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INSIGHTS

MAY/JUNE 2023

FOCUS ON: iLOTTERY

We look at **games, engagement, new developments,** and **Virginia's success.**



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From the
**NASPL
President**

Dear lottery colleagues,

I would like to invite you all once again to attend the 2023 NASPL Professional Development Seminar on July 17-20 in Denver, Colorado. This year's theme is Mile High Expectations, featuring breakout sessions for Public Relations, Accounting, Audit, Legal, IT, Security, Sales/Marketing, and Product Management. No matter the focus of your role in the lottery industry, PDS has something for you.

I know the planning committee is working with our NASPL Associate Members to host some after-hours social events all around Denver as well. These events can create lasting bonds with your industry colleagues.

The Seminar is being held at the Grand Hyatt, an AAA Four-Diamond hotel in the heart of Denver's entertainment district. Coors Field, the home of the Colorado Rockies, is a short walk from the hotel and the famous 16th Street Mall is just one block away.

PDS is also when NASPL announces the winners of the 2023 Powers Awards and the Ott Brown NASPL Scholarship. It is always great to hear the stories of those winners and how much they have contributed to our industry.

Registration is currently open, and more details will be provided at nasplprofessionaldevelopment.com as the agenda is finalized.

And if you're from a lower altitude state like me, be sure to check out the tips on avoiding altitude sickness. HINT: Stay hydrated!

Looking forward to a great event!

Sarah M. Taylor

Executive Director, Hoosier Lottery
NASPL President



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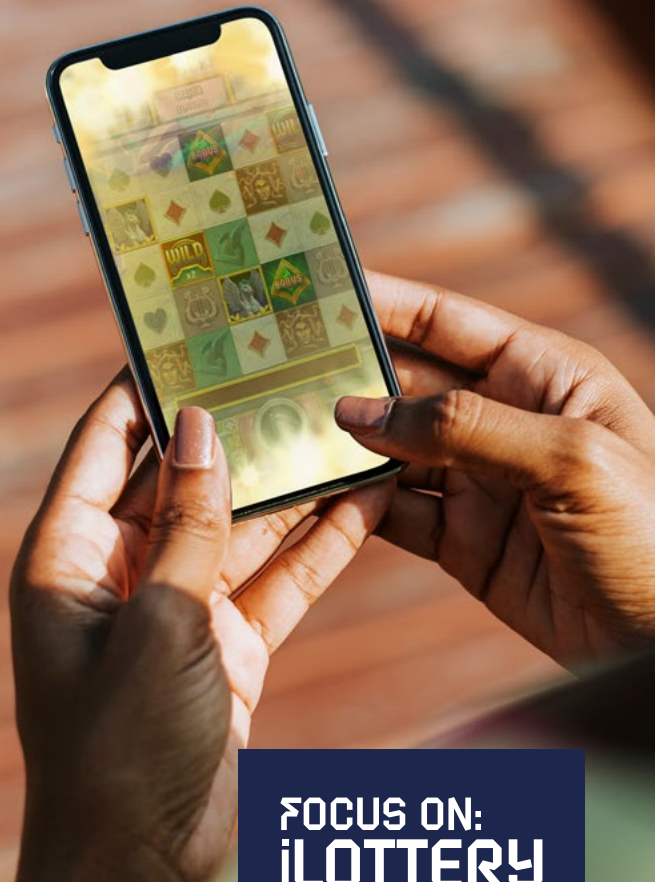
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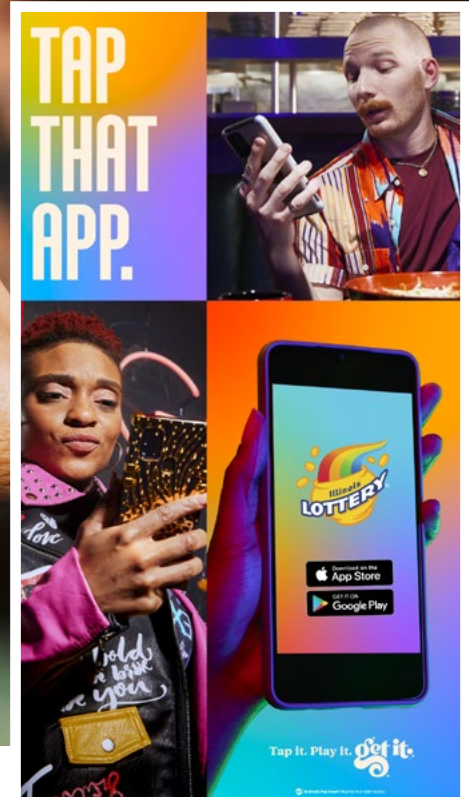
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FOCUS ON:
iLOTTERY



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iLottery success.

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The Science Inside the Connections



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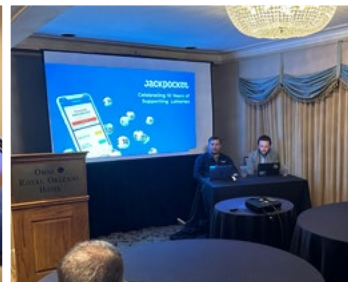
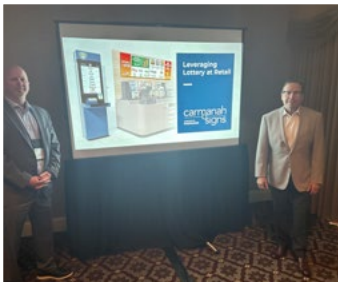
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NASPL Spring Directors Meeting

Lottery executives gathered in mid-June for the NASPL Directors' Meeting in New Orleans to discuss key business initiatives and hold a dialogue with our associate members. We thank those associate members – and of course the dedicated lottery chief executives around North America – for making this year's meeting a resounding success. And a special thank you goes to Rose Hudson and the Louisiana Lottery team for hosting the event!

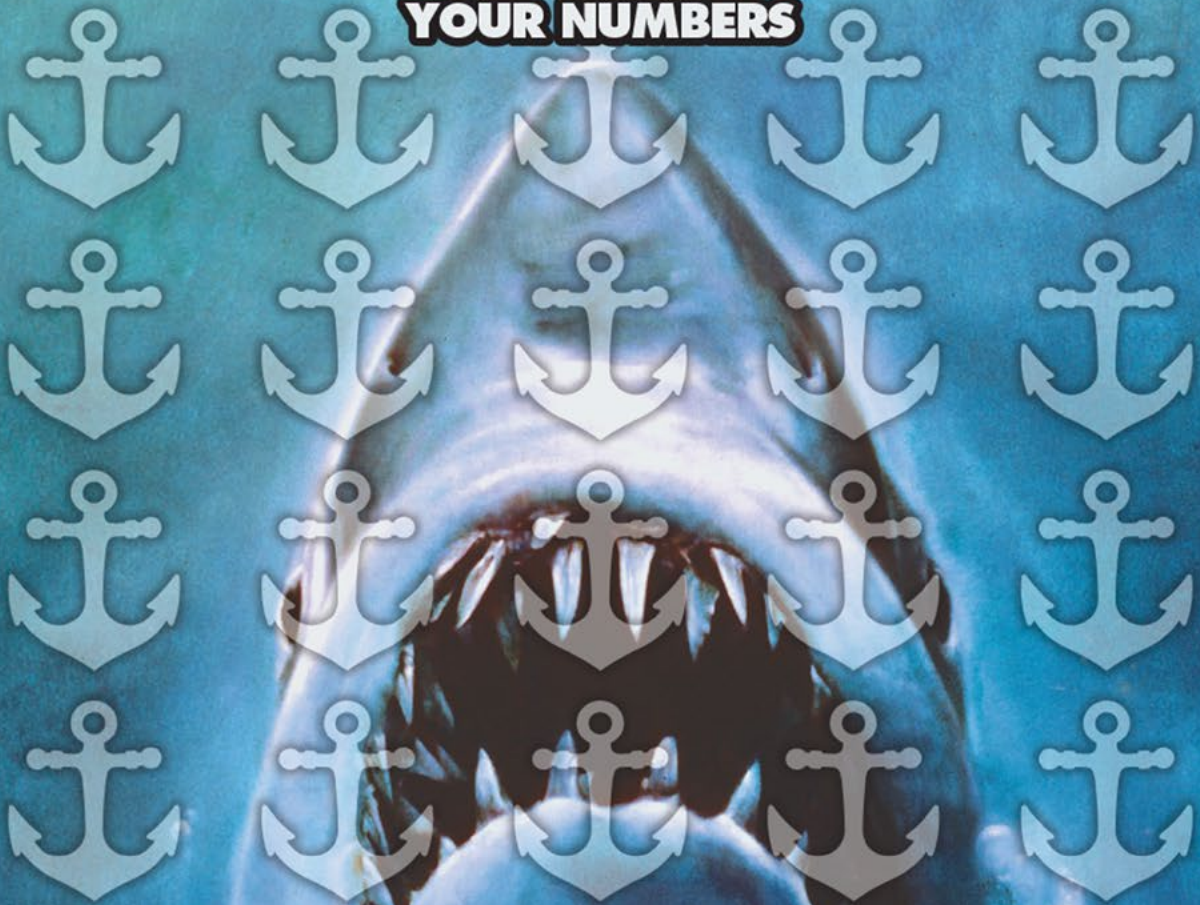


JAWS

WINNING NUMBERS



YOUR NUMBERS



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MAKING A DIFFERENCE

CHRISTINA PRICE

*Director of Finance,
Louisiana Lottery*



Someone who can solve problems is a prized member of a team in any environment.

While daily ins and outs of work – and life – are often routine, inevitably challenges come up that require solutions. Just ask Christina Price, who considers problem solving to be one of her best attributes. Much to the benefit of the Louisiana Lottery, when something comes up or there's a problem that needs addressing, her mind goes into overdrive. "I want to figure it out and come up with a solution, one that will continue to work well going forward."

"Christina Price is such a valued member of our lottery team," said President and Chief Executive Officer Rose Hudson. "She is talented, inquisitive and strives for the best. Her approach to her work is not only competency-based, but also makes her a role model and leader in the organization."

Price first joined the Louisiana Lottery as an accountant in 2004 and was promoted to a senior position about two years later. She left to pursue other opportunities at the end of 2009, then returned as Director of Accounting in late 2010; the title was changed to Director of Finance in 2019 to more accurately reflect her responsibilities.

In this role, she manages a staff of four, covering accounts payable, purchasing, payroll and accounting. She also works with other finance staff in prize payments and accounts receivable, because those processes have impacts on the underlying accounting functions.

She just loves structure of accounting, the rules and procedures that must be followed. "I'm an accountant by nature – I like black and white," said Price. That said, she knows that not everything is black and white. "There is some gray. I don't enjoy the gray." Yet like any good professional, she continues to adjust and adapt, and the Louisiana Lottery is the winner. In fact, in each year of her tenure, the organization's Accounting Department has been recognized by the Government Finance Officers Association, earning a Certificate of Achievement for Excellence in Financial Reporting.

The pandemic had a material impact on how some of the work gets done (more on that later), and also permanently changed the way the Lottery's employees work. These days, there is a hybrid schedule each week – three days in the office and two days working remotely.

Away from work, Price loves to travel, and she and her husband Kelvin try to take a "couples vacation" every

two years or so. But mostly she is a proud mother of three active children, sons Larkin (20) and Cambren (15), and daughter Keri (9). They are active in sports, including basketball, football, soccer, swimming and gymnastics. "I've always encouraged my children to work hard in academics as well as extra-curricular activities, as they are the foundation to a great work ethic." Price volunteers with a Girl Scout troop, assisting her mom (who is the troop leader), and also on a community board dedicated to amateur youth sports (LA Broncos).

Most recently, she started serving on her city's planning and zoning commission. "The volunteer position gives me some insights into how cities plan neighborhoods and all of the things that go into that. It's been a learning process." That fits well with her desire to experience new things as she gets older, even something as simple as trying new foods. Through it all, though, she tries to focus on things that bring her peace and joy. "Self care and work-life balance is crucial."

Price has a Bachelor of Science in Finance and a Master of Science in Accounting, both from Louisiana State University. A Certified Public Accountant, she maintains membership in various related organizations.

What brought you to the Louisiana Lottery the first time, and what made you come back?

The first time it was simply meant to be. I had actually applied for a job with another company, and the interviewer didn't think I'd enjoy that position so she passed my resume along to a friend at the Lottery. An interview was arranged, I asked a lot of questions, and I was offered the job as a staff accountant. Although I was promoted to a senior accountant, it was still a small department here and the other senior positions were held by long-time employees. I felt there was no room for further advancement and I left to explore other opportunities. As it turned out, I preferred the structure of the environment here, and when the Lottery's Director of Accounting position opened a year later, I jumped at the chance to come back. Because we are a small group, we have open communication – if there are questions, we know who to ask in order to get things done. There's not a lot of red tape and it's a good working environment. You know what to expect for the most part, although we do have things that pop up from time to time.

What are the biggest challenges in lottery financial reporting?

The Louisiana Lottery is a corporation, but we are still subject to some of the same governmental rules as some state agencies. That makes it a little interesting. Because we're a corporation, I'm not only involved in accounting, but also with treasury management, fixed assets, etc., which may not be part of a more typical state agency. But at the same time, we have to submit our budget, and even any game changes, to the legislature and go through the political process. So we don't get to act independently in everything.

I'd say the main challenge in accounting itself comes when we introduce new games or make changes to existing games. We have to do additional testing to make sure things flow correctly to our accounting records. We have to think about all of



the details and the work that goes into creating each transaction. As Director of Finance, I get to see how everything works together; I'm not just working in a silo. For example, I now understand how our scratch game inventory levels must comply with state insurance requirements. Everything is intertwined, and I think that's the most interesting part of my job.

How did the pandemic impact your role at the Louisiana Lottery?

We were very paper-intensive prior to the pandemic. When they sent us home in March 2020, it soon became clear that the situation was not going

to resolve itself quickly. We still had payroll to meet and vendors to pay, and we had to figure out the best way to do that without going into the office. It was a challenge that gave us the opportunity to take a look at what we were already doing and learn how to make things better. I'm really big on efficiency, and working smarter, not harder. And as noted earlier, I love a challenge where I can solve problems!

The biggest accomplishment was converting to a paperless environment, using tools we already had. We were already using Microsoft Teams, so that became our primary method of communication. We were already



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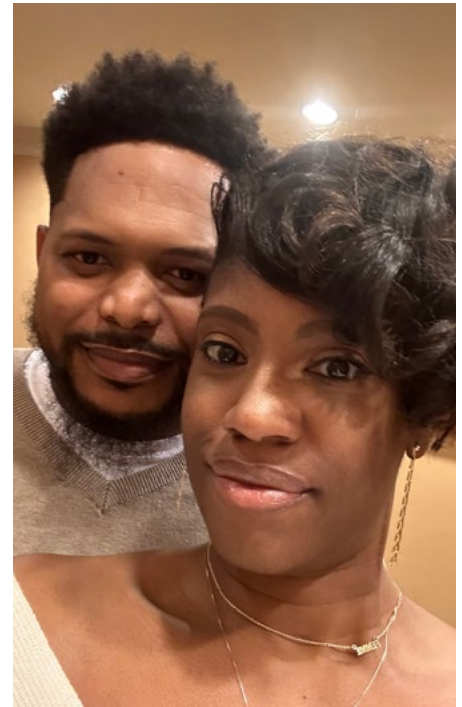
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using Adobe software, and now we use its built-in features like electronic signatures. Similarly, our accounting software also had capabilities we could implement for the first time. We started storing more documents using Microsoft OneDrive, which is a collaborative and efficient way to share information. All in all, we went from passing paper around the office and storing things in file cabinets to doing it almost all electronically. We're able to share more information and get things completed quicker, without sacrificing the integrity of everything we do. It was a big challenge, but it wasn't as difficult as it seemed when we first started. And again, that's mostly because we already had the necessary technology; we just had no previous need to take advantage of all it has to offer.

and what we can do better. If I can present research showing how we can improve operations in a cost-effective way, I usually get the green light for implementation. There's no automatic "we don't have the resources," or "we don't have the technology," or even "but this is the way we've always done it." That's really what I enjoy the most, that management is always willing to implement things that make our jobs better. That really took on a new life with the pandemic, which was a catalyst for change.

Although we aren't a big corporation, I still sometimes wish we could have an on-site cafeteria or small gym here in our headquarters. We have a little extra space right now, and it would be nice to have somewhere we could just take a work break every now and then. ■



From your perspective, is there anything you wish the Louisiana Lottery – or the lottery industry in general – could do differently?

I used to think it would be great to always work remotely, so that was one thing that I wanted to do. However, the pandemic made me realize the value of sometimes being in face-to-face environments. The hybrid situation we have here in Louisiana is the best of both worlds, so I can't really say we should do things differently. But maybe it's something all lotteries should consider, if they aren't already doing so. I've always been a champion of work-life balance – I don't like the idea of having to choose between work and family. Here, I don't ever feel I have to choose. I have the flexibility to go to my sons' games, or my daughter's swim meets, or whatever they have going on, without worrying about work. Of course, I have to plan accordingly, but that's our part of the bargain.

What do you enjoy most about your job? The least?

I like the autonomy of my job, meaning that I have the ability to come up with new procedures and make appropriate decisions. It's the ability to think about what we need to do





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Player Surveys Provide Decision-Making Insights

By **Dan Iverson**
Content Manager,
Montana Lottery

In the past two fiscal years, the Montana Lottery has sought to enhance its offerings by utilizing surveys to gather insights from players. These surveys have played a pivotal role in informing the development of our games, ensuring they align with the preferences and desires of the Lottery's customer base.

The two case studies presented here highlight two different research efforts. The first was in-house research for a new scratch game, and the second involved research performed by a third party for the annual Montana Millionaire raffle game.

Case Study: Chevrolet Silverado (Scratch)

Every summer, the Montana Lottery launches a featured scratch game – often a licensed property with a merchandise or experiential prize and second chance drawings.

In previous years, the featured scratch game awarded trucks, recreational vehicles and other prizes. Preparing for 2023, we faced a familiar question: Do we repeat something we've done before or do something new? We decided to ask the players.

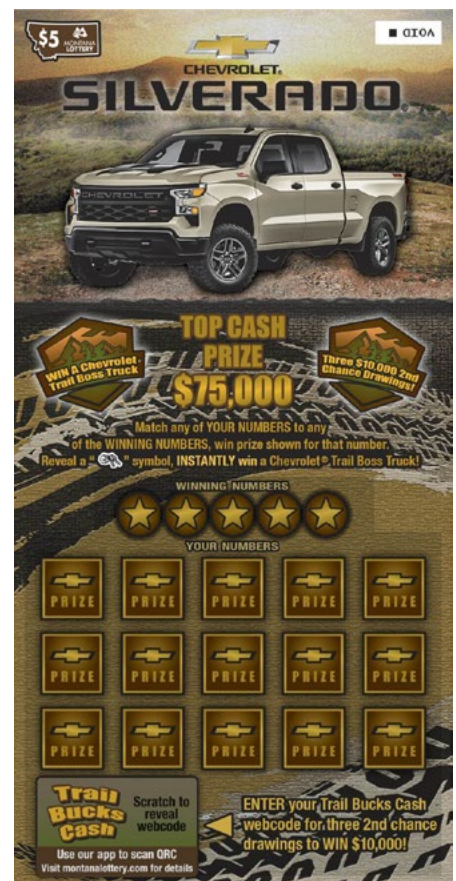
In January, the Lottery used a popular online survey tool (Survey

Monkey) to ask respondents about the prizes they're most interested in playing for. Respondents were asked to rank their preferences among four general categories (vehicle, recreational vehicle, sporting event and vacation), and then for each category choose from more specific options.

To distribute the survey, we used our Player's Club email list filtered by active members. From there, a random sample of 30,000 members received an email asking them to complete the survey.

Responses were slow at first, but after we added a small incentive, we quickly accumulated enough responses to be statistically significant. A clear winner emerged: Players wanted the chance to win a vehicle.

When it came to the specific prizes within the vehicle category, participants were asked to choose the type of vehicle that would most likely encourage them to play. The options provided were a pickup truck, a large SUV, a midsize SUV, or none of the above. The pickup truck garnered the highest interest, with 36.4% of respondents selecting it. The midsize SUV followed closely behind with 29.8% of participants expressing interest. The large SUV received a 20.9% interest rate, while 12.9% of respondents chose none of the above.



The results didn't necessarily surprise us. After all, Montana has nearly 74,000 miles of public roads, an economy in which agriculture is the top industry, and endless opportunities for outdoor recreation. That said,

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WINNING SYMBOLS



GRID 1	
LINE 1	Anchor, Flip-flops, Beach ball, RCCL CERTIFICATE
LINE 2	Sunglasses, 5X, Passport, Camera, 50.00 FIFTYS
LINE 3	Beach ball, Flip-flops, Camera, 10.00 TEN
LINE 4	Palm tree, Beach ball, Anchor, Camera, 20.00 TWENTYS

GRID 2	
LINE 1	Life preserver, Palm tree, Sunglasses, Passport, 15.00 FIFTH
LINE 2	Beach ball, Flip-flops, Camera, Beach ball, \$1000 ONE TH
LINE 3	Life preserver, Anchor, Beach ball, Beach ball, 20.00 TWENTYS
LINE 4	Sunglasses, Beach ball, Passport, Flip-flops, 15.00 FIFTH

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we'd done truck prizes more than a few times before, and it was helpful to confirm the demand still existed.

After working with other brands before, the Lottery settled on its first-ever Chevrolet license with Pollard Banknote and launched a \$5 game featuring a Silverado Trail Boss truck.

As of writing, the game has been available for four weeks and sold an average of 130 packs per week. By comparison, 2020's Ford game sold an average of 187 packs per week, although it is important to note that all scratch sales in Montana increased dramatically at the height of COVID. It is also worth mentioning the Lottery's advertising campaign supporting the game doesn't launch until July.

Case Study:
Montana Millionaire (Raffle)

In November 2021, our players surprised us by selling out our annual raffle game, Montana Millionaire, in only six days, or approximately three times faster than the previous record. The game sold so quickly, we didn't even have time to launch our media plan to support it; although suffice it to say, it wasn't necessary.

Understanding what drove such a dramatic increase in demand would be critical to designing future iterations of the game in such a way that would allow for sustainable growth. Which of the many variables – price point, ticket quantity, prize structure, etc. – could we adjust? Which factors did players consider to be intrinsic to the experience of the game and should be left alone?

In pursuit of answers to these questions, we worked with our vendor to commission research. Leger Marketing was selected to design, administer and



interpret the results of a survey, which the Lottery distributed using the same methodology as the featured scratch game survey.

Several key findings emerged, shedding light on the preferences and motivations of past purchasers as well as potential buyers.

The survey results indicated that a remarkable 46% of individuals who purchased Montana Millionaire tickets in the past year plan to buy even more tickets in the coming year. This finding underscores the game's appeal and suggests a growing fan base eager to participate in future draws,

highlighting the opportunity to grow revenue by increasing the number of tickets available.

Among the various aspects of the game, the two \$1 million top prizes emerged as the most enticing feature for respondents, with 27% expressing particular interest in this aspect. Following closely behind, the limited number of tickets sold garnered attention from 25% of participants. These findings emphasize the appeal of sizable prizes, and that although there may be demand for more tickets, it's also important to maintain the exclusivity of the game.



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Additionally, the survey revealed the impact of the pandemic on players' decision-making. Approximately a quarter of respondents stated that the pandemic made them more likely to purchase tickets. In contrast, only 4% claimed it made them less inclined to participate, while the majority (70%) reported that the pandemic did not affect their decision.

Among individuals who did not play, 38% expressed that the presence of more instant winners would incentivize them to participate. Additionally, better odds (43%) was identified as one of the top factors that would influence their decision to participate.

The findings suggest that by maintaining or increasing the odds of winning and introducing more instant winners, Montana Millionaire can continue to engage and excite both existing and new participants in the future.

With access to the survey results, we designed the 2022 iteration of the game with an additional 30,000 tickets, 500 more instant-win prizes, and better overall odds. It would prove to be another success. The sales window narrowed even further to only 29 hours before the game was sold out, and profit grew by 12%!

For this year's game, we discussed a lot of options but ultimately decided something incremental wouldn't be enough, so we're adding another 100,000 tickets and a third \$1 million prize. The 2023 raffle will launch Nov. 1. ■



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- TWO early bird drawings
- \$100 and \$500 instant wins
- Best odds of winning \$1,000,000

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- Early bird prizes increased:
 - \$100,000 & \$25,000
- More instant wins:
 - 1,800 for \$500
 - 1,200 for \$100

Mark Your Calendar!

	Nov. 1	Nov. 25
NOVEMBER	Tickets on sale	1st Early Bird \$100,000*

*Odds for the Early Bird drawings will depend on how many tickets are sold prior to the drawing deadlines.


	Dec. 16	Dec. 26–Jan. 1**
DECEMBER	2nd Early Bird \$25,000*	Grand Prize and \$100,000 draws

**If tickets sell out prior to Jan. 1, the Grand Prize drawings may be held sooner, but never before Dec. 25. Drawing date will be announced after all tickets are sold out.



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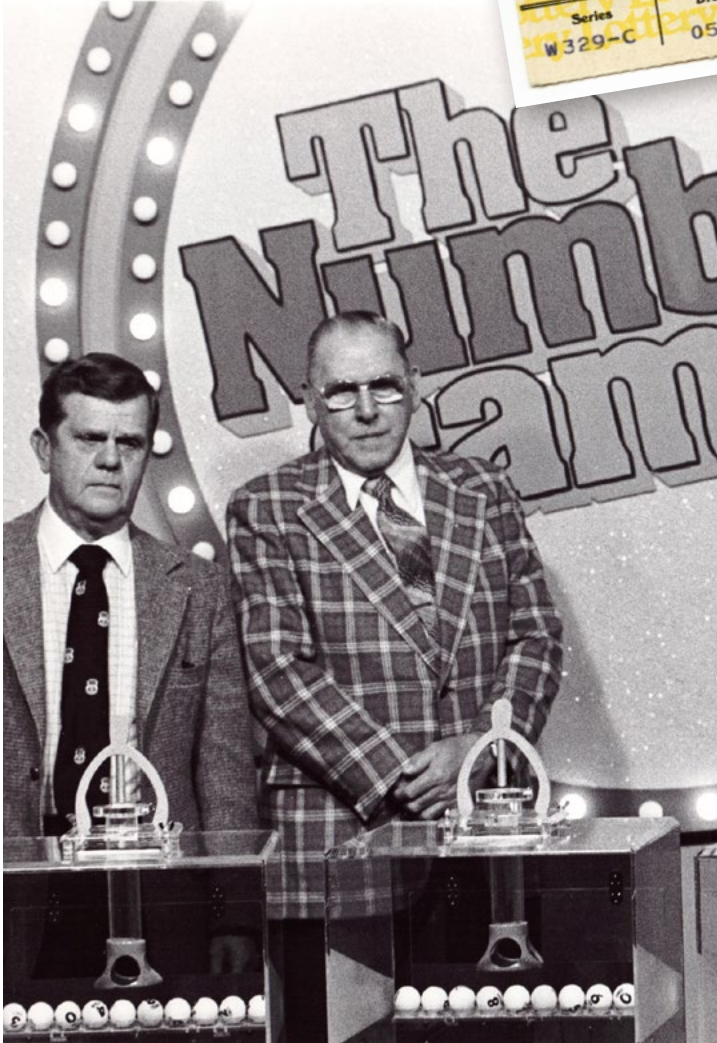
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Fifty Years of Fun in Maryland

The Maryland Lottery is celebrating its 50th anniversary in 2023, and while the organization is considerably different today than when it started, the goal has never changed – to raise money for good causes.

By Patricia McQueen

Nestled in the center of the Eastern seaboard is Maryland, whose residents range from urbanites who thrive in the congested Baltimore–Washington, D.C., corridor, to those who find more comfortable environs on the Eastern Shore or mountainous points west, reaching beyond the Cumberland Gap. One of America’s smallest states by geography, its population of more than 6.4 million ranks it much higher by that measure.

Those Marylanders love their lottery games, to the tune of more than \$2.6 billion in FY22. One of the country’s 16 lotteries with sales of traditional products exceeding \$2 billion that year, Maryland’s population is considerably smaller than almost all of the other lotteries in that group. That support by players is a testament to five decades of history and a diverse product mix.

In the 50 years since the first lottery games were sold in May 1973, the Maryland Lottery and Gaming Control Agency has generated more than \$25 billion in revenue for the state’s good causes. That includes net revenues from both lottery operations and gaming activities. Initially launched as the Maryland State Lottery, the agency got its current name after it was tasked with the regulation of casinos (the first of six opened in September 2010). Sports betting regulation was added to its portfolio later, and launched in December 2021. Most of that \$25 billion in historical revenue has gone to Maryland’s General Fund supporting the state where needed; casino and sports betting revenues in the modern era are allocated primarily to education.

Variety of Products

The Maryland Lottery is relatively unusual among most American lotteries in terms of overall product mix, with all three primary product lines (scratch, draw and monitor) each holding a solid percentage of sales. Draw games, spurred on by a smashing debut of Fast Play in February 2020 and a strong debut of Pick 5 two years later, still account for a slight majority (39% of total lottery sales in FY22) compared to scratch games (38%), with monitor games holding strong at 23%. The Lottery also offers instant ticket lottery machines (ITLMs), which present animated displays of prizes on dispensed scratch tickets; these are limited to qualified veterans clubs in certain regions.

That strength in all three general product categories “is in our DNA,” explained Director John Martin, who is happy with the overall mix. “It’s important to us not only that we have our fingers in a number of pies, but also that we do well in them. Our monitor game strategy is second to none. We’re in the top tier of lotteries with Fast Play. The general diversity of our product line also allows us to ride the swings in the big jackpot games that have more impacts on other lotteries.”

That’s not to say there hasn’t been movement. Scratch games, while still a small percentage of sales compared to most other American lotteries, have grown their share of the mix in recent years, up from less than 30% a decade ago. A number of factors have contributed to that growth, including product design,



Maryland Lottery at a Glance

..... Traditional Game Sales				
	Scratch-Offs	Draw Games	Monitor Games	ITLMs
FY 2022	\$1,009,473,559	\$1,033,956,620	\$606,141,596	\$13,132,050
FY 2021	993,407,426	1,035,023,037	572,194,487	10,525,120
FY 2020	852,739,383	839,681,319	489,482,954	7,864,356
FY 2019	812,426,311	876,772,692	498,058,435	9,651,061
FY 2018	750,888,512	798,790,431	483,994,277	9,121,117

Current games:

Scratch tickets: About 55 new games per year; \$1, \$2, \$3, \$5, \$10, \$20, \$30 and \$50

Terminal games: Powerball, Mega Millions, Multi-Match, Bonus Match 5, Cash4Life, Pick 3, Pick 4, Pick 5, Fast Play, Keno, Racetrax

Vital statistics:

Number of employees: 329

Number of licensed retailers: 4,348

Number of self-service machines: 2,017 full-service machines in retail locations; 402 Instant Ticket Lottery Machines in 91 qualified veterans clubs.



at the expense of another product.” Personally, he thinks it would be the latter scenario, which is not really a desirable outcome. And at the end of the day, it’s all about generating money for the state, and scratch tickets generally have lower profit margins than other products.

Maryland’s two monitor games, Keno and Racetrax, combine to make Maryland one of America’s leaders in the category with FY22 sales of \$606 million. On a per capita basis, Maryland is behind only Massachusetts in monitor game sales. And Maryland and the District of Columbia are the only jurisdictions where a second monitor game outsells the original such game, Keno. Both happen to be games with horse racing themes – Racetrax in Maryland and Race2Riches in D.C.

Racetrax bets are made using racing parlance, and the winning numbers are presented using sophisticated animation that provides the perceived action of a sporting event. “The

inventory management and distribution, along with retailer education. Although Martin thinks their share can go still higher than it is today, it’s unlikely to reach as much as 50%.

Even at 50%, it would still put Maryland in the minority of lotteries

across the country, most of which have a considerably larger percentage of scratch sales in their portfolios. “If we get scratch to 50% of our portfolio, that probably means one of two things. Either the market has grown so the pie is much bigger, or it will be

***** Gross Gaming Revenues *****					
	Casino Slots & Tables	Sports Betting	Total Revenues	Lottery Prizes	Net to State*
FY 2022	\$2,001,780,232	\$19,216,623	\$4,683,700,680	\$1,689,109,893	\$1,527,108,786
FY 2021	1,745,721,796		4,356,871,866	1,655,957,335	1,392,754,777
FY 2020	1,279,974,107		3,469,742,119	1,369,035,515	1,112,315,429
FY 2019	1,760,408,579		3,957,317,078	1,357,478,258	1,314,115,565
FY 2018	1,678,966,410		3,721,760,747	1,248,722,984	1,255,883,991

* Represents net revenue to the state from lottery, gaming and sports betting activities; recipients include the Maryland General Fund, Education Trust Fund and other state funds/agencies.

graphics are so real that if you just glance at the monitor, you would think you are watching an actual race,” said Martin. He added that players act that way as well, urging on their “horses” as they race to the finish line. “The reality is that at its core, Racetrax is simply a 3- or 4-digit numbers game, and numbers games are very much an urban product” that are particularly popular in Eastern jurisdictions. “They are part of our history and uniqueness.”

Indeed, Maryland’s Pick 3, Pick 4 and Pick 5 games combined produced sales of almost \$667 million in FY22, dwarfing sales of all lotto games combined, including the national games.

Martin thinks that as Racetrax grew and Keno sagged, it just reflects the natural progression of the games. He noted that Keno has typically declined as a mature casino product around the country, and long-running lottery Keno games are no different. Racetrax is there to offer something a little different, and it has grown steadily since its debut in 2006; Maryland launched its original Keno game in 1993.

When it comes to the big national games, Martin personally believes that the industry needs to work more collaboratively and perhaps develop a plan that would differentiate the



two games. From the players’ point of view, Powerball and Mega Millions occupy the same space, and they’ll choose whichever jackpot happens to be bigger. “I think there needs to be a more strategic alignment of games, and if that means one of those two games is very different tomorrow than it was yesterday, then that’s ok. We should be having those conversations.”

Retail and Marketing

Comfortable with the current product strategy – although the team is always on the lookout for new games – the focus turns to getting those

products sold at retail and reaching players through marketing. For Martin, that doesn’t necessarily mean just getting lottery into more retail outlets. With his business background, it never seemed logical for a lottery to emphasize recruiting new retailers, which requires considerable costs in equipment, infrastructure and human resources. “Wouldn’t we be further ahead if we could get our existing retailers to be more productive and to improve our inventory management?” he asks.

Rather than set an arbitrary goal to increase the number of retailers from the current 4,400, Martin would

rather focus on things the Lottery can control, like better merchandising at the stronger retailers. “It’s not about making poor retailers good. It’s about taking good retailers and making them even better.” Combined with industry-wide efforts to bring companies like Walmart into the lottery fold and other opportunities that present themselves along the way, these are Maryland’s current paths for growth through the retail network.

What’s the strategy for making good retailers better? Some of it is just “boots on the ground” efforts to educate retailers on merchandising, managing inventory, and understanding what is selling in their stores. Maryland uses a number of sales force automation tools, including the gem[Intelligence suite provided by Scientific Games. That helps make decisions on product mix in the market and inventory management. “We have a good base with our field team, a strong network and great relationships, and good communication with top-tier retailers. A lot of little things contribute to our retail success.” Anything new, such as the latest in digital retail tools, has to first go through serious cost-benefit analysis, so Maryland is currently just watching and waiting.

One of the current industry developments being followed closely are efforts for retail expansion via “in-lane” opportunities in multilane environments, both those new to lottery and those representing more reach in existing locations. “We’ve looked at it, trying to see if it makes sense for us to pilot it somewhere,” said Martin. “I think that’s still an emerging topic that the whole industry has to figure out.”

Maryland’s strong relationships with retailers are part of the Lottery’s overall marketing efforts that also include strong relationships with both media partners and players. For the latter, there’s an emphasis on the My Lottery Rewards program, which includes prizes, incentives, promotions

and contests, all designed to keep players engaged.

Another component is winner awareness, and the Lottery’s communications team excels at drawing out winners who are hesitant about publicity. By creating a “persona” using props and funny names, winners can maintain their anonymity while having their story told. “The stories are all wonderful, and we try to get that message out, because it’s important that people understand that real people win,” emphasized Martin.

In total, he credits a lot of advance planning to make all the marketing programs come together, from top-tier initiatives that get full court press, to other programs that are maintained on an ongoing basis. Yet he still sees one big area of potential improvement – better utilization of social media. “I’m intrigued with what we could do there.”

Responsible Shift

Through it all, Maryland Lottery and Gaming takes its mandate to raise revenue for good causes in Maryland to the next level by ensuring responsible play throughout its operations, from lottery games to casinos and sports betting.

The agency is a founding member of the Maryland Alliance for Responsible Gambling (MARG), formed in 2010 upon the introduction of casinos. It’s a statewide partnership focused on coordinating and maximizing resources to address problem gambling in Maryland. Other members include Maryland Department of Behavioral Health, Maryland Department of Public Safety and Correctional Services, Maryland State Senate, Maryland House of Representatives, Maryland Council on Problem Gambling, Maryland Center of Excellence on Problem Gambling, and representatives from Maryland’s casinos.

“We do a lot with responsible gambling messaging all year long,”

explained Martin, adding that the agency has a great relationship with the University of Maryland’s Center of Excellence on Problem Gambling, which offers far-reaching programs including public awareness, prevention of problem gambling, and training; manages a help line; maintains a network of treatment providers, and more. “It’s all about helping everyone affected by the behaviors of a player who may be struggling with addiction.”

On the lottery front specifically, Maryland has achieved Level 4 certification in the World Lottery Association’s Responsible Gaming Framework and is verified at the sustaining level in the NASPL Responsible Gambling Verification Program.

Problem Gambling Awareness Month each March has always been a particular focus, and in 2022 the Lottery went beyond public service announcements and awareness messaging and implemented a paid advertising campaign. “That allowed us to take an approach that focused on positive messaging about responsible play,” said Martin. Another paid campaign this year included a series of tips on how to enjoy lottery games responsibly; these are described in detail on the Lottery’s website:

- Only spend within your limits.
- Never borrow money to play.
- Understand your odds of winning.
- Feeling stressed? Don’t play.
- These are games of chance – not skill.
- Play for fun, not for profit.

Planning for the Future

Always with an eye towards responsible gambling measures, Martin knows his ultimate task is to ensure that Maryland Lottery and Gaming is a good steward for the industry and is always moving to be a better corporate citizen. “We have an obligation to continue growing revenues to support good causes. We’re the fourth-largest

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50 Years: Thanks for Playing

As befitting a 50th anniversary celebration, the planning was almost two years in the making, and a small project team began more intensive work about 18 months out. With an overall theme of “Thanks for Playing,” the festivities began in January with an employee event to honor those who make it all happen. Retirees were invited to the luncheon event, and employees were provided with 50th anniversary swag and given hints of things to come.

To kick things off on the games front, a Gold family of scratch games was introduced in January, taking advantage of the well-known precious metal symbolic of a 50th anniversary. In February, a modern update of the Lottery’s very first scratch game (in 1976) was launched, keeping the original name, Instant Lottery, while moving to the \$2 price point.

February also marked the launch of Maryland’s first \$50 scratch ticket, 50 Years!, offering three \$5 million top prizes and 1 in 2.44 overall odds of winning any prize. At the other end of the spectrum, the \$1 MD Lottery Logo game offers four scenes, each showcasing the Lottery’s different logos over the years.

Among several second-chance promotions and events that play off the 50th anniversary, the highlight is the 50th Anniversary Cash Bash. For every \$50 spent on any game, My Lottery Rewards members receive an entry into the monthly drawings. The Cash Bash finale will be held at the State Fair in September, with one lucky winner given a chance to win up to \$5 million in a live event. The Lottery is working with partners SCA Promotions and Atlas Experiences. “It’s going to be a big and exciting event to really be the ‘crown jewel’ in our 50th anniversary celebration,” said Director John Martin.



revenue generator for the state of Maryland, behind sales taxes, corporate tax and income tax. That’s a pretty significant burden on us.” And at the same time, it’s important to make the agency a place where people want to work and with whom players want to engage, and to do it all responsibly, for the right reasons. It’s a balancing act for sure, “like the guy in the circus who manages all those spinning plates.”

When looking at future growth potential, the Maryland Lottery will continue to stay the course while exploring new technologies and new games at the same time. Martin hopes that someday Maryland will legalize iLottery, since sports betting is already out there in the virtual space. After all, neighboring Virginia, Pennsylvania and the District of Columbia all have well-established iLottery operations.

There is always a desire to expand the lottery player base. All of Maryland’s casinos are required to sell lottery products, but efforts to introduce casino players to lottery games have had mixed results. There could be greater potential if iLottery is eventually added to the mix. “With people already familiar with sports wagering on a mobile device, the incremental move to iLottery might be easier,” noted Martin. Although it’s far too soon to really think about such things in detail, a centralized player wallet could help guide the player experience across gaming, sports and lottery.

Until then, Maryland will continue to provide entertaining games of chance, with the utmost integrity, in a responsible manner, to help generate the revenue to support causes that benefit all Marylanders. “That sums up what we should be doing each and every day, and I think that’s our legacy, our message going forward.” ■



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FOCUS ON: iLOTTERY

THE iLOTTERY LANDSCAPE – AND WHAT'S IN STORE

A look at where things stand **today** and what new developments are **coming soon**.

Eleven years have passed since the Illinois Lottery became the first American lottery to offer single-ticket sales online in March 2012. The Georgia Lottery followed suit in November that year. Michigan and North Dakota joined the club in 2014; Kentucky and North Carolina in 2016; New Hampshire and Pennsylvania in 2018; and Rhode Island, Virginia and the District of Columbia in 2020.

There has been little new movement in iLottery over the past 30 months, even as states have charged forward with online and mobile sports betting options. The Connecticut and West Virginia lotteries continue to work their way through the iLottery development process and will eventually join the ranks. West Virginia will offer eInstants and draw games (iGaming is already available in the state), while Connecticut is limited by law to draw games.

North of the border, Atlantic Lottery and British Columbia Lottery Corp. were the first in North America to offer iLottery in 2004. Loto-Québec's online gaming platform added lottery sales in August 2012, and Ontario Lottery and Gaming added lottery to its platform in January 2015. For residents of the six provinces and territories served by the Western Canada Lottery Corp., that organization's Subscription Spot offers subscriptions for the national and regional lotto games via mail or online. Last year, WCLC added the Lotto Spot mobile app, allowing for the purchase of single-draw tickets.

In addition to those options, Manitoba Liquor & Lotteries launched BCLC's PlayNow gaming platform in January 2013; lottery products were added the following September. Alberta Gaming, Liquor and Cannabis

offers the online platform PlayAlberta, which added lottery games in May 2021.

For this annual review of North American iLottery activities, we asked lotteries about a variety of topics, and their edited responses are included here and in the roundups on the following pages. As always, we thank those lotteries that were able to participate.

GAME CHOICES

Like many things in life, there is no "one size fits all" for iLottery. Variations in a number of factors will drive the choices made – legislation, stakeholder concerns, and technology roadmaps, for example. Some jurisdictions are prohibited from offering eInstants, and some may offer all of their draw games online while others offer only a subset. We asked lotteries about their choices, and here's what the respondents told us.

BCLC: On PlayNow.com, BCLC first introduced its more popular draw games, including national lottery products like Lotto 6/49 and Lotto Max as well as the B.C.-only BC/49, but eventually expanded to include Keno as well. In the future, we plan to introduce other regional draw games on PlayNow.com.

DC Lottery: We want to give our traditional and online players the same exciting winning opportunities. However, there is a clear difference in the type of players they are and their style of play. Our online players are looking for a different playing experience so we offer Keno games as eInstants—games such as Lucky Keno, Stars & Stripes Keno, and 21x Keno, our most recent eInstant Keno game release.

Illinois Lottery: To ensure convenience of purchase and availability for consumers, the Illinois Lottery offers all of its draw games in retail and online. This includes multistate jackpot games, in-state jackpot games, daily numbers games and Fast Play. In FY23, Fast Play sales are projected to be more than double the prior year, and the Illinois Lottery now has the highest per capita sales of any U.S. lottery that offers Fast Play. Year-to-date, iLottery sales are up 94% vs FY22 – driven by large multistate jackpots, new games and experiences, and marketing and promotions to drive awareness, trial and engagement.

Kentucky Lottery: In Kentucky, we try to ensure that the player experience is consistent across all mediums. We want to be where the next generation of players are, and providing them

convenience and ease of play is important. In addition, we are constantly evaluating our offerings and tailoring them to our players' desires.

Loto-Québec: All our retail draw games are now available online. We are looking into the possibility of offering draw games featured exclusively online, but nothing is currently in development.



New Hampshire Lottery: When we started iLottery in September 2018, the agreement was for Powerball and Mega Millions. Each year we try to add a new draw game to the lineup. Since our go-live date, we have launched Tri-State Gimme 5 and most recently, Lucky for Life this fiscal year. We have plans to launch Tri-State Megabucks this September; that coincides with a game change of adding a Monday draw. The only other draw games not available through iLottery are the Pick games and Keno. Keno is due to local approval challenges; it is likely that the Pick games will be added in future roadmaps.

North Carolina Education Lottery: Our big change came in February when we added Pick 3 and Pick 4 to the online portfolio. We saw quick adoption of these games from online players in the first month after launch. Since the addition, 30% of online sales come from Pick 3 and Pick 4 players and we see increased frequency of play among



our online players. Our goal with these additions was to add incremental sales and not just shift players from retail to online. As a result, we are focused on awareness of the platform in general and cross promoting our current online play audience to play the daily games online.

No additional changes are planned, so we hope our high jackpot games allow us to continue to attract new online players and grow sales with those who like the convenience of buying tickets and getting their prizes online. We do continue to explore offering Keno online. The key thing there is making sure the integration required between our traditional gaming system and our online play program to handle drawings every four minutes can and will work seamlessly.

Our philosophy with online is the same with traditional retail. Success comes with taking our time and making consistent and steady progress over time. That kind of growth will be the most sustainable growth.

Pennsylvania Lottery: The PA Lottery first launched iLottery with eInstant games in May 2018, then added multi-state jackpot games in January 2020 before eventually launching in-state jackpot games and the Pick games. We added draw game subscriptions in September 2022. We are working to bring all PA Lottery draw and monitor games online, which should be complete in 2024.

The iLottery rollout, and the order in which we launched games online, was a strategic decision. We

took a “crawl, walk, run” approach to rolling out iLottery because lottery retailers were initially concerned that iLottery would harm their retail lottery business, which has not happened – in fact, the opposite is true. Selling online helps grow lottery retail sales.

Rhode Island Lottery: When we launched iLottery, we were operating an older system which had been set up to accommodate only Keno and eInstants. We are working to expand our iLottery game offerings to include most of our other retail games: Powerball, Mega Millions, Lucky for Life, Wild Money and Numbers.

Virginia Lottery: Most of our regular draw games are offered online. One exception is Bank a Million, our lowest-selling draw game, which has a small, dedicated audience but has been on the decline for some time. We will continue to evaluate the future of this game in our draw game portfolio. Keno and Cash Pop have not been added mainly due to other higher priority projects. Additionally, the complexity of these games with more frequent drawings across two gaming systems (IGT for our retail gaming system and NPI for our iLottery system) makes the technical implementation a bit more complicated. In June, we added a new Pick 5 game both at retail and online (the first in Virginia to launch simultaneously online and at retail). We are changing the matrix for our existing Cash 5 game this fall, and will continue to evaluate where Keno and Cash Pop may fit in our release schedules.

eINSTANTS

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first Set for Life eInstant game this year; it's the first game offered on PlayNow.com that has annuity, just like the popular retail Scratch & Win ticket Set for Life, with a top prize of \$1,000 a week for 25 years.

DC Lottery: We have a number of things coming up in the rest of our fiscal year (which ends in September): A full promotions module; a new third-party games provider (EQL Games); a revamped iLottery website; a new iLottery mobile app; and a new CRM vendor with added capabilities.

Illinois Lottery: Fast Play will be a continued focus with new games launching throughout the year, including the Scan-N-Play games that offer players an omnichannel experience in retail. Additionally, we aim to continually improve the experience for players throughout their journey with regular enhancements to the iLottery platform.

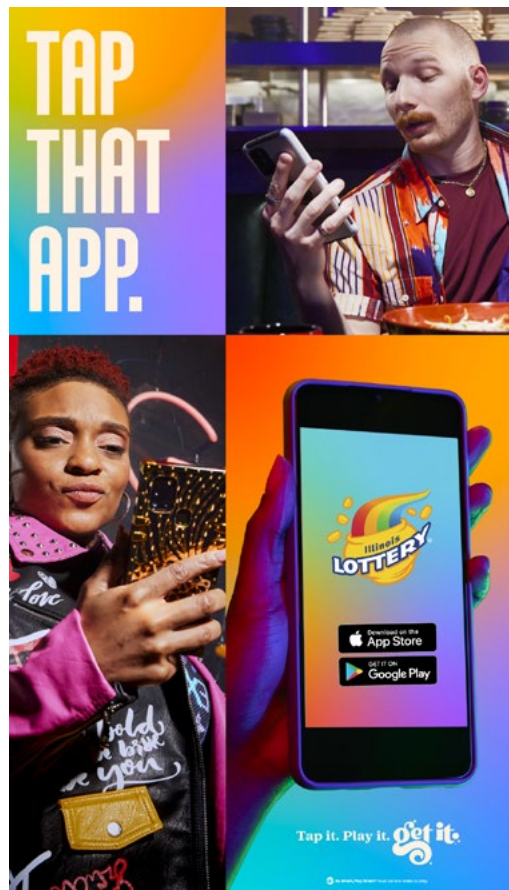
In April, we launched a new awareness campaign around our iLottery app, called Get It!, letting Illinois players know that they can get the excitement and energy of the lottery at their fingertips. The objective of the campaign is to raise awareness of the Lottery's online offering and appeal to players that may have previously felt like the lottery wasn't for them.

Kentucky Lottery: It's on our road-map to do an omnichannel game launch with the game Precious 7s available on iLottery, as Fast Play and as a Scratch-off. We also hope to deploy a Ghostbusters game this fall online and in-app to coincide with the release of the movie franchise's sequel set to premiere by the end of 2023.

WHAT'S NEW?

Lotteries responding to our questions have a number of things in store for their iLottery programs this year, from product launches and promotions to customer service and other platform improvements.

BCLC: We plan to launch a transactional version of the Android Lotto! mobile app by early 2024, as the current Android version is for checking tickets only. Players who use the Apple/iOS version of the Lotto! mobile app can check winning numbers and buy tickets. Growth of scratch-style games and the recent focus on bi-channel launches with lottery retailers and online on PlayNow.com is another area of interest for BCLC. We are launching our





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Loto-Québec: We have a new second chance promotion that is available on all our online draw games and we might add eInstants to that promotion in the year to come.

New Hampshire Lottery: We are hoping to add a number of things this year, including in-app iLottery play; a rewards points economy; some new bonus types; Tri-State Megabucks to the online offering; added security and withdrawal features; and some reporting to make our players happy! In general, adding automation and taking advantage of advancing technologies.

North Carolina Education Lottery: We are evaluating the addition of a raffle game that would be online-only in the fourth quarter of the year. Like many other lotteries, we are keeping our eye on eInstants and studying how they perform in other states. Part of our success has been slowly but steadily building our game portfolio. When the time is right and we are sure North Carolina is ready for eInstants, we will be ready to go. No date for the introduction of eInstants has been set at this time.

Pennsylvania Lottery: The PA Lottery is excited to be upgrading our iLottery platform and mobile app in late 2023/early 2024. We are also planning to move to a cloud-hosted solution to better scale the platform during the large jackpot runs.

Rhode Island Lottery: As noted above, we are working to expand our online game offerings to include most of our retail games, adding Powerball, Mega Millions, Lucky for Life, Wild Money and Numbers. If all goes well, these will all be added at the same time.

Virginia Lottery: Our biggest initiative will be the launch of our new loyalty program designed for both retail and online players. This will combine our



current promotional and engagement activities into a single program, providing a positive and consistent experience for players. We're still working through a lot of the details, but it's going to be a points-based program, with points earned for purchases and other behaviors – watching a video, referring a friend, and different types of engagement activities. At launch, retail players will be able to scan their tickets to earn points, but we're still having discussions on other possibilities. It's a much bigger project than we initially anticipated and is pretty complicated. We're trying to not make it another second-chance program – we want it to be a true loyalty program. ■

READ ON!

On the following pages, you'll find additional insights into lotteries' player acquisition efforts (specifically after big jackpot runs) and eInstant programs, such as what features players enjoy the most. You'll also read about the Virginia Lottery's rapid rise, and get some ideas from IGT about the ingredients found in a winning iLottery recipe.



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FOCUS ON: iLOTTERY

ENGAGING THE JACKPOT CHASERS

Big jackpots in the national games bring in new online players, but the challenge is always how to keep these online “jackpot chasers” engaged. We asked lotteries what strategies they use – and have found successful – in building that engagement and encouraging trial of other games.

British Columbia Lottery Corp.

For national draw-based games (i.e., Daily Grand, Lotto Max, Lotto 6/49), BCLC runs promotions roughly once a month to engage with our players and generate excitement around the products. For example, we run SuperDraw promotions with national lottery games such as Daily Grand and Lotto 6/49, where there are additional chances for players to win guaranteed prize amounts of \$25,000.

Instant progressives are a popular feature for players, especially with growing jackpots. Reactor games also keep players highly engaged with the arcade-style play mechanics. We have also found that players enjoy games that are more familiar. For example, Instant Keno resonates well with PlayNow.com players in Manitoba and Saskatchewan because Keno games can be commonly found in those markets. Adding new digital scratch card games have become a strategic focus in our bi-channel game launches to bring the same favorite games to players both on PlayNow.com and in retail locations.

DC Lottery

Keeping new players acquired through exciting high jackpots runs is a key objective of DC Lottery across platforms including iLottery. We do this through a very strategic



communications plan that provides these specified acquisitions with various promotional offerings to try our eInstant games. We utilize different touchpoints after their signup date (day 1, day 3, day 7 and day 10, for example). We highlight specific game options that appeal to draw game players, such as progressive jackpot games. We also offer bonus opportunities when the jackpot rises again to reengage with these specific players.

As just one example, we ran an iLottery promotion during the Mega Millions high jackpot run in January: Play at least \$20 on Mega Millions or

any other draw game(s), and get \$10 Free Play on 50x the Money, Extreme Green, Vegas Cash Drop, Jungle Tumble Jackpots or Cauldron of Cash.

Illinois Lottery

We lean on owned media channels to keep “jackpot chasers” interested in playing our games. We onboard and nurture new players through an automated CRM communication journey, which covers a variety of content such as game suggestions and winner stories. Having these emails and push notifications automated helps streamline communications and

ensures we stay top of mind without overwhelming new players.

Digital promotions are another tool we use to keep new players engaged. We've conducted extensive testing and are learning to understand what types of promotions drive the strongest redemption rates and deliver incremental revenue to the business. Most notably, we've seen strong success encouraging trials of our newest draw game, Fast Play, with this audience, especially while large jackpots are rolling or were recently won.

Kentucky Lottery

Acquisition and retention is critical in this space. We strive to keep new players engaged after big jackpot runs by testing and refining our player email journeys. We try to keep players engaged at the lower levels by sending them multiple offers of the jackpot games they love or reminding them of the other offerings in our portfolio. Constant, targeting communication is key in this area.

Loto-Québec

We've created promotions with all our online categories in order to spark a more diverse mix of players. For example, a recent promotion encouraged jackpot players to try our eInstants and slot games by showcasing the games with progressive jackpots, which is something we know they are drawn to. The Jackpot Madness Promo offered players of online progressive jackpot games chances to win \$200 bonus cash and a top prize of \$15,000 (deposited into the winner's online account); they received one entry for every \$5 purchase in the progressive games categories.

New Hampshire Lottery

We have a strong CRM program that focuses on engaging jackpot players after the jackpot is won, though it is a struggle since those jackpot chasers came in with a purpose in mind.

There are a few tactics we have



used to try and shift the purchasing habits of draw game players, such as reorganizing the games lobby to put draw-centric or progressive eInstants at the top, ensuring similar games are available on the purchase confirmation screen to provide a player an easy route to find games that might interest them, and promoting a progressive jackpot on a website popup for all players to see.

We also celebrate big wins, and with progressive jackpot big wins, we try to use the name of the player, town, city, state – showing that real people win. We are thrilled when they allow us to take a photo to use to promote their big win. If the winner's first name is Susan, we often follow up with a promotion like: "When Susan Wins, You All Win – with your deposit today, you get 25 free plays of the same game that Susan won on."



North Carolina Education Lottery

In North Carolina we focus most on the new or lapsed players that big jackpots bring in or bring back. We want to provide ongoing engagement for those players, with an effort to retarget those who visit our website or click through a display unit during a high jackpot run.

Our research showed the record-setting Powerball jackpot attracted new players to play Powerball and they engaged with many of our other games too. The high jackpots generated widespread participation and helped pique new players' interest, which then spread to other games. The positive impact of the high jackpot run last fall was not only felt during the play period, the research showed, but continued to show impact during our third quarter.

To keep those players engaged in FY24, we plan consistent and regular promotions throughout the year, including giving our new online



Pick 3 players the chance to join our popular Double Draw promotion. We're scheduled to expand omnichannel promotions at retail and online to try to retain those casual players who registered during high jackpot runs. We will also add retention campaigns specifically designed to keep those new players that came to us during a high jackpot run engaged and playing online. In our advertising strategy, we use multiple channels – TV, radio, digital video, digital display units, and social – to promote the jackpot. This multichannel approach plays an important role in raising awareness of the jackpots. Advertising campaigns, both broadcast and digital, will deliver consistent support for our draw games throughout FY24. We roll out high jackpot ads whenever jackpots exceed \$300 million and continue until they exceed \$800 million. Research showed our high jackpot ads were most successful at moving the needle around purchase interest.

We'll continue supporting high jackpots with strong earned media efforts. Media in North Carolina demonstrate they know the high jackpot stories will bring them clicks and views. So, we consistently spread the word and the excitement that a big jackpot brings. Our releases feature the jackpot but also deliver news of the latest North Carolina wins, prizes of \$100,000 and \$1 million, as well as the thousands of wins in each drawing. Seeing that winning makes a difference for players and keeps them engaged. Every media release on a draw game win includes information about the draw games that we now offer online.

We're marketing to everyone. That person standing in line at the store might make an impulse buy at the counter or might pull out his smartphone and buy while waiting in line. So we're excited about two new pilot programs at retail. We will be testing new digital play centers and new 90-inch digital menu boards. We think both will increase sales for draw

games with dynamic and eye-catching content.

All in all, these times are like catching and riding a wave and you make the most of it as long as you have it.

Pennsylvania Lottery

We use different methods to acquire new online players, such as paid digital advertising, the VIP Players Club database, an affiliate customer referral program, a refer-a-friend marketing program, and bonus codes on Scratch-Off and Fast Play tickets. Because we offer Powerball and Mega Millions online, high multistate jackpots also drive online player acquisition.



We have been testing different marketing strategies to engage the jackpot players to try eInstants, such as promotions and bonuses and positioning of progressive jackpot and licensed property games in the game lobby. We've also been testing low-jackpot social media ads that focus on the growing jackpot, without the jackpot amount.

We offer daily promotions and bonuses to keep online players engaged and to retain them. We are also continually working to offer new online games that appeal to players, such as progressive games. We have nearly 150 eInstant games on the site for players to choose from.



Virginia Lottery

Since iLottery went live three years ago, we've had several high jackpot runs. One thing Virginia has learned is that there isn't a perfect playbook to keep these players engaged. With iLottery, we have an opportunity to test a variety of segmented offers in an agile environment. Evaluation tells us which of those offers are successful in converting new jackpot players to eInstants.

We have paid digital jackpot advertising in the market year-round to further supplement the messaging. The goal there is twofold: First, to engage players by making them aware that online purchase of their favorite jackpot games is an easy and convenient option. Second, once they're comfortable playing online, then hopefully they'll transition to trying the eInstant games. Though online play is available through the web (including mobile), we are increasing our focus on the easier-to-navigate Virginia Lottery mobile app, and within the past several weeks, we have seen higher sales through this platform.

We also recognize the effectiveness of timely online winner awareness for both eInstants and draw games, often with promotional offers tied to them, in helping to convert players. Our long-term strategy is to focus on the player experience, prioritizing our development efforts on ways to make customer flows as frictionless as possible. ■

FOCUS ON: iLOTTERY

CHOOSING INSTANT GAMES



With consumers thriving on instant gratification, it's expected that online eInstants are capable of significant revenue generation much like their paper counterparts. However, it does depend on a variety of factors, including payout rates and game choices. We asked lotteries offering eInstants about the features they look for and that are most popular with players, what their launch schedule is, and what game vendors they use.

British Columbia Lottery Corp.

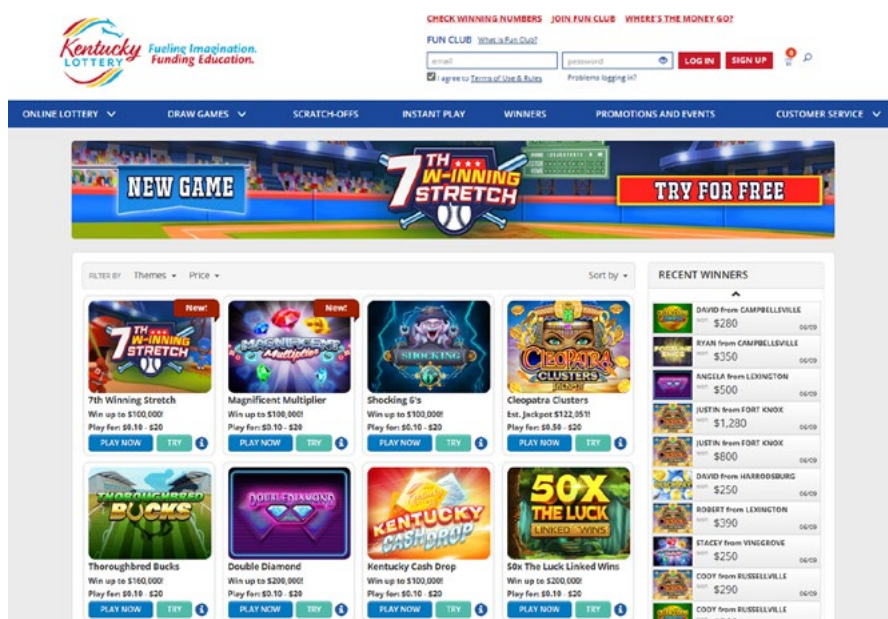
On PlayNow.com, we launch new games based on player preference for popular themes, game mechanics and new features, and we're always engaging with our players to understand what they like most. Some examples of features that BCLC looks for are cross-channel options (i.e., games that are available at lottery retailers and online), new mechanics and features, and themes that resonate with our players. On average, BCLC launches new games every two to four weeks.

Game-show themed tickets resonate well with PlayNow.com players in Manitoba and Saskatchewan likely because they are familiar with the brands (Wheel of Fortune, Monopoly, etc.). Similarly, Keno is also popular due to its familiarity in the market.

BCLC sources eInstants from various gaming vendors that offer digital scratch cards, reactors and instant Keno games. Some vendors include Instant Win Gaming, IGT, WMS and Pixiu (i-keno).

DC Lottery

We love to cater our games to specific seasons of the year, including holidays. We have noticed our players love symbol cluster match games, and



this game style was used in 13 of our top 20 games last year. Originally, eInstant games were launched every three weeks. We moved to a biweekly launch schedule in September 2022. This has proven to be a remarkable move as we have seen dramatic increases in monthly revenue. Our current eInstant vendor is IWG, and we adding EQL Games to the mix this summer.

Kentucky Lottery

The tumbler play style, and of course progressive jackpots, are big-time player favorites. Our launch strategy consists of two new games a month, and players are conditioned to expect them. We currently have IGT and IWG content supported in our eInstant portfolio.

Loto-Québec

We choose games that we believe answer players' current wants and needs in terms of design, mechanics and features. We are always looking for new games that add variety to our portfolio, always ensuring that we maintain a good balance between e-scratch, reactors and long play games. If the name of the game is available in French, it is definitely a quick win for our market because players can better relate to and bond with the game. Games with classic casino features are always well received since players are familiar with the style/iconography.

We try to launch a new game on Mondays every week or two in order to create a reflex for players who enjoy trying new games. Mainly our games are from IWG, IGT, Light & Wonder (including G Games, Inspired Gaming, Pixiu/Playzido) and Scientific Games (including Sideplay), and we also develop games in-house.



New Hampshire Lottery

We take multiple factors into consideration, such as seasonality, game theme, game mechanics, and what is available to the Lottery off the shelf. We find that players love bonus

rounds, progressive jackpot games, and newer mechanics such as expander and cascade cluster match type games. The old school key number match style games still have their followers, but players seem to enjoy more dynamic graphics, soundtrack-esque music, and engagement from new play styles.

We launch a new eInstant every two weeks, and like scratch tickets we see an immediate lift from the new game launch. Players like the new content. Sometimes they will go back to their old favorites faster than other times, depending on how much they like the new game. Both NPI and IWG provide our eInstant games.

Pennsylvania Lottery

Among our eInstant games that do well are progressive jackpot games, fast-paced tumbler and cascade games, licensed property games and Pennsylvania-themed games. The PA Lottery launches new games quite frequently, and we have been testing different game launch patterns and days of the week to maximize sales. The sweet spot appears to be launching three eInstant games within a four-week window, and more games during the holiday period. Players tend to gravitate toward trying the new games, while continuing to play their favorites.

We currently partner with Scientific Games (and its SidePlay studio) and IWG to supply our eInstant games. We are evaluating and looking to bring on more third-party game suppliers.

Rhode Island

Our players seem to enjoy the games where they're collecting symbols to win, such as collecting clusters of matching symbols or filling a prize meter to win. In terms of graphics, we have a series of games with the emoticon theme, which all have proved popular with our players. We launch one or two new eInstant games each month, and IGT provides our games.

Virginia Lottery

The way we plan for and select games is similar to how we manage the scratcher portfolio. Evaluation includes what games are currently in-market, which themes and mechanics perform well both in Virginia and in other jurisdictions, new playstyle innovations, and the cadence of licensed property game launches which are designed to drive acquisition. We also will continue to introduce new progressive jackpot games, which are becoming a large part of our overall sales.

Progressive jackpots and engaging bonus rounds are two of the game features we've seen impact play, along with the need for appealing themes, graphics and mechanics which make the overall experience a positive one. We launch games twice per month on the second and fourth Tuesday. There are times where we may launch games more frequently, or launch multiple games, but the majority of the time the cadence is one eInstant game, twice per month. Our current eInstant providers are NeoGames and IWG. ■



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FOCUS ON: iLOTTERY

THE ROAD TO SUCCESS IN VIRGINIA

The **Virginia Lottery** has quickly become an industry leader in iLottery revenues and overall operational success.



VIRGINIA LOTTERY

It may not quite be the Road to Utopia (with a nod to the old Bob Hope and Bing Crosby movies), but the iLottery road being taken by the Virginia Lottery has propelled its eInstant business to the top of the industry in just three short years. Many ask about the secret to that success, but Deputy Executive Director Rob Wesley will quickly tell you that there is no simple answer. Rather, there has been a series of decisions and actions over time that have led to where Virginia is today.

Many of those decisions were influenced by what Virginia learned from those who have gone before. After all, the Virginia Lottery was the tenth American lottery to launch an iLottery program, and the beauty of the lottery industry is that everyone shares. In particular, Wesley appreciates the willingness to talk. “You can’t put every nuance into a conference presentation, or on paper, so I spent hours and hours talking with other lotteries to really understand why they were doing what they were doing. That was the way to learn what was working for them, so we could do things even better. That was our goal.”

Yet that doesn’t mean other lotteries aren’t doing the best they can given their circumstances – every jurisdiction is different in terms of legislation, technology capabilities, operational structure, culture (both internal and external), etc. For Virginia, though, many of these things came together to serve up an iLottery eInstant program that is now second to none in the American realm, and it does quite well on the draw games side as well.

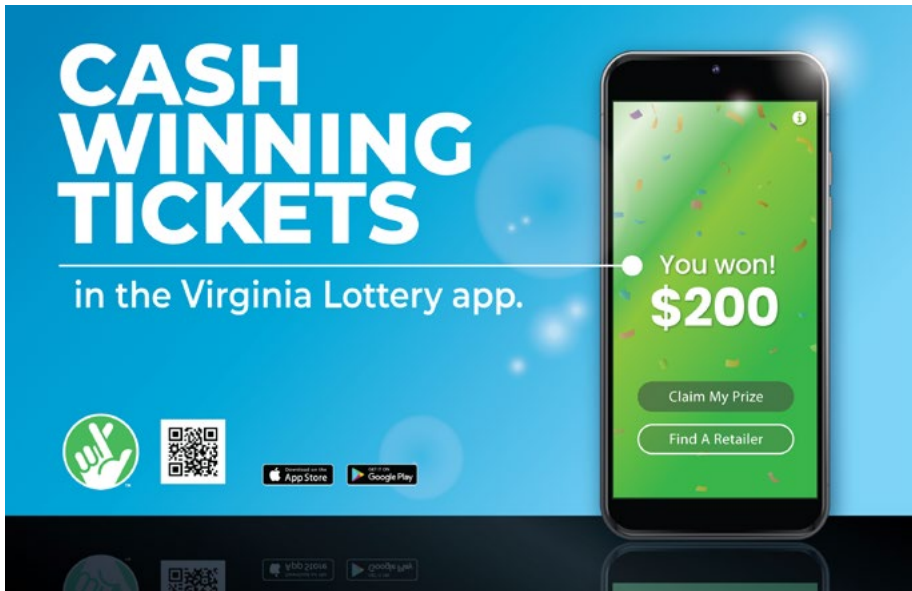
It goes back to 2005, or even further if Lotto by Mail subscriptions, which began in 1992, are included. It was in 2005 that the Virginia Lottery pioneered online lottery subscriptions



in the United States, and did so using its own technical team. In fact, Virginia has a long history of self-sufficiency on the technology side, and that enabled it to quickly set up a full iLottery system when the state directed the Lottery to launch online in 2020. Quickly? That’s putting it mildly – it was less than four months from when the legislation was signed in March 2020 to implementation on July 1 that same year. That

legislation was predominately focused on casinos and sports betting, so iLottery was almost an afterthought – yet critical for the Lottery to keep up with a changing customer base to continue providing support for K-12 education across the state.

Those 15 years of selling online subscriptions meant that the Lottery had an established customer database ready to roll, plus the expertise to



manage that database. Much of the technical infrastructure was already in place; one thing learned from other lotteries was just how important that part of the equation is before launch. And although Virginia called upon NeoPollard Interactive (NPI) to provide assistance, the Lottery's own team is still involved to a greater extent than is typical with many full-featured American iLottery operations.

"Like other lotteries, we work very closely with NPI in defining our development roadmap each year, and with our game providers, NeoGames and IWG, on all aspects of our eInstant games," explained Wesley. "What makes us a bit unique is that our own team handles the vast majority of the marketing and advertising activities internally. This includes digital creative and content, promotional planning and execution, defining player segmentation, conducting player and ROI analysis, and more."

"We" means a team of 15 employees who were assembled as part of the Digital Department that launched iLottery. Wesley understands that Virginia has an advantage with its status as an independent state agency, so it was able to allocate the proper resources to the new venture, including financial

resources and the ability to bring in new employees. And when it came to the new hires, it wasn't just about numbers. "Of the 15 people we hired, only two of them had any lottery experience!" The others had a variety of different digital backgrounds, experience and knowledge. "Selling online is very different from selling at retail, so it's really important to make sure you have people of the right mindset to sell online, those who understand that it IS different than retail."

"Selling online is very different from selling at retail, so it's really important to make sure you have people of the right mindset to sell online, those who understand that it IS different than retail."

Despite the speed with which iLottery was launched, it was imperative that it be done right. "We only get to launch once, so our goal was to make sure we did things really well," emphasized Wesley. That meant the iLottery

platform began as a mobile-friendly website; more time was taken for the development of a mobile app. When that app was ultimately launched about a year ago, it was quickly adopted by players – almost half of Virginia's iLottery sales now come through the app.

The wait for a top-notch app was all part of the lottery's overall philosophy of prioritizing the customer experience. "We're focused on making the customer experience better. We're almost three years in, and there's still a long list of things that we know we can improve upon." Some of the areas that are critical in creating a great experience include the registration process, making deposits and purchases, claiming prizes, and withdrawing winnings – anything that has to do with the customers' money and their personal information is most critical. "We have to make sure that whole experience, from making deposits to claiming wins and withdrawing money, is seamless and frictionless. We still have work to do there." The games and the prize structures are important, of course, but from a player perspective, the security around their personal information and their money has to be the foundation of any iLottery program. "They won't even get into the game if you don't get that stuff right."

Wesley does have one other important recommendation for lotteries hoping to add iLottery someday. There is plenty of evidence that iLottery doesn't hurt retail sales – in fact, as the saying goes, all boats rise with the tide. That means there really is no need to give up anything just to get the retailers on board, either in terms of commissions or by limiting the online game choices. Lotteries should proceed cautiously if the subject of concessions comes up during the process. "Sometimes we forget that we are created to make money for our beneficiaries, and if we give up something, it's really hard to get it back later."

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ONGOING STRATEGIES

In April 2022, there was an operational shift that began full integration of the digital team with the sales and marketing departments. “When we launched iLottery, our marketing and digital departments were separate,” explained Wesley. “We didn’t want to advertise and communicate with players like we were two different lotteries, so we’ve been focused on the message that ‘this is the Virginia Lottery, and our products are available to you however you want to purchase them.’” There are new employees and new roles, and some teams have been combined; it will take a few game and campaign cycles to fully understand how it is all working operationally. “We’re very pleased with the progress we’ve made in getting the groups together over the past year.” There are a few things still being ironed out, and at the end of the day, everyone just wants the lottery to make money for the state, regardless of whether it’s online or retail.

Therefore, most of the Virginia Lottery’s draw games are offered through the iLottery program; the ones that aren’t there yet are really just because other projects have had priority for various reasons. Bank a Million, for example, offers prizes

totaling \$1 million tax-free, but it’s a small game that’s been on the decline. Although it has a dedicated player base, the expected incremental sales and profit for an online option put that on the back burner.

Keno and Cash Pop present other challenges. Since they have more frequent drawings, technical implementation would be a little more complicated across both Virginia’s retail IGT system and the NPi iLottery system.

So it’s not surprising that other projects have been at the top of the roadmap. Mobile cashing was launched in February, allowing players to cash winning tickets purchased at retail. Prizes go into a player’s wallet, not directly to their bank account, so they can either play iLottery games or withdraw the winnings at any time. Pick 5 was introduced in early June; it’s the first game launched simultaneously online and at retail. The Cash 5 game will have a matrix change this fall, and there’s also a loyalty program in the works that spans retail and online play (more about that on page 34). Through it all, Wesley noted that “we will continue to evaluate where Keno and Cash Pop may fit in our release schedules.”

Meanwhile, cross-channel efforts are important, so there is a lot of emphasis on leveraging licensed properties across product lines. The same

game themes might be offered online, as scratch tickets, and now as Print n’ Play games (Virginia’s version of Fast Play). “We know licensed properties work really well for online acquisition, and they are typically popular brands for scratchers. We plan to launch one cross-channel licensed property per quarter.”

Other successful player acquisition efforts include online raffles. After seeing the Michigan Lottery’s success with these games, Virginia followed suit. “We use online raffles on a promotional basis with the primary goal of new player acquisition. These online raffles, like eInstant licensed properties, have been some of the best performing games for acquisition.”

With these game strategies and all the new developments still in the works, Wesley is pretty optimistic that the Virginia Lottery will continue its iLottery growth. And so far, the results speak for themselves. At this writing in early June, there was less than a month left of the fiscal year, so Virginia had a pretty good idea of where it would end up. Estimated FY23 gross gaming revenue on eInstants is about \$250 million (based on gross sales of more than \$2 billion), and estimated sales of draw games is about \$130 million. Relative to the rest of the industry, that’s a meteoric rise in just three years. ■

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FOCUS ON: iLOTTERY

THE WINNING RECIPE FOR LOTTERIES



Leveraging **diverse content, draw popularity, omnichannel advantages, subscription strength, and group play** can all help cook up an appetizing mix of ingredients for lotteries.

Whether professional chefs or home cooks, food fans know that the right mixture of ingredients can make magic and yield delicious results. This is true of the best lotteries as well, where a tasty mix of elements can ensure a mouth-watering player proposition.

Smart partners supply guidance on game portfolio curation to the world's lottery leaders. They advise lotteries about must-have components that should be responsibly integrated into their offerings, like the succulent ingredients that belong in successful recipes.

Ideal Lottery Baseline Feature Set

All lotteries operate differently, depending on local preferences and

jurisdiction regulations. However, "building a lottery on a rich baseline of content with desirable features sets a program up for success," says Derek Levesque, Director, iLottery Business Development, IGT, "while still allowing for customizable feature inclusion." A strategic partner can help lotteries strategically concoct the correct recipe of content for each jurisdiction, while excluding elements not relevant for local tastes.

Optimizing the Game Portfolio

"In order to optimize their portfolio offering," notes Karri Paavilainen, Senior Director, iLottery Marketing Services, IGT, "lotteries can turn to their partners to build a bespoke roadmap developed just for them,

showcasing eInstants and eDraws." Partners can provide testing, analysis, and data-driven recommendations about the most favorable formula for a particular lottery's specific players.

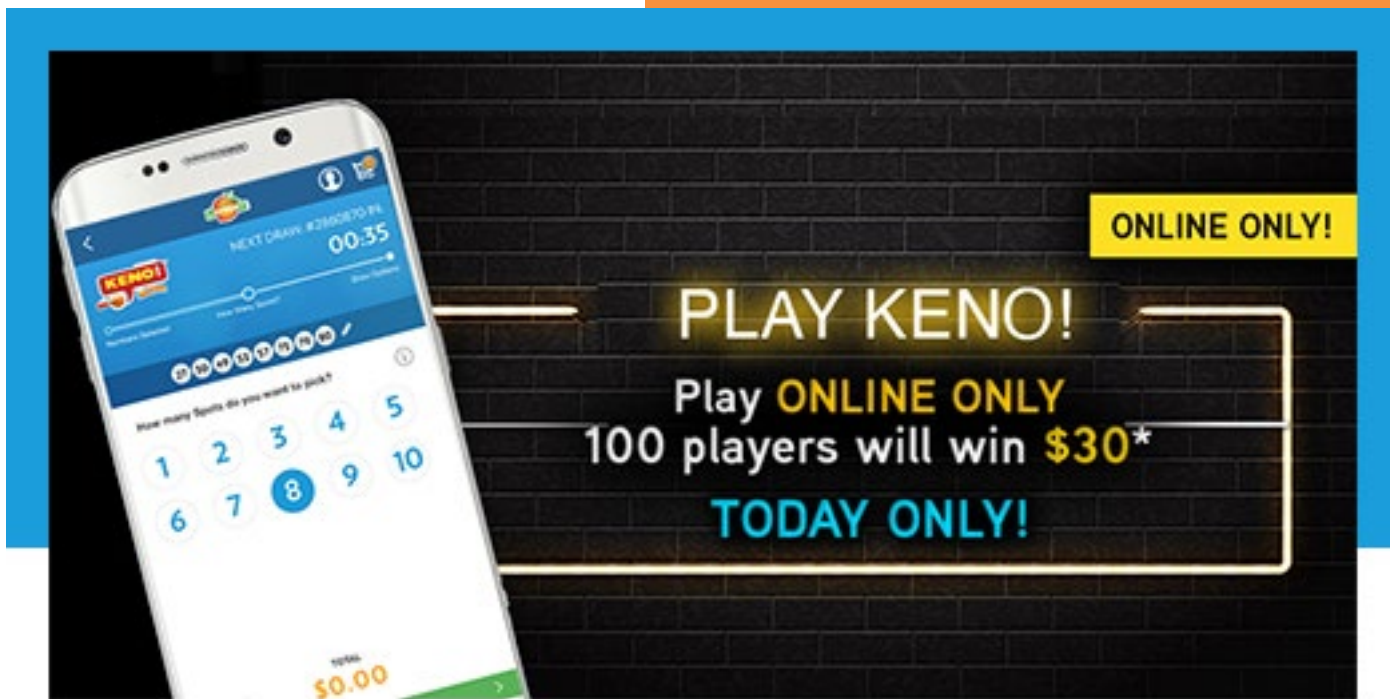
Growing Business

When the objective is growth, the recipe for a thriving lottery can yield player engagement, player acquisition, and business sustainability.

Essential elements that can help make that happen:

Lotteries can leverage diverse content. Variable game opportunities include themes, mechanics, prize structure, traditional vs. progressive jackpot games, and casual vs. fast play.

Propelled by buzzworthy news headlines, **today's draw games** are



valuable tools for acquiring new players. Quick Draw games like Keno and Cash Pop™ can be considered main courses for any complete menu. There is an unlimited buffet of opportunities for featuring specific online-exclusive eInstants and fast play games.

Lotteries' strategic partners can help them leverage the appetizing **advantages of omnichannel**. In today's digital world, some providers can offer a digital iteration of the same games that players enjoy at retail, removing complexity for lotteries and players alike. These include digital versions of eInstants, draw games, and Quick Draw, featuring consistent branding both at retail and online. With their highly interactive sound and animations, digital eInstants offer lotteries an opportunity to further popularize favorites. Omnichannel cross-branding allows for marketing cost savings and drives sales performance.

Offering Keno in both **retail and online channels** leverages its versatility, amplifies its benefits for operators, and makes it even more meaningful to players. "My experience with Keno comes from both the consumer and business perspectives," says Andy Salvadore, Account Manager, iLottery Business Development, IGT. "I was a Keno player before I came to IGT. It is important for lotteries to offer digital Keno because it provides players real-time entertainment that is fun and easy to engage in."

"Digital Keno is uncomplicated and does not require a player to be in a specific location," Salvadore notes. "In Georgia, in-person Keno is not available everywhere. Players in physical locations like restaurants and bars can also enjoy it when they are home or on the go, if they stay in the state." Geolocation ensures that play only takes place within state

lines, per regulations. "Plus, Keno is a win-win for operators. Responsible cross-promotion of this user-friendly game to digital players can also bring awareness of draw, "Diggi" (Georgia Lottery's name for eInstants), and other games to drive engagement, supporting educational causes in the process."

Harnessing the **power of subscriptions** is another great way to drive longer term sustainability. Customers can configure their own personal subscriptions, ensuring they do not miss draws and generating incremental revenue for operators. When players opt-in to a subscription opportunity, lotteries can offer these customers other great online benefits too.

One such advantage lotteries can look forward to is the community derived from **group play**. This is a desirable, differentiated capability, which enriches the lottery experience

with a social element. Lotteries should consider integrating this fun feature, which is coming soon, into their offerings. Like a digitalized version of the popular office pool, the group experience enhances value for lotteries by bringing people together to play.

Responsible operators do not have to go it alone to source all the items necessary for a satisfying smorgasbord. They can collaborate with a **flexible, external vendor who can contribute as a key strategic partner to the lottery.** This partner can bring cross-jurisdictional experience to the table and assist in making informed strategic decisions. The right vendor helps lotteries successfully execute all the features and functions desired by the lottery and its players. Lotteries should select vendors that will have the ability to seamlessly integrate with the lottery and add significant value, whipping up a soufflé of player satisfaction!

More Peach State Pride

Georgia provides appetizing examples of the benefits of successful game portfolio optimization. The Georgia Lottery presents broad offerings that players appreciate, like its wide variety of branded eInstant Diggi games, including Cleopatra Clusters Jackpot, Hog Heist, and 50X the Luck Linked Wins. Cash 3, Cash 4, and Cash Pop draw games appeal to both longtime lottery loyalists and a new generation of players who prefer digital and omnichannel play to retail only.

“The mission of the Georgia Lottery is to maximize revenues for specific educational programs: Hope scholarships and GA Pre-K. Students



in the Peach State benefit through these programs via a fun and exciting form of entertainment,” says Gretchen Corbin, President and CEO, Georgia Lottery Corporation. “This experience is responsibly delivered via a variety of games that Georgia players can choose from.”

The Georgia Lottery’s rich games portfolio is supported by a flexible promotional calendar – including extended promotions for holidays, like Valentine’s Day, deposit promotions, welcome bonus, weekly game promotions and daily fun offerings.

This diverse menu of available games is responsibly driving acquisition and reinforcing engagement in the state. Since its inception, the Georgia Lottery has successfully transferred more than \$26 billion to the State Treasury’s Lottery for Education Account. ■





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NASPL and Lottery Industry Schedule of Events

2023 SCHEDULE

July 17-20, 2023

**NASPL Professional
Development Seminar**

Denver, CO

Hosted by the Colorado Lottery

October 30 - November 2, 2023

NASPL Annual Conference

Milwaukee, WI

Hosted by the Wisconsin Lottery

December 2023

**NCPG/McGill University
Gift Responsibly Campaign**

2024 SCHEDULE

March 2024

**NCPG Problem Gambling
Awareness Month**

April 15-18, 2024

**NASPL Lottery
Leadership Institute**

Nashville, TN

Hosted by the Tennessee Education Lottery

July 22-24, 2024

**NASPL Professional
Development Seminar**

Omaha, NE

Hosted by the Nebraska Lottery

September 9-12, 2024

NASPL Annual Conference

Kansas City, MO

Hosted by the Missouri Lottery

December 2024

**NCPG/McGill University
Gift Responsibly Campaign**

MILE HIGH EXPECTATIONS

NASPL PDS 2023

The NASPL Professional Development Seminar is a unique event, designed to bring together lottery industry employees at all levels in a small-group, firsthand format. This arrangement allows for candid discussions and information sharing among participants and provides attendees with tangible ideas about how to take advantage of the industry's biggest opportunities and find solutions to its greatest challenges.

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NASPL 2023

BREWING THE BEST

MILWAUKEE, WI



BREWING THE BEST

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OCT.30-NOV.2 2023 | MILWAUKEE, WI

