sheet to fund R&D and ensure that we continue to meet and exceed our customers’ expectations to fulfill player needs and drive the global lottery industry forward.

At the time of the merger in 2015, the management team assured lottery customers that the company would not change its focus and commitment to the lottery business. Since then, the feedback has been positive that we have lived up to our promise. This change only solidifies our commitment to our customers.

### **How has your role changed within this new structure, and how will that benefit customers?**

**Gendron:** Until now, I’ve principally been focused on our NASPL

customers. My role has changed from managing sales and operations in North America to managing them worldwide, with responsibility for overall customer satisfaction. With the view of the international lottery player and the trends emerging in the rest of the world combined with insights from North American lottery players, we can continue to invest and expand on solutions to deliver the best player experience. Whether it’s leveraging leading practices elsewhere or working with the early adopters of new programs or products, we can feed all of that back into our own R&D plans and product development roadmaps, and share the insights with customers as they develop their own business plans.

### **Where is IGT focused now to help ensure lotteries’ success going forward?**

**Gendron:** Worldwide, everyone wants a seamless player experience, one touchpoint with the player, whether they’re at retail or online, or at a bar or casino. We are drawing on research and innovations from across the organization to deliver the products, technologies, and games to enhance the player experience.

Improving player convenience and increasing the number of potential touchpoints with consumers remains a priority. IGT is the in-lane leader. We collaborate with more than a dozen customers and enable over 80,000 lanes worldwide. We’re working to help more lotteries reach a large, untapped market of retailers and potential players while also minimizing contact, lines, and cash handling. With ongoing concerns around the pandemic, IGT’s state-of-the-art solutions for cashless and contactless lottery transactions support health and safety and offer consumers the preferred experience they’re using today for other purchases.

Every jurisdiction that can’t currently offer interactive wagering is looking at digital for a variety of good reasons. We continue to advocate for and help customers fast-track digital play. IGT PlayDigital solutions

offer an engaging and responsible player experience, and they serve an important role in making the retail player journey contactless. We can also support lotteries that are restricted from offering full digital play with bridging strategies, such as a convenience app to entertain players and offer ticket checking capabilities, e-Subscriptions, and e-Wallets to claim payments and pay at the retailer. This allows lotteries to establish a digital relationship with players and to better know their habits and behaviors to enable more tailored experiences and communication.

### **IGT recently launched ACE, Advancing Cultural Education – the company’s sixth global Diversity & Inclusion (D&I) group, which focuses on advancing people of African descent in the industry through professional development and networking. Why have you taken on the role as executive co-sponsor of ACE?**

**Gendron:** Our company has made tremendous progress with Diversity & Inclusion, and I was proud to be asked to be a part of developing this D&I group. The timing of me taking on this role coincides with a global discussion and civil unrest around race and racism. The first thing that I did was listen. Through a series of discussions with ACE and within our global company, I have a better sense of the challenges some of our Black colleagues experienced at IGT and beyond, and that many of us do not truly understand or appreciate. An effective leader needs empathy, and that starts with listening and being willing to engage in difficult discussions about challenging issues. That allows me to be a better mentor, sponsor, and advocate. I strongly believe that D&I is a responsibility of all companies and all employees. It’s not enough to do a few things and say, “Okay, now we’re a diverse and inclusive company.” It’s something that’s an ongoing challenge, and we can all do more, myself included. So, I’m pleased to take on this role and urge other leaders to join one or more of our D&I groups. ●





## How One Team of Leaders Is Driving Lottery Performance in a Crisis

In a year where the world has seen unprecedented disruption, the funding need for lottery beneficiaries remains a constant. The impact of a global pandemic and subsequent economic fallout continues, affecting nearly every business sector including the lottery industry and the mission to fund important programs and projects in communities. The need for funding, modernizing to serve consumers in the new normal, and investing in growth has become more vital than ever.

Amidst the challenges to keep global operations and support for customers going strong, Scientific Games' Lottery Leadership team explains how they're navigating the COVID-19 pandemic:

### How are you leading your team through this global crisis and continuing to serve customers?



Pat McHugh



Mike Conforti



John Schulz



Jennifer Welshons



Dena Rosenzweig

#### Pat McHugh

*Executive Vice President and Group Chief Executive, Lottery*

It's difficult and challenging times like these when people's true colors come through. I'm impressed and humbled by how our teams are supporting each other, adapting rapidly and remaining focused on delivering for our customers. I'm also thankful for our customers who are overwhelmingly supportive of our teams, and concerned about them. My goal throughout the pandemic is to keep

our employees safe, communicate transparently to our employees, customers and business partners, and maintain an adaptive environment that anticipates and works through a challenging global situation.

Over the years, we have done a great deal of work on disaster recovery planning and diversifying our global supply chains. Our teams are trained for all kinds of disasters as part of our standard business continuity plans. With the pandemic, they are proving the resilience of Scientific Games – from being able

to mobilize our global team swiftly, to working remotely and effectively, and shifting instant game and lottery hardware manufacturing and supply chains between facilities globally. In fact, lotteries who aren't using our managed services have turned to us during COVID-19 for guidance on how to keep operating productively.

Our Lottery Leadership team's strategy early on was to get ahead of potential supply chain interruptions in the U.S. and internationally. We knew this would be vital for recovery. We were very bullish on it.



Our customers were able to regain significant amounts of their profits and keep funds flowing to their beneficiaries. Our digital product teams also adapted successfully to scale opportunities as shelter-in-place orders were enacted. Online/mobile play and sales are accelerating, which will pay dividends for our customers.

Additionally, fostering collaboration between our teams and our partners allows our people to come up with creative solutions to deliver to customers and plan the critical parts of our operations in an extended crisis. This collaboration is built upon mutual trust. Trust in relationships with our customers, trust in our employees, trust between teams across our business, and trust in our Lottery Leadership team – all a result of transparent communication, visible commitment and consistent, successful results.

Our people believe in the industry, they believe in lotteries' mission to fund beneficiary programs in their communities – whether for education, seniors, or general funding for transportation and other causes. Our employees understand they're part of something much bigger. And especially in a time like this when so many people are affected not only by the health crisis, but the economic fallout and the negative impact to state budgets and programs that serve those in need.

It's critical for our industry to lean in on growth investment to come out of this crisis generating increased proceeds to beneficiaries.

### **Mike Conforti**

**President, Global Strategic Accounts**

Scientific Games has served our lottery customers for more than four decades and we have never experienced anything even remotely as impactful as the COVID-19 pandemic. In late 2019 and early 2020,

we saw first-hand how the early phases of the virus were affecting our China operations and lottery sales performance. This helped us more accurately forecast its impact on our customers in other parts of the world and allowed us to prepare accordingly.

Fortunately, we were also able to leverage our global presence to progress work on multiple important business initiatives as well as continue to drive several major projects that were in process prior to the global shutdown. By way of example, we recently delivered our retail and digital lottery gaming platforms, retail and digital instant games, and 10,000 WAVE™ lottery terminals for the successful conversion of the Turkish National Lottery on August 1. This important business now complements our 2019 Turkey sports betting joint venture where we supply the system, terminals and risk management for the retail and digital offering – one of the world's largest sports betting operations, which has achieved record sales and gross gaming revenues since launching our program.

Delivering projects of this magnitude, as well as tens of thousands of terminals to SISAL in support of its lottery operation in Italy, and progressing our joint venture implementation for the exclusive national instant ticket concession in Brazil, could only have been accomplished in such difficult times due to our global scale and the collaborative nature of the relationships we enjoy with our customers and partners.

### **John Schulz**

**Senior Vice President, Instant Products, Lottery**

No one predicted the pandemic's impact on the global economy. To lead through this crisis, we immediately adapted our playbook for business continuity. Constant and

clear communication to employees, customers and suppliers has been critical.

We remain focused on delivering profits for our lottery customers and crucial funding for their beneficiary programs. But we had to rethink and reimagine our business models to meet the “new normal” of business operations. Prioritizing employee health and safety, and understanding the challenges they face due to COVID-19, helps us continue executing day in and day out.

Throughout the pandemic, our teams are keeping lotteries' game plans on track, and our global manufacturing operations are continuing to produce games for customers. Our advanced logistics managed distribution centers continue to supply product to retailers and keep the pipeline of new product pumping.

With other forms of gaming entertainment temporarily shut down in many regions, instant sales in some markets hit record levels of up to 33% growth. The Scientific Games Enhanced Partnership program helps us deliver more instant game inventory to our customers' retailer networks. When sales levels increased, these partner services enabled lotteries to respond. Our focus on all aspects of the instant product business for these customers makes it possible to grow sales during a crisis.

### **Jennifer Welshons**

**Senior Vice President, Marketing & Insights, Lottery**

As Scientific Games' go-to resource for what's happening with retail sales and consumers, we knew that business intelligence requests from our Marketing & Insights team were going to increase due to the uncertainty and new trends created by the pandemic.

One of the first things we did as a team was lay out what we

believed were the main questions our internal stakeholders and our customers would need to answer, and we focused all our energy in that direction. We quickly created new and modified insights deliverables that have been invaluable to our customers and will have merit far beyond the pandemic. We credit our amazingly talented team members for this ability to pivot, but also our well-established infrastructure for data streams and enterprise business intelligence.

The efficiency of building and disseminating new insights through Infuse™, our proprietary business intelligence platform, allows us to generate views of market performance while also freeing up time to create custom deliverables that dig deeper into the “why” of consumer behavior, such as our weekly Data In Motion report. Through an increased cadence of communication, we’ve truly been able to focus on

information that is easily consumed and immediately actionable to help our lottery customers meet their profit goals.

**Dena Rosenzweig**  
*Senior Vice President and Deputy General Counsel, Lottery*

Our Lottery Legal team fully integrates across Scientific Games’ business to keep everyone’s focus on responsibly generating profits for lottery beneficiary programs. At the onset of the pandemic, once protocols were in place for employee safety, we worked closely with our Government Affairs team to ensure that we could continue to supply our lottery customers with products and services despite the myriad executive and local orders limiting business operations both in the U.S. and internationally.

We are dividing and conquering to take on the challenges of

COVID-19 and provide legal support for our existing customer engagements as well as new opportunities, including RFPs and contracts that lotteries are powering through during the pandemic to keep their businesses operating. We communicate regularly and continually reassess business priorities and adapt.

As always, our Legal team supports Scientific Games in its overall mission to be a good corporate citizen. This includes our ongoing responsible gaming initiatives and, similar to other companies, expanded efforts to create a diverse, equitable and inclusive workplace.

With no end in sight for this pandemic in the coming months or year, it’s in times of crisis that strong leadership, global scale and adaptability, continuous communication, and ability to keep teams safe and focused are crucial to sustaining lottery performance. ●

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# Lessons From a Pandemic

This has been a year like no other, with unprecedented business shutdowns and consumer movements limited to essential activities in many jurisdictions. Lotteries initially saw a sharp decline in sales, but almost surprisingly, many rebounded quickly after the first month. Indeed, we're seeing reports of record sales in some cases, although ultimately there will be a wide variety of financial results depending on a number of different factors.

Most businesses, and consumers, know there is now a new normal – that some things will never go back to the way they were, and they have to adapt. So we asked our associate members the following question:

**What is the most important lesson learned by the lottery industry from the global pandemic of 2020?**



*IGT executives shared their thoughts from the perspective of operations, the player experience and the road ahead.*

I think the most important thing we learned as an industry is the value of communication and collaboration. There were some very unsettling times, especially in the initial stages. Everyone across the industry worked together to make sure lottery interests were protected in the short and long term while preserving the health and well-being of all involved. Lottery was viewed as an essential service because it provides critical funds to governments. At a time when there's an economic crisis as well as a health crisis, governments need those funds more than ever for healthcare, education and other causes. Lottery proved its resilience. While sales dipped at the start of the crisis across all types of lottery products, there has been a resurgence, and some lotteries are breaking sales records.

**- Jay Gendron, IGT Chief Operating Officer Lottery**

Through the lens of the player experience, it was a reminder that lottery purchases compete for consumers' wallets with all types of entertainment. We witnessed this when people had limited options for how to spend their discretionary dollars. As an industry, we can't see ourselves as a monopoly. It was also clear that lottery needs to be sold in ways that are consistent with consumers' purchasing habits. Especially

with new concerns over cash and paper handling, the industry saw that it has to seriously pursue the opportunities around selling digitally and using new technologies like cashless, as they not only support contactless play but are the norm in all types of consumer categories.

**- Wendy Montgomery, IGT Senior Vice President Global Brand, Marketing, and Communications**

The shift to lottery operations online was a trend that has been accelerated by the pandemic. Whether a jurisdiction can offer iLottery or not, operators are learning in real-time how digital solutions facilitate a contactless player journey at retail, now a primary concern. Digital play slips and tickets replace paper ones, and the same types of e-wallets that consumers are using widely to buy their morning coffee can be used at retail for lottery payments and prize claims. All this can be achieved responsibly with IGT's convenience app today, and it's a vital consideration for every lottery, whether they offer digital wagering or not.

**- Enrico Drago, Senior Vice President IGT PlayDigital**



Throughout the pandemic, businesses and industries are looking for creative ways to reinvent their operations to meet the needs of customers, while others aren't able

to adapt or move quickly enough to align their business objectives with the new normal. The lottery industry has experienced significant impacts from COVID-19 across players, retailers, supply chains and ultimately, profits to beneficiary programs. In some states, these impacts have been crippling to the lottery with full line sales declines of up to 19%.

The most important lesson the lottery industry is learning during the pandemic is the resilience of the more than \$52 billion U.S. instant product category, and how vital these games are to the lottery's portfolio and ability to generate profits. U.S. instant product performance over the 12 weeks ending July 25-26 showed a year-over-year growth rate of 25%, a testament to how the industry responded during the pandemic. With other forms of gaming entertainment shut down temporarily, COVID-19 brought many new players to instant games. However, some lotteries experienced instant game sales declines up to 12% due to product distribution challenges or suspension, postponed new game releases, retailer closures and changes in consumer behaviors.

The 13 U.S. lotteries participating in the Scientific Games Enhanced Partnership (SGEP) program for managed services show a year-over-year growth of 33% during the same 12-week period. Our teams at SGEP facilities located in these states remain focused on game planning, and their connectivity to the lotteries' teams is allowing game production and distribution to continue. Additionally, the scale of our global supply chain gives us the ability to move production across nine presses, and when necessary, across five manufacturing facilities. Our production teams are continuing to manufacture and deliver product to lotteries and SGEP warehouse



locations where teams process orders and supply retailers with enough product to meet player demand. These lotteries have been able to keep game launches on schedule, working through allocation schedules with us so that any disruption in supply is minimal.

No one in our industry predicted this pandemic and its gravity, but Scientific Games' scale, agility and managed services program allowed us to adapt immediately to serve our customers and their mission to fund vital programs in their communities. Our lottery philosophy is based upon all aspects of the instant game development process and ensuring the right balance of product in the retailer pipeline remains consistent, no matter the challenge.

**- John Schulz, Senior Vice President, Lottery Instant Products, Scientific Games**

## **intralot**

This has been a tough year for the lottery industry, and all industries as organizations face uncharted territory when it comes to unpredictable market conditions. As an industry we must be prepared to adapt and evolve, and it is important to note that while the lottery has learned many valuable lessons during this time, many more will come to light as we face new challenges from this ongoing pandemic and its aftermath.

Prior to COVID-19 there was already a move towards cashless transactions within the industry, providing customers with the

ability to purchase products via non-traditional channels. However, the pandemic pushed lottery forward, faster than expected, allowing lotteries to pivot to safer purchasing options for customers.

We as an industry must have products in place that enable our players to continue to play lottery and provide dividends to the state, while maintaining needed social distancing protocols, protecting players, retailers and other customers occupying the same retail environment.

Additionally, we recognize that the long hours contained at home with lockdowns and working from home has led to a need for at-home entertainment.

We see now, more than ever, the need for a phygital lottery landscape. Lotteries must be able to provide their players with playing and cashing methods that allow them to play when and where they want, while also understanding the need to better protect themselves and understanding retailer's needs to protect their employees. As we continue to adapt to a new normal, we expect to see an immense amount of new technology that allows lotteries to succeed in this new world, while continuing to provide players with the best user experience.

At INTRALOT, we are committed to this new way of retailer operations and are already creating new products that will provide our lotteries and their players with the most user-friendly and exciting offerings in a phygital market landscape.

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



The lottery industry is very much a face-to-face, relationship-style business, and is based on frequent industry meetings. To suddenly take away the face-to-face AND all of the industry meetings with no warning was indeed a shock to the system.

Abacus, like others, had to adapt by relying more on Zoom (or other) type of calls, so the face-to-face was now conducted through a computer flat screen medium. In some ways, we feel we actually got more valuable face time with key industry players and retailers. Abacus was able to set up weekly or bi-weekly Zoom calls where progress was actually made toward enabling our gateway.

Post pandemic, we see a lottery world that will be accelerated towards the digital and self-service, BOPIS, scan & go, and even frictionless transactions. And much to our delight, these all make the Abacus Gateway essential in the lottery future.

The Abacus Train is leaving the station. Don't hesitate, get on board!

## **POLLARD** banknote limited

As the engine of lottery growth over the past twenty years, instant tickets have proven to be resilient in the wake of a global pandemic. In jurisdictions where lotteries have managed to continue distributing and selling instant tickets, sales have quickly rebounded, with several lotteries posting record sales in recent months. This has reinforced the need for lotteries to continue focusing on strengthening this



category for ongoing success.

Whether it's at retail or online, the way players interact with lotteries is changing. Understanding and reacting to these new conditions is key to keeping players engaged, particularly new and lapsed players attracted to lottery during COVID-19, and supporting the instant category as we emerge from the pandemic with new player behaviors and expectations.

Now is the time for lotteries to actively pursue new revenue sources and innovative solutions to keep pace with the changing retail environment. Impactful merchandising methods, in-lane solutions, big box store partnerships, omnichannel and online sales are just a few options to expand beyond traditional channels. The pandemic intensifies the benefits of in-lane solutions, such as Pollard Banknote's In-Lane Activation platform, which allow customers to conveniently purchase instant tickets alongside other items, minimizing in-store interactions. COVID-19 has also highlighted the value of iLottery as a channel for lottery diversification. Lotteries equipped with iLottery solutions, including Michigan, Virginia, New Hampshire and North Carolina, have seen significant growth in online sales and new player registrations during the crisis.

Lotteries can also now explore how to build a robust digital presence to extend beyond traditional ways of communicating and playing. Solutions such as digital games, mobile cashing apps and loyalty programs facilitate more engagement opportunities with players. Adopting the right digital strategies can help lotteries capitalize on pandemic-related growth in website and app traffic by converting online visits into registered players. As a result, lotteries can create one-to-one

marketing opportunities to communicate directly with players, fostering customer loyalty and retention. Lotteries around the world have been successfully using their digital platforms and tools to engage players with special promotions during stay-at-home orders. In addition to creating more one-to-one marketing opportunities, lotteries can use these solutions to balance the need for maintaining the lottery brand's top-of-mind awareness with messaging that focuses on the beneficiaries of the good causes lotteries support.

If lotteries can leverage these lessons from the pandemic, they will set themselves up for success in this new reality.



The pandemic not only resulted in major changes in what consumers purchase, but how they purchase it as well; trends that are likely to continue into the near future. As an industry, we must be faster to react to sudden changes in consumer needs and consider new or modified channels of distribution.

*Shopping Mom and Pop:* Concerns surrounding public health and the desire to keep small businesses afloat have emphasized the benefits of shopping locally. These circumstances create excellent opportunities to bring on more Mom and Pop retailers in a variety of trade styles, both traditional and non traditional, that may have been resistant to selling lottery in the past.

*Curbside pickup:* How can we integrate lottery sales into this growing shopping trend?

*E Grocery delivery:* Are there innovative ways to incorporate

lottery sales? Can we create mini ITVMs (similar to exterior ATMs) that are positioned at the point of pick up (POPU)?

*Improving the in-store experience:* Lotteries and their vendors have made notable improvements in this area and are slowly making the in-store purchase experience more turnkey. This is more important than ever as consumers want to get in and out of retail as quickly as possible. Touchless purchase solutions are another area of opportunity. At retailers with vending, players could use their own mobile devices to select games, pay for their purchase, and then connect wirelessly to a vending machine to receive their order without having to touch the machine.

*Subscription Services:* While lotteries have offered this service for many years, it is more important than ever that we create awareness that consumers can play via subscription. Highlighting the ease of play, payment and payout will register with players more than ever.

### Considerations in Moving Forward

Will we be in a prolonged recession, or headed to a depression? Lottery sales typically remain strong during recessions, but what happens if the economy does not recover quickly? Will consumers be more reluctant to spend, especially during the Q4 shopping season? What if a stronger wave hits this fall as some predict? If government assistance is delayed or terminated, will lottery sales fall too?

We know that consumer shopping habits will continue to change, so lotteries need to adapt within their legislative parameters accordingly. Lotteries focusing on customer needs and building loyalty may never be as important as it is right now.





As the pandemic became more long term than anticipated and workforces became nearly fully remote, patience and accepting that projects may take additional time has been critical in our success. Homes are filled with children, pets and other distractions, and understanding and flexibility are key to our projects continuing onwards. Where in the past one was able to hand someone a file with needed information which took 30 seconds, that now takes a process of a couple of days. In some cases requiring someone to go into the office (upon approval) or have something retrieved by whomever is covering the building, then scanned and emailed. We've also had to be creative in the ways we as auditors test and observe things by leveraging screen sharing and video meetings to complete our work. Policies related to security have had to be adjusted so that work may continue off site and information shared in fashions not normally permitted by best practices.

From a controls and security perspective we learned that life and business go on, and processes and procedures were quickly adjusted to reflect our new way of working, but didn't stop. Controls that were adjusted or changed should be documented, and we've learned that expectations for required processes did not cease. The adaptability of the industry to provide products and services was incredible, and we were all fortunate to see relative minimal impacts versus other industries.

The industry will see further demand for iGaming and digital

content as the world changes. The process of passing paper tickets between two strangers is not as welcome an idea anymore, and new ways to allow players to safely continue to play lottery games will be critical to our success. As lotteries move to the digital world we cannot forget the need to secure systems, have controlled procedures and maintain monitoring procedures to ensure that the integrity of the lottery is not forgotten. Now more than ever the hope that the lottery brings to players for making their dreams come true is what this world needs, and we all must continue keep that in mind as we work from our homes and see things continue to evolve and change.



#### **Invest in digital.**

There are a wealth of digital initiatives that lotteries can implement to boost engagement with players and increase net proceeds to good causes. Lotteries stand to benefit and improve player experience irrespective of whether they currently have a digital sales channel.

The global pandemic has forced many industries to accelerate the pace of change to their business models and ways of working. Lotteries placing a greater emphasis on digital is one such change that is being accelerated.

Lotteries with well-established digital sales channels, such as our European colleagues in the UK and Ireland, saw the digital share of sales go from 33% to 50% as retail shops

closed and players stayed indoors – with stronger than expected sales in those digital channels. Rather than preparing to go back to pre-pandemic trading, these lotteries are now accelerating investment into digital.

The Illinois Lottery, managed by our sister company Camelot Illinois, has also driven a significant rise in digital sales. They've done this by maximizing the opportunity presented by a growing digital audience, including utilizing new digital promotions functionality to re-engage lapsed players and keep casual players engaged for longer.

Lotteries not yet selling online are still able to invest in modernizing the player experience through digital products and solutions. For example, moving to the Cloud, as opposed to physical data centers and servers, reduces infrastructure spending and keeps systems automatically up to date.

Consumer elements of a lottery business can easily adopt digital innovations too. Most lotteries in North America have mobile apps with ticket scanning functionality. Using this existing feature, there are opportunities to harness the power of digital to offer hyper-targeted sweepstakes and promotions that are proven to boost incremental sales. The lottery industry in North America is moving to an increasingly digital future – one that complements retail channels rather than replaces them – and the global pandemic has only served to accelerate that change.

Lotteries should be investing in digital today.  
- **Brett Cross, Chief Technology Officer, Camelot Lottery Solutions.**



The global pandemic of 2020 has brought with it a number of important lessons. Above all else, it has made clear that the role of lotteries in benefit to the greater good is more important than ever.

The pandemic has highlighted the importance of meeting players wherever they are, including online, as well as the value of investing in omnichannel players. It has also shown that retail is not going away, with most lottery retailers being deemed essential services.

With brick-and-mortar sales continuing to be critical for the lottery industry, supporting retailers remains key. As we move into the recovery period there are many ways to support retailers, such as investment in initiatives like lottery digital signage networks that enhance the customer experience, improve operational efficiencies and increase sales.

Carmanah continues to collaborate with lotteries and retail partners around the world, rolling out in-store marketing technologies (such as Lottery Digital Menu Boards) that:

- Strengthen retailer partnerships;
- Build a strong lottery presence at retail;
- Boost player engagement;
- Promote omnichannel play;
- Enable hyperlocal targeting;
- Expedite rapid changes to messaging (i.e. public service announcements); and
- Increase lottery purchases.

As the industry moves forward, Carmanah remains committed to increasing our lottery customers' contributions to good causes. Carmanah continues to take care of our customers and partners, delivering the highest quality retail marketing technologies, and ultimately, benefiting the greater good. If there is any way we can assist now or in the future, please reach out.



The lesson we should all embrace from 2020 is that innovation is about investing in the future, not the present. The most obvious example of this lesson is online lottery, whether through a dedicated platform or courier service. When we only looked at financial returns for these platforms a few years ago, it was difficult to justify the investment. But when these decisions are made with the future in mind, the value proposition changes and we make better decisions for our businesses and are better prepared for the unknowns the future holds.

We took the pandemic pause to reevaluate our value proposition and evolve our vision even further. We've reimagined our approach and invested in new technology that will help move the industry forward on all draw games and not just our suite of live sports lottery games. For the innovators in this industry, we will look back at this time as the turning point for our businesses and the products we offer our lottery clients. The impact of these efforts

won't be seen immediately, but the investment we have each made in the future during this time will pay dividends for everyone in the industry.



If there is one word to illustrate the most important lesson learned by the lottery industry from the global pandemic of 2020, it is adaptability.

The lesson of adaptability isn't exclusive to the lottery industry. Commercial and tribal operators, suppliers and regulators across the industry spectrum, and in every jurisdiction, have learned that adaptability is crucial to survival against the dramatic threat we are facing as a global industry.

What is interesting about the necessity for adaptability is how quickly suppliers were able to respond to global market change and develop new products and services to help. The rapid changes over the last few months spawned a host of new technologies, as well as renewed interest in existing technologies to address new global challenges.

However, the deluge of recent information, change and pressing urgency can leave lottery regulators and operators feeling overwhelmed. Lottery regulators and operators everywhere are taking fresh approaches and reviewing new and existing technologies to meet the demands of the new world, from cashless systems to iLottery to sports betting.

It can be overwhelming; however,



lottery regulators and operators can be comforted by the fact that while solutions might be new to their particular jurisdiction or operation, there are standards that provide a solid base to start from. Many jurisdictions have adopted standards such as GLI-16 Cashless Systems in Casinos, GLI-33 Event Wagering Systems, and GLI-19 Interactive Gaming Systems, to which we recently released GLI-19 V3.0 to give additional clarity and best practices surrounding interactive gaming systems.

Speaking of adaptability, lottery regulators and operators must be aware that criminals everywhere are also adapting, and the threat of cybercrime increases and becomes more pressing every single day. This is a constantly moving target, and lotteries have to be increasingly vigilant in vulnerability assessment and management, network penetration testing, web and mobile application testing, firewall and device management, realtime active defense systems, incidence response, and digital forensics.

Lotteries, along with the rest of the gaming industry, have learned a valuable lesson in adaptability. We must apply these lessons to secure the future of gaming. At GLI, we are fully committed to the success of the lottery industry worldwide, and we are here to help you adapt.



As the pandemic progressed and many consumer activities were shut down in some of the most severely impacted jurisdictions, gas stations and convenience stores were among

the essential businesses permitted to remain open. These locations are a critical resource for fuel, food and information – and we know that consumers are inclined to keep a full tank of gas and shop for basic essentials. Data show that this past summer, spending in c-stores was more than double that of the year before.

And as things began to open up across the country, consumers still not willing to travel by air or other public means started hitting the road, in their own vehicles or in RVs. As a result, visits to fuel and convenience retailers are increasing and will likely continue to increase as we see this as a new normal highlighted by more recreational driving.

It's critical that lotteries connect and reach consumers where they are actively attentive and engaging on their consumer journey. GSTV continues to serve viewers and businesses at fuel and convenience locations from coast to coast, and our audience actively purchases eight lottery tickets a month on average (Nielsen DPB Fusion to 2019 GfK MRI Doublebase Study, A18+).

The GSTV network remains an informative and entertaining respite for viewers, and a brand-safe, family-friendly environment for advertisers. We've partnered with the OAAA, CDC, American Red Cross, Ad Council, Feeding America, and Dining at a Distance, amongst others, to ensure our audience stays informed and safe, as well as using our network to thank our heroes during this time. We salute our fuel and convenience retail partners who are a vital part of our communities working on the front lines.

For more information about our COVID-19 response and consumer behavior trends and insights during the pandemic, please visit [gstv.com](http://gstv.com).

One thing we have learned is



that even in a pandemic, lottery can thrive if it's in a position to do so. Draw games have been hit pretty hard, mostly due to low jackpots, but the instant product has been selling at an astronomical rate. From a demand/supply perspective, the demand was there for sure and limited entertainment options across the economy resulted in incremental spend, and perhaps more importantly, incremental players either discovering the category for the first time or reengaging with lottery. As we look at supply, meeting this demand was the challenge but by the looks of things lotteries and their major partners did an excellent job despite unprecedented COVID-19 challenges to get product into market.

The bottom line is that pandemic or no pandemic, lottery operations have to work, and game, distribution, and player-centric innovations must continue. From an InComm perspective, we believe that the biggest lesson learned is yet to be determined: The unprecedented COVID-19 opened up the biggest opportunity to all lotteries – player acquisition. The unanswered question is: Will these new and infrequent players and the levels of sales attributed to them be retained?

Now more than ever lotteries must be laser focused on engaging with their players through the traditional products and channels, but importantly also through new and innovative products and channels, and if required, with equally new and innovative strategic partners.

At InComm, we think beyond the



norm, looking for ways to engage customers in ways that perhaps traditional partners cannot support. A partnership with InComm immediately starts to build relationships with new retailers, offering expanded network opportunities, and will also refresh your thinking and showcase new and exciting ways to leverage the lottery, retail and payments businesses to create new and expanded retailer partnerships, launch new products and build lottery brand equity in both physical retail and online. Lastly, but most importantly, a partnership with InComm can support player acquisition and retention at a time when all state governments are depending on lotteries to maintain and continue the growth and opportunity presented by the pandemic, in a measured and sustainable way.

## Jackpocket

The coronavirus pandemic has created an even greater sense of urgency around embracing technology and unlocking new distribution channels for lotteries. As we've learned this year, the availability of digital lottery products is about more than just convenience – it's also about accessibility and even player safety. This distribution channel works in tandem with state lotteries and brick-and-mortar retailers to broaden access to the lottery, increase participation and stabilize state budgets during this period of uncertainty and beyond.

At Jackpocket, our mobile lottery platform is a quick and easy way for state lotteries to offer mobile play to their players without the need for regulatory changes, lengthy tech

integrations, or any cost to the state. Our digital process gives players a safe alternative to play official state lottery games from home, and we even remove the need for players to leave the house to receive winnings under \$600. By partnering with Sightline Payments (Play+), we're able to offer players in eligible states a cashless lottery experience.

Contrary to traditional retail sales, Jackpocket has actually seen a significant increase in sales during this time of social distancing. In fact, we've seen our market share reach record highs. It's an interesting statistic that indicates our sales are driving a very large proportion of overall state sales (and increasing rapidly).

We've also observed increased engagement within the Jackpocket user base during this time. App-based lottery options aren't just attractive to tech-savvy millennials. All demographics are adapting to living their lives digitally – from ordering groceries online to seeking lottery entertainment from home, and growing accustomed to an easier way to play. As an example, we've witnessed a streak of significant week-over-week increases in ticket sales over the last two quarters and anticipate this trend to continue.

Building a high-quality, cutting-edge product is difficult, and this is where a proven third party like Jackpocket can set up lotteries for long-term success. Our mobile-first platform provides state lotteries a clear path to drive innovation, expand their audience and increase revenues in an unprecedented time.



The big lesson from the pandemic is that customer experience (CX) and the customer journey drives everything. In normal times, CX is all about customer (or retailer) expectations around efficiency and engagement, etc., and constantly looking to stay out in front of them. In times of crisis, customer expectations are changed or accelerated by less predictable influences, but they are still manifest in the changes they make to their journey.

Effective marketing comes from a healthy value exchange between a lottery and its players and retailers, all within certain market, economic, society and technological limits. One thing a crisis teaches us (or reminds us) is that a lottery's needs are always changing; player and retailer needs are changing; and the environment we operate within is also changing. Again, the customer journey reveals how these changes are manifest.

If we keep a close eye on this value exchange and the customer journey, solutions will present themselves more quickly. Priorities will set themselves. And clarity will come from knowing what things we can fix from those we can't.



The lottery industry is in a persistent search for the next big thing as the community partners to bring innovative products and experiences that evolve alongside



player expectations. This evolution is essential to securing the sustainability of the revenue that lotteries contribute to good causes. 2020 has proven that the next big thing to meet both of those objectives has been in front of us all along.

The typical lottery environment operates on entrenched processes supported by meticulous, advanced business planning. 2020 brought with it a culture shock – requiring swift agility that rocked the system in terms of up-ending standard operating procedures with less than a moment's notice.

And with all great challenges, comes opportunity. Many of the reactive changes that lotteries implemented in response to COVID-19 called attention to aspects of our business that must evolve. The fundamental commonality in all of these modifications: addressing player expectations for minimal disruption.

Digital strategies ensure that lotteries are able to maintain player communications, engagement and revenue generation. The single next big thing that addresses all of these points? iLottery. COVID-19 has guaranteed that every strategic dialogue with a lottery today includes iLottery. NPi, North America's leading provider of the most powerful iLottery programs, echoes the sound advice offered by lotteries that had the benefit of operational iLottery programs during COVID-19: Start now, don't wait.

The digital lottery solutions that can be executed by lotteries today are invaluable to ramping up a new iLottery program. Mobile apps, second chance programs and player loyalty solutions have all proven to be highly effective building blocks for iLottery. These touchpoints with players allow for important data collection that certainly contributed to communication and engagement strategies during the most uncertain

waves of the effects of the pandemic.

This would be the most critical lesson learned during the global pandemic: Don't wait to organize your digital strategy. Don't wait to begin educating your stakeholders on modern sales channels like iLottery. The post-COVID lottery won't soon forget the impacts of the pandemic, which forced lotteries to change rapidly. The online channel is wired for quick reaction time and, by partnering with stakeholders and the vendor community, designing an iLottery program that fits each state's boundaries is an achievable goal. The nimble mindset that was tested during 2020 is exactly the lesson to learn and resets the focus on the need to execute strategies that reliably drive sustainable lottery revenue. iLottery has proven to be that strategy.



In our home base of California and in many other states, the sudden onset of COVID-19 and state regulatory restrictions on residents brought all non-essential industries to a virtual standstill. As a collective whole, many industries saw sales and revenue come to a sudden halt. However, as rapidly changing policies evolved in the weeks and months to follow, Pro-Lite had observed demand for lighted retail signage significantly uptick in Q2 and remain strong in Q3. What did it mean?

Though not an indication of complete recovery, retail store visibility was now back on the minds of many store owners. Stores that managed to endure the weeks of closure now

needed consumers to see and know that they are open for business and open to the community.

The same lesson can be applied to the lottery industry. In general, lottery jurisdictions that had actively built a strong brand image through multiple channels of brand advertising, especially in the sectors that remained open during COVID (e.g., grocery and fuel), saw faster recovery of sales revenues than those jurisdictions that did not. Of course, though there are confounds and multiple variables that influence the result, no one can argue the importance of brand visibility and its influence on a player's mindshare during this period.

Brand visibility and awareness through primary and direct marketing efforts should continue to be a top priority for any lottery. It is one strategy to preserve revenues for the good causes lotteries contribute to every day.



We have learned that we are resilient, resourceful and adaptable. I think we are even a little surprised at how work can get accomplished under such onerous constraints, and that everyone loves playing the lottery in spite of troubling times. I think we can breathe a big sigh of relief that things were not worse than they were. But I also think this is no time to be sanguine about the future.

In the pre-COVID era, we had time to monitor trend lines and adapt as needed, and nothing bad happened if we were a little late to the party. Now, the time it takes for trends to achieve mass market acceptance and transform society in this new normal is being



radically compressed, which means we all need to be more proactive at anticipating trends and taking action now to preserve the value of government lottery for the benefit of future generations of stakeholders.

Even though lottery has been less buffeted than others by the pandemic and economic repercussions, I think we need to be much more mindful of the macro economic/sociological/cultural trends that are reshaping consumer behavior and marketplace trends, and how they will affect the lottery industry. Digital mediation has enabled us to stay connected and get the work and education done, and the insights revealed by its warp speed implementation will be transformational to the way work and education are accomplished in the future. How will this affect other aspects of daily life, like shopping and playing the lottery? The pandemic crisis has set in motion a massive re-engineering process of work, education and countless other activities, and the learning has just begun.

This is also a time of revelation, the pandemic being catalyst towards a renaissance when the need to solve a profound problem morphs into solutions that we would not have otherwise had.

In spite of the incredibly liberating power of video conferencing, I believe the new normal will include a return to in-person interaction. It may not take all the same forms as the pre-COVID era, but fulfilling the fundamental human need for social interaction will continue to be a vital part of the fabric of a healthy society. At least I hope so, because I miss seeing all of you!



Sportech has long affirmed that lottery, betting, gaming and raffle operators need a robust, progressive digital strategy to enhance and expand the demand for their content. We have been delivering digital platforms for web and mobile betting for nearly two decades, but with the 2019 acquisition of the Lot.to business and its all-star digital development team, we adopted a very aggressive digital-first ethos across all of our businesses, both b2b and consumer facing.

What the global pandemic did was to very suddenly throw into stark relief the vital need for a strong digital strategy to augment – and in this time of pandemic, to replace – traditional sales channels.

Our clients with a digital presence in place when the pandemic hit were better able to weather the storm so far and, in some cases, even performed ahead of expectations. When local and regional content became scarce, operators who had the option of offering content from other domestic or international markets also fared better. When sporting events were canceled, raffle clients who already had digital platforms were able to continue their fund-raising efforts at a time when their charitable services were in demand as never before.

With the pandemic, we must now recognize that operators, vendors, legislators and regulators must continue to evolve their accommodations for digital services and content sharing in order to sustain industries that are vital to state and provincial economies and to lotteries and other entities that use their platforms to fund good causes.

We've also learned that, even when the pandemic is in the rear-view mirror, consumers, partners and employees will likely never completely approach many aspects of daily life in the pre-pandemic way again. Ways of working, ways of engaging with players, ways in which we network and share new ideas, and the ways in which we generate content for players will be digital-first from now on with in-person experiences perhaps being secondary.

The COVID-19 pandemic has been and continues to be one of the most impactful economic and humanitarian events in our lifetimes, and it is incumbent on all of us lucky enough to work in an industry that funds and promotes good causes to maximize the potential of our operations in order to deliver on our promises.

## Szrek2Solutions

During the pandemic, many lotteries throughout Europe, Asia, Africa, North and Latin America were required to close down. U.S. lotteries struggled to perform critical functions that ensured operations continuity. Draw continuity emerged as a weak element in contingency plans. Many lotteries use mechanical draw machines or offline electronic draw systems that require human interaction in draw rooms or studios. When access to draw facilities was limited by lockdowns, lotteries risked postponing or canceling draws. In response, Szrek2Solutions set up a remote draw service hosted at IGT primary and backup facilities as an immediate contingency solution for manual draws. Using this solution, lottery staff can perform draw and audit functions from



remote locations, including from their homes. The solution is based on Szrek's patented RNG technology with proof of integrity. See [szrek.com](http://szrek.com).

To ensure business continuity, draw contingency solutions must be automated or allow for remote operation, while adhering to legal requirements and procedures performed by draw staff and auditors. Backup draw solutions, like primary draw solutions, must have the highest level of security available to ensure continued player trust and game integrity. As Daniel Sagrario, IT Manager from S.L.E., the entity that runs EuroMillions, said: "We've recognized that we need several viable backup solutions for the EuroMillions draw, which ensure business continuity under the most extreme and diverse circumstances. These solutions need to provide us with as high a level of integrity as our regular draw solution so that when we award large amounts of money, we can prove to the public that those draws were random, unpredictable and altogether correct."

Szrek2Solutions offers draw continuity solutions serving as primary and backup draw systems with proof of randomness and integrity. These draw solutions are manual, accessed by draw staff remotely, or automated, where draws are triggered by the gaming system. Szrek's draw systems with random number verification have been deployed for over 15 years without being compromised and without having any failures. As the industry prepares to apply lessons learned, lotteries need to assess if their backup solutions ensure security and resilience, and provide opportunities to diversify strategies for working remotely. European Lotteries (EL) encourages the industry to use the pandemic "as an opportunity for lotteries to further

enhance their digital transformation, as well as their operational and overall business resilience." The pandemic is nudging us toward digital transformation and in the direction of remote and automated draws.



After decades of experience creating and producing marketing content for brands of all shapes and sizes, we have learned many lessons the pandemic has reinforced. Here are a few we feel lotteries might find relevant.

*Sharpen the Point | When you choose to say something be sure it's something valuable to say.*

During the pandemic, consumers have consumed an exceptionally large volume of content, from news to ads to entertainment. Never before have they become so selective in what they watch. Avoid saying something because you feel the need to do so. Only create content when you have something meaningful to say. Then, say it well. Otherwise, it's just more noise to be ignored.

*Think Together | Be a collider of diverse thinking to catalyze impactful creativity.*

Being "locked down" by the pandemic has challenged us to choose between a world of abundance or scarcity. Choose to recruit and respect diverse minds with unique perspectives so you always think holistically rather than individually. This will ensure the relevance and influence of what you make.

*Make Better | Focus on making something better before simply making more of it.*

The world doesn't need more of just about anything. In fact, the pandemic has reminded us we can live without many things we thought we couldn't. Making more is easy. Making better is hard. The pandemic has put a priority on being more innovative.

*Maximize Good | Clearly communicate what you do that's good for people.*

Success and longevity are dependent on purpose. Meaningful, relevant purpose. Clearly identify what it is you can do to make people's lives better and make every decision and effort to maximize it. Such positive purpose is needed more than ever in the midst of the negativity spawned by the pandemic.

*Reduce the Pursuit | Work hard to refine your utility and offer a frictionless experience.*

Something easy to do is far more desirable than something difficult. Simplicity beats complexity every time. Embrace the constraints of the pandemic to make the pursuit of a person's happiness an easy one.

*Hate Waste | Always separate what matters from what doesn't.*

Nature never takes more than it needs so why should we? The pandemic has reminded us all that we're consuming or paying for more than we need. Use this moment to identify and eliminate hidden waste so you only invest in what's needed and never what's not.



## Scientific Games Corporation

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Jennifer Welshons, *SVP, Marketing & Insights, Lottery*  
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Dena Rosenzweig, *SVP, Deputy General Counsel, Lottery*

**Year of inception:** 1973

**Contact:** Therese Minella, *APR, Director, Lottery Communications (770) 825-4219, [therese.minella@scientificgames.com](mailto:therese.minella@scientificgames.com)*

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

For more than 85 years through our acquired companies, Scientific Games has delivered what customers and players value most: trusted security, creative content and innovative technology. Beginning with the world's first slot machine, the "Bally Baby" in 1936, to our development of the world's very first secure lottery instant game in 1974, and our revolutionary SCiQ® lottery retail ecosystem in 2018, we are a trusted business partner to more than 1,500 customers around the globe.

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

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

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

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

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



## **INTRALOT**

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The logo for intralot features the word "intralot" in a bold, lowercase, sans-serif font. A thick orange horizontal bar is positioned below the letters "o" and "t", extending to the right.

## **INTRALOT, Inc.**

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*Chris Dimitriadis, Group Chief Executive Officer, INTRALOT*  
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*Byron Boothe, Chief Executive Officer, INTRALOT, Inc.*  
*Nick Papadoglou, Vice President and Chief Commercial Officer, INTRALOT, Inc.*  
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**Year of inception:** Greece (Parent Company) 1992; United States 2002

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INTRALOT, a publicly listed company established in 1992, is a leading gaming solutions supplier and operator active in 44 regulated jurisdictions worldwide. With a global workforce of approximately 3,800 employees in 2019, INTRALOT is committed to redefine innovation and quality of services in the lottery and gaming sector, while supporting operators in raising funds for good causes. Uniquely positioned to deliver state-of-the-art technology across geographies, the company has developed an advanced ecosystem that serves all verticals enabling the digital transformation of gaming operators and offering players an unparalleled gaming experience.

As a member of the UN Global Compact, INTRALOT is a global corporate citizen committed to integrity and responsibility. It has been awarded the prestigious Responsible Gaming Framework certification by the World Lottery Association and is certified under the WLA Security Control Standard.

INTRALOT contributes decisively to the industry's future developments, being a Level I Associate Member of NASPL and a partner of the major lottery and gaming associations around the world.

INTRALOT has an established presence in the USA market through its subsidiary, INTRALOT, Inc., employing more than 570 employees, and has secured 16 contracts - three of which are sports betting - in 13 jurisdictions nationwide to provide online systems and services, warehousing and distribution of instant tickets, and VLT/COAM monitoring. Currently, INTRALOT, Inc. has contracts with the state lotteries in Arkansas, DC, Georgia, Idaho, Illinois, Louisiana, Massachusetts, Montana, New Hampshire, New Mexico, Ohio, Vermont and Wyoming.

## International Game Technology PLC (IGT)

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A global leader in lottery and gaming, IGT is uniquely positioned to deliver unrivaled gaming experiences that engage players and drive growth.

To support player-driven innovation and growth for our customers, we leverage a substantial investment in player insights, a wealth of premium content, operator experience and leading-edge technology. Our Global Lottery and Global Gaming organizations support four key segments:

**Lottery** – IGT’s pioneering and award-winning solutions encompass all aspects of the lottery business, from the player experience to portfolio optimization and retail management. We continually refine and optimize our systems and tailor distinctive game content to help our customers strengthen their relationships with the players they serve.

**Gaming** – We deliver dynamic games, systems, gaming machines and other growth-driving innovations to gaming venues around the world. IGT’s distinctive systems solutions give operators the control and flexibility they need to optimize their gaming floors, offer cashless gaming and manage robust loyalty programs.

**Digital** – IGT PlayDigital is dedicated to delivering growth-driving solutions that advance digital play across lottery, casino and digital operations. From content and systems technologies to critical support services, our PlayDigital portfolio is integrated, modular and flexible.

**Sports Betting** – The IGT PlaySports sports betting platform and solutions portfolio was created specifically to meet the needs of U.S. casino and lottery operators. The proven, widely approved platform is versatile and annually processes billions of dollars in wagers through retail, mobile and self-service technology.

IGT’s commitment to responsible gaming is woven into the fabric of our product development, services, programs and policies. IGT was the first lottery vendor to receive the WLA’s Responsible Gaming Standards for Associate Members, covering IGT’s lottery and digital operations, and was the first gaming vendor in the world to achieve responsible gaming accreditation from the Global Gambling Guidance Group (G4) for both its gaming and digital operations.

In 2018, IGT joined the United Nations Global Compact network to align strategies and operations with universal principles related to human rights, labor, the environment and anti-corruption. We also support the United Nations’ Sustainable Development Goals (SDGs).

IGT is dedicated to creating a fair and inclusive culture that values unity, diversity and belonging in our people, players, customers and communities. IGT is one of 325 companies across 50 industries selected for the 2020 Bloomberg Gender-Equality Index (GEI).



## Abacus Solutions International Group

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*Simon Butler, Chief Executive Officer*

**Year of inception:** 2008

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### **Fully managed service offering includes:**

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

Abacus brings the lottery to where the consumer is, no longer making them come to the terminal.

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

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

## **Pollard Banknote Limited**

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

Our team of talented lottery specialists is dedicated to delivering on three key dimensions for success: outstanding games that excite loyal players and attract new ones, retail excellence through effective in-store strategies and retail network expansion, and digital innovation that cultivates a true integrated experience.

Subsidiary companies and a joint venture partnership further strengthen our offerings in each of these dimensions.

These companies include:

- American Games and International Gamco, which specialize in charitable and lottery gaming products;
- Schafer Systems, a foremost supplier of innovative instant ticket merchandising, dispensing and display solutions in the lottery industry;
- Diamond Game, a leading provider of innovative electronic gaming solutions, designed to engage players in social establishments;
- Fastrak Retail™, an award-winning retail point-of-sale (POS) display company specializing in customized solutions for lottery and retail customers;
- mkodo, delivering world-class apps and digital user experiences for mobile, online and retail environments in the betting, gaming and lottery sectors; and
- NeoPollard Interactive (NPI), our joint venture and award-winning provider of iLottery platforms and games. NPI helped pioneer the introduction of online gaming in regulated lottery jurisdictions in the U.S. and powers the most profitable iLottery programs in market.

Pollard Banknote offers our global lottery partners an ever-evolving portfolio of innovative products and services to help accomplish their business objectives and maximize proceeds for good causes. All of our marketing strategies and related services are designed with the express goal of elevating our lottery clients and creating the ultimate player experience. Our retail-focused products feature industry-leading instant lottery and charitable games, including patented and proprietary offerings as well as innovative tools and services for optimizing lottery operations. Our full suite of digital solutions includes world-class mobile application development, interactive games, player engagement platforms, iLottery systems and services, plus a variety of software solutions to help lotteries manage their operations effectively and efficiently. From outstanding game design and innovative merchandising to in-lane solutions and one-to-one marketing, Pollard Banknote continues to be a driving force in the lottery industry.





## **Alchemy3, LLC**

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

**Year of inception:** 2007

### **Contact:**

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### **Primary products and services:**

- Instant and draw game promotional executions
- Strategic business and marketing planning
- Integrated marketing programs
- National campaigns
- Premium branded games
- Digital solutions
- Loyalty programs
- Second chance drawing services

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

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



## **BerryDunn**

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*John Chandler, Managing Principal*

**Year of inception:** 1974

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### **Primary products and services:**

- SOC examinations and readiness assessments
- IT audits and reviews
- Security assessments
- Risk assessments and risk management consulting
- Compliance audits and readiness assessments
- Organizational change management consulting
- IT internal audit

BerryDunn is a full service Certified Public Accounting (CPA) and consulting firm providing IT assurance services to public gaming clients since 1995. A dedicated team focused on lotteries, iGaming, sports betting and other industry emerging products and services, we provide our clients with efficient and effective engagements that focus audits and other reporting needs on the specific needs of the industry. New for 2020: As the industry changes dramatically with new products and player offerings we are working with lotteries to understand and prepare for change using Prosci® Change Management practices on implementing ways to prepare and lead personnel through major changes.

**Lottery customers:** Scientific Games, Inc. (SOC examination services at operations sites in Arizona, Connecticut, Delaware, Illinois, Iowa, Maine, Maryland, Oklahoma, Pennsylvania, SG Gaming Game Development, SG Instant Ticket Game Development, SG iCore, and SG’s National Data Center, SG Netherlands igaming and sport betting), IGT (SOC examination services at operations sites in Georgia, Florida, Indiana, Kentucky, Michigan, Minnesota, Missouri, Nebraska, North Carolina, New Jersey South Dakota and Tennessee, and for IGT instant ticket operations; Texas Lottery Security Study Services and Oregon Lottery Organization Change Management Consulting Services other past clients include the Tri-State Lotto Commission and lotteries in New Hampshire and Rhode Island.



## Camelot Lottery Solutions

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**Year of inception:** 1994

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Camelot Lottery Solutions is the leading technology and solutions provider to lotteries around the world.

We help our customers reach new players and deliver responsible growth through increasing engagement, leveraging digital technology and providing new ways to play.

Our next-generation technology, platforms, e-Instant games and marketing solutions help to power some of the most innovative and fastest growing lotteries in the world, including the Illinois Lottery, the Arkansas Scholarship Lottery, the UK and Irish national lotteries, and Loterie Romande in Switzerland.

With more than 20 years of operator experience, we view the lottery through the lens of the business, taking a unique “player-first” approach to every aspect of the lottery mix. With integrated technology and strategic advisory partnerships, we help lotteries responsibly maximize player engagement, drive sustainable growth and accelerate benefits to the communities they serve.

We deliver a range of services and products based on powerful data-driven insights, helping lotteries better define the player journey and enhance the player experience. Because when players are engaged, lotteries grow, and communities thrive.

We have an unrivaled track record of delivering long-term digital and retail growth, supported by a history of integrity, security and transparency. Camelot Lottery Solutions is an accredited Responsible Gaming Supplier under the World Lottery Association Responsible Gaming Framework.

Camelot Lottery Solutions designs, builds and deploys technology and solutions to power the global lottery industry.



## Carmanah Signs, a Division of STRATACACHE

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

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

**Year of inception:** 1993

### Contacts:

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

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

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

A leading supplier to the global lottery industry for over 20 years, Carmanah is the Lottery & Gaming Division of STRATACACHE, the world's largest provider of intelligent digital media and in-store marketing technology.

Together, STRATACACHE and Carmanah have over three million digital media devices and 155,000 wireless jackpot signs at retailers globally, serving 55+ lottery jurisdictions and 700+ casinos on four continents. An associate member of five global lottery associations, and an ongoing sponsor and content contributor to numerous lottery industry events, Carmanah Signs is the only digital signage provider committed to the industry at this level.





**Delehanty Consulting LLC**  
Security, Integrity, and Performance

## **Delehanty Consulting LLC**

742 Basswood Ave  
Verona, WI 53593  
Phone (608) 832-1751

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

Herb Delehanty, Principal

**Year of inception:** 2003

**Contact:**

Herb Delehanty, [herb@delehantyconsulting.com](mailto:herb@delehantyconsulting.com)

**Primary products and services:**

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

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

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



## **EquiLottery Games**

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

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

Brad Cummings, Chief Executive Officer  
Austin Mayberry, Chief Technology Officer  
Kim Spalding, Chief Financial Officer  
Jim Acton, Business Development Consultant  
Kaitlyn Johnston, Director of Win Place Show

**Year of inception:** 2014

**Contact:** Brad Cummings, [brad@equilottery.com](mailto:brad@equilottery.com)

**Primary products and services:**

- Win Place Show®, a daily \$2 draw game based on the results of live horse races; it launched statewide through the Kentucky Lottery on August 16, with 40+ racetracks under contract and featuring premium races throughout the calendar year including the Preakness Stakes.
- A series of 10-game parlay tickets based on the results of top professional team sports leagues. In partnership with top brands including Major League Baseball (MLB) and the National Basketball Association (NBA), these are daily \$5 draw games based on the sport(s) running at the time. Baseball Bucks™, Slam Dunk Dollars™, Touchdown Treasure™, and Slap Shot Silver™.
- NASCAR Racing Riches™, a weekly \$5 draw game based on the results of a Cup Series race beginning with the Daytona 500 and ending with the Cup Championship.
- Services include central gaming systems, data licensing, player and horsemen negotiations, intellectual property licensing, multi-platform mobile apps, multi-channel marketing support, operational support, second chance raffle prizes, sports calendar development, sports league licensing, systems integrations, and video streaming.

Pioneers of the live sports game of chance category, EquiLottery Games made gaming history in 2020 by being the first company to launch a live sports lottery game in the U.S. with its horse racing game Win Place Show. This game is currently being offered through the Kentucky Lottery and marks the beginning of a new live sports category in lottery draw games.



## Gaming Laboratories International (GLI)

600 Airport Road  
Lakewood, NJ 08701  
Phone (732) 942-3999  
Fax (732) 942-0043  
<https://gaminglabs.com>

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

**Year of inception:** 1989

**Contact:** Blaine Preston, (702) 914-2220,  
[b.preston@gaminglabs.com](mailto:b.preston@gaminglabs.com)

### Primary products and services:

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

Gaming Laboratories International, LLC (GLI) is committed to delivering the highest quality land-based, lottery and iGaming testing and assessment services around the world. GLI provides suppliers, operators and regulators with expert guidance for navigating the future of gaming and ensuring gaming innovations meet regulatory standards with confidence. Since 1989, GLI has certified nearly two million items and has tested equipment for more than 475 jurisdictions.

GLI has a global network of laboratory locations across six continents, with U.S. and international accreditations for compliance with ISO/IEC standards for technical competence in the gaming, wagering and lottery industries. GLI was named "Responsible Business of the Year" by Global Gaming Awards in 2019 for its social responsibility in charitable giving, diversity and inclusion, green initiatives, and responsible gaming support and education. GLI is an associate member of NASPL, the World Lottery Association, European Lotteries Association and CIBELAE.

## GOLDENRACE

### GoldenRace

Ruby Court, Apartment 6  
Andrea Debono Street  
Birguma, Naxxar  
Malta  
Phone +34 952 124098  
[www.goldenrace.com](http://www.goldenrace.com)

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

**Year of inception:** 2006

**Contact:** George Vonapartis, (902) 877-7972,  
[gvonapartis@goldenrace.com](mailto:gvonapartis@goldenrace.com)

### Primary products and services:

- Virtual sports
- 3D sports: Virtual soccer, with single match, more than 20 leagues and tournaments (including World Cup and Euro Championships); 3D horse racing and trotting races.
- HD pre-recorded sports: Real fighting, 3x3 basketball and races (motorbikes, dogs, horses, dirt track, speedway and karts).
- Virtual number games: Spin2Win Royale American, Keno Deluxe and Perfect Six.

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

In addition, its portfolio has been prepared to cover the needs of three main industry branches: sports betting, casino and lottery. Because games can be delivered in three different ways, we are able to target the sports betting audience, and also casino and lottery players.

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

Licensed under various regulatory bodies around the world, GoldenRace has partnered with numerous market leaders and experiences excellent year-by-year growth globally. Currently, the company processes more than 15 million tickets daily in more than 50,000 shops and 400 online integrations worldwide.





## **GSTV**

1201 Woodward Ave  
Detroit, MI 48226  
Phone (313) 580-0600

<https://gstv.com>  
[gstv.com/lottery](https://gstv.com/lottery)

Sean McCaffrey, *President and Chief Executive Officer*

**Year of inception:** 2007

**Contact:** Nick Yacobucci, *Account Executive*,  
[Nick.Yacobucci@gstv.com](mailto:Nick.Yacobucci@gstv.com)

### **Primary products and services:**

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

GSTV is a national video network engaging consumers with full sight, sound and motion video. Reaching one in three adults 18+ steps from the convenience store; 68% of GSTV viewers are headed into the c-store.

GSTV delivers measurable results for the world's largest advertisers. With proven success, GSTV increased same day reported lottery ticket sales for a state lottery, driving a +31% lift in reported lottery ticket purchases<sup>1</sup>.

Brands win big on GSTV with an audience actively purchasing eight lottery tickets a month on average<sup>2</sup>.

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

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

<sup>1</sup>Mfour Lottery Client Study, Q4 2019. Reported lottery sales same day as fuel up, exposed vs. control.

<sup>2</sup>Nielsen DPB Fusion to 2019 GfK MRI Doublebase Study, A18+.



## **InComm**

250 Williams Street, 5th Floor  
Atlanta, GA 30303  
Phone (770) 240-6100

Fax (404) 601-1000  
[www.incomm.com](http://www.incomm.com)

Brooks Smith, *Chief Executive Officer*  
Stefan Happ, *President*

Tim Richardson, *Senior Vice President – Financial Services*

**Year of inception:** 1992

### **Contacts:**

Mark Smith, *Vice President – Sales & Marketing*, (404) 747-5130,  
[marksmith@InComm.com](mailto:marksmith@InComm.com)

John Houseal, *Vice President – Product*, (770) 815-3349,  
[jhouseal@InComm.com](mailto:jhouseal@InComm.com)

Craig Fitzgerald, *Senior Director – Product Management*,  
(678) 296-8276, [cfitzgerald@InComm.com](mailto:cfitzgerald@InComm.com)

### **Primary products and services:**

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

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

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



## INSPIRED

### **Inspired Entertainment, Inc.**

250 West 57th Street,  
New York, NY 10107  
Phone (646) 565-3861

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

[www.linkedin.com/company/inspired-entertainment-inc](http://www.linkedin.com/company/inspired-entertainment-inc)

Lorne Weil, Executive Chairman  
Brooks Pierce, President and Chief Operating Officer  
Steve Rogers, Chief Commercial Officer Digital Games  
Claire Osborne, VP of Interactive  
Lee Gregory, Chief Commercial Officer VLT and ETG

**Year of inception:** 2006

**Contact:** [inspiredsales@inseinc.com](mailto:inspiredsales@inseinc.com);

Contact our employees by email at [firstname.lastname@inseinc.com](mailto:firstname.lastname@inseinc.com)

Inspired offers an expanding portfolio of content, technology, hardware and services for regulated gaming, betting, lottery, social and leisure operators across retail and mobile channels around the world. The Company operates in approximately 35 jurisdictions worldwide, supplying gaming systems with associated terminals and content for more than 50,000 gaming machines located in betting shops, pubs, gaming halls and other route operations; virtual sports products through more than 44,000 retail channels; digital games for 100+ websites; and a variety of amusement entertainment solutions with a total installed base of more than 19,000 devices.

**Virtuals** – Inspired created virtual sports and is the top provider in regulated virtual markets worldwide. Inspired’s award-winning visual effects team has been creating the action and settings of some of the world’s most famous sporting events for 15 years. We provide a complete end-to-end online and mobile product solution that allows operators access to Inspired’s award-winning Scheduled Virtuals games with minimal integration effort.

**Server Based Gaming** – Inspired has a wide range of cabinets to address any market or venue type. Our cabinets are built to deliver unmatched player experiences, incomparable excellence, reliability and easy serviceability. They are powered by a premium platform technology, creating server-based gaming-ready cabinets that can deliver content to your players in record time and with astounding quality.

**Interactive Gaming** – Inspired offers a diverse portfolio of high-performing HTML5 games, currently available on over 100 top tier websites. Our games include branded content, well known omnichannel slots, international casino titles, leading table and number games, scratch cards and a suite of award-winning Virtuals games. Inspired’s close attention and insights into players’ preferences have paid off with online and mobile product launches that have drawn enthusiastic attention from customers and players.

## Jackpocket

### **Jackpocket**

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

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

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

**Year of inception:** 2013

**Contact:** Michelle Wong, [michelle@jackpocket.com](mailto:michelle@jackpocket.com)

#### **Primary products and services:**

- Ticket orders: Age-verified and geo-located players can place orders for official state lottery games such as Powerball and Mega Millions directly from their mobile phones.
- Lottery pools: Players combine their tickets in a shared pot for better odds. They can create private groups with friends or join thousands of players across multiple jurisdictions in Jackpocket’s Powerball and Mega Millions pools.
- Autoplay: Players can set up automatic orders using Quick Picks or their favorite numbers, so they never miss a drawing.
- Ticket lock: Jackpocket’s proprietary ticket-scanning technology ties a customer’s account to their ticket serial number, eliminating the risk of ticket loss or theft.
- Responsible gaming: Safeguards such as daily deposit and spend limits, self-exclusion, and in-app access to problem gambling resources promote responsible play.

Jackpocket is a mobile-first company helping to modernize and grow state lotteries. Our mission is to create a more convenient, fun and responsible way to play. As a no-cost, no-integration, turnkey platform, Jackpocket helps lotteries drive incremental revenue – benefiting essential state programs – by engaging traditional players while attracting new customers like millennials. Through the Jackpocket app, players can order tickets for their favorite games, check lottery results, join lottery pools with other Jackpocket players, and turn on Autoplay so they never miss a drawing. Jackpocket is the first third-party lottery service to receive responsible gambling certification from the NCPG’s Internet Responsible Gambling Compliance Assessment Program. As the first registered lottery courier service in New Jersey, the company also became the first lottery courier to be formally licensed in a U.S. jurisdiction.

**Lottery customers:** Arkansas, Colorado, Minnesota, New Hampshire, New Jersey, Ohio, Oregon, Texas, Washington D.C





## LD Plastics & Displays

1130 Pearl Street  
Brockton, MA 02301  
Phone (800) 256-5611, (508) 584-7651  
Fax (508) 580-9764  
[www.ldplastics.net](http://www.ldplastics.net)

Dana Hermanson, President  
Gary Hermanson, Vice President  
Regis Dufour, Vice President Sales

**Year of inception:** 1978

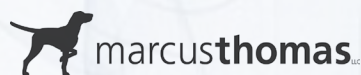
**Contact:** Danielle Simmons, (508) 584-7651,  
[dsimmons@ldplastics.net](mailto:dsimmons@ldplastics.net)

### Primary products and services:

- Instant ticket dispensers
  - On-counter
  - Wall hanging
  - Modular
  - All in one
- Point of purchase displays
- Signage/sign holders
- Bet slip towers
- Product merchandisers

LD Plastics & Displays is a long-time manufacturer of high-quality custom fabricated products. With over 40 years of experience, LD Plastics & Displays has worked diligently to achieve practical, effective solutions to merchandising and display demands for many consumer brands including the lottery industry. All multi-game units are easily modified to most any size and configuration.

**Lottery customers:** Colorado, Connecticut, Florida, Indiana, Illinois, Massachusetts, Maine, Minnesota, North Carolina, New Hampshire, Rhode Island, Virginia



## Marcus Thomas LLC

4781 Richmond Road  
Cleveland, OH 44128  
Phone (216) 292-4700  
[www.marcusthomasllc.com](http://www.marcusthomasllc.com)  
[www.mtlc.com/lotterytech](http://www.mtlc.com/lotterytech)

Jim Nash, Chief Executive Officer  
Chris Abate, Management Supervisor, Website and Application Development

**Year of inception:** 1937

**Contact:** Chris Abate, (216) 970-3753, [CAbate@mtllc.com](mailto:CAbate@mtllc.com)

### Primary products and services:

- Digital services and innovation
- Analytics and performance optimization
- Experience design and testing
- Sales and marketing automation
- Loyalty and player club development and service
- Retailer acquisition and management
- Research
- Strategic planning
- Creative services
- Media planning and buying
- Public relations and social media

Marcus Thomas LLC, with 230 professionals in its offices in Cleveland, Ohio, Buenos Aires, Argentina, and Santiago, Chile, is among America's leading independent advertising agencies with a long history of award-winning lottery advertising. Since the mid-1990s, the agency has also distinguished itself as a leader in lottery marketing technology, developing sophisticated websites and innovative loyalty, retail support and mobile technologies. Recently, the agency introduced a new cashless mobile payment application currently in use by Ohio Lottery.

**Lottery customers:** Ohio, Georgia, Mega Millions Consortium, and INTRALOT



## NeoPollard Interactive LLC

920 N. Fairview Avenue  
Lansing, MI 48912

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

[www.linkedin.com/company/neopollard-interactive](http://www.linkedin.com/company/neopollard-interactive)

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

**Year of inception:** 2014

### Contacts:

Doug Pollard, (204) 474-2323, [doug.pollard@neopollard.com](mailto:doug.pollard@neopollard.com)  
Moti Malul, (734) 353-4275, [moti.malul@neopollard.com](mailto:moti.malul@neopollard.com)  
Liz Siver, (734) 294-1695, [liz.siver@neopollard.com](mailto:liz.siver@neopollard.com)

Born in the digital domain, NeoPollard Interactive LLC (NPi) is an award-winning supplier of best-in-class iLottery solutions to the North American lottery market. Serving the largest share of U.S. lotteries that currently sell online, NPi helped pioneer the successful introduction of iLottery in the U.S. NPi offers cutting-edge technology, a full suite of managed services, and the industry's top performing game content, as part of its innovative and comprehensive approach to partnering for iLottery success.

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

**Managed Services:** NPi provides the broadest range of iLottery services in the market, encompassing player experience services and revenue-generating services. NPi's 24/7 Customer Support Center is an essential player experience service that provides email, chat and phone support for iLottery players. A flagship revenue-generating service, Customer Engagement Marketing (CEM), is paramount to a successful iLottery program. CEM serves lottery needs for analysis, player segmentation, and a full range of player funnel maximization to drive acquisition, conversion and retention strategies.

**Game Studio:** NPi's in-house Studio produces the most compelling iLottery content across eInstants, Instant Keno and Instant Lotto game categories to support diversified portfolios geared towards revenue maximization and player retention.

NPi is North America's proven partner of choice to enable regulated lotteries to design and deploy complex gaming solutions in support of generating incremental revenue for good causes through the online channel. Jointly owned by Pollard Banknote Limited and NeoGames S.a.r.L. – both globally recognized industry leaders – NPi powers the most profitable iLottery programs.



## Pro-Lite

3505 Cadillac Ave., Building D  
Costa Mesa, CA 92626  
Phone (855) 533-5225 / (714) 786-6001

[www.pro-litelottery.com](http://www.pro-litelottery.com)

Andy Kaoh, Owner/President

**Year of inception:** 1981

**Contact:** (714) 786-6001, [lottery@pro-litelottery.com](mailto:lottery@pro-litelottery.com)

Pro-Lite's lottery signage solutions are designed with sales generation in mind. Our patented technologies are proven to generate more awareness for the lottery jackpots – and awareness is essential for more sales.

Pro-Lite's lottery signage solutions include jackpot signs, logo signs, digital ticket menu boards, playcenter kiosk displays, promotional items and many more. Pro-Lite's LED product line now includes models for window, countertop, in-lane, floor, outdoor and billboard applications. Pro-Lite has also developed promotional marketing solutions for lottery keno games in several states.

Pro-Lite Inc. introduced LED technology to the U.S. in 1981 and has since supplied over one million signs to customers worldwide.

In 2000, Pro-Lite introduced updatable LED jackpot signage to the U.S. and holds the distinction of supplying New York Lottery with the largest lottery sign program.

**Lottery customers:** Over 100,000 LED signs have been made for more than 45 North American, Caribbean, Central American and European lotteries. Out of the 46 US lotteries, 40 are currently using Pro-Lite products. Internationally, Pro-Lite has supplied British Columbia, Ontario and Atlantic in Canada, Honduras in South America, and Switzerland and Italy in Europe.





## Public Gaming Research Institute (PGRI, Inc.)

218 Main Street, Suite 203  
Kirkland, WA 98033  
Phone (425) 449-3000  
Fax (206) 374-2600  
[www.PublicGaming.com](http://www.PublicGaming.com)

Paul Jason, Publisher and Co-Chief Executive Officer  
Susan Jason, Publisher and Co-Chief Executive Officer

**Year of inception:** 1975

### Contacts:

Paul Jason, (425) 449-3000, [Pjason@PublicGaming.com](mailto:Pjason@PublicGaming.com)  
Susan Jason, (425) 985-3159, [Sjason@PublicGaming.com](mailto:Sjason@PublicGaming.com)

### Primary products and services:

- Public Gaming International Magazine, published six times a year
- [www.PublicGaming.com](http://www.PublicGaming.com), an industry news website
- [www.PGRItalks.com](http://www.PGRItalks.com), for video-recorded presentations and interviews
- "Morning Report" e-newsletter sent out every Monday
- Three-times-a-week e-newsletters
- Smart-Tech: conference held annually (in March) in Miami
- Lottery Expo: conference held annually (in October) in Nashville

Public Gaming Research Institute is dedicated to the support and growth of lottery organizations around the world, government sponsored gaming of all varieties, preservation of responsible regulatory policies and the forging of an informed and enlightened approach to public policy issues. We do this by providing information resources, daily e-news services and in-depth commentary by experts and leaders in the gaming industry, and by keeping our readers and constituents abreast of the status of legal, political and regulatory matters that so affect our industry.

Our mission is to serve the government gaming industry. Our constituents include everyone who supports lottery and government gaming.



## Spectra Systems Corporation

40 Westminster St., 2nd Floor  
Providence, RI 02903  
Phone (401) 274-4700  
[www.spsy.com](http://www.spsy.com)

Nabil Lawandy, Chief Executive Officer  
Brian McLain, Chief Financial Officer  
Matt Pratap, Director ICS Operations

**Year of inception:** 1996

**Contact:** Matt Pratap, (604) 638-1719, [mpratap@spsy.com](mailto:mpratap@spsy.com)

### Primary products and services:

- ICS (internal control systems) for monitoring and auditing all forms of lottery – traditional draw games, instants, iLottery interactive, mobile and pari-mutuel gaming.
- Sports betting internal controls and reconciliation for regulators.
- Electronic RNG draw monitoring and auditing.
- Dashboard portal for at-a-glance game and draw status across all games.
- Central gaming system independent, our ICS interface supports all major gaming vendors.
- ICS operations are ISO/IEC 27001:2013 certified.

Spectra Systems is an established world leader in providing technology for securing transactions, from gaming to banknotes and brand protection. Spectra's Premier internal control system is the industry's most advanced ICS offering for realtime protection and is the leading supplier of realtime auditing, fraud control and risk management systems to government-sanctioned gaming operators. Prior to the strategic acquisition of the ICS business for regulated gaming markets, the company penetrated the currency and document security markets through a series of supply and licensing agreements with governmental, institutional and corporate partners.

**Lottery customers:** Spectra Systems serves over 20 lottery jurisdictions across the U.S. and worldwide; currently deployed in North America, the Caribbean, Europe and Asia. Premier Integrity systems monitor and audit more than \$25 billion in annual sales for lotteries and pari-mutuel organizations.



## Sportech

Icarus House  
Hawkfield Business Park  
Bristol BS14 0BN  
United Kingdom  
Phone +44 0117 902 9000  
[www.sportech.net](http://www.sportech.net)

Richard McGuire, Chief Executive Officer

**Year of inception:** 2000

### Contacts:

Julian Bewley, Chief Commercial Officer,  
[Julian.Bewley@sportech.net](mailto:Julian.Bewley@sportech.net)  
Dave Kurland, President, Bump 50:50,  
[Dave.Kurland@sportech.net](mailto:Dave.Kurland@sportech.net)

An international betting technology business, Sportech delivers solutions for some of the world's best-known gaming companies, sports teams, racetracks, casinos and lottery clients. The Group focuses on highly regulated markets worldwide with over 75 licenses held, more than 29,000 betting terminals deployed to over 400 clients in 38 countries and 36 US states, and global systems that process \$12.3 billion in betting handle annually.

Sportech offers a complete b2b gaming and lottery platform with 200+ different lottery draw games, unique games content and robust gaming management systems to handle player accounts, back office, content and marketing tools, payment solutions and responsible gaming.

Sportech's Bump 50:50 division provides platforms and services that help nonprofit organizations and foundations, many affiliated with professional sports teams, offer digital 50/50 and progressive jackpot raffle programs in-stadia and online. With a rapidly growing list of over 130 clients in North America and over \$51 million raised for good causes, Bump 50:50's raffles are vital to helping charitable foundations raise funds to support their charitable missions.

## Szrek2Solutions

### Szrek2Solutions

Corporate Headquarters  
60 Spencer Avenue  
East Greenwich, RI 02818 USA  
Phone (401) 398-0395  
[www.szrek.com](http://www.szrek.com)

European Operating Headquarters  
Rua Professor Antonio Cruz 291 6E  
Porto 4200-001, Portugal  
Phone +351 960 065 434

Irena Szrek, President and CEO, [irena@szrek.com](mailto:irena@szrek.com)  
Helena Pereira, Marketing Director, Global Point of Contact, (401) 692-2530, [helena@szrek.com](mailto:helena@szrek.com)

Szrek2Solutions is the lottery industry's leading supplier of random number generators (RNG) and electronic draw systems with provable integrity of random numbers and draw processes.

- Since 2003, Szrek RNG systems have generated and verified integrity of billions of random numbers, providing full transparency into RNG processes.
- Szrek's systems never experienced RNG problems, providing 100% availability for over 15 years of operation in multiple environments.
- Szrek's RNG system has been certified over 30 times and is independently attested for providing proof of integrity (non-repudiation).
- Szrek's scalable and flexible product architecture supports standalone offline systems, online automated systems, and multitenant systems that serve multiple clients and can be customized to meet clients' specific needs.
- All systems offer capability for remote operation and independent Trusted Audit™.

Szrek's philosophy, "when I play I trust," is to provide provable security, protecting lotteries and the integrity of their games. Szrek's Trusted Draw™ system protects its customers from RNG failures/fraud, and allows for fully remote or automated operations, guaranteeing continuity and security under all circumstances.

Partnering with leading vendors and lotteries, Szrek has deployed its systems on four continents. Customers include IGT, Scientific Games, and other vendors and lotteries throughout the United States and internationally.

[What is Proof of Integrity \(video\)](#)

[Bulletproof Independent Technology Review](#)

[Redefining electronic draw security \(whitepaper\)](#)

[Szrek product brochure](#)





## **Tilt Creative + Production**

23 S. 13th Street, Suite 301  
Richmond, VA 23219  
Phone (804) 346-3232  
[www.tiltcp.com](http://www.tiltcp.com)

Ron Carey, Founder and Chief Executive Officer  
Bill Hickman, Chief Growth Officer

**Contact:** Bill Hickman, (804) 346-3232 ext. 101,  
[bill.hickman@tiltcp.com](mailto:bill.hickman@tiltcp.com)

### **Primary products and services:**

- Retail and shopper marketing strategic support
- E-comm and digital content creative + production support
- Digital asset development for individual games
- Digital asset development for social channels
- On-demand, in-house creative team support
- Broadcast and digital video creative and production

Tilt C+P is a full-service creative + production studio built to easily complement the efforts of state lottery in-house content teams and their external agencies of record. We are expert at visual story-making and an ideal resource for lotteries to leverage when needed.

Our content teams have decades of experience partnering with hundreds of leading consumer brands like Audi, Capital One, P&G and Starbucks as well major retailers like Walmart, to develop and deliver impactful marketing content across every type of screen and environment.

Our “Power of +” creative production model makes every partnership unmistakably easy, efficient and impactful by concentrating all efforts under one roof and eliminating unnecessary hand-offs and markups.

We’re a proudly independent and minority-owned business. While based in Richmond, Va., our partnerships exist from coast to coast.

We are also active members in NRF (National Retail Federation), NMSDC (National Minority Supplier Development Council), ANA (Association of National Advertisers) and IHAF (In-House Agency Forum).



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**Again, NASPL would like to thank all of our 2020 Associate Members for their continued support.**

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