



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

INSIGHTS

MAY/JUNE 2021

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12112 22280 03007 18148 06885 00000 0000
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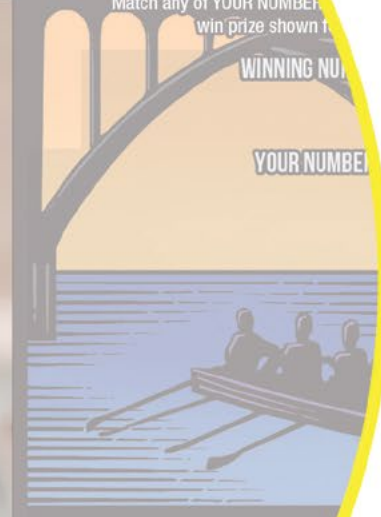
A	06	08	14	23	36
	02	09	19	23	35
B	01	10	21	25	33
	02	09	19	23	35
C	03	05	11	22	27
	02	09	19	23	35

Total: \$15.00

SIGN THIS TICKET BEFORE PRESENTING FOR PAYMENT

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Sun - Sat 24/7 24/7 03.11.19
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18113 22280 03007 18148 06885 00000 0000
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2 WIN UP
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Retirements Leave a Big Void

Lynne Roiter, Tom Shaheen
and Gordon Medenica

While we work in an exciting industry that provides a source of fun and entertainment, we have a saying: “We are serious about our fun.” Our profits benefit many great causes in our jurisdictions, including education, veterans’ programs, public works projects and so much more. Therefore, it is incumbent upon us that we focus on our product offerings, keeping games innovative, fresh and fun.

Our more mature lotteries were launched during a time when draw games ruled. In Georgia, Lotto South, Powerball, and Mega Millions – along with our daily Cash 3 and Cash 4 games – helped raise lottery awareness and generate play among consumers. Large jackpot games caught the attention of the media, and consumers became familiar with number games, looking forward to daily and weekly drawings.

The addition of Georgia FIVE, Fantasy 5, Keno!, Jumbo Bucks Lotto and Cash4Life to our draw game portfolio, as well as the price point expansion within our Scratcher category, have been instrumental in our continuing year-over-year growth and increased returns to fund our beneficiary programs – Georgia’s HOPE Scholarship and Pre-K programs.

As consumer demands have changed over the years, many jurisdictions have seen a tremendous shift in play, with instant games at the head of the pack. Fiscal year 2021, year-to-date, Georgia’s in-state Cash 3, Cash 4, Fantasy 5, and Keno! games make up 76% of draw game sales, while our Scratcher games contribute 67% of total sales.

In 2012, thanks to the foresight and hard work of our Board of Directors and executive leadership, we became an early adopter of iLottery, allowing us to offer Diggi Games, which generate 66% of iLottery sales. And to date, our mobile app has 3.4 million downloads and accounts for 68% of iLottery sales.

Over the past year, we experienced a 250% growth in our iLottery channel. As this trend continues and iLottery expands around the country, we need to be available through all channels where our players want to engage with us.

A recent addition to our draw game portfolio includes the introduction of Cash Pop in December 2019, launching simultaneously at retail and iLottery. Players who tell us they dream of winning the “Big Jackpot” nevertheless place value on the fun and excitement of just winning a prize. Cash Pop allows us to offer smaller prizes, with better odds, creating lots of Georgia winners and boosting game sales beyond forecasts.

This same school of thought of increasing smaller prizes has enhanced our Scratcher portfolio sales as well, where prize structures are now designed to provide more low- and mid-tier wins.

Scratcher games continue to be extremely important to our product portfolio. We continue to introduce new play styles, winning experiences, price points, and second-chance opportunities to win prizes. The Scratcher category appeals to a wide variety of our consumer base, presenting opportunities ranging from a \$1 game of fun to a \$30 multimillion-dollar prize jackpot.

Georgia also receives profit from Coin Operated Amusement Machines, which we are responsible for regulating.

In today’s world, consumers are looking for variety, immediate satisfaction, fun and convenience. The right mix of games and winning experiences is critical and remains our focused goal.

Congratulations to all of our jurisdictions and vendor partners who have recently invented and brought exciting new products to the market. Your innovation will continue to drive enhanced lottery sales.



Sending my best,

Gretchen Corbin
President and CEO,
Georgia Lottery Corporation
NASPL President



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Reimagine Next

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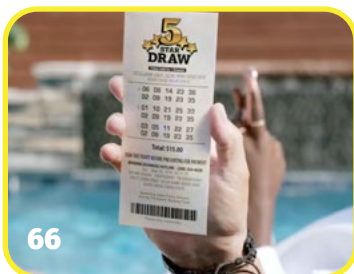
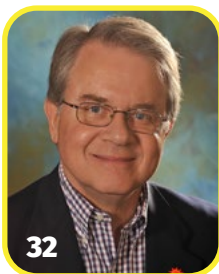
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Future Forward

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Take a \$hot!

The U.S. COVID-19 vaccine rollout is in full effect, and lotteries across the country are doing their part to encourage their jurisdiction's residents to get vaxxed.

By Mackenzie Whitacre



Shortly after COVID-19 vaccines became available to the public, U.S. states began offering innovative programs to motivate residents to roll up their sleeves and get vaccinated. The incentives started small – from a free park pass in Maine to a “shot” and a beer in New Jersey. In mid-May, however, Ohio upped the ante when Governor Mike DeWine announced the state’s Vax-a-Million drawing.

With this program, Ohio residents 18 and older who have received at least one dose of the COVID-19 vaccine can enter to win one of five \$1 million prizes. Ohioans between the ages of 12 and 17 who have received at least one dose of the vaccine can enter to win one of five four-year, full-ride scholarships to any state college or university in the state. Drawings are conducted by the Ohio Lottery, and winners are revealed

each week during the Lottery’s traditional drawings.

And the incentive seems to be working: “Since we came out with the Vax-a-Million, we’ve seen a dramatic change in the number of people getting vaccinated in Ohio,” said DeWine.

In fact, in the week following the announcement, the number of people in Ohio ages 16 and older who received their initial COVID-19 vaccine jumped 33%, according to the Associated Press. And by the May 23 deadline, more than 2.7 million adults had signed up for the \$1 million prize and more than 104,000 Ohioans ages 12 to 17 had entered the drawing for the scholarship.

The Kentucky Lottery was also an early supporter of state vaccine initiatives, teaming up with Kroger and Walmart to give out free lottery ticket coupons to any adult getting their

first or second shot. Across more than 170 locations, the Lottery gave out 225,000 coupons, redeemable at any lottery retailer, for Kentucky Cash Ball tickets. Kentucky Cash Ball is a nightly draw game with a top prize of \$225,000.

“We hope that by literally injecting a little fun into the process, more people will get vaccinated,” said Kentucky Lottery President and CEO Mary Harville. “This is good for Kentucky’s businesses, it’s good for the Kentucky Lottery, and it’s good for Kentucky college students counting on us through the scholarship and grant programs funded by our proceeds.”

Ohio and Kentucky were just the beginning.

Echoing Ohio’s Vax-a-Million, Colorado is handing out \$5 million – \$1 million each to five lucky winners – as part of the Colorado Comeback

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Cash vaccination incentive program. Winners must be 18 or older and will be chosen through a random drawing run by the Colorado Lottery. There are also scholarship prizes for those between ages 12 and 17.

In Delaware, Governor John Carney announced DE Wins!, giving vaccinated residents a chance to win \$5,000 in cash and additional prizes in twice-weekly drawings held by the Delaware Lottery. Other prizes including a four-day vacation, a full scholarship to a public Delaware university, annual Delaware State Parks passes, tickets and camping at Firefly Music Festival, and prize packages from other local partners. The program culminates at the end of June with a \$302,000 cash prize drawing, also conducted by the Delaware Lottery.

Just over the state line, the Maryland Lottery is working in collaboration with the state's Department of Health on a \$2 million Vax Cash promotion, in which vaccinated residents ages 18 and older are automatically entered into the daily lottery, featuring a \$40,000 cash prize each day. The final daily drawing will feature a grand prize of \$400,000.

New York Governor Andrew Cuomo introduced a Vax and Scratch program, awarding New York Lottery

tickets with prizes of up to \$5 million to those 18 and older who get vaccinated at one of 10 sites across the state.

The West Virginia Lottery took their own approach, hosting a drive-through vaccination clinic at Lottery headquarters. There are plans to hold a second one soon.

Down south, in Arkansas adults vaccinated after May 26 can get a \$20 Arkansas Scholarship Lottery scratch ticket, with a chance at winning a \$1 million cash prize. Non-winning ticketholders can also enter their ticket numbers into a drawing for a second chance at \$1 million.

Back out west, New Mexico has announced the Vax 2 the Max Sweepstakes, a vaccine incentive program that will make available \$10 million in total prize money to residents who receive their COVID-19 vaccinations, among other prizes and awards throughout the summer. Additionally, the New Mexico Lottery will bring 10 prize wheels to providers across the state; people who receive vaccinations at these sites will be eligible for a chance to win various prizes like New Mexico Lottery tickets.

On the coast, California's Vax for the Win program, coordinated by the California Lottery, includes a \$15



million cash grand prize, to be split between 10 vaccinated Californians, as well as "\$50,000 Fridays" cash prizes for 30 vaccinated Californians, and \$100 million in \$50 gift cards for the next two million new fully vaccinated Californians.

The Take Your Shot campaign, a collaboration between the Oregon Lottery and the Oregon Health Authority, offers residents ages 18 and up a chance to win a \$1 million cash prize for getting at least one dose of a COVID-19 vaccine; one person from each of the state's 36 counties will win \$10,000 as well. Oregonians ages 12 to 17, who are eligible to be vaccinated but are not old enough to play lottery games, will have a chance to win one of five \$100,000 Oregon College Savings Plan scholarships.

And the list continues to grow! At the time of this writing, more and more jurisdictions are exploring creative ways to boost their percentage of inoculated residents.

While the details vary from state to state, the funding for these programs has largely been provided by dollars from the federal Coronavirus Aid, Relief, and Economic Security (CARES) Act, under the Department of Treasury requirements for the \$2.2 trillion stimulus package passed by Congress last year to help states cope with the coronavirus pandemic.

U.S. lotteries will continue to support the cause and encourage public health, while adding a dose of fun and entertainment. And for the lucky winners, a lifesaving vaccine just may come with a lifechanging windfall of cash! ●

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Making A Difference

Jennifer McKee

Communications Manager
Montana Lottery

She may not be able to buy lottery tickets in Montana anymore – she was an avid player – but now that she’s part of the day-to-day operations of the Montana Lottery as the agency’s Communications Manager, Jennifer McKee couldn’t be happier.

“The unique perspective and heart Jennifer applies to her work at the Montana Lottery and the work supporting her community is so inspiring,” said Marketing and Sales Director Anne Charpentier. “She leads by displaying a genuine love of her profession, a love of her native state of Montana, and the easy ability to add an often needed laugh.”

McKee joined the Lottery in 2015, and as head of the two-person communications department she has her hand in a lot of different activities. Through social media content creation and website management, she helps with the Lottery’s brand awareness directly with customers. She answers information requests, provides press releases and talking points, and often does media interviews. With Communications Specialist Michelle Chandler, her office is also responsible for events and Players’ Club prize fulfillment. Answering to Charpentier in marketing and sales, McKee works closely with those in other departments as well, such as product managers and graphics design.

Much of her previous career was spent in journalism, covering politics and government for Montana’s largest newspapers. She points out that her experience with news – writing about what people care about – isn’t that different from marketing. “It’s knowing what it means to communicate with the Montana audience

and how they respond to anything you put out into the public sphere.” That experience also gave her extensive knowledge of the Montana Constitution along with legislative activities, learning how decisions are made as a society.

Most recently, the pandemic opened her eyes on one aspect of lottery operations – paying prizes and the winner experience. With most people shifting to remote work, accountants were some of the few who had to remain in the Lottery’s office. By necessity, they were the ones who started handling winners. “We always had it in our minds that winner stories are good marketing, so a lot of effort went into getting a good story,” explained McKee. “But what we’ve found in the past year is that it didn’t make any difference!” So even as the Lottery’s lobby is coming back to be a comfortable place for winners, the whole marketing-driven winner experience may be a thing of the past. “It sort of made sense – doesn’t winning a significant prize deserve some sense of formality? I think our larger winners actually liked calling to make an appointment to claim a life-changing amount of money, and having a serious conversation about the real things that would happen. I think that it’s an improvement for our winners.”

A Montana native, McKee earned a degree in journalism from the University of Montana in Missoula. But for a two-year stint for the *Albuquerque Journal*, covering Los Alamos National Laboratory, she has always lived in Montana. She was elected to the Helena Public Schools Board of Trustees in 2020.

McKee met her husband Jonathan while in New Mexico, and they have



two children (Maggie and Cormac). Her daughter, now 14, led her to her current passion; she’s a Girl Scout volunteer and troop leader, a role she has relished for almost a decade. Last year, when the world went virtual, the members of her troop (ages 12 to 14) all decided to continue meeting in person as much as they could. That meant staying outside, and in the Montana fall and winter, that meant cold and dark. “We got real good at using headlamps AND face masks, and climbed the mountains around Helena in the dark all winter long. It was so awesome how they embraced it!” She was thrilled how her girls handled themselves, adapting to challenges, learning to start fires and make survival shelters. “It was a really cool way to see these young women become more competent and confident because they have skills.”

While the Girl Scouts are a major part of McKee’s life, she enjoys typical Montana activities with her family – backpacking in the summer and skiing in the winter. She also spends time crafting and making candles, more activities she shares with her Scout troop.



Why did you take the job at the Montana Lottery?

After I left journalism in 2010, I went into communications for other state agencies. I learned a lot of what goes into marketing, like graphic design and social media, but I didn't do real marketing, with a real brand and real products for sale to the public. So I jumped at the chance to join the Lottery – it was a rare opportunity in Montana to work at the corporate headquarters of a large brand. There's also a fun similarity to my work in print journalism – everything is located in one building. When I worked for newspapers, everything from the story idea to the paper rolling off a printing press all happened in one location. Lottery is exactly the same, with an entire business located in one building here in Helena. It's really cool to work so closely with all the diverse parts that make a business happen. It has to be

good for sales somehow, but I can't quantify it. It's definitely good for our work experience, because it's fun for us to spend time together. COVID took us apart, but we are all looking forward to spending time together again.

Did your experience as a lottery player give you any unique insights that you have shared with the team? Did anything surprise you?

The Montana Lottery started in 1987 with a scratch ticket, and to this day Montana is a really strong scratch state. Many Montanans remember buying that first ticket, so you get the idea that “lottery” means “scratch tickets.” So I guess the thing that surprised me the most is that the Lottery operates a whole other line of games called Treasure Play. These are Fast Play-type games but they are only available in Montana's bars, taverns and casinos – locations with

a different kind of lottery license usually tied to a liquor license. I never knew these games existed.

I do think my experience as a player gives me some insights. For example, in our industry we often use the words “play” or “player.” Yet I don't think people buying lottery tickets think that they are “playing” anything, they are just buying something. We used to put “make a play” on our terminals, but really no one knows what that means unless they are in the industry. People pick their numbers or scratch tickets, make the purchase and do their dreaming. They don't consider it “playing.”

Are there any unique challenges handling communications for a very small lottery?

The funny thing is that we are a small lottery, but we're also in a small state with a little over one million in population. We don't really have a



sense of scale for what the Texas or California lotteries might be like, so we don't seem small. Any business operating only in Montana is like this. Sure, sometimes we feel like we can use more staff, and sometimes you just can't get as much done as you want. But the big upside is that we challenge ourselves – there's no other place where I could be building new social media campaigns for a sports betting product, managing a statewide brand, and doing all the other things that I do. It can be a lot of work but it's also an opportunity to be able to do all of that in one little two-person communications office.

How did your work life change when sports betting was added last year?

Well, from the communications point of view, it doubled almost everything. While our vendor manages the transactional website, we do everything else. We had to

create new social channels for Sports Bet Montana and plan new events around the product. While I like Twitter, I had to learn a whole new way of doing things with sports on Twitter. It was a challenge to figure out who uses that platform and how to communicate with them effectively. Of course, we launched Sports Bet Montana at the exact same time as the pandemic was declared, so it provided extra challenges in our launch. Here, bets can only be taken in selected liquor-licensed facilities like our bars, taverns and casinos, and we were never sure what places would actually be open. But one thing that worked out really great was the way the revenue distribution was designed – a significant portion of revenue stays with the retailer. So this past year in particular, when it was such a rough time for so many people, a little bit extra went a long way in the private sector. It helped

our retail partners at a time when they really needed a way to earn more money.

What do you like most about working for the Lottery?

Having your work product out in the public realm. It's truly fun to create a concept or social image on the creative side, put that out to the public and see them respond to it. Sometimes you can see them respond in the same marketing vein, like on social media, but you also see them respond in what they buy. I also like that the attitude and the personality of the Lottery is just plain fun – that is our brand! Finally, as a fourth generation Montanan, this state is really special to me. We market Montana back to Montana, so I'm marketing to people that I like. I feel like I understand Montanans, and that just makes the whole thing really great. ●

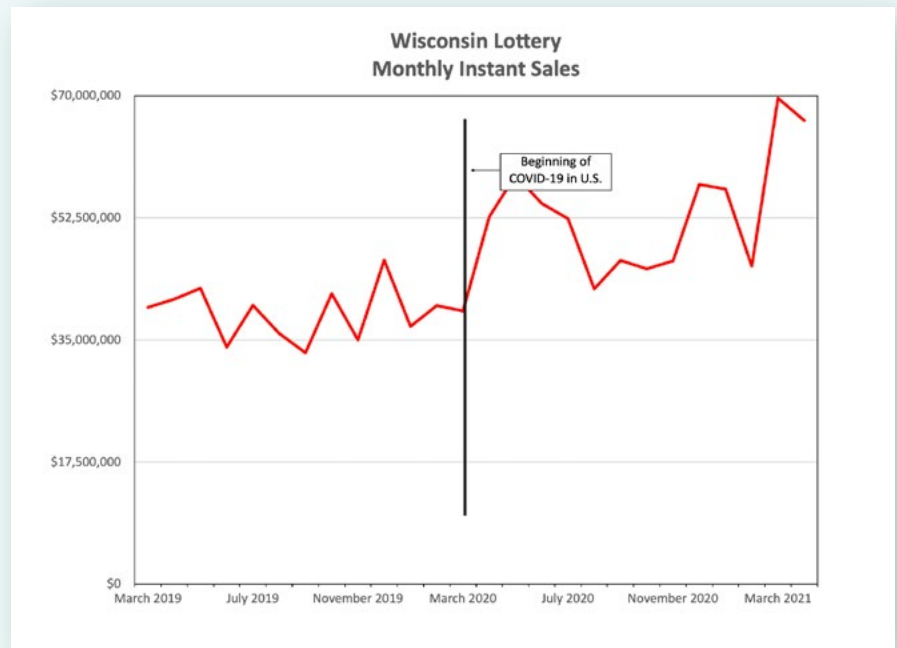
Scratch Game Sales During the Pandemic



By Stephen Schelb
Instant Game Research Analyst, Wisconsin Lottery

The COVID-19 pandemic dramatically changed the way people participated in leisure activities. Many traditional avenues for leisure activity and discretionary spending were closed in 2020, but lottery remained one of only a few entertainment activities that were accessible and could be enjoyed from the safety of home. The Wisconsin Lottery conducts marketing research studies that track not only lottery participation and spending, but metrics for other forms of gaming such as casinos and taverns. During the pandemic, there were few alternatives to casinos, taverns and other forms of gaming during a very unusual time. As a result, lottery sales in Wisconsin, particularly scratch games, soared.

In FY20 (July 1, 2019, through June 30, 2020), Wisconsin Lottery scratch games posted their ninth consecutive year of record sales at \$513.0 million, a 13.9% increase over the previous year's record of \$450.4 million. Sales in FY20 can largely be attributed to increasing demand for higher price point tickets (\$10 and higher) and to a very strong fourth quarter of scratch game sales overall.



During the year, sales of higher price point games increased significantly compared to FY19: \$10 game sales were up by 12.7%, \$20 games by 21.9%, and \$30 games by 43.6%. Price points at or above \$10 accounted for 56.4% of total scratch games in FY20. And it was that record-setting fourth quarter that pushed the annual

sales to the highest in Wisconsin Lottery history.

These trends towards more sales of higher price point tickets in Wisconsin follow general trends in the lottery industry. Each month in the fourth quarter of FY20 had sales well above \$50 million, resulting in total scratch game sales for the

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Although the “new normal” may have become somewhat of a cliché phrase over the past year, the big question for Wisconsin and many other lottery jurisdictions going forward is what will the new normal be for sales.

quarter of \$165.7 million, a 41.5% increase over the same period in FY19. It appears that with other avenues for entertainment closed during the pandemic, demand for scratch tickets increased. Since Lottery products are sold in two of the retail channels that remained open throughout the pandemic, c-stores and grocery stores, our products remained in front of customers, likely resulting in very strong sales.

As the pandemic is easing, over a year later, scratch game sales in Wisconsin continue to be strong, as seen in the chart. FY21 will be another record year for scratch game sales, our tenth in a row. With a little over a month remaining in the fiscal year, through the week ending May 22, year-to-date scratch sales were already over 12% ahead of last year’s record level. Even as Wisconsinites return to a more typical way of life, sales have not yet backed off. Just in April, scratch sales hit their highest monthly total in lottery history and were 26% higher than April 2020, when the pandemic was in its early

weeks. Throughout the past year, monthly sales of scratch games have averaged 34% higher than in the 13 months leading up to this COVID-19 period.

Although the “new normal” may have become somewhat of a cliché phrase over the past year, the big question for Wisconsin and many other lottery jurisdictions going forward is what will the new normal be for sales. Ongoing research like Wisconsin’s Tracking Study will help answer this question, but more targeted research will be needed in the coming months to better understand this lift in sales. Other potential research includes online or in-person focus groups, new player research, and research with our online player panel to better understand purchase and play habits over the past year. Perhaps even more important than understanding player habits will be understanding why newer players find lottery games appealing, and then using that knowledge to continue to engage and grow new player segments through product development and marketing efforts. ●



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An Extra Special Anniversary

With a 30% profit mandate, the New Mexico Lottery has its share of challenges, but a bold new strategy is making for happy players and helping provide a great message for the organization's 25th anniversary.

By Patricia McQueen

New Mexico was the first state to pass lottery legislation after the wildly successful first years of the Georgia Lottery and its groundbreaking HOPE scholarship program, and not surprisingly, the Land of Enchantment followed in Georgia's footsteps. From its start in April 1996, New Mexico Lottery proceeds have funded Legislative Lottery Scholarships to the tune of some \$890 million. To date, more than 134,000 students from across the state have attended New Mexico public colleges, universities and technical colleges with the help of these scholarships. And that's something that hits home in a very personal way for the Lottery's Chief Executive Officer David Barden, who has been at the helm since late 2013 after stints with the startups of the South Carolina Education Lottery and the Arkansas Scholarship Lottery.

"One of the reasons I got into lottery, and wanted to be with a state that funds scholarships, is because I paid my way through school," explained Barden. "I had student loans when I got out, so I know the value of helping a student get out



of school without having student debt. Anytime a student gets to go to school for free, I think that's a win-win situation."

So it's not surprising that when asked about the New Mexico Lottery's most important achievement over 25 years, Barden replied quickly. "It's all about the students and the scholarships. We are excited to have a big anniversary and we'll keep raising more money for the students."

Certainly the current year is going to be a good one, with a bold new Scratchers initiative providing a big boost along with a couple of big jackpot runs in the national games. That all couldn't have come at a better time based on struggles in 2019 and early 2020.

By law the New Mexico Lottery must return 30% of its sales as profits to the Lottery Tuition Fund, primarily for those all-important Legislative Lottery Scholarships. That money has to be paid monthly, leaving precious little leeway for the natural ebbs and flows of lottery sales, particularly jackpot games like Powerball and Mega Millions. When those games

New Mexico Lottery at a Glance

	Scratchers Sales	Draw Game Sales	Total Sales	Total Prizes	Net to Education
FY 2020	\$79,313,453	\$47,739,708	\$127,053,161	\$68,288,867	\$38,146,935
FY 2019	74,941,122	68,689,613	143,630,735	77,040,374	43,109,939
FY 2018	72,291,175	61,737,934	134,029,109	73,142,478	40,218,983
FY 2017	72,398,832	53,642,432	126,041,264	67,184,150	37,835,459
FY 2016	83,105,873	71,238,895	154,344,768	84,754,383	46,324,157

Current games:

Scratch tickets: Approximately 58 new games launched in FY21; \$1, \$2, \$3, \$5 and \$10

Terminal games: Powerball, Mega Millions, Lotto America, Roadrunner Cash, Pick 3 Plus, Pick 4 Plus, Fast Play

Vital statistics:

Number of employees: 33

Number of licensed retailers: 994

Vending equipment: 192 Self Service Lottery Ticket Machines



grow, they bring extra attention to all the Lottery’s products, but the reverse is also true. As last year (FY20) progressed, a big drop in the jackpot games was felt in Scratchers sales too, especially when the Lottery couldn’t enhance those products to meet industry best practices because of that profit mandate.

“We got to a point where we knew we soon wouldn’t have sufficient funding available to actually meet the 30% monthly return,” said Barden. “That’s when I began to consider something that had probably not been considered in North America – launching nearly every instant game with a 54% payout.”

Success at 54%

Normal industry thinking says that players need higher prize payouts to keep them playing and to provide the value they are looking for, especially as they move up the price points. But done correctly, this alternative theory can put

more prizes in the lower tiers, so that players end up winning even more than they would on a “normal” ticket. “I think I scared my staff when they saw I was considering something totally new like that,” Barden said, chuckling at the thought.

As it turns out, the strategy worked. In early 2020, just before the effects of the pandemic, the Lottery replaced its entire lineup of Scratchers – which had payouts that varied from about 54% on a \$1 game to maybe 64% on a \$10 game (still lower than industry standards) – with games that all had a 54% payout. It’s still a tight margin, and the Lottery still has to depend on short-term boosts in jackpot game sales and even a few unclaimed prizes, but with good management the math works.

Better yet, with more prizes moved to the lower tiers, there are more winners! “Players want to see winning experiences, and we now see more winners than ever,” noted Barden. Previously, in a typical New Mexico Scratchers



game there would be less than a handful of top prize winners, so very few people ever win big and too much of the prize structure went to funding those top prizes. By reshuffling the deck, there are far more winners and a better overall experience for players. “You can make four people happy with a big prize, or 100 to 200 people happy by having more prizes in the lower tiers. Everybody wants a chance to win, and if you give that to them, they play more because they enjoy the games more.”

Given a choice, of course, he’d rather not have been forced down this path, but faced with the reality of meeting a statutory requirement, you have to do what you have to do. He hopes that eventually the mandate will be lowered or even removed. But even if that happens, the recent experience will keep a lot of prizes in the lower tiers going forward. The top prizes may be lower than they used to be, but now players know they have a decent chance to win a solid \$100, \$500 or \$1,000 prize.

For Barden, it has all helped bring back a fundamental reason why

people play lottery. “From time to time, we get away from understanding that people just want that chance to win. If they win more often, they’ll feel good about it and they’ll tell someone. So I think that’s one of the things that we reestablished.”

The Thousandaires Campaign

All those new winners even handed the Lottery a clever new marketing campaign – Thousandaires. “When we changed the prize structures and the game mix, we created so many \$1,000-plus winners and even \$500 winners,” explained Director of Advertising and Marketing Wendy Ahlm. “We started thinking that we needed to keep a list going of all these winners!”

That’s how “Thousandaires” was born. A dedicated page on the Lottery’s website keeps a running list of all winners of prizes in the thousands. “We started seeing a hundred of them a month, and that’s really a lot for us.”

The campaign has been very positive, getting back to the basics

of players winning a satisfying prize – and no, a satisfying prize doesn’t have to be in the millions! “Players are enjoying all the wins at this level, so it’s been very well received,” added Ahlm.

While the Thousandaires campaign came naturally, other marketing efforts are more challenging given the 30% profit mandate. That’s one reason why Thousandaires has become so important – it’s easy to implement and has had such an impact. For taking advantage of the opportunity, and for finding other budget-friendly ways to build campaigns, Barden praised his team of marketing and graphics professionals.

“We have a very creative staff in marketing, and they create everything we do in-house,” said Barden, adding that the Lottery even has its own recording studio. For a lottery on a tight budget, it all helps save money.

Saving money is also the idea behind the current advertising program. All media buys are made for an entire year in advance, a “fantastic strategy” implemented by Barden,



explained Ahlm. In most years – the exception being any year where there’s an agency RFP in progress – the Lottery will negotiate each spring for the next fiscal year’s media buys. “Our ad agency is very good about working with our media partners, which often provide a lot of added value.” That might include low-cost or no-cost spots, trips that can be used in second-chance drawings, or various other items or perks that otherwise might be too expensive to fit into the Lottery’s budget. “That annual media buy is one of the most critical things we do that provides the most bang for our buck,” she said.

The Lottery team also maintains great relationships with all of the radio stations throughout New Mexico. Anytime a new promotion comes up, dozens of stations jump in depending on their availability. “We provide them with the prizes, and they promote our messaging and do giveaways with their listeners,” said Ahlm. “It’s a fantastic partnership that helps us with added value as well.”

She’s looking forward to resuming more normal events and promotions as the nation tries to put the pandemic in the rear-view mirror. As with every other lottery, most in-person events were curtailed and there likely will be lingering changes in the way things are done. That’s especially challenging for a small lottery with a small staff.

Everything Gets Attention

Meanwhile, the 25th anniversary celebration is in full swing. Every product will get attention in an effort to share the momentum that has come from the Scratchers makeover. “We want to continue our recent success, rewarding our players and keeping them engaged,” noted Ahlm. “The timing of our 25th anniversary was perfect for us to be able to offer an entire well-rounded set of promotions.”

Exciting new Scratchers are on the schedule, such as WILLY WONKA GOLDEN TICKET™ in July. Local pride will be showcased with a lineup of “Show Me” games this fall, featuring things to see and do in New Mexico in a boost for travel and tourism now that things are opening back up after pandemic-related restrictions.

There’s also an emphasis on second-chance drawings. For example, a Big Scratchers promotion is running through November, with monthly drawings for \$500 prizes. WILLY WONKA GOLDEN TICKET will have an exciting second-chance opportunity to win a trip to Las Vegas for a chance at the EVERLASTING MILLION CHALLENGE, where a lucky player could receive a million dollars a year for life.

“Our overall strategy is to really have a lot of added value opportunities for our players with more chances to win through second-chance drawings and other promotional activities,” explained Ahlm. “Combined with all the \$500 and \$1,000 prizes that are coming from our new Scratchers lineup, and we are giving some great prizes back to players.”



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But it's not just Scratchers that are getting the royal treatment. "We are trying to do things that will help other games that don't get very much attention," said Barden. While Powerball has strong name recognition in New Mexico, and the First Millionaire of the Year promotion will help ring in Powerball Monday drawings in August, other games sometime get lost on the promotional schedule.

So, it all started off with a Lotto America coupon-driven promotion running this May and June, offering eight weekly drawings for \$1,000 each – creating even more Thousandaires! And in early June, the Lottery relaunched its daily numbers games, which became Pick 3 Plus and Pick 4 Plus. New ways to win plus a chance to win \$50 for an extra \$1 play are all designed to give players a better experience.

Looking further ahead, Roadrunner Cash will be the focus in October, followed by a promotion for Pick 3 Plus and Pick 4 Plus. The anniversary year wraps up early next spring with plans for a Mega Millions promotion. "We are really trying to take our portfolio and create these fantastic promotions for our players throughout the year," emphasized Ahlm.

In addition to the game promotions, she has rolled in a series of radio and social media promotions, including ridiculously easy and fun trivia contests that will keep the focus on Lottery proceeds – the scholarships awarded to students through Lottery funding.

Importantly, she hasn't forgotten about one group that is critical to any lottery's success – retailers. At press time, details were still being developed on promotions designed just for the retailers who sell the games. "We have to thank our retailers and give them chances to win cash prizes as well."

On the Horizon

With so much promise realized over the past year, and a full slate of activities over the coming year, everyone at the New Mexico Lottery hopes there's even more to come.

Given the smashing success of the Scratchers line, Ahlm is extra excited about the holiday tickets that are in the works for later this year. All were designed in-house, and for the first time all holiday games will have themes unique to New Mexico, and highlighted by stunning artwork.

Barden looks forward to any changes that may come with Powerball and Mega Millions. As mentioned, Powerball gets a third draw night, but he believes it should also expand to international markets. "The added population would help the game." He's not so keen on add-on options, but is open to increased ticket prices to help the jackpots grow faster. "Everything goes up in cost, and we've had these games at \$2 for so long now." Whatever the industry decides, Powerball and Mega Millions are critical for lottery success. "We have to have these big games to balance our portfolios and our returns to our beneficiaries."

He's also keeping a close eye on in-lane developments in other states. "We have to find ways to make it easier on our players to play. If you are going through the grocery line, why should you have to go to customer service to buy a lottery ticket? It's a no-brainer to offer in-lane sales, but it does matter how you do it and the costs that are involved." With that mandate always looming, it's important for New Mexico to offer options that bring in new revenues while controlling the costs of doing so.

To that end, he's had discussions with Jackpocket, a company with an existing business relationship with Circle K, which happens to be one of New Mexico Lottery's biggest retail chains. "In theory they could partner with an existing lottery retailer and provide a mobile play option that would increase sales at no cost to the Lottery. We're always looking for ways to move the needle."

The pandemic, and its related shutdowns that created a widespread work-from-home reality, brought into sharp focus the need for lottery products to be sold online. "This is what we need to move to in the future," said Barden. He also thinks parlay sports wagering, more like a traditional numbers game and not full sports betting, could significantly increase the revenues the Lottery earns for Legislative Lottery Scholarships. He noted that both initiatives are under consideration by the Lottery's Board of Directors. "We will be asking them for guidance. Hopefully it's just a matter of time." ●

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Retirements Leave a Big Void

The lottery industry is saying “so long” to more than 80 years of expertise this spring, as Lynne Roiter, Tom Shaheen and Gordon Medenica are all retiring from their posts as chief executives of Loto-Québec, Mississippi Lottery Corp., and Maryland Lottery and Gaming, respectively.

Lynne Roiter stepped down as President and Chief Executive Officer as of May 31, after having served with Loto-Québec in a few capacities since first joining the organization in 1985. It’s a remarkable run of more than 35 years with the same organization. She started as Director of Legal Affairs, became Corporate Secretary and Vice President of Legal Affairs in 1996, and took over the helm as President and Chief Executive Officer in 2017 (after first serving that role in an acting capacity). Roiter also served on the Board of Directors and Executive Committee of the Interprovincial Lottery Corporation, and as a member of the Executive Committee and Secretary General of the World Lottery Association. She will continue

in the latter role for the time being.

Tom Shaheen’s retirement is effective June 30, and he’s been in the lottery industry since 1987 – almost as long as Roiter, but with multiple lotteries, and a vendor, on his resume. Launching the Mississippi Lottery in 2019 was not his first lottery start-up – he also led the North Carolina Education Lottery to a very successful beginning in 2005, served on the executive team at the launch of the Georgia Lottery, and worked at the Texas and Florida lotteries during their startups as well. If that isn’t enough, Shaheen also spent five years as Chief Executive Officer of the New Mexico Lottery, and before becoming the first employee of the Mississippi Lottery, he was an executive with Linq3. He has been active in industry associations, including terms as President of both the North American Association of State and Provincial Lotteries and the Multi-State Lottery Association.

Gordon Medenica, whose retirement was effective June 1, is the relative newcomer in this group,

starting his lottery career as Executive Director of the New York Lottery in 2007 after a long career as an executive in the publishing industry. During his five years in New York, he oversaw continual growth and the development of the video gaming industry, experience he eventually took to Maryland. There, the state’s largest casino opened in 2016, about 18 months after Medenica was appointed Maryland’s Director in 2015. Between the two lottery terms he served as transitional CEO of the Northstar New Jersey Lottery Group, which manages sales and marketing functions for the New Jersey Lottery. He has also served as President of the North American Association of State and Provincial Lotteries, as a regional director on the NASPL Executive Committee, and also as Lead Director of both the Mega Millions and Cash4Life consortiums.

That’s a whole lot of industry knowledge to lose within the span of a single month, so we asked each of them for some parting thoughts about the industry they have served so diligently. We wish them well!

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Lynne Roiter

What do you consider your key accomplishments in the industry?

When I joined Loto-Québec as head of its legal department, one of my first files was successfully defending our initial sports betting offer in the courts against the powerful North American sports leagues. The fact that these same organizations now support sports betting is a sign of just how much things have changed.

Over the years as I moved on to become Loto-Québec's Corporate Secretary and Vice President of Legal Affairs, I played an integral role in the diversification of the company's business lines to include casinos and their hotels, a video lottery network, network bingo, omnichannel online gaming, joint ventures in Québec and France, and the list goes on.

The past years as CEO have been particularly rewarding, growing our net revenues by 10.3% notwithstanding all our vertical being in a mature market. Loto-Québec's ability to be innovative and agile in changing times is noteworthy.

On the international front, I am proud to have been associated with the creation of the World Lottery Association in 1999 and serving over all these years as its Secretary General. Being an integral part of the Association's growth and pertinence in the lottery world has been very rewarding for me.

How important are international lottery associations, such as NASPL and the WLA, to the lottery industry, and how do lotteries benefit from all that institutional knowledge?

The importance of the WLA and NASPL, as well as the other lottery

regional associations, cannot be overstated. Our industry is unique in that our members do not compete with each other, and they all have the mission to contribute to the common good. Consequently, there exists a distinctive openness to share knowledge, experiences and best practices; lottery associations provide a unique forum to do so. The certification programs for responsible gaming and security are two examples of this. The cooperation between the WLA and NASPL has grown over the years, enabling our members to benefit and learn from each other. Globalization has shown that regardless of where our lottery members are located, they face many of the same challenges; having recourse to how other members have met these challenges is extremely valuable. I know, speaking for Loto-Québec, that this is true.

On a personal level, two of my special memories were working with NASPL to organize its convention in Québec City in 2004 as well as the World Lottery Summit in Montréal in 2012. I look forward to a repeat performance for WLS 2022 in Vancouver.

What do you see as the biggest challenges for Loto-Québec, and the greater lottery industry, over the next few years? The biggest opportunities?

With COVID-19 and the closing of our land based establishments, we have seen exponential growth in the number of customers playing online on our website. Loto-Québec has paid particular attention to ensure that we have enhanced our RG measures so that this is done safely. With our eventual reopening, we will have to ensure that the highest sanitary

standards are in place; the health of our employees and clientele is of utmost importance.

The competition lotteries face from non-regulated operators will only intensify in the coming years. We have to be able to meet the challenge – an omnichannel competitive and innovative offer is key to our success. As well, it will be increasingly important for state sanctioned lotteries to build on the goodwill they have established over the years by showcasing their commitment to social responsibility, responsible gaming and their contribution to good causes.

What's next for you?

Although I am retiring from Loto-Québec after a fulfilling 35-year career, I'm not retiring from life. It has always been important for me, as a person, to feel I am contributing to society and I hope to be able to continue to do so but in a less time-consuming way. I definitely plan on spending more time with my family, and I especially look forward to taking extended ski holidays with my grandchildren. ●

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It has always been important for me, as a person, to feel I am contributing to society...



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Exercise extreme patience because you will be juggling many initiatives, and be prepared for something to unravel that you thought you had worked out or resolved.

Tom Shaheen

What do you consider your key accomplishments in the industry?

When I first started out in the lottery industry as a sales representative at the Florida Lottery in 1987, I didn't know anything about lotteries and at the time had no intentions of staying long term. Honestly, I was out of work and needed a job. I was born in Michigan and resided there the first 25 years of my life. Michigan approved a lottery in 1972, but I didn't even know Michigan had a lottery prior to joining the Florida Lottery.

With this historical knowledge as a preface let's get to the answer to the question. My key accomplishments were advancing my career through several positions of increased responsibilities at the first three of the six lotteries I have had the pleasure to be a part of, and becoming director of the second three lotteries, two of which I started from the ground up. Throughout my career, I was able to work with and help shape the career paths of many individuals who also went on to advance their careers in the lottery industry. Many of them rose from entry level and lower-level management to positions in senior management, as well as becoming lottery directors themselves. In addition, I helped shape the lottery industry by encouraging all U.S. lotteries to cross sell Powerball and Mega Millions and to introduce the \$2 price point for draw games.

There are still a few American states without a lottery. As someone who has been involved in several lottery startups, what words of advice would you give a CEO starting a new lottery?

I could go on for pages, but at the highest level:

- Have a portfolio of industry resources (people) you can call on for input, guidance and general assistance, and in some cases offer employment to them.
- Have a detailed task sheet for each day planned by day, week and month.
- Be prepared to make quick and logical decisions on a day-to-day basis.
- Be a very good listener.
- Exercise extreme patience because you will be juggling many initiatives, and be prepared for something to unravel that you thought you had worked out or resolved.
- Be prepared to work many long hours; peak weeks could reach 75 to 80 hours.
- The first week will be very lonely and you will be the only employee, so hire staff rapidly.
- Ask everyone you hire if they know people with requisite skills in various fields that may want to come to work at the lottery.
- Know the lottery business as well as general business requirements. Remember, you are building a business from the ground up – you are inheriting nothing.
- Keep the work atmosphere lighthearted but always moving forward.
- Work harder than everyone else.

What do you see as the biggest challenges for the Mississippi Lottery, and the greater lottery industry, over the next few years? The biggest opportunities?

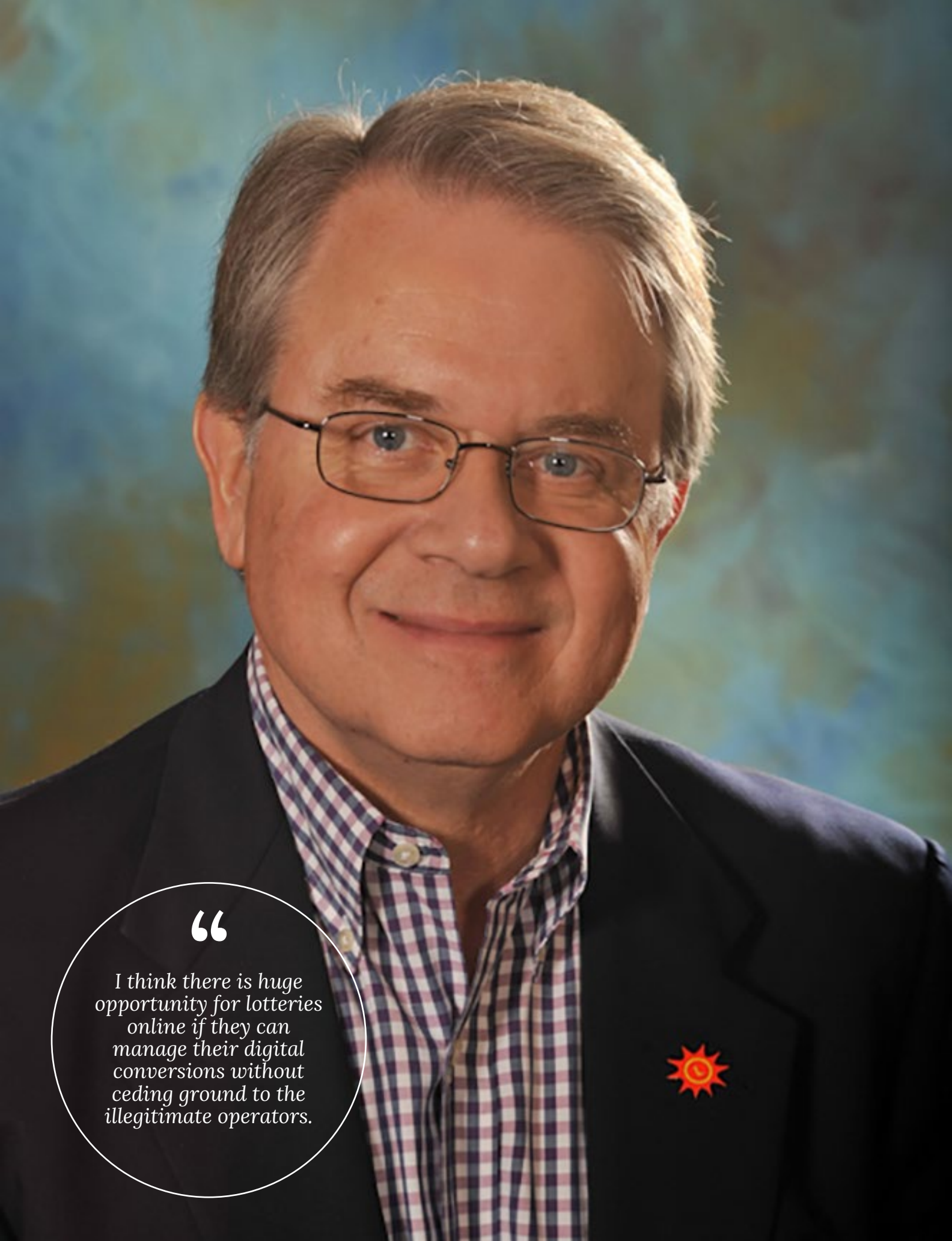
By law, the Mississippi Lottery Corp. is limited to offering traditional lottery draw games and instant tickets through traditional distribution channels. To ensure long term growth,

the state of Mississippi will need to consider expanding to other types of games and distribution channels available and already in place at several U.S. lotteries. That's the biggest challenge.

Although I have been here almost two years, the Lottery has only been up and selling for about 18 months. Sales and returns have been stronger than anyone anticipated. The retailer base is continuing to increase, so growth for the short term should continue. Opportunities for long term growth include introducing an informational and interactive mobile app for players. By law the app must be non-transactional; lottery tickets cannot be sold and prizes cannot be paid on a mobile device. Adding this service will prepare the Lottery to be in tune with the next generation of lottery players. Another opportunity is mobile and internet sales; however, this would require a legal change.

What's next for you?

Other than spending time with my family, maintaining my home, and looking for my next endeavor, I have nothing planned at this point. I don't know that I can last more than a day with having some type of job. I do know this much – whatever it is, I doubt it be full time and definitely will not be full time plus. But I enjoy working, keeping my mind stimulated, interacting with others, and helping others build their careers. ●



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I think there is huge opportunity for lotteries online if they can manage their digital conversions without ceding ground to the illegitimate operators.



Gordon Medenica

What do you consider your key accomplishments in the industry?

Probably the most significant accomplishment for the long-term health of the industry was the 2011 Department of Justice opinion on the Wire Act, which essentially legalized lotteries going online. Despite an attempt by the Trump administration and Sheldon Adelson to reverse that ruling, the original 2011 opinion still stands. All credit to Bill Murray, my General Counsel in New York at the time, for pushing the idea and getting Illinois to join in our arguments to the DOJ.

Other accomplishments worth noting include the creation of the instant “Black Ticket” in New York, one of the most successful instant tickets ever, imitated worldwide. I’m also pleased with the seamless and successful conversion of the sales and marketing functions to private management in New Jersey back in 2013.

Lastly, I’m very proud of the work that the Mega Millions Consortium did in fighting the threat of illegal lotteries and unauthorized resellers. I think the rise of the parasite lotteries is a long-term existential threat to the lottery industry, as we are seeing in Europe and elsewhere. The threat comes from losing our special status as monopoly operators of lotteries in North America. Having to compete with private lotteries will lower our sales and reduce our profit margins, ultimately shrinking our contributions to good causes. The primary tool we have in fighting these entities is to beat them at their own game by going online and selling our products digitally; the industry needs to be much more aggressive in expanding via the internet. If we sold our own

products online, it would negate the need for resellers and other short-term stopgap entrepreneurs filling that segment of consumer demand.

There’s a lot of concern about the big national games – what are your thoughts about their future?

I think the big national games – Mega Millions and Powerball – have a very bright future. Despite some sales volatility in recent years, they continue to evolve in order to appeal to players far into the future. While these two games represent less than 10% of industry sales, they have outsized impact in terms of brand value and consumer recognition.

Also, having two big national games has tremendous value, giving us strategic options, alternate governance models and different marketing opportunities. Of course, as I write this, we are in the middle of another great jackpot roll series and this fiscal year will likely show a recovery in total category sales from the trough of Fiscal 2020. In the meantime, Powerball will launch a third draw day. The Mega Millions Consortium will closely monitor the change, while also analyzing and researching options that would differentiate the games even further, such as moving to a \$5 price point with better player odds. All that being said, the games remain very healthy and strong, providing excellent brand visibility for our entire portfolios.

What do you see as the biggest challenges for the Maryland Lottery, and the greater lottery industry, over the next few years? The biggest opportunities?

The biggest short-term challenge for the Maryland Lottery will be in

implementing the very complicated sports betting bill recently passed by the legislature. The bill fails to adequately take into account the economics of the sports betting industry, which has small margins and high volatility. It also fails to understand the level of sophistication, expertise and integrity required to operate a sports book, technically, managerially and operationally. By opening up the field to small inexperienced entrepreneurs, we risk creating false hopes for small businesses that will find it difficult to compete and survive in this very tough business. Additionally, there will be political risk in maintaining the very rigorous licensing standards we currently employ in our gaming business. In all likelihood, there will be those who apply, even those who are “connected” to people, who are expecting to be approved, but who will be disappointed if they don’t meet the standards needed to pass our licensing background investigations.

As I mentioned earlier, I believe the biggest long-term existential threat within the industry will come from non-governmental lotteries taking market share away from our traditional lotteries. But with competition comes creativity, and I think there is huge opportunity for lotteries online if they can manage their digital conversions without ceding ground to the illegitimate operators.

What’s next for you?

Hopefully, health, happiness and lowering my lap times at Lime Rock. ●



Focus On: Games

Success in an Instant!

Instant games have dominated the American lottery landscape for years, and we take a look at some of the biggest recent success stories.

By Patricia McQueen

For many lotteries, an adaption of a phrase made popular by the movie “Field of Dreams” comes to mind when you look at recent sales trends: “If you offer it, they will buy it.” The “it” in question being instant tickets, which have been flying off retailers’ shelves for more than a year. And “they” refers to just about any consumers looking for ways to entertain themselves in a strange new world impacted by the pandemic.

But even as the world started to recover in recent months, instant tickets were still selling. Lotteries continued to report record weekly sales and record year-to-date sales. Perhaps all those new players introduced to the games for the first time decided to keep playing. Certainly many lotteries have spent the past few years refining their game portfolios to build more attractive products, and those efforts were driving sales even before the pandemic. And that’s where we lead off here.

We looked at two time periods, both starting in FY16. One ends in FY20, but the other ends in FY19 in order to weed out the impacts of COVID-19. Although some lotteries seemingly couldn’t release games fast enough to meet demand at the end of FY20, others faced unique challenges that hampered growth more than expected. And two lotteries with the most success in terms of percentage increase in sales from FY16 to FY20, Michigan and Texas, both have later-ending fiscal years (in September and August, respectively) that likely gave them more pandemic-driven sales in their reporting years.

There’s a caveat here. If you look at Exhibit 1, which ranks the top 10 lotteries by percentage increase in sales from FY16 to FY20 (with growth from FY16 to FY19 included for comparison), the Oklahoma Lottery actually comes out on top. Way on top. Long constrained by a mandated return percentage, Oklahoma lagged most of its peers in instant ticket

sales without the ability to increase price points and payouts, two things that have helped drive sales dollars in other jurisdictions. Freed of that mandate with a legislative change in 2017, instant sales in Oklahoma soared – up more than 150% from FY16 to FY20.

Apart from Oklahoma, the Michigan Lottery was hands down the biggest success story, with sales up 79% from FY16 to FY20, and almost 46% from FY16 to FY19. Behind Michigan, through FY19 was the Maryland Lottery at 33%, and through FY20 was the Texas Lottery, up almost 50%.

Synergy in Michigan

No matter how you look at it, the Michigan Lottery has achieved tremendous success with instant games. And given that Michigan also leads American lotteries in terms of net revenues from iLottery, that success on the retail side of the business



The Michigan Lottery credits execution at retail for much of its success.

EXHIBIT 1

Top Ten American Lotteries

Ranked by Percentage Increase in Instant Ticket Sales, FY16 to FY20

	Instant Ticket Sales			Percentage Change	
	FY16	FY19	FY20	FY16-FY19	FY16-FY20
Oklahoma	\$78.6	\$136.0	\$198.3	73.1%	152.4%
Michigan	1,136.8	1,655.5	2,038.2	45.6%	79.3%
Texas	3,715.8	4,845.6	5,555.8	30.4%	49.5%
Arizona	590.7	750.3	848.4	27.0%	43.6%
Florida	3,954.7	4,937.8	5,665.3	24.9%	43.3%
West Virginia	102.5	115.6	145.4	12.7%	41.8%
Delaware	65.7	79.8	92.9	21.6%	41.4%
South Dakota	26.3	32.2	37.1	22.6%	41.0%
South Carolina	1,135.0	1,450.4	1,582.2	27.8%	39.4%
Maryland	618.2	822.1	860.6	33.0%	39.2%
All U.S. Lotteries	\$45,180.7	\$51,485.8	\$55,454.7	14.0%	22.7%

(Dollars in Millions)

should not go unnoticed.

What is behind Michigan’s sales growth? Ask that question of Glenn Strong, Deputy Commissioner of Marketing, and William Griffin, Deputy Commissioner of Sales, and you’ll get the same answer: product and execution. “It is very much a collaborative effort,” explained Strong. “Marketing and sales work very closely together, and I think we’ve gotten much better at it over the last several years.”

For example, there is a “printed products” meeting every month that brings together the product, marketing, and sales teams. Everybody gets an update on all fronts, and sales reps are encouraged to provide feedback from retailer partners. “It’s been a really good learning opportunity,” said Strong, one that has most certainly contributed to the Lottery’s success. He also emphasized that research dictates a lot



of what the Lottery does, with every game under the microscope. “We like to feel that we make really informed decisions about the games that we produce.”

On the product side, price points have risen and that’s been a key driver of sales. “There has been a definite shift in the market to the higher price points. We used to say that the \$5 is the new \$2. Now it seems like the \$30 is the new \$10,” Strong said, adding that Michigan now has four or five \$30 games on the market at any given time. But it’s also about prize structures and ticket quantities. “In order to create a prize structure that a player can really feel, you need to have a larger quantity of tickets.” What helps make that work in Michigan is that games don’t need to be ended when all the top prizes have been claimed, and games may stay in the market for up to three years (there is an expiration date printed on every ticket.) “There’s this synergistic effect between prize structures and quantity that allows us to create callouts on the tickets that players find attractive.” Indeed, there is something for everyone, like games with high

top prizes and games for players who enjoy more frequent smaller wins.

Strong noted that there hasn’t been any real change in prize payout percentages for years, just the gradual increase you would expect as more games are offered at higher price points. Overall, the Lottery’s payout averages 74% across all games. The sheer volume of sales increases has meant that the Michigan Lottery returned 33% more to education in FY20 than it did in FY16. “Our payout is higher, but our volume is so much higher that our return to beneficiary is also higher,” he emphasized.

As for trying new things with prize structures, he was skeptical at first of \$10 blowout games with just two prize levels and overall odds approaching 1 in 9, but he’s a believer now. So much so that Michigan expanded that concept to a \$20 game with three prize levels, and had to reorder tickets. “That has been a very, very welcome addition to our product line.”

While Strong always takes a cautious approach to product enhancements, he’s a fan of some options. “We use print production enhancements predominantly on the \$10 and higher

games, and we’ve been able to validate that they increase sales. Nonetheless, we always consider the additional cost before committing.” Michigan also uses foil on all games, because “it just adds that reflectiveness that you don’t get on plain paper.”

New games are on a regular launch schedule once a month, with an annual plan that includes family introductions in January and May. There are very strong base games, like Cashword and Wild Time families that are now at \$2, \$5, \$10 and \$20. “There seems to be an insatiable appetite for those categories of products,” marveled Strong.

All of these great products are enhanced with brilliant execution at retail. Griffin credits a number of factors on the sales side of the business that have contributed to industry-leading growth. First and foremost, the use of credit and debit cards for ticket sales. That had been allowed in the past, but never really promoted for several reasons. But with dramatic shifts in the way consumers paid for goods and services in recent years, it was time to spread the word.

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\$1,000	THE SHIP	THE MOONRISE	THE COWBOY	THE CARDINAL			
\$5,000	THE PIRATA	THE CACTUS	THE GUITAR	THE JACK RABBIT			
\$1,000,000	THE HORSE	THE SADDLE	THE OIL RIG	THE DRU			

1

2 PLAYBOARDS/TABLAS DE JUEGO

THE BOAR	THE CACTUS
THE CHERRIES	THE NORTH PISTOL
THE NEWSPAPER	THE HORSESHOE
THE CARDINAL	THE FIRE

PRIZE/PREMIO **PRIZE/PREMIO**

3 BONUS GAMES/JUEGOS DE BONO

THE CORN	THE MARACAS	GAME 1/JUEGO 1 PRIZE/PREMIO
THE RACE CAR	THE BOAR	GAME 2/JUEGO 2 PRIZE/PREMIO
THE MOONRISE	THE LONE STAR	GAME 3/JUEGO 3 PRIZE/PREMIO
THE STRAWBERRY	THE CHILE PEPPER	GAME 4/JUEGO 4 PRIZE/PREMIO
THE WINDMILL	THE BUTTERFLY	GAME 5/JUEGO 5 PRIZE/PREMIO
THE BAT	THE MISTLETOE	GAME 6/JUEGO 6 PRIZE/PREMIO
THE SOCCER BALL	THE COVERED WAGON	GAME 7/JUEGO 7 PRIZE/PREMIO

4 BONUS/BONO

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One way to do that was to include credit and debit usage in the retailer incentive program; other components of the program are sales goals and new game activation. One requirement is that retailers have to activate at least one pack of each new game within three days of receipt. They receive the new games on a Tuesday, and by Friday the tickets have to be activated and out for sale in order to qualify for any incentives. The vast majority of retailers are doing so – there is regularly a 99% compliance rate. The Lottery is also fortunate to be able to incentivize its own sales reps, so they also benefit if they reach their sales goals.

Griffin also credits the installation of IGT's GameTouch 28 self-service machines, which include the all-important card payment options. "They have increased sales across the board where we have placed them," with particular success at CVS stores. To ensure responsible play, there are daily play limits for any given credit card used.

Also at retail has been an effort to get facings to a manageable level. "You can get out of control with the number of facings," noted Strong. "Research supports the notion that when you are faced with too many choices, you just buy nothing." So while the Lottery currently has about 45 games available at any given time, the current average facings per retailer is about 29. "That's very manageable," said Griffin. Some locations use 36-game promoters, but most use 24-game displays. There are also special four-game dispensers typically used to highlight families or holiday games, or even other games such as older games with prizes to promote. "We set them aside from the big displays, and that has helped increase awareness of the product, resulting in increased sales," he added.

One last nod to the overall emphasis on retail – Michigan likes to design prize structures with a lot of prizes under \$600, so they are redeemable at retail. "That's just good business with our retail partners," said Strong.

Clearly there's a lot going on in Michigan that has led to 79% growth from FY16 to FY20. "It's been a concerted effort on both sides – the teamwork is remarkable," exclaimed Griffin. "It's the aggregate of a lot of good choices we've made over the years," added Strong.

Big Strides in Texas

The Texas Lottery is another that has been rapidly growing instant ticket sales, and by FY20 its \$5.5 billion in instant sales eclipsed all American lotteries except Florida. And the paper games are big business in Texas for another reason – they accounted for a whopping 83% of the Lottery's total sales in FY20.

Some of the key reasons for that Texas-sized success include optimizing prize structures, the phenomenon of Loteria, and big promotions worthy of the third-largest lottery in the United States.

"Several years ago we began to take a fresh look at our prize structures for various price points," explained Scratch

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\$500	THE BADMINTON	THE SUNSET	THE WHEEL	THE SADDLE			
\$5,000	THE SHOES	THE LIZARD	THE GUITAR	THE HEN			
\$100,000	THE CHILE PEPPER	THE NEWSPAPER	THE BOAR	THE PIRATA			



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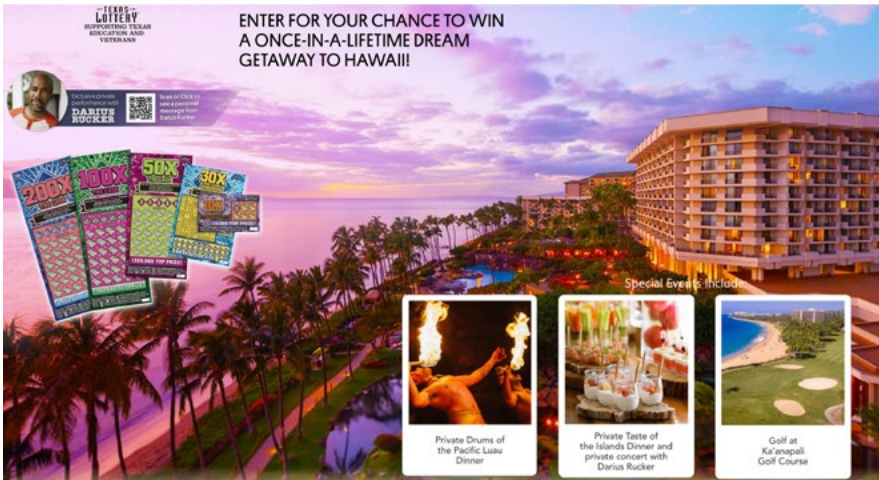


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Ticket Strategy Coordinator Dale Bowersock, noting that payouts and top prizes for each new game at each price point were traditionally uniform in structure. He credits IGT corporate for assisting with the optimization efforts, which started with the \$50 price point and ultimately included the entire portfolio. “We realized that players don’t always want the same prize structure. You need to have something out there for everyone.”

So now there is much more variety in the prize structures. Most games offer break-even prizes, some have more lower-tier prizes in the churn and chatter levels, and still others include more high-tier prizes for high rollers who are less interested in small wins or break-even prizes – which high rollers don’t even consider a “win.” For example, at the \$50 price point there’s always a game in market now with a \$5 million top prize, and another with a \$1 million top prize, with the lower tiers adjusted accordingly. And for the games that do appeal more to high rollers, there’s always a callout on the front of the ticket informing players that the minimum prize is greater than the ticket price. “That flags the games they want to play,” said Bowersock.

And then there are players who just want the latest games and will buy anything new. In Texas, that’s

now twice a month, standardized to make it easier – and less confusing – for both players and retailers.

To select games to bring to market, Texas gathers together agency staff from different disciplines to review the games presented by the vendors. A panel of perhaps 15 people, representing product, sales, marketing and advertising managers, periodically whittles down potentially thousands of ticket designs. “We get input from a good variety of people within the agency and across our vendors, not just a small group of Texas Lottery managers,” noted Bowersock.

A significant share of the Lottery’s sales growth can be attributed to the impact of one particular game (at various price points) – Loteria, modeled after a centuries-old Mexican bingo-based game. That makes it especially familiar to many members of Texas’ large Hispanic population, and it’s an understatement to say that the game has been well received. The dual-language Loteria game has expanded over time from the \$3 price point to the \$5, \$10, \$20 and now \$50 price points. “It’s typically at the top of the sales chart every week, at all price points. It’s been an amazing suite of games for us.”

Families of games are key to Texas’ growth, partly because they typically

have very special promotions bundled with them. “We ask the vendors to create unique promotions that offer dream prizes people can’t get anywhere else,” explained Bowersock. And it has worked. There’s the \$5 Million Vegas Challenge coming up on its third iteration; the promotion sends a group of players to Las Vegas to play a game show for cash prizes up to \$5 million. Then there’s a dream getaway to Hawaii, which includes a private concert with Darius Rucker. Or Tinseltown Takeover with exclusive experiences prior to the Academy Awards in each of the next two years. And the list goes on.

“Texas is blessed that we have the population to support such large promotions. They do seem to be working for us, because we do very well with families of games.” And those families of games often include special print features such as holographic paper and fluorescent inks. “We are selling product in very busy retail locations, and if it doesn’t stand out, it’s just not going to sell as well,” Bowersock emphasized.

With more than 80 games introduced each year, Texas perhaps has the luxury of trying different things more so than most lotteries; a variety of prize structures, various game themes and even an assortment of special effects. “We’ve got some room to do experiments in-market. There’s flexibility if a game doesn’t perform very well, because another is going to replace it soon.”

In fact, Bowersock invites all vendors to come to Texas with something new. “We are eager to try the latest innovations from the vendors.” For example, the Texas Lottery couldn’t wait to try Pollard Banknote’s Clear Play ticket for the 2019 holiday season, and looks forward to using that technology again in the future. In the meantime, the Lottery is waiting for the next big thing that will drive scratch ticket sales in Texas.



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Climbing the Ladder in Maryland

The Maryland Lottery may not have had the dramatic surge of sales due to the pandemic that many other lotteries did in FY20, but its overall growth over the past four years makes it stand out.

Maryland's Director of Product Development Kate Airey pointed to expansion into higher price points as the key driver for the Lottery's recent growth, but noted that it's never easy. "Product planning is as much an art as it is a science. It can be very difficult to balance price point, theme and playstyle mixes to maximize sales while also speaking to the broadest possible audience."

She cited great success introducing \$30 games without cannibalization of the Lottery's \$20 tickets, maintaining variety so all products can coexist and prompt multiple purchases. "We've mixed strong themes and graphics with perceived value – not necessarily longer play, but bonus areas, unique play action or prizing – and we've used print features that imply wealth and excitement."

When Maryland first launched a \$30 game, one \$20 game was removed to make room. But after two years, that extra \$20 was reintroduced to the lineup, this time as an extended play game – the Lottery's first at this price point. "We've seen fantastic growth with the addition of \$20 crossword and bingo playstyles, while simultaneously enjoying significant growth in our \$30 and \$10 tickets," marveled Airey.

She added another reason for overall instant ticket growth – the flexibility to close games at any time, no matter how many have been sold. An underperforming game can quickly be replaced by a newer, better-performing game.

Finally, Maryland has strategically used licensed properties and



second-chance promotions to appeal to peripheral lottery players, potential players and core players alike. One important metric for Maryland is the first ticket entered by new player's club members. "Licensed properties and instant games that are connected with a second-chance promotion consistently bring in the highest volume of new loyalty club members. That's especially true when there is advertising behind the game, which helps us reach infrequent players and raise their awareness."

A New Concept From OLG

It's safe to say that lottery products have certainly gained a measure of added awareness over the past year. While no one would ever want to repeat the circumstances that got us here, it's now up to lotteries to continue offering products that players – hopefully new players – enjoy playing.

There is a ceiling to payout percentages, and presumably one for price points as well (although you'd never know it with experience to date), so the nuances in prize structures and added value via promotions seem to be a good road forward for now. But there are other innovations on the horizon. On June 1, Ontario Lottery and Gaming introduced the world's first add-on game for instant tickets, INSTANT TOP UP.

The option can be added to any eligible instant game purchase at retail for an extra \$1, which buys a play in a progressive jackpot game that starts at \$25,000 and grows with every ticket sold until won, then resets. INSTANT TOP UP also offers lower cash prize levels and free plays; overall odds of winning any prize are 1 in 4 (odds of winning the jackpot are 1 in 2,000,000.) Upon purchase, the in-store lottery screen plays an exciting animated video with flipping tiles of various prize amounts to display the outcome for the player; the result is also printed on the customer's ticket.

Canada's lotteries have long excelled in the sale of add-on options for lotto games, so it will be interesting to see how this unique add-on option for instant games plays out. The potential revenue could be significant for the province even if only 10% of buyers add it to their purchase, noted Adam Caughill, OLG's Director, Retail Lottery Innovation. "We are pretty excited about that." ●

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A Discussion of South Africa's Surprising Powerball Draw

Focus On: Games

Award-Winning Games

NASPL annually honors the Best New Instant Game in the Buddy Roogow Innovation Awards. We look at how recent winners developed their games.

By Patricia McQueen



What makes an award-winning instant game? To help answer that question, we turned to the most recent lotteries to take home Best New Instant Game honors in the annual NASPL Buddy Roogow Innovation Awards.

Sometimes it's taking a popular family board game and turning it into an innovative best-selling lottery game. Sometimes it's just packaging and promoting something in a whole new way. And sometimes it's acknowledging local features of a jurisdiction and building a special connection with residents.

In all cases, though, the proof is in the sales, and these games are truly winners!

2020 Battleship



Last year, the British Columbia Lottery Corp. (BCLC) won accolades for a unique two-player instant ticket version of Battleship™ that retained many of the features and game play of the original board game. The \$10 lottery game launched in July 2020 and sold out in record time, helping contribute to a record instant lottery sales year for BCLC in FY21, which ended March 31.

The game offered extremely attractive overall odds of 1 in 2.70, and the vast majority of the prize structure was allocated to churn and chatter prizes – almost 96% of the prize pool was assigned to prizes of \$100 or less, with a smattering of other prizes up to \$5,000 and one top prize of \$100,000. There were a total of 22 prize categories, including four that included a free ticket. One key goal of Battleship was to maximize the number of winners, and the prize structure reflected that goal.

The idea for two-player Battleship comes from BCLC's Scratch & Win segmentation studies. Scratch & Win's largest player segment is what they call "Receptive Indulgents" or "Coffee Breakers." "They like to play to pass the time, for entertainment, and they like to play with friends," noted Gladys Primeau, Category Manager, Instant Games. Historically

that meant scratching their own tickets and talking about the results; especially a tradition at Christmas. "We started thinking that we don't really have a product that's actually designed for two players to play at the same time. Maybe there was something there in this social play category. It was a new idea and we decided to put it out there and see how players would respond."

She added that one of the great things about instant tickets is that there are a lot of games launched each year. "Not all of them are going to be big hits, but it gives you a good opportunity to try new things."

Battleship was originally scheduled to launch in June 2020, but it was delayed for a month because of the pandemic. Since the game was designed for two players, BCLC wasn't sure what would happen given the stay-at-home orders throughout the province, so they had their fingers crossed. "Most people were at home, looking for things to do," said Primeau. "So we hoped this would be an activity people could do together in their home."

The results were remarkable. Battleship sold out 37% faster than the average \$10 BC-only game, with no marketing support and no cannibalization of other games. But because BCLC hasn't yet completed

follow-up research, there's no telling how often two people were actually playing the game versus one person playing both sides – the game was designed for both possibilities.

There was, however, plenty of research before the game was developed. There were choices to be made in the game design, such as whether play would be competitive, so only one person wins, or 100% collaborative, where both players would win together. "We decided to split between those options, so either player could win or both players could win," explained Primeau. And because it's designed as a social game, the lower overall odds means both players have more winning opportunities. And even if no one wins, they've spent time together having fun.

"I can't stress enough that I really think there's something to this social game category." More recent research has looked at other concepts, and uncovered opportunities to attract another segment of players, including those who don't currently play lottery all that much. "These potential players all mention that they like playing games together."

BCLC was so pleased with Battleship that a second two-player game is on deck with another licensed property. "It will be interesting to see what happens," said Primeau. ●

2019 An Anniversary Family

If the timing is right, lotteries often use anniversaries for the introduction of a new price point. That certainly has been true over time for the Idaho Lottery. For example, its first \$20 game came out for the 20th anniversary and a \$25 game followed suit after 25 years. So it seemed only logical that for the 30th anniversary in 2019, there should be a \$30 game brought to market for the first time.

But there was a challenge, thought Public Information Specialist David Workman back then. “I knew there were going to be a lot of people who would want to participate in our 30th anniversary, but who were not going to spend \$30 on a scratch ticket.” So in came the idea of an anniversary family that included that shiny new \$30 ticket, but also offered options at \$5 and \$10, two of the most popular price points in Idaho.

Why did this family of games take home the award for Best New Instant Game in 2019? Not only did all three price points index very high, “They became the focal point for everything that we ended up doing for about six months,” explained Workman. Each ticket was designed in-house, full of images focused on fun, parties and prizes. They incorporated Pollard’s Scratch FX treatment, so they had a premium look and feel, and included a variety of different play styles that Idaho players enjoy.

There was also an innovative second-chance promotion, where players could enter a code on

each ticket to play an interactive game to get entries into biweekly drawings for \$3,000. They led up to a final drawing, once the games’ last top prize was claimed, for \$30,000. Retailers around the state joined in the fun during an extended Lottery road trip, with all sorts of events centered on the anniversary and the game family.

And at the end of it all, after the four-month anniversary campaign, there was something super special. The Idaho Lottery ended up setting a new Guinness World Record for the “largest gathering of people scratching scratch cards,” on July 19, 2019, when players gathered in Boise to scratch a special Guinness World Record scratch ticket.

“The 30th Anniversary family became the focal point for our large anniversary celebration,” said Workman. “It was an entire campaign that pulled everything together. It wasn’t just about the ticket, but what we did with the ticket and how we transformed what we were doing.”

And like any good award-winning idea, the success lingers. “The 30th Anniversary raised the bar for us, successfully introducing the \$30 price point and sending us across the threshold to the \$5 price point for good,” noted Workman, adding that most sales now come from \$5 games. The idea of a comprehensive campaign for families or even groups of tickets has also stuck, and families of three to five games are now regular parts of the Lottery’s game portfolio. ●





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2017-2018 Twice Is Nice

The DC Lottery has earned not one, but two recent Best New Instant Game awards – in 2018 for Neighborhoods and in 2017 for DC-7s. Both games involved collect-and-win experiences for second-chance drawings and new ways for the Lottery to engage with its players.

The idea of DC-7s came about from a Scientific Games sample pack designed to showcase different print technologies using the number 7. The Lottery posted the samples on a big cork board to use as reference images for foils and print treatments. But from time to time, Lottery team members would see that wall of 7s and ask when the game was launching. “We started thinking about actually doing something with those 7s,” said Stephen Cooke, DC Lottery’s Instant Product Manager. “After all, we know our players love numbers-themed games.”

And so the idea was born to create a \$5 game featuring 21 different artistic renditions of the number 7, including some designed with uniquely DC themes. “We have a very strong sense of pride in DC, so anything that ties into that traditionally sells well.”

Non-winning tickets could be entered on a special collect-and-win website for a series of seven second-chance drawings – six with a prize of \$7,777 each plus a final drawing for \$77,777. By collecting all 21 scenes, bonus entries were awarded.

The game was a huge success, becoming one of the Lottery’s top-selling \$5 games ever, and players loved the collect-and-win concept. It was also the Lottery’s most successful second-chance drawing to that time, garnering a higher participation rate than even contests with \$1 million prizes.

Emboldened by that experience, DC took the idea further with Neighborhoods. While DC-7s followed the prize payouts and print runs for the Lottery’s typical \$5 games, the \$10 Neighborhoods was designed to be the talk of the town. It had a much higher prize payout, at just over 84% (including \$525,000 in second-chance prizes), and had a 12.5%

larger print run than most \$10 games.

The game was designed in two phases. Twelve scenes of iconic DC neighborhoods were included in the first phase, and six came in the second phase. Those six were actually chosen by players during the first phase – they would vote for a new neighborhood on the second-chance website. As players collected the scenes and entered them on that website, they could also learn all the great history of each neighborhood. “These neighborhoods, these communities, are some of the things that make DC great,” said Cooke. “We were stepping out of the traditional realm, if you will, of building a lottery game. It was more about tapping into the feelings that people have when they played the game – we wanted to tug at the heart.”

The impact of Neighborhoods went far beyond its best-selling status – there was so much positive feedback around the city from the tickets and the related marketing campaign that it helped the Lottery’s overall brand.

To develop these award-winning games, the Lottery team had to have faith in the concepts. “These games both had risks,” noted Cooke. With DC-7s, the big risk was having to develop a whole new second-chance website for the Lottery’s first collect-and-win game. “Neighborhoods was more of a love letter than it was a traditional game, and that was also a risk.”

But he knows that with risks come rewards. And in the cases of these award-winning games, the rewards weren’t just sales, they were the successful engagement of players and tapping into a sense of community like never before. “Knowing your players, giving them what they want in a new way to keep them engaged, and staying true to yourself – that’s what makes a great game,” said Cooke. ●





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Focus On: Games

What Makes a Great Instant Game?



We asked Scientific Games, IGT, Pollard Banknote and Alchemy3 a very open-ended question:

What makes a great instant game?

Here are their responses.





Six Ingredients for a Great Instant Game



By Jason Prentice, Vice President Game Creation, Scientific Games

Mass Appeal Theme. Attractive themes play a major role in creating successful games. Themed families of games like Blowout and Cash Multipliers are top performers because they appeal to a very wide audience. These games have been successful as individual games over the years, and together in a family there's a synergy that catapults them beyond other themes. It's why they have become pillars in game portfolios.

Exciting Prizes. Prizes are really what the instant game is all about: instant excitement. The Blowout and Cash Multipliers families are popular because the prizes move up the price point. Lotteries offer entertainment – the thrill of winning increasing prizes. With the Blowout games, players have much better chances to win more impactful prizes anywhere from \$50 on a \$1 game up to \$500 on a \$10 or \$20 game. And with the Multiplier games, prizes range from \$10,000 to millions of dollars.

Game Name. The names of these special games are actually the major selling points for the lottery. With the Blowout and Cash Multipliers, the names say it all. There are multiple games in the family under one theme, which makes it easier than launching three or four different games with different themes and names.

Strategic Positioning. These two families can be positioned by prize and this may actually be the most important feature. The lottery can get four games into the marketplace, one at each price point as core products. With family games, there's one theme and the lottery differentiates by prize. These games are easily positioned by



that one feature. It's much better than trying to position by ALL of the ingredients: theme, price and prize.

Ease of Communication. Concepts like blowout and prize multipliers are immediately understood by players; they understand the value. So it's easy communication, not a dual or triple message. One major message makes point-of-sale advertising and promotion more effective. The lottery can focus

on one theme with retailers and consumers at point-of-sale.

Longevity. All of the elements of the Blowout and Cash Multipliers games are strong and exciting. With other games, themes can be very short-lived; they're exciting and performing well for a while, but over time they may begin to wane. These two families don't seem to be slowing down at all. They allow the lottery to build around them as the core elements of the portfolio.



What Makes a Great Instant Game?

A great instant game is one whose attributes satisfy its intended players and creates a positive and informed play experience. Understanding player expectations is rooted in player insights – drawn from market research, customer feedback, performance analytics and industry experience. It is then that the greatness of an instant game may begin to take shape. A great instant game ticket is attractively packaged, offering fun, excitement and anticipation of a winning experience in a manner consistent with players’ identified needs. Such a game isn’t intended to please all players, as “one size does not fit all.” Instead, a great game will be great for its expected purchasers.

– Todd Bauman, IGT Senior Director Instant Ticket Analytics



Some players are primarily drawn to novel games featuring eye-catching graphics, unusually sized tickets or other unique visual or thematic attributes, including quickly recognizable branded properties that elicit a personal connection. Others are primarily drawn to preferred themes, such as numbers, money or precious metals. Others may be first attracted to “marquee” prizing messages, callouts, and game features such as multipliers, that foster additional excitement about potential winning outcomes. Still others are likely to focus first on gameplay action that satisfies their preference for engagement, be it a preference to determine quickly if they have won or instead, longer, more immersive play. Yet others seek higher priced games that offer exciting prize amounts and/or additional opportunities for play.

– Keith Cash, IGT Vice President Global Instant Tickets

Instant game “beauty” is only skin deep. An attractive instant game’s packaging that is commensurate with prospective player needs and communicates value for price paid will garner trial. Ultimately, what determines a game’s long-term success is not its packaging; rather, its greatness will be judged by the outcomes experienced after engagement. A truly great instant game will maximize delivery on the promises it makes once the game is played. Every game presents a chance to win. A great game focuses on what happens during play. That is, the game meets a player’s thresholds for prize level and frequency that are meaningful enough to keep them playing, even after non-winning plays or less desirable prize outcomes. A great instant game is crafted from knowledge and creativity to elicit emotion, building suspense and excitement, from the player’s first attraction and purchase decision to the promise of the potential to win until the very last play symbol is revealed.

– Todd Bauman, IGT Senior Director Instant Ticket Analytics

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15	24	42 56
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03	17	4
12	21	
13	22	
14	30	

CARD 1 LINE # FREE TICKET 4C - \$5 3 - \$10

CARD 2 LINE # \$5 + 4C - \$10 3 - \$15

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Great Instant Games: Crossword - A Recipe for Success

What are the magic ingredients for creating an outstanding instant game that piques the interest of players? There is no single answer; there are several variables that, when combined and tailored for a specific lottery, make them great games. Let's look at Crossword (or Cashword) – one of the lottery “greats” – and the features that contribute to its lasting popularity.

Crossword is one of the most recognizable brands and sets itself apart with distinct play mechanics and prize structures that differentiate it from other instant games. This well-established category is a proven revenue earner, representing a noteworthy proportion of overall North American instant sales (in FY2020, 15% on average). Over the past six years, Crossword games have been a key driver of instant sales growth, outpacing overall instant sales growth while demonstrating resiliency, specifically during the COVID-19 pandemic.

Despite its position as a perennial favorite in many North American jurisdictions, there is still an opportunity for Crossword growth; per capita Crossword sales ranged from \$2 to \$75 in FY2020.

Keeping instant games fresh and interesting to maintain and enhance player engagement is an ongoing endeavor. Based on our strong understanding of the Crossword player segment, we know that over time, regular players seek more variety and

sophistication in their Crossword play, making the evolution of the category a priority.

Lotteries are having success with tried-and-true strategies, such as enhancing games with fresh features and themes; innovative print elements that boost the ticket's visual appeal and/or maximize the play area; play extension through digital play, where allowed; and optimized prize structures.

Pollard Banknote is also dedicated to invigorating the Crossword category with its newPLAY™ games portfolio. A dedicated team develops new extended play game features and

play mechanics based on industry trends and evolving player preferences, fusing familiarity with novelty. Recent trends combine the successful Crossword brand with the popularity of families of games. This tactic includes expanding the category to a family with multiple price points or adding a \$3 Crossword game to a family – an unexpected but pleasant twist.

Crossword is also a great omnichannel option. Its high entertainment value makes for an easy transition to the digital realm, where allowed, with online gameplay tied to instant tickets as well as iLottery versions.



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What Makes a Great Instant Game?



Beating all original expectations and during a global pandemic, instant sales achieved new record-breaking heights, creating even more questions about the future of the category and the definition of what makes a great game. Traditionally, a great game would be defined as a top selling game generating more or faster revenue than budgeted or even reordered to fulfill demand. But is that truly the only definition of “great”?

In order to measure success, a lottery must first define the target audience and overall goal for each game:

What is the target audience? Some games are designed to appeal to core players by focusing on money or popular themes like multipliers or luck, while others are used to engage new players through the introduction of new designs or branded games offering aspirational prizing.

Can we promote incremental spend? A lottery could leverage strong core games and extend to new price points offering more play value to reward a player’s increased expenditure, while increasing revenue for the overall product line. In addition, a lottery could maximize their advertising and marketing budget by launching a family of games that could reach a broader audience of players by offering games at multiple spending levels or by promoting unique prizes.

Can we maximize the overall portfolio awareness? With newcomers to the instant game category, a lottery could cross promote a theme or brand across multiple product lines: instant, draw, ilottery, or even Keno, driving trial and awareness across numerous channels.

“These are just several examples of recent conversations that we’ve had with customers here at Alchemy3. We work with each customer individually to align with the lottery’s goals for their portfolio and determine what makes sense for our proposed programs,” said Karen Harris, Account Director and Instant Ticket Specialist. One thing is for sure: One size does not fit all and the traditional definition of “great” needs to be reevaluated taking into consideration the bigger picture of opportunities and new buying trends.



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Focus On: Games

Putting Some Zing Into the Games

Western Canada Lottery Corp. took the bold step of rebranding its decades-old Scratch 'N Win line as Zing games.

By Patricia McQueen



No company ever takes changing a brand lightly, especially a brand that is decades old and so perfectly describes the product, like Scratch 'N Win. But sometimes you just have to take a leap of faith, hoping that research and creativity will win the day. That's exactly what Western Canada Lottery Corp. did a few years ago when it started examining the branding and positioning of its storied Scratch 'N Win instant games.

The project was led by WCLC's creative agency at the time, and

the exercise wasn't entered into lightly, explained current Director of Marketing Adam Cortiula, who joined WCLC in 2017. That was shortly after the research had been done and the decision had been made, and he has been formulating the rebranding strategy ever since.

The problem WCLC was trying to solve was this: While Scratch 'N Win product awareness was strong and fairly steady, play frequency was declining. "We were doing a really good job of laddering players up to higher price points, but the actual

touchpoints with each individual ticket – the number of tickets being sold – was in decline. So the goal behind this initiative was to grow the business and increase play frequency."

The creative agency dove into the project with everything it had, examining WCLC's segmentation study and reviewing existing research, conducting stakeholder interviews, performing a brand audit and peer reviews. They looked at instant games and other games within WCLC's portfolio, and talked with other Canadian and American lotteries and

their printing partners. “It was a real robust exercise,” said Cortiula.

They took all this and developed a new brand positioning based on functional and emotional brand benefits for players: Instant tickets offer engaging games that give you the thrill of discovering hidden possibilities.

There were three main parts of that positioning:

The thrill of discovery. This speaks to the player journey – the anticipation and discovery of playing the game along with the outcome of the game. It speaks a little bit to the psychological factors and excitement players experience when they play games.

Opportunity. There was opportunity in trying to combat the perception that “you never win playing instant games,” because the research actually found that the largest number of weekly winners across all of WCLC’s lottery product lines were instant players.

Freedom. Instant products aren’t dependent on daily or weekly drawings, or based on a sporting event. This aspect highlights that you can purchase a ticket and play anywhere at anytime – it’s a very personal endeavor.

Enter Zing

When it came time to put a name on the venture, Zing won out over a few other possibilities. “It speaks to the category benefits and communicates the feel and thrill of playing,” explained Cortiula. If you are playing a Crossword ticket and you get a word, it’s “Zing!” Or if you get three in a row on a Bingo game, it’s “Zing!” “That’s how the agency explained the feeling.”

One of the original goals was to keep an eye on the future of lottery play. Instant tickets printed on paper have been around forever, but who knows where paper tickets are going to be 10, 20 or 50 years from now? After all, WCLC has already introduced E-PLAY games, which are traditional scratch tickets with a digital game option for added play value and winning opportunities.

“So one of the things we asked the agency during the initial work was to not think only about paper play.” Scratch ‘N Win is a great name for a paper product that is actually scratched, but the industry is evolving to other forms of instant play. E-PLAY games have been very successful for WCLC so far, providing great engagement with players along with useful information about them through Google Analytics.

Evolving is also the key word in the establishment of the Zing brand. It has been a slow, deliberate transition over the past four years. “There was tremendous equity



in Scratch ‘N Win,” noted Cortiula. “My initial challenge was to advocate for the new brand with everyone in our organization, with our retail partners and our players. So we went slowly to bring Zing into the conversation.”

The transition has been accelerating, and all communications in retail and advertising now feature the Zing brand. There’s a Zing sound effect that plays on retail terminals when winning tickets are validated, and the same sound is used in television and radio spots. “All these things tactically reinforce our message.”

Zing might have taken hold faster with a dedicated marketing campaign to really introduce the brand, but as with most lotteries, budgets are thin. Still, Cortiula loves that Zing has been a great conversation starter as people wondered what it was all about. And now as more people know the brand, from players and stakeholders within the WCLC market area to other industry participants across Canada, it is starting to take hold. “We are making positive gains in recognition,” he said, adding that while it’s harder to point to tangible sales results given everything that’s happened in the past 18 months, he thinks there has been some positive impact there too.

For his part, he enjoys the challenge. “I love trying new things, and this is a cool initiative. Yes, it’s pretty high risk, and is really out-of-the-box thinking, but it’s actually kind of exciting to be trailblazing something new.” ●

Focus On: Games

Fast and Easy

Many lotteries have found the appeal of instant-win games printed through a lottery terminal, and these games often have the fastest growth rates of any draw game.

By Patricia McQueen

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Fast Play. InstaPlay. EZPLAY. Fast Cash. Print-n-Play. They may go by different names, but instant-win games that print from a lottery's terminal have expanded to many new U.S. jurisdictions in recent years, triggering a rapid rise in industry-wide sales from \$287 million in FY16 to \$657 million in FY20. That's an increase of 128%, as the number of selling jurisdictions rose by 10 during that time period, with 21 lotteries offering the games at the end of FY20. Through early June, 24 lotteries offered these products, with Connecticut, Illinois

and North Carolina joining the ranks over the last few months. Louisiana was on deck to be number 25 with an expected June 28 launch.

The Minnesota Lottery was a trailblazer in this category, with its line of G3 games that launched in February 2004. A few years later, those evolved into Print-N-Play games with just three themes: bingo, crossword and slots. Other lotteries tried the concept as add-a-play games, linking an instant-win ticket to the purchase of selected draw games, but those have been phased out where they were offered.

There are games with set top prizes and games with progressive jackpots, also called rolling jackpots. The latter combine the instant-win appeal of a scratch game with a growing jackpot like a lotto game. Recent launches have included only games with set top prizes, only games with progressive jackpots, or a mix of the two. Exhibit 1 summarizes vital statistics about these games for each lottery offering them, including year of launch, number of games of each type, and price points.

While most lotteries have chosen to offer a variety of game themes,

either by regularly introducing new games or keeping them fresh using a rotational schedule, the Virginia Lottery joined Minnesota in simplifying the lineup to variations on just three themes that players found most attractive: bingo, blackjack and crossword. That transition was made in January 2017, 10 years after the product first launched in Virginia.

For those lotteries that started out with set top prize games, the eventual addition of progressive jackpot versions worked wonders. Fast Play sales in Arkansas increased 200% when progressives were added. And in Virginia, Print 'n Play sales jumped 66% from FY18 to FY20 after Rolling Jackpot – which differs from the base themes of the Lottery's other games in the category – was added in FY19.

The Ohio Lottery offers its brand, EZPLAY, in three ways. There are the regular terminal-printed games sold at all 10,000-plus lottery retailers in the state. EZPLAY Touch & Win games are based on keno and played on interactive terminals at about 1,500 locations, primarily bars and restaurants. There are more than 30 games in the current Touch & Win portfolio, and players can wager from 25 cents up to \$20, depending on the game. Finally, there are EZPLAY Tap games, offered only at veterans and fraternal organizations.

Other jurisdictions also have games in this category in selected locations. The Montana Lottery's Treasure Play games are played in taverns and casinos across the state, and the DC Lottery's Tap-N-Play games are available only on selected self-service terminals throughout the city.

Organic Growth in Arkansas

One lottery with longevity in Fast Play is the Arkansas Scholarship Lottery, which has offered the games since October 2010. FY20 sales of \$16.7 million accounted for 3.1% of the Lottery's total sales that year, and 21%



of all draw game sales.

Even without marketing support, there has been steady growth in the product over the years, with two big spurts along the way. The first was in FY14, after Arkansas Progressive Jackpot was introduced at the \$1, \$2 and \$5 price points – sales increased three-fold to more than \$10 million. Prior to this, the portfolio included only games with set top prizes.

A second big boost came in FY19, when there was a significant increase in the number of player advertising displays in stores. According to Gaming Director Mike Smith, less than a third of the Lottery's retailers had the displays at the time; now more than 75% of retailers have them. The ability to include the current progressive jackpot as one of the rotating slides on that display in so many more locations was instrumental for awareness, and sales were up 20% in FY19.

Arkansas currently has 24 regular (non-jackpot) Fast Play games in its portfolio, with six active at any time as they rotate in and out of the lineup; each game stays on the market for three months. That helps keep the games fresh considering that they only account for about 5% of total

Fast Play sales; the other 95% comes from Arkansas Progressive Jackpot. "Some players still ask for them, and so they do have a place in the market," said Smith of the set top prize games. "There's something for everyone, and we also have holiday and winter themed games."

He's pleased with the jackpots that have been awarded to date in Arkansas Progressive Jackpot, adding that the game really starts getting exciting when the jackpot hits about \$15,000. With the allocation of any jackpot wins based on the price of the ticket (a \$1 ticket gets 20% of a jackpot win, a \$2 gets 40%, and a \$5 gets 100%), there can be very happy jackpot winners at \$1 and \$2 level without the jackpot resetting back to its base, keeping the momentum going. "There's still that excitement because it starts growing again," and there have been several times where the jackpot stayed above \$20,000 despite being hit more than once at a lower price point.

Smith is a little hesitant to add more progressive families to the lineup, for fear of cannibalizing what's currently on the market, and because sales are still organically growing without much attention. So for now, things will stay as is. "If you put out a good game, it kind of sells itself."

Out of This World in Maryland

While some lotteries offer only games with set prizes and others only offer progressive jackpot games, one of the newest members of the Fast Play club offers a broad selection of both. As of early June, the Maryland Lottery has 11 games with set top prizes and price points ranging from \$1 to \$10, plus seven different progressive jackpot games at the \$5, \$10 and \$20 price points.

"Fast Play's progressive jackpots provided us the opportunity to offer a new value proposition to our players," explained Director of Product Development Kate Airey. "Progressive

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CHBELL	MILK	CAT	BARN	CAT		
COH	PIG	BULL	DOG	TURTLE		
TURTLE	CORN	MILK	COH	CHBELL		
CAT	TRUCK	CHBELL	CAT	COH		
DOG	BARN	CHICKEN	TURTLE	DOG		
MILK	DOG	TURTLE	BULL	CHICKEN		

PRIZE **PRIZE** **PRIZE** **PRIZE** **PRIZE**
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game sales are a bit more volatile, as you'd expect, with sales rising and falling along with the jackpots." And while player response to those jackpots has been strong, there are players who prefer the set top prizes. "The static top prize games provide a consistency for the players and in turn, generate fairly consistent sales."

Prior to launch, Maryland studied the product implementations in other jurisdictions, things like payouts, launch cadence and price point introduction. All of that helped create a set of best practices specific to the Maryland market. One of the most critical factors was how other states differentiated their Fast Play product

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line from their scratch games. "Since scratch-off growth has been one of our primary objectives, we didn't want to risk cannibalization, so we carefully curated a product plan for Fast Play alongside our scratch-off product plan," said Airey. That included an effort to strike a balance between offering variety and the themes and playstyles that speak to core players. "We also opted to have a slightly lower payout for the Fast Play product line, while keeping overall odds, chances to win and static top prize offerings aligned with our scratch-off games.

Maryland has found that Fast Play responds well to advertising and promotions, "perhaps because the actual games aren't as visible at retail as our other products." The initial advertising campaign at launch in February 2020 included a television campaign that featured an extraterrestrial character "beaming down" and buying a Fast Play ticket. "That generated a lot of attention, and we utilized that creative again in a new commercial that

coincided with the launch of three Fast Play titles in April 2021."

While casino-themed scratch-off games have never worked well for the Maryland Lottery, the story is different with Fast Play. Games with slots, dice and blackjack themes are best sellers. Another success is the whimsical Why did the CHICKEN cross the road? "Whimsical themes haven't typically done well in Maryland, but that game contributes roughly double the sales of our other \$3 games," noted Airey.

Blazing Fast in Pennsylvania

The Pennsylvania Lottery came out of the gate running with Fast Play when it launched the product line in February 2017. Sales have exceeded \$100 million in each of its first three full years, and were on target to set a new record in FY21. The Lottery currently offers more Fast Play games than any other lottery, with 27 on the market in early June.

EXHIBIT 1

Lotteries With Instant-Win Terminal Games

	Launch	Set Top Prize Games:		Progressive Jackpot Games:	
	Year	Number	Price Points	Number	Price Points
Arizona	FY18	12	\$1 - \$20	8	\$2 - \$20
Arkansas	FY11	6	\$1 - \$3	1x3	\$1-\$2-\$5
Connecticut	FY21			1x3	\$1-\$2-\$5
D.C. (1)	FY11	20	\$1 - \$20	2	\$1, \$20
				1x3	\$2-\$5-\$10
Florida	FY18	3	\$1 - \$5		
Georgia	FY17	8	\$1 - \$5		
Idaho	FY17	9	\$1 - \$7	4	\$5 - \$20
Illinois	FY21	2	\$1 - \$5	2	\$5, \$10
				1x3	\$1-\$5-\$10
Indiana	FY15	17	\$1 - \$20	2	\$5, \$10
Iowa	FY17	5	\$1 - \$20	5	\$1 - \$20
Kentucky	FY20			1x4	\$2-\$3-\$5-\$10
				1x4	\$1-\$2-\$5-\$10
Louisiana (2)	FY21	5	\$1 - \$10		
Maine	FY18	10	\$1 - \$10	6	\$1 - \$20
Maryland	FY20	11	\$1 - \$10	7	\$5 - \$10
Michigan (3)	FY17			10	\$2 - \$20
Minnesota	FY04			3x3	\$1-\$3-\$5
Montana (4)	FY12	7	\$1 - \$10	3	\$2 - \$5
				1x3	\$1-\$10-\$20
New Hampshire	FY06	12	\$1 - \$5	1x3	\$1-\$2-\$5
				1x3	\$2-\$5-\$10
				1	\$20
New Jersey (3)	FY16			12	\$1 - \$10
New Mexico	FY12	6	\$1 - \$2	1	\$5
North Carolina (3)	FY21			9	\$2 - \$10
Ohio (5)	FY08	14	\$1 - \$10	5	\$1 - \$40
				1x3	\$1-\$5-\$10
				1x3	\$5-\$10-\$20
Pennsylvania	FY17	18	\$1 - \$20	9	\$1 - \$30
Vermont	FY06	4	\$1 - \$5	1x3	\$1-\$2-\$5
				2	\$10, \$20
Virginia	FY07	10	\$2 - \$10	1x3	\$2-\$5-\$10

Information gathered from lottery websites in early June 2021.

The number of games in the progressive column represents the number of distinct games and jackpots; where there is a 1x3 type of notation, it means there is one game with multiple price points.

Specific notes:

(1) DC's game counts do not include Tap-N-Play games, which are only sold in selected locations.

(2) Louisiana was scheduled to launch Fast Play on June 28, 2021.

(3) All games in MI, NJ and NC share a common jackpot in each state.

(4) Montana's games are only sold in selected locations.

(5) Ohio's game counts do not include Touch & Win or EZPLAY Tap games, which are only sold in selected locations.



The Lottery has had success with a few licensed property Scratch-Off games over the years, so earlier this year a MONOPOLY™ family of Fast Play games was introduced at the \$1, \$2, \$5 and \$20 price points. “These four games helped us obtain our third highest overall sales week back in April, and the games accounted for 36% of total Fast Play sales for that week,” said Sparks. She noted that the \$20 game in the family is the Lottery’s first non-progressive game at that price point. “It is proving to be the sales constant the price point was longing to have.”

to be contributing to progressives accounting for 66% of total Fast Play sales dollars.

Mays has to be happy with the early results, although he indicated that there were very conservative expectations given the launch last fall on the heels of the COVID-19 summer. There’s very little cannibalization of other products evident, and sales are almost double the original projections.

Onward and Upward

Clearly, lotteries have found a lot of potential for this category to capitalize on some of the success scratch tickets have been experiencing for years. There are certainly trends being borrowed, like blowout games with just two or three prize levels, expanded price points, frequent game introductions and even licensed properties. And, importantly, price points are going up. Twelve lotteries go as high as \$20, Pennsylvania has gone to \$30, and Ohio introduced a \$40 game in February.

That game, Ohio Jackpot 7’s, is a progressive jackpot game that was intended as a limited time offering, but with strong sales it was kept as a permanent part of the lineup. There have been five jackpot wins in the game since launch, including a \$812,970 prize on March 12.

With new jurisdictions adding the product over the last few months, and reports of record sales from those already offering Fast Play, results in FY21 should blow the previous record out of the water. ●

Several months after launch, Pennsylvania’s Fast Play sales started mirroring its scratch ticket sales trends, with player demand for variety driving an increase in the number of available games and the frequency of launch. “The product category has evolved and we are learning the proper mix of the right price points to offer, the number of games at each price point, and the mix of progressive and non-progressive games at each price point,” explained Director of Products Kara Sparks.

The \$5 games are the bread and butter of the category, but there has been a successful venture into the \$20 price point. With increasingly popular games at higher price points, “it didn’t take long for us to realize we could add a \$30 progressive game without a massive impact on our \$20 games.” She added that it’s too early to tell what the long-term future is for a \$30 Fast Play product.

Pennsylvania has also been learning the right mix of games between those with progressive jackpots and those with set top prizes. Each market is different in terms of how many progressive games are too many – there can’t be so many that the jackpot doesn’t grow fast enough for player attention, but there has to be enough so there is likely to be another game with a significant jackpot if one jackpot gets hit.

Illinois Considerations

The Illinois Lottery was one of the most recent to launch Fast Play when four games went on sale last September – \$1 and \$5 games with set top prizes, plus progressive jackpot games at \$5 and \$10. A third progressive game, Quick Spot, offered at the \$1, \$2 and \$5 price points, hit the market in May.

Acting Director Harold Mays noted how Fast Play has been expanding across the country, so it was chosen as the first completely new game introduced in Illinois in a long time. “Fast Play is part of our effort to diversify our portfolio and show players that we are trying different new things, and that we want to engage with them in a fun new way.”

For Illinois, launching with both progressive games and those with set top prizes was a way to see how players would respond to both options, although “there’s definitely a bigger opportunity with the progressives.”

Indeed, while there are more actual tickets sold with set top prizes (62% of tickets come from those games, versus 38% from the progressives), in terms of actual sales dollars progressives come out on top. Of course, the \$10 price point is included in the progressive lineup, so that has

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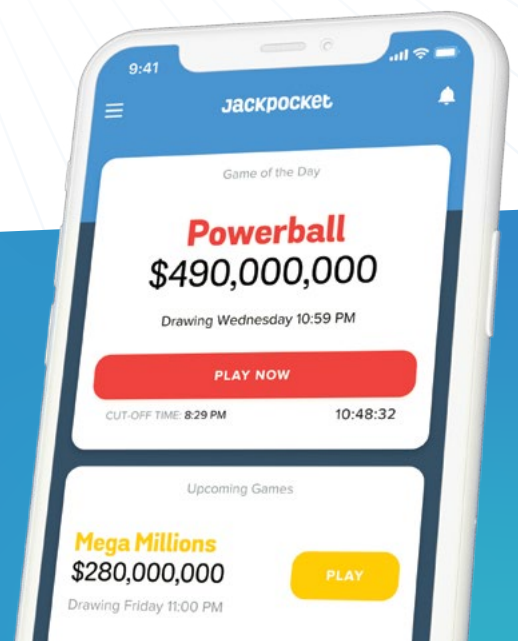


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Focus On: Games

New to the Draw

The development timeline may be long, and the risk greater, but new draw games help lotteries provide diversity and much-needed revenue support.

By Patricia McQueen

There is a never-ending search for new draw games that can stand up and be seen in a lottery's portfolio, but just what that means varies depending on who you talk with. There seems to be an increasing sense that consumer interests have shifted enough that perhaps there needs to be a renewed effort to focus on smaller, more frequent wins on the draw side of the equation.

Given the extended development time needed to create entirely new draw games, and the possible market disappointment at the end of that effort, it is hard to come up with something new. The easiest route to making changes in a lottery's portfolio – and to add more chances to win – is to use add-options.

Most lotteries in the U.S. have their own in-state lotto games, and now almost half of them offer add-ons for an extra \$1, or sometimes two add-ons for \$1 each. That extra dollar might buy a chance for an instant

win, or multiplied lower-tier prizes, or extra drawings for more chances to win with the same numbers. That's what the Illinois Lottery did recently with its Lotto game, adding not one but two extra drawings for \$1 million prizes.

Adding more draw days is another way to boost sales in any given game. That worked very successfully in Canada two years ago when Lotto Max added a second weekly drawing, but Powerball is testing new waters in the big lotto category by adding a third drawing in August. Across the U.S. most lotteries offering traditional in-state lotto games with a 6-of-xx matrix still only offer twice weekly drawings, although cash lotto games are often daily draws.

On the pricing side, in-state lotto games are still predominantly at \$1 or \$2 – about three-quarters of such games are at \$1, with all but two of the remaining games being offered at \$2.

But there have been innovations that go well beyond adding draw

days and add-on options, although those can certainly have the desired effect. Read on for some of the latest developments on the draw side of the industry.

Extra Millions in Illinois

The Illinois Lottery had a challenge on its hands. Its flagship Lotto game had last changed in 2013 and struggled to stand out in the portfolio with flat sales. Acting Director Harold Mays explained: "We looked at the matrix and we asked ourselves 'Why would someone play this game given the odds and the prize structure?' That sort of started the conversation about how we could increase the game's value proposition and get players to look at it differently."

Any revisions to Lotto had to keep the familiar brand, while at the same time producing exciting new ways to win big prizes, both for players who knew the game and for others who had never played. "We wanted




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to create some buzz around the idea that you can play locally, an Illinois-only game, and still have the opportunity to win a good-sized jackpot.”

Player research conducted two years ago looked at different options for Lotto, such as ways to increase the jackpot and options to increase the chances to win. The chosen format launched at the end of March was the concept that won out in the research.

The matrix was reduced from 6-of-52 to 6-of-50, improving the overall odds, and every ticket is entered into not one, but three

drawings. There’s the primary Lotto drawing for the jackpot and lower-tier prizes (the jackpot starts at \$2 million), plus two additional drawings, dubbed Lotto Million 1 and Lotto Million 2, each offering a \$1 million prize if a ticket matches the six numbers drawn. Those additional drawings are conducted immediately following the main Lotto drawing.

That’s three chances to win at least \$1 million with every purchase, and Lotto drawings take place on Mondays, Thursdays and Saturdays – Illinois is one of the very few to have gone to three days a week for

its primary in-state big jackpot game. To support the enhancements, the ticket price went to \$2, but an Extra Shot add-on, introduced in 2012, remains an option. For an extra \$1, any non-jackpot winnings are multiplied.

“It’s a total reenvisioning of what the game could be, or should be, to our players,” said Mays. “We are very encouraged by the new look and the new opportunity to engage players.” And right off the bat, there were two consecutive jackpot winners, followed by the first \$1 million winner in Lotto Million 1. “It was definitely a good start to encourage some buzz around the new game.”

The \$5 Goal

While the \$5 Lotto Max has excelled in Canada, that price point for lotto games hasn’t made much progress in the U.S., where just two lotteries currently offer a \$5 lotto game – Idaho and Wyoming. It’s basically the same game, called Cowboy Draw in Wyoming and 5 Star Draw in Idaho.

The Wyoming Lottery’s game portfolio is unique. Although not allowed to offer instant games, it can offer both multistate and in-state draw games. That’s different from North Dakota, the only other state without instant games, because only multistate games may be sold by the North Dakota Lottery.

When Cowboy Draw debuted in Wyoming in March 2015, it was only the third game the young lottery offered, after Powerball and Mega Millions. Residents have really taken to Cowboy Draw, which typically garners the most sales of any game sold in Wyoming.

In Idaho, the similar 5 Star Draw went into a much different environment when it debuted in October 2019. The Idaho Lottery was a mature 30-year-old lottery with a complete



product line of instant tickets, pull-tabs and a number of draw games of all types. 5 Star Draw was launched into the mix as an Idaho-only premier playing experience that offers a much larger starting jackpot than Idaho Cash, a \$1 game with the same matrix.

Each 5 Star Draw ticket costs \$5 and includes two plays; for a single \$20 purchase a player gets 10 plays. Players can pick their own numbers (it's a 5-of-45 matrix) or choose Quick Pick. The starting jackpot is \$250,000, and drawings are held on Tuesday and Friday nights. The odds of winning the jackpot are 1 in 610,880, and overall odds of winning any prize are 1 in 6.

"5 Star Draw has consistently had a unique niche following," said Idaho Lottery Public Information Specialist David Workman. That following is growing as the jackpot grows; as of early June, the jackpot had not been won since the game's debut and was sitting at a little over \$1 million. While that big number is generating

renewed excitement, "the really interesting thing about 5 Star Draw is the number of second prize winners of \$1,000." That's a very good prize for any Idaho-only draw game, and since the beginning there have typically been one to two \$1,000 winners per draw. "It's a big selling feature of the game and we have concentrated our efforts on those winners. That goes a long way towards developing that following the game has."

Money Dots in New York

The thinking about adding options to generate more, smaller winnings was partly behind the idea of Money Dots, launched last December 28 by the New York Lottery as a complement to Quick Draw (keno). Unlike other monitor products used to fill the time between keno draws, Money Dots actually plays off the numbers not drawn in each Quick Draw game. That said, while Money Dots is based on the unused numbers in the Quick



Draw field, it is an independent game and a Quick Draw purchase is not required to play.

Quick Draw's 20 winning numbers are drawn from a field of 80. Money Dots takes the remaining 60 numbers and assigns each of them a color (yellow, purple, green and red), representing cash prize values of \$5, \$10, \$20 and \$50, respectively. Each Money Dots ticket, a \$1 Quick Pick

purchase, has eight numbers with their respective color assignments. If one of the assigned Money Dots is revealed as the winning number, players win when that number matches one of the Money Dot numbers printed on their ticket for that drawing.

Goals of the new game are to generate additional revenue by offering something simple that complements Quick Draw, and to help expand the player base. Since monitor games are frequently played in social environments, a complementary game needed to appeal to both players and non-players of Quick Draw.

It was felt that Money Dots adds a layer of fun and energy immediately after the Quick Draw numbers are drawn, and the \$1 price point along with lower odds (overall odds of winning are 1 in 13.33, with 1 in 400 odds of winning the \$50 prize) was appealing.

The Lottery conducted research in advance of introduction, and noted that lapsed players, non-players and Quick Draw players all liked the concept. They thought it was easy to understand and offered a great chance to win a little extra money. That broad support for the concept indicated that the game would help expand the player base.

Money Dots launched when social establishments were still impacted by the effects of the pandemic, so a promotion for the game and a second round of advertising will come after customers are more regularly visiting Quick Draw locations at full capacity.

Lightning Strikes Ontario

Most successful games have good research behind them, but you never know what that research will uncover. If you listen, you might get something totally unexpected.

That's exactly what happened to Adam Caughill, Director, Retail Lottery Innovation, for Ontario Lottery and Gaming, during a focus group on Lotto Max nearly a decade

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ago. The light bulb went on after a participant shared his thoughts on the game: *We buy a ticket for a big jackpot and look forward to the draw all week, then when it comes and nobody wins, it's a letdown. So why can't the lottery machines be turned on for another hour so we can buy quick picks and try to hit the winning numbers that were just drawn?*

"Everybody laughed," recalled Caughill. "I laughed too, but then I thought, wait, there's a game there!"

Fast forward to October 2020, when Lightning Lotto was added to OLG's lottery portfolio, all because of that customer insight way back then. It's likely the only game in the world where the numbers are drawn first and people have all day to buy quick picks trying to match those winning numbers for an instant win.

In all the research, there was more than a little concern that some players might assume that with the winning numbers drawn first, OLG would control if and when any winning ticket could be printed. So there was an entire communications package prepared that explained how the drawing and the tickets are produced on two totally separate systems, and there is no connection between the two. And as it turned out, no one – players or retailers – had anything negative to say. "The people playing this game understand how it works, and they understand the fairness," said Caughill. It helps that the overall odds are quite good and there are winners quite often – there were jackpot winners within the first few days.

The winning numbers for each day's game are drawn between midnight and 1am; sales open at 3:30am each day except Tuesday, when sales begin at 5:30am. Sales close daily at 11:58pm before the next day's numbers are drawn. For \$2, a player gets three sets of five numbers from 1 to 49. There are five prize levels: \$2, \$7, \$250, \$5,000 and the jackpot, which starts at \$125,000. Odds of winning the jackpot are 1 in 635,628, and the overall odds of winning any prize are 1 in 4.47.

There were unique challenges to launching such a unique concept in the middle of an ongoing pandemic. Marketing and promotional opportunities were limited. At retail, although in-store posters showcased the game, there could be no handouts distributed, and players were separated from retail clerks by plexiglass, not exactly a situation that

fostered communication. And in the era of social distancing, players were encouraged to buy tickets and leave the store – no waiting around to keep playing.

On the flip side, people were looking for things to do. Casinos and most entertainment venues were closed, so in came Lightning Lotto as something new and different to try. “We really crossed our fingers and put this out there,” said Caughill. “Thankfully, our customers responded.”

When compared to other terminal-printed instant win games like Fast Play (not currently offered in Ontario), Caughill has the sense that players think their results in Lightning Lotto are more fair and under their own control. That whether they win or not is based on when they go to the store and when their ticket is printed. That it doesn't feel predetermined as something “the lottery” has already chosen to send the players. “There's something different about Lightning Lotto that players see as more random and dependent more upon when they buy their Quick Picks.”

Based on research, OLG expected Lightning Lotto to generate about \$25 to \$30 million a year in sales, just what it needed in the budget. But sales quickly blew past those expectations. From its launch in October to the fiscal year ending March 31, Lightning Lotto sales were \$35 million, more than doubling the half-year forecast of \$15.7 million.

Even better, once OLG can put some resources into marketing and promotion, there's a world of potential. In just a few months, the game has proven to provide the jackpot activity that gets people excited and playing – as of mid-June, 34 jackpots had been won. The current record is almost \$1 million, and jackpots have averaged \$357,000. “There is ongoing news in this game with spikes as the jackpot builds, so there is an

opportunity to take advantage of that excitement through promotions and marketing offers that encourage trial,” said Caughill.

Making It Pop

It seems fitting to close this review of some of the more recent draw game innovations by going back to the concept of little wins. The Georgia Lottery was looking for an exciting new game, one that could reach younger adults who are known to love

playing games but don't necessarily want to make a financial investment; many also think lottery games are too complicated. In came Cash Pop, which had already been launched as a second monitor game in Kentucky and New Jersey. In fact, it was first considered as a monitor game in Georgia as well, but research into the local market changed those plans.

“I wanted to really understand Georgia players,” said Vice President of Product Development Katherine Cundiff, specifically about how many

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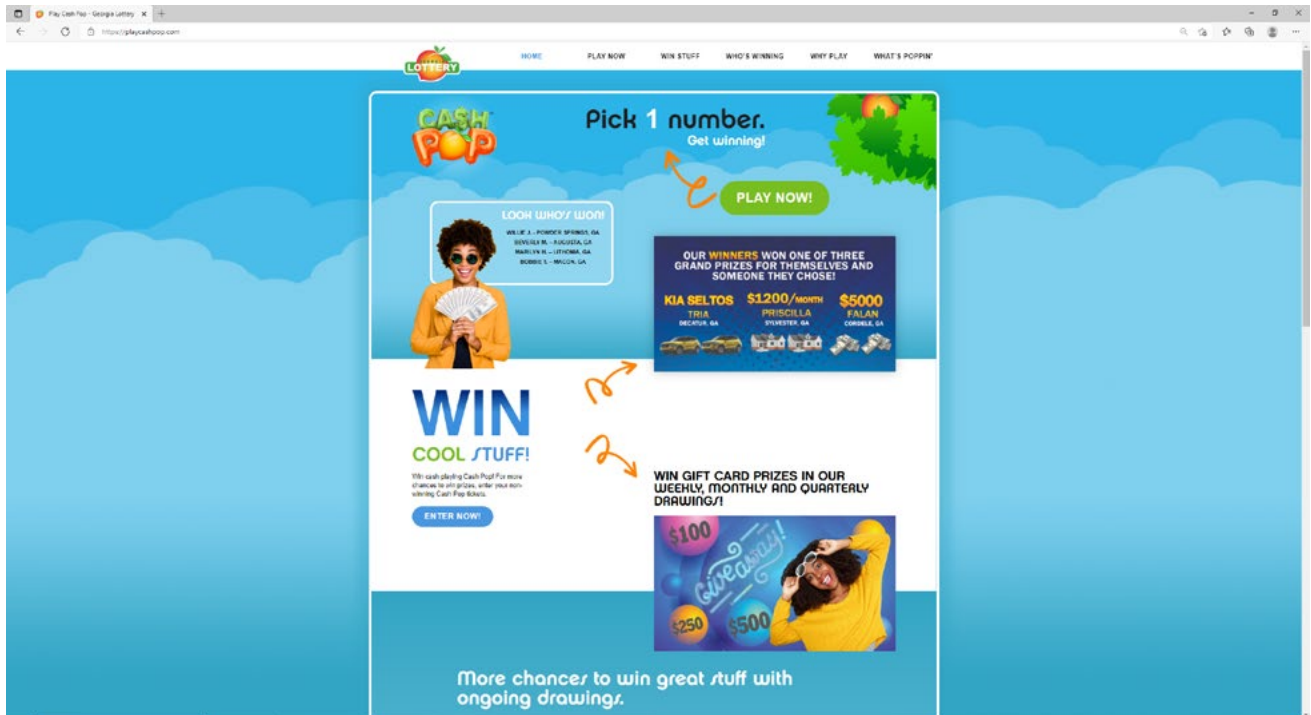
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drawings were desirable and what price points they would purchase. Research indicated that four to five drawings a day was optimal, and prices up to \$5 were acceptable.

The Lottery also utilized a group of its student interns, all recipients of HOPE scholarships, by asking what they liked about the Cash Pop concept and what they would expect from such a game. They were, after all, the target market – young adults who may know about lottery, but who were not fully engaged with lottery.

Three key things came out of those discussions. To keep this demographic engaged, a game must be on their phone, payments have to be cashless, and they have to win or somehow be rewarded for play. Otherwise they would walk away.

With all of these insights, Cash Pop was launched in December 2019, positioned as a modern, cool, fun way to play the lottery, with a great mobile experience. Drawn five times daily, the top prizes are

\$250 for a \$1 play, \$500 for a \$2 play, and \$1,250 for a \$5 play. The odds of winning the smallest prize – five times the ticket price – are about 1 in 32, the odds of winning the top prize are 1 in 8,250, and overall odds of winning any prize are 1 in 15.

“The top prize is not a life-changing prize, but players are really happy with consistent small wins, and they understand that it’s an attractive value proposition,” noted Cundiff.

A microsite, playcashpop.com, serves as a fun and fresh portal for all things related to the game, including chances to win additional prizes with weekly, monthly and quarterly drawings. And since Cash Pop is available both at retail (which currently accounts for 85% of game sales) and on Georgia’s iLottery platform, there is of course a link to play online. The extra chances to win prizes, combined with the great overall game odds, are exactly what keeps players engaged. Not surprisingly, Cundiff credits that microsite for a lot of the Lottery’s success in

growing playership in the game.

Although consistent advertising support has been important, the Georgia Lottery also hired social influencers around the state to help drive the introduction and reach the intended demographics. “I think they were instrumental in the success of this game. It wasn’t the voice of the Lottery, it was peers telling peers.”

So it all came together for Cash Pop. With one month left in FY21, sales had surpassed \$63 million through May 31, far exceeding expectations. “That’s incredible for a tertiary game in Georgia,” said Cundiff. “It clearly fills a void for us.”

She noted that lotto games built the lottery industry, but not only has the industry changed with so much emphasis on instant games, the market has changed as well. There’s competition everywhere, from casinos, sports betting and other entertainment. “We have to figure out how to keep players engaging with us, or we are going to be left behind. People still chase the large jackpots, but at the end of the day, people want to win.” ●



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