



la fleur's magazine

Vol. 19, No. 2 November/December 2011



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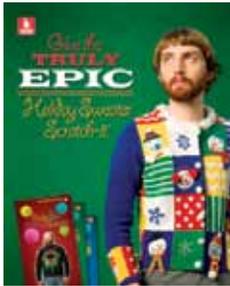
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www.lafleurs.com

© 2011

TLF Publications, Inc.

ISSN# 1536-8750

La Fleur's Magazine is published six times a year in January/February, March/April, May/June, July/August, September/October and November/December by TLF Publications, Inc.

EPIC HOLIDAY SWEATERS

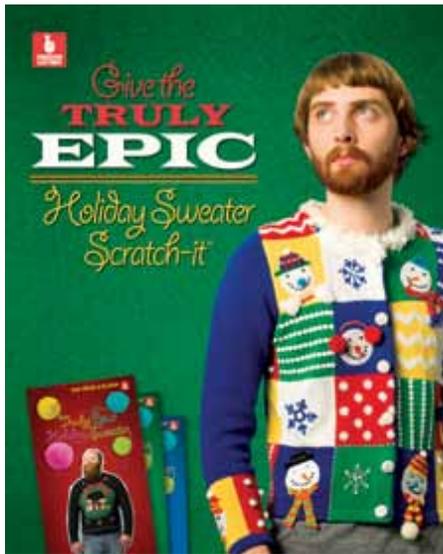
The Oregon Lottery is challenging players to give the truly epic present: the Holiday Sweater Scratch-it.

“Each year we try to develop a game and promotion that represents the essence of brand Scratch-its—a little bit of fun,” said Carole Hardy, assistant director, marketing, Oregon Lottery. “Holiday sweaters are a tradition that everyone loves to make fun of, but that they also embrace.”

The “brain-blizzard” for this epic idea resulted from the Oregon Lottery’s in-house Scratch-it product team playing “snowball” with BPN (the lottery’s ad agency).

Hardy said the group’s mission was to create a holiday ticket and campaign effort to attempt to match last year’s holiday ticket.

“For What’s in Santa’s Beard, our \$2 holiday game sold last year, we began distribution in late October (weeks earlier than all previous years), increased the number of our \$2 price point holiday game by 50% and sold through the product by the end of December.



Overall, we reached the highest sales week for Scratch-its in the history of the lottery—hitting a \$4 million+ sales week. Our average weekly sales are around \$2.1 million,” said Hardy.

The Holiday Sweater Scratch-it features a four-scene game, TV, radio, interactive, POP and social media elements.

“The campaign showcases how The Truly Epic Holiday Sweaters have turned the Oregon fashion industry

on its ear this holiday season,” said Hardy. “POP includes characters from the tickets donning Epic Sweaters and gift box towers holding cards shaped like holiday sweaters.”

To create buzz through its social media channels, the lottery is also offering players a chance to get photographed in their Epic Sweaters at holiday events, such as the Portland Holiday Ale Festival and The Woodburn Company Stores Outlet Mall.

“We have found that if we provide photo opportunities for people at events, people will take photos of themselves and post them immediately to Facebook. We are helping them do that by using a service that instantly prints a hard copy of a photo and immediately posts it to their site so that others can share,” said Hardy.

The lottery has contracted with a Portland-based company, Paparazzi Tonight, to take the photos at events.

Holiday sweater wearers will also receive a free Truly Epic Holiday Sweater Scratch-it and be invited to sign up for an Epic Holiday Prize (an iPad 2).

GTECH works for me



“Our overall business was not at the level we expected, and we wanted to improve our revenue contribution to education. Because GTECH knows all the variables that impact player behavior — game launches, instant ticket allocations, prize structures, odds, and more we asked them to help us develop a strategy to increase sales. They reviewed



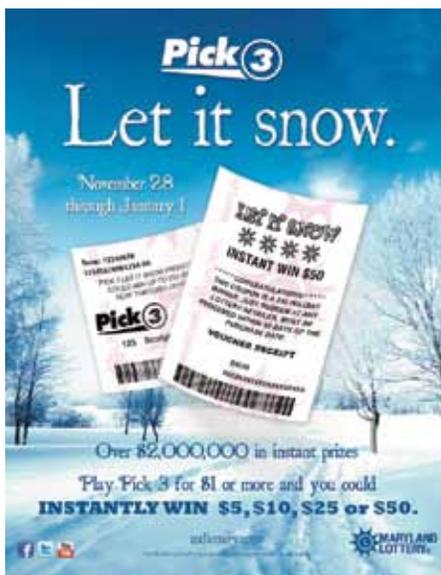
“All they have to do is to sign up for the Oregon Lottery player database through laptops provided at the events,” said Hardy. “If they invite friends to sign up as well, they will get multiple entries into the drawing.”

The Truly Epic Holiday Sweater is only one of four fun holiday Scratch-its. “All of the Other Reindeer was also created as a joint venture between our ad agency and our product team,” said Hardy. “Santa Paws Scratch-it and Holiday Treasures complete the lineup. We are on track to sell through all of the games which will help us meet or exceed the highest sales week ever for Scratch-its from last year.”

LET IT SNOW SALES

The Maryland Lottery is forecasting a blizzard of sales from its two holiday terminal game promotions.

From Nov. 28-Jan. 1, players receive instant win cash vouchers in the amounts of \$5, \$10, \$25 and \$50 when they wager \$1 or more on Pick 3. Vouchers are generated on an nth basis. Players can redeem immediately.



“The Pick 3 Let It Snow Promotion is a ‘Thank You’ to our most loyal players,” said Michael Hofferbert, strategic products manager, Maryland Lottery.

In addition, keno players are rewarded with the Keno Sprinkler promotion, which runs Nov. 21-Jan 1. Players can double to triple their winnings while playing keno. Both promotions are funded through the unclaimed prize fund.

“This nth promotion is offered a few times a year and does especially well during the holidays,” said Hofferbert. “It continues to produce sales increases of 15% to 20%.”

The lottery is also running a Facebook contest to promote its \$2 Santa Paws ticket. “The Keith Kimberlin-licensed property from Pollard Banknote uses six scenes to feature six different cute animals (three cats and three dogs),” said Nicole Ramey, creative products manager, Maryland Lottery.

The lottery developed a small scale Facebook contest to support this ticket. Players can upload photos of their pets for the Cutest Pet Contest.

“We thought it would be a nice way to connect fans with the ticket using their love for their pets,” said Jason Snapkoski, new media manager, Maryland Lottery. “Also, we felt it was a good way to test a contest like this to see how powerful the tool can be to help promote sales without any other additional advertising. The verdict is still out.” (As of November 9, the lottery had 600 entries into the contest.)

best-in-class practices, analyzed our own efforts, and recommended a focus on instant and online sales for maximum impact. We saw a 10% increase in the first quarter of 2011 versus the same period in 2010. Our collaboration with GTECH really paid off.”

Alice Garland, Executive Director, North Carolina Education Lottery

For more about this story and others like it, visit us at gtech.com/testimonials.



Alice Garland

The pet contest is the third promotion which the lottery has run through WildfireApp.com.

FROST-O-MATIC

The Nebraska Lottery cooked up a sweet promotion for its \$3 holiday ticket, Sugar Cookies.

The lottery is promoting the \$3 game with a fun web application called The Frost-O-Matic, where players can design their own sugar cookie.

Players can scan the QR code on the ticket or go to lottery's website to use the application.

"After selecting a background, frosting, and greeting, players can post their cookie on Twitter and Facebook, or send it via email to a friend," said Neil Watson, public information officer, Nebraska Lottery.

"The Frost-O-Matic gives us an opportunity to increase awareness of the Sugar Cookie game outside of our core player base," said Watson. "When you email a cookie to a friend or post it on Twitter or Facebook, a message is included about playing the Sugar Cookies game."

No projections are available on how many players will use the app. "This is our first campaign targeted to mobile users," said Watson. "But the initial response with a minimal amount of promotion is encouraging. It indicates that our players are familiar with QR codes and use them without prompting."

The Frost-O-Matic is promoted on the terminal's electronic displays at retail. In addition, the lottery is planning a special email focusing on its holiday games and the Frost-O-Matic app. It will be sent to the player registry in early December.



LOTS OF MOOLAH

"Deck the halls with lots of moolah" is the California Lottery's call to action in holiday ads hyping the new \$250 Million Cash Spectacular ticket. It was launched September 30.

This ticket is likely to produce record *moolah* as measured by sales. It is the first \$10 ticket ever sold by the California Lottery.

Ticket sales have been averaging almost \$11 million a week, which has exceeded the lottery's projections.

"Total sales thus far for this game alone are almost \$67 million in the five weeks since launch," said Michael Brennan, deputy director, sales & marketing, California Lottery. "Our highest weekly sales of \$13.48 million were achieved on November 5. This was largely due to our full advertising campaign which kicked-off on October 31."

The lottery chose the spotlight ticket based on its success in other markets.

"We researched the industry to see what was the most successful approach to \$10 game introductions and together with our large print runs it was a perfect fit to launch our first \$10 game as a spotlight game," said Brennan. "Spotlight games emphasize the total amount of prizes contained in the entire game."

"We conducted various rounds

of research well over a year before launching this game to determine which concept was the strongest and also which callouts were most significant to our players," he added.

The lottery has a second advertising wave with a holiday message to launch on December 12. There is holiday creative for general market, Spanish language and Asian language markets.

The tag for the campaign is "It's a whole lot of cash." Spanish POS promises "es mucha lana." Translated this means lots of wool, which is slang for lots of cash. To illustrate the idea, the lottery's Spanish language ad features sheep dressed in Santa hats.

The general market holiday ads also stress the rich payout for the \$10 ticket: "Jingle bells. Rolls of bills. Money everywhere."

For retail support, the lottery introduced a 7-inch ticket dispenser to improve visibility of tickets as well as provided a LED light for the in-counter display to draw more attention. It also developed a Check A Terminal decal to optimize existing real estate at retail.

Brennan said activation goals for the \$10 game were established for the first 10 weeks of introduction to ensure distribution was paced to meet sales goals.

"The \$10 game was added to the target bonus game mix for our field sales staff bonus incentive program," said Brennan

Scheduling the spotlight ticket's launch during the fourth quarter of the calendar year optimizes the sales potential.

"Traditionally the holiday time frame is one of our higher sales periods



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and also when we are able to attract new and infrequent players," said Brennan. "Since we expect to have our \$10 game in market for quite some time, we wanted to provide plenty of support throughout the year."

PEPPERMINT PAYOUT

"Follow Your Nose To The Perfect Gift!" is the slogan for the Florida Lottery's \$2 Peppermint Payout ticket.

The \$2 ticket is the lottery's first peppermint-scented ticket. The lottery is marketing six different holiday games. They use several specialty printing features, such as foil paper, metallic inks and scene games.

"Although it is early in the season, our overall holiday ticket sales are already up by 14.98% over the same period last year and in its first week of sales, Peppermint Payout is 7% higher than the \$2 holiday game launched at the same time last year," said Cynthia O'Connell, secretary, Florida Lottery. "This year's October sales were the best in our history, so hopefully people are feeling a little more optimistic during the holidays this year."

The lottery re-edited last year's holiday advertising campaign featuring Christmas carolers singing about scratch tickets.

"We included the new ticket art, supers and updated the voiceovers to share the benefits of the new holiday

games," said O'Connell. "We spotlighted Peppermint Payout when featuring as a visual."

A CHRISTMAS STORY™

Move over Santa Claus. Ralphie is coming to town. Two U.S. lotteries—Arkansas Scholarship Lottery and Kentucky Lottery Corporation (KLC)—are selling the MDI-licensed A Christmas Story™ ticket based on the classic holiday movie.

Both lotteries feature "the old man's" infamous leg lamp on the ticket. It is instantly recognizable to the film's enormous fan base.

KLC jumped at the chance to market this property. "Every year when we begin planning our holiday games, this movie always comes up in conversation so we were extremely pleased to learn that MDI had obtained the license," said Rhonda Goodwin, product manager, Kentucky Lottery Corp.

In 2010, it ranked as December's top movie on basic cable for adults 18-49. "A Christmas Story is a beloved classic," said Julie Baldrige, interim director, Arkansas Scholarship Lottery. "The mix of whimsical humor and nostalgia makes for a fun and one-of-a-kind addition to our holiday lineup."

The movie's tremendous popularity would also make it an easy sale by lottery retailers. "We knew this classic brand would resonate with our current players and would also grab attention from fans of the movie thereby encouraging trial from lapsed and/or non-players as well," said Goodwin.

"Additionally, since this brand is considered an 'all-time holiday favorite,' we knew we could successfully promote the tickets as a great gift-giving idea," she added.

Both lotteries used the leg lamp for artwork. But numerous movie "assets" from the movie are available through the agreement with Warner Bros. Consumer Products, including drawings of Ralphie in his pink bunny suit and silhouettes of Flick with his tongue stuck to the schoolyard flagpole.

To capture movie fans' attention at lottery retailers, the Kentucky Lottery



is conducting regional promotions, including store decorating contests and pack activation incentives.

"We have four sales regions, so each region developed their own promotion to award two retailers per region with the 'major award' of the legendary life-size leg lamp made so famous in the movie," said Goodwin.

Kentucky Lottery launched its ticket on October 20. "We're projecting about six cents per capita per week which equates to about \$260,000 in weekly sales," said Goodwin.

The ticket is priced at \$3, which is a relatively new category for Kentucky Lottery. "We felt the popularity of this property could really help us in building a strong foundation and loyal player base for this price point as previous properties such as Loteria and Minute To Win It have done," said Goodwin.

Arkansas Lottery launched its \$2 ticket on November 1. "We anticipate that the theme will help increase sales over last year's \$2 holiday game, which averaged \$250,000 weekly for the weeks before Christmas," said Bal-



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dridge. "Our players in Arkansas have shown an appreciation for licensed games, such as Wheel of Fortune® and Betty Boop™. They have allowed us to reach new and varied groups of players. We hope that in addition to appealing to current players, A Christmas Story™ will attract some enthusiastic fans of the movie to try our games for the first time."

HOLIDAY POUCH

The Minnesota Lottery hopes to wrap up big holiday sales with its \$20 pouch game. Called Holiday Celebration, each pouch game features an assortment of price points: \$1, \$2, \$5 and \$10.

Despite the poor economy, sales prospects are good for the \$20 game. "Our \$20 tickets represent 20% of our overall scratch sales," said John Mellein, director, marketing, Minnesota Lottery. "A \$20 pouch price point, especially one designed for a gift, will be well received by our Minnesota players."

This is not the lottery's first experience in selling a pouch game. "Minnesota offered several pouch games many years ago, but while the tickets sold well, the production cost was too prohibitive to create an on-going pouch game," said Mellein.

To maximize attention, the lottery is spotlighting the prizes. "We felt the best marketing of the pouch game we could do would be to create compelling callouts on the actual front of the pouch. 'Guaranteed Win in Every Pouch!' and '6 Lottery Tickets inside Valued at \$21!' should gain immediate attention from both clerks and players."



DELAWARE PROMOTION

In October, Vernon Kirk was named acting director of the Delaware Lottery, replacing Wayne Lemons who had retired. Kirk has served the Delaware Lottery since its startup, most recently as principal deputy.

CAPITALS TICKET

The D.C. Lottery launched its first hockey ticket in September. The \$5 Washington Capitals scratcher represents the D.C. Lottery's first team ticket with the Capitals hockey organization.

"The Washington Capitals are one of the most successful hockey teams in the NHL," said John Gorman, strategic development specialist, D.C. Lottery. "They have a strong fan base in the D.C. Metro area, selling out every night at the Verizon Center."

The Capitals ticket features three scenes, a top prize of \$50,000, and a host of second-chance prize opportunities, including 2012 season tickets and "Be a Cap for a Day."

"This is an MDI licensed product," said Gorman. "We realized significant value-added with this program from the Capitals, including team merchandise and tickets, premium signage, event opportunities and social/online marketing opportunities."

In negotiating its partnership agreement with Monumental Sports and Entertainment (Verizon Center), the lottery focused on key elements that directly supported the marketing of the Capitals ticket.

"For example, we negotiated significantly more on-site presence within the Verizon Center on key game nights, thus allowing us to sell and promote this ticket directly to the fans. That type of direct interaction with the fans was very attractive to us," said Gorman.

The game is currently indexing at 109 after five full weeks on the market. "Honestly, we had some concerns about a hockey-themed ticket. Even though the Caps are a great team, we weren't sure if the ticket would appeal beyond that core audience of Caps fans," said Gorman. "With the sales



results coming in ahead of forecast, we feel that the ticket has appeal beyond the Caps fan base."

ILLINOIS APPOINTMENT

Illinois Gov. Pat Quinn has appointed Michael Jones as superintendent of the Illinois Lottery.

Jones will be responsible for maximizing lottery profits and overseeing the private firm hired last year to manage Illinois' lottery operations for the next decade.

He brings decades of experience to this critical position. He served as superintendent of the Illinois Lottery from 1981-1985 under former Governor James Thompson, overseeing a record billion-dollar increase in sales.

After leaving the position, he founded a marketing promotion firm that specialized in assisting all forms of gaming with maximizing sales and profits in an ethical and responsible manner.

Jones has served as a consultant for lotteries in 13 states, the District of Columbia, the Virgin Islands, Great Britain, Ukraine, British Columbia and Western Canada. Jones also served as a director of Independent Lottery Research that uses market and consumer analysis to evaluate growth potential in lotteries.

CORRECTION

The story "Weekly Grand," which appeared in Lottery Biz in the September/October 2011 issue of *La Fleur's Magazine*, inaccurately described the Idaho Lottery's top prize for Weekly Grand. The correct amount is \$1,000-a-week for a year (not life). 

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FY11 NORTH AMERICAN VLT REPORT

By **BYRON LA FLEUR**

In fiscal 2011, the U.S. electronic gaming machine (EGM) industry grew 4%, with net machine income climbing to \$7.79 billion from \$7.49 billion, according to *La Fleur's Fiscal 2011 VLT Special Report*. The five-year growth rate, however, is 34%.

Since the economy tanked in 2008, the industry has experienced single-digit growth.

"I would sum up the North American VLT industry in three words: explosive, volatile and competitive. As more states face financial challenges, the footprint of the VLT industry has quickly expanded," said John Musgrave, director, West Virginia Lottery.

NEW YORK CASINO: AQUEDUCT

New York Gov. George Pataki signed the law to permit VLTs operated at racetracks in 1991.

In 2004, Saratoga Racetrack opened the first racetrack casino, followed by three other racetrack casinos (Finger Lakes Gaming and Racetrack, Fairgrounds Gaming and Raceway and Monticello Gaming and Raceway).

In 2005, Batavia Downs Gaming, Tioga Downs Gaming and Yonkers Raceway-Empire City commenced operations. In 2006, Vernon Downs Gaming began operations.

Between fiscal 2005 and fiscal 2011, the New York Lottery's VLT net machine income increased 379% to \$1.1 billion from \$231.7 million. The statewide VLT network expanded to 12,524 devices operated at eight casinos.

On October 28, 2011, the ninth casino opened in New York. The Empire State, like most states in the U.S., is cash strapped due to the unfortunate economic conditions that have plagued the world for the past few years.

The VLT casino at Aqueduct has encountered numerous political and legal delays. But the preliminary results are "simply amazing," said New York Lottery director Gordon Medenica.

"Although it's still in the early days, Aqueduct has far exceeded our

expectations, with win per day figures exceeding \$700 on weekends. And, only half of the casino is open so far; the second phase will be open by year-end," said Medenica.

The Aqueduct casino features 2,280 VLTs and 205 electronic table games as of October 28th. The remaining 2,245 VLTs and 270 electronic tables—combining for a total of 4525 VLTs—should be operational by mid-December.

Yonkers Raceway, which operates New York's other big casino, and Aqueduct should significantly increase profits for the New York Lottery.

"Yonkers is bigger than our seven smaller casinos put together and Aqueduct will be as big, if not bigger, than Yonkers, so the addition of Aqueduct will increase our casino profits by over 50%," said Medenica.

"We have always said that Aqueduct has the potential to equal or exceed the performance of Yonkers, which produced over \$318 million for New York education last fiscal year," he added. "We still believe those estimates. We would expect a minimum of Yonkers-level performance for the full year of fiscal 2013."

However, Medenica wants to set the record straight. Both Yonkers and the Aqueduct have been called "racinos," which is the generic industry term for a VLT casino operated at a racetrack.

Medenica prefers to avoid the term racino. "We see very little consumer overlap between our casino customers and the horse racing customers at co-

located facilities," he said. "Although the horse racing industry benefits from the substantial subsidies paid to them from casino proceeds, the businesses are essentially independent from a customer perspective. That is why we avoid using the term 'racino,' which may have a negative marketing connotation for some customers."

Bloodhorse Magazine described the Aqueduct casino as "a financial life raft for the thoroughbred industry."

NEW JURISDICTIONS ON THE HORIZON

In North America, states and provinces legalizing VLTs have reaped the rewards. It is not unusual for a jurisdiction to see double-digit increases in revenue and profits during the first few years of operation.

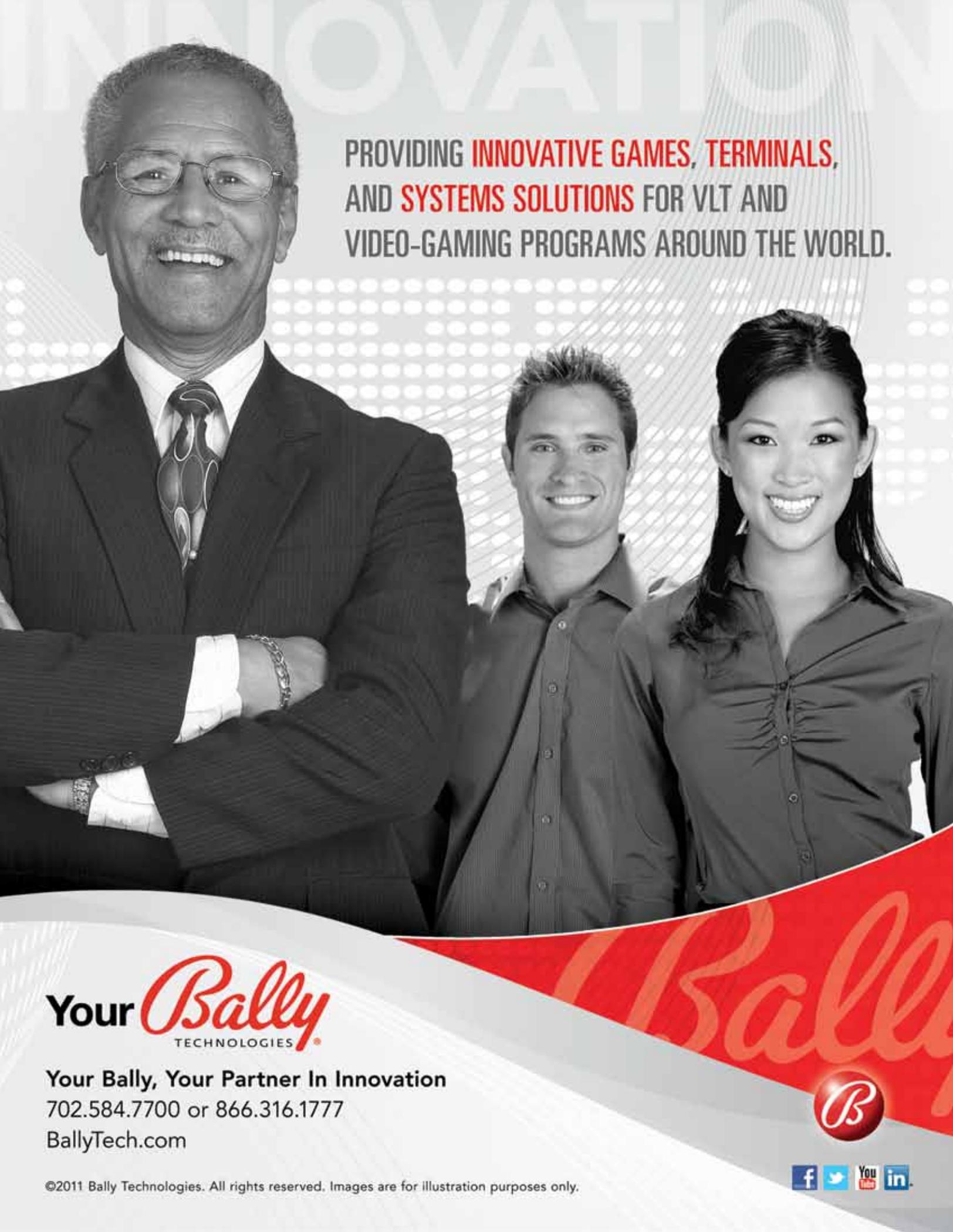
Now, as the unstable economy threatens to double dip one day and then turn around the next, more jurisdictions are looking to VLTs to provide a safe stream of revenue.

"Casino gaming is likely to continue proliferating throughout the country so long as states encounter challenging budget environments. States with no casino gambling are giving it a look; states with only slot machines will look at expanding to table games. And mature markets, like New Jersey, are looking at new forms of gaming such as sports betting. The result is greater competition and more gaming accessibility," said Stephen Martino, director, Maryland Lottery.

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U.S. VLT Net Machine Income: (FY07-FY11)





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travel to resort casinos, à la Las Vegas and Atlantic City, because customers want more convenient locations, considering the current economic conditions. This has kept the VLT business healthy and more appealing for new jurisdictions.

"I think that as jurisdictions begin to understand that their citizens enjoy casino gaming, and will travel out-of-state to do so, then it makes sense to offer people the option of playing closer to home," said New York's Medenica. "Massachusetts looks close and New Hampshire has joined in the discussion."

However, it can take an extended period to legalize VLTs in any given jurisdiction. "The possibility of new jurisdictions legalizing VLTs in North America is certainly a possibility at any point, but video lottery brings controversy so anything at this point is pure speculation," said Norm Lingle, executive director, South Dakota Lottery.

At this point of time, though, Ohio, is definitely past speculation. The lottery's online system vendor, INTRA-LOT, has been awarded a two-year contract to implement a monitoring system for tracking VLTs. Due to putting VLTs on the fast-track, it is possible that the system could be up and running as early as January 2012.

On October 18, Ohio Gov. John Kasich signed Executive Order 2011-22K, which should speed up the implementation of VLTs.

"As a result of recent legislation, Ohio is gearing up now to offer VLTs within the next year," said Jim Logue, deputy director, video lottery, Delaware Lottery. "There are a number of other jurisdictions that already have bills introduced in their legislatures and several more that are currently debating the merits of VLTs in anticipation of drafting legislation."

It varies by jurisdiction whether the state lotteries will operate the VLTs. "Some jurisdictions are proposing casinos under the lottery's authority and control while others are creating separate Lottery Commissions for

oversight," added Logue. "Either way, I believe the number of jurisdictions offering VLTs will continue to grow for the next several years."

MID-ATLANTIC COMPETITION

Depending on the number of jurisdictions that enter the VLT market in the next few years, there could be a negative effect on the existing industry.

The legalization of slots in Pennsylvania fueled VGD expansion as well as heightened aggressive competition between the mid-Atlantic states operating VLTs in Delaware and West Virginia. In September 2010, the Maryland Lottery commenced its VLT operations.

"With the success of VLTs in several jurisdictions in North America and the increasing need for more revenue in each state, I expect other jurisdictions will enter this market," said West Virginia's Musgrave. "As new properties are developed and gaming expansion places even greater competitive pressure on state revenues, states will find it increasingly difficult to sustain play and keep entertainment dollars inside their own borders. It will then become harder to increase net income and provide the growth that drives success."

The mid-Atlantic states are well aware of the consequences of an overly crowded market since there is significant border competition. (The state lotteries in Delaware, Maryland and West Virginia, together with the Pennsylvania Gaming Control Board, represent a combined \$4.1 billion industry, as measured by annual combined net machine income, according to *La Fleur's Fiscal*

2011 VLT Special Report.)

In fact, West Virginia Lottery's VLT net machine income declined 1% in fiscal 2011. "West Virginia is not projecting an increase in VLT net machine income in fiscal 2012. We have experienced huge success in the VLT market in this jurisdiction, but as competition on our borders continues to increase, it has become more difficult to sustain higher levels of net income," explained Musgrave.

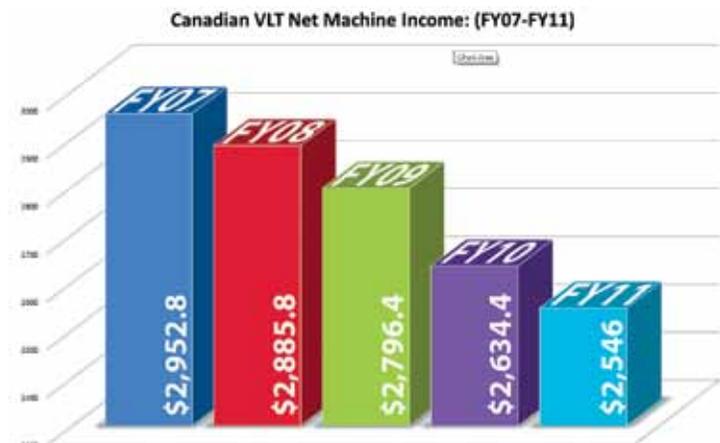
Similarly, the Delaware Lottery experienced a 9% decrease in VLT revenue in fiscal 2011 compared to fiscal 2010. "This was the result of not only the continued poor state of the economy, but increased competition from new casinos opening along our borders in both Pennsylvania and Maryland," said Logue.

Maryland's two currently operating casinos—Hollywood Casino Perryville and Casino at Ocean Downs—will have their first full year of operation in fiscal 2012.

Maryland *Live!*, Maryland's soon to be largest casino, is slated to open in June 2012. The Maryland Lottery also plans to award two more VLT venue licenses.

"Background suitability investigations are being conducted for the Rocky Gap and Baltimore City casino applicants," said Martino. "Once that key step is complete, the Video Lottery Facility Location Commission has indicated that it would like to award the licenses as soon as possible."

Delaware, being wedged in between Pennsylvania and Maryland, may be bracing for another decrease



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in revenue. "We will be faced with increased competition over the next year with the openings of two rather large casinos, one in Anne Arundel County, Maryland and the Revel property in Atlantic City. We currently attract a large number of players from Baltimore and the surrounding area so we believe the Anne Arundel opening will have a significant negative impact on our player base resulting in a reduction of VLT income in the next fiscal year," said Logue.

"We were able to temper our losses a little with the addition of NFL Parlay Sports Betting, which we instituted back in 2009," added Logue. "We are the only state east of the Rocky Mountains legally permitted to offer sports betting. In addition, we added live table games to our casino mix in fiscal 2011. If you factor in our table game revenue, the Delaware Lottery actually realized a 5% increase in overall casino gaming revenue for fiscal 2011 over fiscal 2010."

Musgrave explained that the West Virginia Lottery has been able to temper its own losses as well. "Competitive pressures from other states have

impacted our VLT market and also decreased revenue, but fortunately the increase of other gaming at our racetracks, table games in particular, has helped to lessen the blow you anticipate as others enter the market and/or expand their product offerings," he said.

POOR MARKET CONDITIONS

The South Dakota Lottery reported a 11% decline in VLT net machine income in fiscal 2011, which dropped from \$215.4 million to \$191.76 million.

"We hope to stop the decline brought on by the economy and smoking ban," said Lingle. "The Lottery Commission authorized the implementation of video lottery line games. Since that time, we have been testing new hardware and software that provides for the implementation of line games. We are hopeful that players will enjoy the new game option and we can bring net machine income back to pre-smoking ban levels."

The tough economy and smoking ban have been suppressing growth in the VLT market for the last few years. As of November 2011, 27 states have

enacted statewide bans on smoking in all enclosed public places, including Delaware, Maryland, New York and Oregon, which represent four of the six lottery jurisdictions that currently permit VLTs. The Rhode Island Lottery's two state-licensed gambling facilities—Newport Grand and Twin River—are exempt from the smoking ban. Currently, West Virginia Lottery has no smoking ban.

"The competitive threat for video lottery is that our players will spend their discretionary entertainment dollars on other forms of entertainment. While we have yet to recover from the full effect of the economic downturn [and statewide smoking ban from 2009], we have remained competitive for our players' discretionary income as noted by an increase in lottery revenue last fiscal year over the two previous years," said Larry Niswender, director, Oregon Lottery.

In fact, the Oregon Lottery's VLT net machine income rose 2% to \$720.5 million in fiscal 2011, up from \$707 million in fiscal 2010.

North of the border, the Canadian lotteries operating VLTs have seen a

OREGON LOTTERY: VIDEO LOTTERY STANDARDS INITIATIVES

The number one gaming initiative in Oregon is to replace its current DXS Video Lottery system and terminals with a new system and network of VLTs that use the new standards-based protocol, G2S.

"The overall goal moving forward with a standards-based protocol and shared cross-jurisdictional business and technical requirements is to reduce the time to market for VLT games and to open up new game libraries," said Larry Niswender, director, Oregon Lottery. "This will enable lotteries and vendors to focus on consumer preferences in content rather than making investments in proprietary and customized systems and platforms."

The Oregon Lottery has been working with the Canadian jurisdictions over the past four years to champion the evolution and adoption of the

G2S protocol to better meet the lottery industry's unique business needs.

"We have been working with the Gaming Standards Association (GSA) to develop specific protocol extensions that are necessary for wide area VLT networks, as well as championing GSA standards for responsible gambling (informed player class) and the guidelines for a player-user interface (PUI)," said Niswender. "The requirements we defined for a PUI in the GSA Operator's Committee are for a software-based solution that will allow operators to communicate directly with their players through a customized screen display on a VLT.

"Through our participation in the GSA Operator's Committee and cross-jurisdictional initiatives, we have successfully influenced gaming vendors to implement GSA standards and to obtain GSA certification for their gam-

ing management systems and VLTs," he added. "Regarding certification, we worked with Gaming Laboratories International (GLI) to establish product testing standards for the lottery market through test specifications GLI-23 and GLI-28."

The Oregon Lottery encourages U.S. lotteries to actively participate in the ongoing OAC efforts to develop the technologies and standards to meet lottery needs.

"Increasing lottery membership and participation in the GSA will allow us to increase our influence on the gaming industry at all levels through our common business requirements and procurement efforts," said Niswender. "Our combined efforts will help the industry move away from proprietary, customized systems, games and VLTs to those that embrace standards."

slow deterioration in VLT net machine income. There has been a 14% decline over the past five years.

Some provincial governments have mandated reducing the number of installed VLTs. Overall, there has been a 6% decline in the installed base of VLTs over the past five years. There are more than 34,000 VLTs operated in Canada.

In fiscal 2011 (ended March 31), total Canadian VLT net machine declined 3% to C\$2.55 billion from C\$2.63 billion in fiscal 2010.

All five Canadian jurisdictions operating VLTs—Alberta, Atlantic provinces, Manitoba, Québec and Saskatchewan—reported declines in fiscal 2011 VLT net machine income.

The Atlantic Lottery Corporation (ALC) reported a 4% decline in VLT net machine income in fiscal 2011.

"This was largely attributed to a reduction in the number of VLTs in Atlantic Canada, market conditions, as well as site closures," said Shawn Ryan, managing director, destination, ALC. "We have not finalized projections for the coming fiscal year, but trending to-date would suggest further declines are possible."

Further declines in VLT net machine income is also projected in Québec. "We are planning a continued but slow decline until the economy picks up and we renew our VLTs," said Carole Drolet, managing director, Société des loteries vidéo du Québec (SLVQ). "The main contributing factors that we identified are two-fold: the economic situation and an aging product (given we have been using the same VLTs for more than eight years)."

EVOLVING TECHNOLOGY

To combat further declines, new VLT networks and machines are being installed which will significantly improve operations.

"Oregon, Alberta, Atlantic Lottery, Manitoba, Saskatchewan and Québec (SLVQ) are in the process of replacing outdated proprietary VL systems with Gaming Standards Association (GSA) open standards systems," said Oregon's Niswender. "Over the next

several years, these jurisdictions will spend over \$1 billion on central systems and electronic gaming machines (EGMs)."

Many North American lotteries are currently at a crossroads in determining when to migrate to the next generation of gaming technologies, according to Niswender.

"The VLT industry has come a long way in recent years," said ALC's Ryan. "The latest in VLTs offer more relevant games, better integrated responsible gambling toolsets, optimized operational abilities, and the opportunity to build the best possible player experience. The industry is moving beyond the VLTs we used to know, and towards new technology that is rapidly evolving."

VLT technology is advancing rapidly. "Manufacturers have really stepped up over the last several years in terms of incorporating the latest in technologies into their games," said Delaware's Logue. "Bally has recently offered a couple of innovative products including their Bally Curve, the first curved LCD screen, giving a more real-life mechanical reel look to their video product, and the ideck, a player interface device that consists of a touchscreen button deck which eliminates the need to replace a physical button deck when installing new game content. The ideck is also capable of displaying bonus events, including virtual wheels and more."

In 2010, SLVQ awarded its new VLT central system contract to SPIELO International. SPIELO will deploy its INTELLIGENT™ central system in 2012. It represents the first-ever G2S-based distributed market solution to North America. The new central system enables remote game downloading, game switching, remote diagnostics, and Advanced Business Intelligence.

SLVQ will also be replacing its aging network with new VLTs supplied by IGT and SPIELO International.

"We will shortly be piloting (in a test market) a new set of games from SPIELO which includes new credit denominations and an increased number

The image shows two VLT game panels. The top panel is for EA Sports, featuring a soccer player and the text "It's In The Game. Win Up To \$100,000!". The bottom panel is for Frisbee, featuring a man throwing a frisbee and the text "Win Up To 15 Times! Win Up To \$35,000!". Both panels include logos for EA Sports and Frisbee, and text about winning prizes.

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of lines. We are looking forward to receiving feedback from our network regarding the launch of our next generation of VLTs," said Drolet.

This ongoing transformation of the gaming market suggests continued success for lotteries operating VLTs.

"The VLT business is very healthy, as the casino gaming industry shifts from a destination resort model (e.g., Las Vegas, Atlantic City) to more of a distributed model where gaming is available at more convenient locations closer to customers," said New York's Medenica. "People are discovering that they don't need to drive (or fly) for three hours to enjoy an evening of entertainment at a casino."

In North America, there are two basic types of jurisdictional VLT business models: wide area network (WAN) operations (bar and tavern market) and venue-style operations (the casino/racino model). WAN operations consist of VLTs installed in age-controlled bars and taverns. Venue-style VLT operations is segregated to gaming establishments.

"WAN operators in Oregon and the Canadian lotteries have been ardent supporters of the Gaming Standards

Association (GSA) and the operational benefits provided through the implementation of products based on G2S and S2S protocols," said Niswender. "This commitment towards standardization and operator investment plans has had a significant impact on influencing the business direction of gaming industry participants. The product development efforts of major EGM suppliers, VLT test specifications, such as GLI-23 and GLI-28, and the GSA have changed from a primary casino focus to one of addressing the needs of WAN operators."

MUSL PROGRESSIVE GAMES

MUSL's new progressive game, MegaHits, has replaced Ca\$hola to become the next generation multi-state VLT game. MegaHits is jointly offered by the Delaware, Rhode Island and West Virginia lotteries. It links together a total of nine casinos in the three jurisdictions.

"MegaHits continues to perform above expectations," said Delaware's Logue. "IGT has provided strong game content and they continue to refresh the game with new themes. This, combined with the increasing jackpot, has

made MegaHits a very popular game with our players. Delaware is currently experiencing revenues over double the house average on these games. West Virginia and Rhode Island have seen triple and in some cases quadruple the house average on their MegaHits games."

In West Virginia, progressive games have historically been strong performers. "We have recently had very strong sales of the MegaHits progressive game," said Musgrave. "This game has outperformed the previous progressive game and net proceeds for West Virginia by VLT per day are well above the group average."

In conclusion, the state of the VLT industry in North America remains stable and profitable. "Because of the economy and increased competition, many established jurisdictions have experienced declining revenues over the last several years but the benefits realized through their contributions remain strong and continue to have a positive impact on government budgets, revenue which they have now come to depend upon," said Delaware's Logue.



VLT MANUFACTURER PERSPECTIVE: STATE OF THE VLT INDUSTRY

How would you describe the state of the VLT industry in North America?

□ "There are a number of jurisdictions looking at enhancing their game incentives investments and they are looking to create a more personalized player centricity and be more responsive to technology changes."—Richard Haddrill, CEO, Bally Technologies

□ "The North American VLT industry is in a state of transition as government-sponsored jurisdictions move toward offering less restrictive and richer gaming experiences to their players. This latest VLT replacement cycle has been an opportune time for operators to introduce new functionalities and technologies that create operating efficiencies and increase

results. For instance, operators are relying on our INTELLIGEN™ central system applications like Advanced Business Analytics to observe and exert more control over the trends that affect their day-to-day business. Meanwhile, our Proactive Diagnosis application significantly reduces downtime, protecting the operator's bottom line, while the Player User Interface is enabling more direct communication with the player, and a more intimate understanding of his or her needs and desires.

Game to System (G2S) technology implemented for the distributed market is no longer a 'nice-to-have.' It's a must-have for VLT operations seeking greater flexibility on the gaming floor, faster speed-to-market for game content, and the largest possible choice of

VLT games.

The advent of a proven wide-area progressive for distributed markets will allow lotteries to take big leaps forward in performance and player appeal. We launched the world's first live distributed wide-area VLT jackpot in Italy, and this solution has been a driver of the Italian VLT program's success. We expect these results to be replicated in North American VLT markets that want the appeal of jurisdiction-wide jackpots offering significant payouts.

This is a new era for the distributed VLT market, and we believe that these advanced solutions will lead to more sustainability and stability for North American gaming operators."—Victor Duarte, senior vice president & COO, SPIELO International 

EURO CHRISTMAS TICKETS

On December 1, children across Europe begin counting down the 24 days before Christmas. It is a habit steeped in tradition. Each day a new shuttered window is opened on the Advent Calendar. Inside the window may be a small toy, a gift or piece of chocolate.

For adults, keeping an Advent Calendar is nostalgic; it recalls all the childhood excitement and anticipation leading up to December 25.

"The tradition of Advent calendars goes back a long time in Norway, often with chocolate or small gifts as the daily countdown," said Silje Tysse, brand manager, instants, Norsk Tipping. "Our Advent ticket has been on the Norwegian market since 1999. It has become a tradition in many homes, and something both customers and retailers are waiting for. So I believe the tradition is the main reason why it's so popular."



In Denmark, Christmas is called Jul, which is an old Nordic word. So Danske Spil created an Advent scratch card called Julekalender Quick.

"Having an Advent Calendar is a tradition in Denmark," said Anne Katrine Schaper, product manager, instant games, Dansk Spil.

Since 1994, the lottery has marketed its Julekalender Quick ticket. "It has been our offer of the Advent Calendar for grown-ups," said Schaper. "For many people and families over the years, this has turned into a permanent tradition either to buy it for themselves or to give it as a present. Therefore, many non-players buy the Julekalender Quick."

Certainly, it is no surprise that the Advent Calendar would hold a special place in the hearts of Finns, since Finland is the home of Santa Claus. (You can meet Santa Claus and cross the magical Arctic Circle every day at the Santa Claus Village in Lapland.)

Veikkaus Oy has marketed its Advent calendar ticket for more than a decade. "It is well known and people are familiar with it," said Erja Holsti, product coordinator, instants, Veikkaus Oy.

As one Finn described it, "The Advent Calendar indeed is an old season tradition with its 24 'shutters' numbered one for each day of December until Christmas Eve. Most of us remember from our childhood how eagerly everyone awaited what could be found next morning behind that day's shutter."

Scandinavian lotteries change the look of the Advent Calendar scratch ticket each year by featuring new artwork. One year, the shutters might appear in a big fir. Another year they could be scattered throughout the elves' workshop or hidden on Father Christmas' red velour jacket.

The idea is simply to make an emotional connection between the lottery player and his best Christmas memories from childhood. The only thing that never changes is the format. There must be 24 shutters, numbered 1-24.

In marketing Advent Calendar tickets, Scandinavian lotteries emphasize the traditional fun associated with this past time.

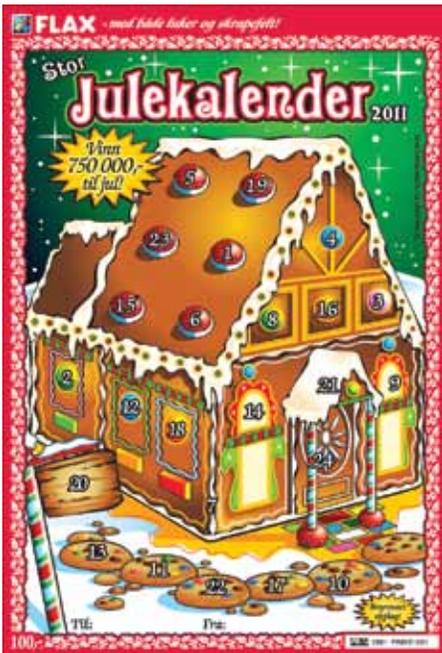
Norsk Tipping's main slogan for Julekalender is "24 chances for Christmas."

Danske Spil emphasizes that the lottery's Julekalender is exclusively an adult pursuit—"The only Christmas tradition which can make you rich."

Finally, Veikkaus Oy reminds lottery players to recall how the calendar made them feel as children—"Scratch more joy for the Christmas expectation."

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TWO NORWEGIAN CALENDAR TICKETS

In 2011, Norsk Tipping introduced a second Advent Calendar ticket on the market at a higher price, instead of changing the price point on its existing game.

As in years past, the lottery is marketing a Julekalender Flax ticket priced at 50 NOK. The stunning vertical ticket features a hillside of village cottages dressed in pastel blue, lavender and green. The 24 scratch-off areas appear in the windows of the house.

All new is the Star Julekalender 2011 priced at 100 NOK. It displays a gingerbread cottage.

Both Advent Calendar tickets are printed by Pollard Banknote.

"It's way too early to predict how the sales will go this season, as the calendars have only been in the market for one week," said Tysse. "But we've had an increase in sales every year, and see no reason why we shouldn't see the same this year, especially with two tickets in the market.

"We are hoping for a 20 % increase in sales—both based on the development we've seen the last years, and the introduction of the second calendar," she added.

In addition to the two scratch calendars, Norsk Tipping will market a NOK 25 Christmas red ticket. Its lowest price point FLAX ticket, which sells for NOK 10, will also feature a Christmas

design. Christmas ticket sales should be brisk.

"Norway has been fortunate and has not been [negatively] affected by the economic situation as much as the rest of Europe," said Tysse. "Therefore, I don't think we will see any effect on the sales."

DANSKE SPIL

Julekalender Quick is traditionally printed in an A4 format (which is sized 8.3" × 11.7"). The ticket is illustrated each year by a famous Danish artist.

"Every year we have a new artist to make the painting/illustration for us," said Schape. "The lottery looks for interesting concepts, but often artists send us their suggestions. For instance,



this year the illustration is made by Johan Linneballe who also created our Danske Spil logo."

Julekalender Quick has an exclusive price point of 50 DKr. The top prize for the game is DKr 1 million.

Ticket sales are expected to be brisk, despite poor economic conditions in Europe.

"It didn't have an impact last year, so we don't expect that the economy will have an impact on the sales this year either," said Schaper.

Since the lottery did not increase the amount of tickets printed for Julekalender Quick, sales are not expected to increase.

The Advent calendar ticket is a very important product for the lottery. It represents about 10% of the lottery's total sales.

Danske Spil will also market a gift tag at part of its Christmas scratch portfolio. The price is 10 DKr. The top prize is 1,000 DKr.

VEIKKAUS OY

The Advent Calendar ticket (Joulu-kalenteri) uses an oversized format. It typically will feature jolly old Father Christmas. Last year's ticket featured Santa Claus Village.

"We have a cooperation with the Santa Claus Association and we are

able to use their artwork," said Holsti.

While Veikkaus Oy has experimented in the past with selling two Advent calendar tickets, it will only sell one ticket in 2011. It costs 10 €.

The 10 euro price point makes it a definitely small gift. "We suppose that the economy won't impact sales for the Advent Calendar ticket, because it is quite a cheap product anyway," said Holsti.

There are no big growth expectations. "We suppose that the sales will be similar to last year's sales, because it has been quite stable for many years," added Holsti.

Veikkaus Oy markets a total of four different price point tickets for Christmas—Euro-ticket 1 €, Ässä-ticket 4 €, Casino 7 €, Advent Calendar 10 € and Gift Pack 10 €.

INTERNET ADVENT TICKETS

Both Danske Spil and Veikkaus can sell instant tickets via the Internet, so they each market an Internet version of the Advent Calendar ticket.

The demographic profile for the traditional versus online Advent Calendar ticket buyer is quite different.

"The profile for the traditional Advent ticket player is very broad," said Schaper. "Many non-players also buy the traditional Advent ticket. But if you look at the demographics, the typical player is a woman, aged 45-59. They buy it for themselves or as present for family and friends. The Internet Advent ticket player is typically male, between 30 and 50 years old."

In Denmark, the Internet version of Julekalender "represents about 2% of the total Advent ticket sales, so it is not that popular," said Schaper "To compare, typically about 15% of our total instant sales comes from our Internet tickets, so then 2% isn't much."

In Veikkaus Oy, lottery officials report the Internet version of the Advent calendar ticket is quite popular.

"The Santa Claus Association's artwork is also used for our Internet Advent ticket," said Holsti. This has not proved to be a problem, even though Internet players are younger."

FRANÇAISE DES JEUX

While Française des Jeux does not market an Advent Calendar ticket, it does sell a Christmas pouch product.

"We launch every year for the month of December Pochettes cadeau," said Christine da Silva, international relations, Française des Jeux. "It is a Christmas pouch in which you can put 20 € worth of instant tickets. (You can choose what you want—two tickets of 10 €, four tickets of 5 € or 20 tickets of 1 €)."

Christmas is one of the best periods for instant sales. "The holidays are quite important for our scratch sales as our turnover rises up to 30% during Christmas holidays," said da Silva.

The French lottery prefers a traditional approach to marketing its holiday products.

"We never create any tickets using nostalgia or humor for the end of the year celebrations," said da Silva. "For this special occasion, our tickets rather carry the positive sensations linked to this period, such as fun, magical times and celebrations. Tickets merely refer to greetings of wealth and prosperity rather than to Christmas and gifts."

Since many new or lapsed players may receive a ticket, ease of play is important.

"Other key factors of success that we use for these tickets are an easy and intuitive game play format as well as many scratch zones, in order to encourage the accumulation of gambling gains as well as suspense," she said.

Française des Jeux has also marketed a New Year's-theme scratch ticket since 2009.

"For the third year, we will launch on December 29th a New Year's scratch ticket called 2012 Année de Richesse," said da Silva. "We launched the 2010 edition which was named '2011 Année de Rêve' on December 16, 2010. We do not have specific Christmas tickets."

On its terminal draw games, Française des Jeux will seed (artificially enhance) mega jackpots for Christmas and New Year's Day for its French Loto game. 



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VENDOR GUIDE TO ONLINE TERMINALS

In the annual roundup of vendors' online terminal offerings, *La Fleur's Magazine* highlights the products manufactured by online vendors. Written by suppliers, the descriptions highlight the key attributes of the terminals.

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As well as supporting data entry for all types of lottery, sports-betting and retail applications, it is also capable of integrating paper-based, manual game formats.

The TPM3000 has 256 MB of RAM, operating on a Windows-based platform.

Specification summary:

- Multi mode operating capabilities, optional wireless GPRS/ CDMA/ Bluetooth, WiFi, PSTN and IP ports
- A 5.7-inch TFT LCD color display with 320 x 240 dot resolution, capable of full graphical operation
- Dust resistant and user-friendly 37-button keyboard
- Attached CCD barcode reader to validate winning tickets that have a barcode of up to 10 cm long
- Easy loading thermal printer with printing speed of 100mm/sec over 80mm wide paper
- Two ISO 7816 smart card readers/

writers and three USB ports (two host, one device) provide secure access and means for transporting data

- External power adaptor to operate over a wide range of AC voltage inputs and providing the 24VDC 2.2A output required by the terminal
- Optional 14-channel OMR reader to support all standard lottery play slips that are up to 18" long
- Optional rechargeable battery pack supports 18 hours of autonomous operation.

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Gemini LVM® is GTECH's bold new instant and online Lottery Vending Machine (LVM) that supports both instant game and online Quick Pick ticket purchases with the touch of a button. Space-saving, secure and player-friendly, Gemini takes lottery self-service convenience to a whole new level by maximizing player awareness of your lottery brand.

An optional, built-in ES Multimedia (ESMM) screen provides jackpot information, winner awareness and customized messaging down to the unit level. In short, Gemini provides a full-service lottery sales product to retailers while

eliminating labor, lines, and loss.

Gemini's patented design provides a curved aesthetic, full-length side trim kits, quad-burster technology and prominently displayed, clover leaf-shaped online game buttons. The Gemini purchase path is intuitive, fun, and simple-to-use through the use of bright LED lights that attract players to the instant and online game buttons. Players simply choose the game they wish to play and press a button, making the purchase transaction simple and quick. As a smart terminal with the same architecture platform as GTECH's Altura® GT1200 terminal, Gemini's Internet Protocol connection enables robust reporting for proactive sales management and measurement.

By year's end over 7,000 Gemini terminals will have been deployed, demonstrating Gemini's field-tested dependability.

INTRALOT S.A.

Genion, the newest member of the INTRALOT family of lottery terminals, provides a powerful and yet very compact and space saving solution for small agencies or retail shops. Genion is a multi-function solution that can serve as game validation and payment terminal, online and scratch ticket checker, player transaction and advertisement display, player access point and in-lane terminal.

The Genion terminal was developed in INTRALOT's labs and is built around a new generation processor with embedded hardware accelerated graphics, which ensures high processing power and full display capabilities when used as an agent or a player-operated terminal.

Its small friendly-sized full color TFT touchscreen interface supports user's interaction and although Genion is compact in size, it can carry a selection of card readers and a 2D barcode reader. Thanks to its online wired and wireless connectivity options, Genion allows seamless integration within the



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agency environment, while by incorporating all the necessary standard type ports it can connect to a variety of peripherals such as printers, scanners and customer displays.

In terms of installation, Genion is extremely flexible. Its small dimensions allow the most efficient use of the available space and provide the best ergonomic operation to the user. Installation options include either desktop base or wall mount bracket.

Genion, a customized solution that INTRALOT has added to its wide and most diverse product portfolio, is the next generation terminal that has come to meet retailers' needs for smaller and more compact devices.

KEBA AG

KEBA's KeWin lottery terminal family is the POS solution for all types of games, instant ticket validation and self-service win checks. It represents an unbeatable combination of top reliability, high modularity and flexibility, versatile connectivity and high performance.

The modular application software provides the KeWin lottery terminals with an identical range of configurable functions. This permits mixing in the



field, which allows lotteries to select the ideal machine for each POS and thus slash their investment costs.

KeWin micro—the tiny lottery terminal with giant performance: The KeWin micro is, without a doubt, the smallest terminal on the market capable of offering a full range of functions, from betting slip scanning and network communication, to printing receipts and user interaction via various displays. The tiny KeWin micro consists of a single housing containing the user interface, system control, printer, communication solution, barcode and betting slip scanner, integrated into one logical unit, measuring just 158x266x209mm (WxDxH).

KeWin multimedia—the most reliable high-speed lottery terminal around: KeWin multimedia is a high-speed lottery terminal for medium- to high-volume points of sale. It offers a phenomenal performance and maximum recognition rates combined with incomparable speed and precision.

MORPHO

ELITE is a cutting-edge gaming terminal offering high efficiency for retailers, flexibility for marketing departments and reduction of the total cost of ownership for lotteries.

The ELITE core is based on a new "On-the-Fly" imaging technology, allowing ease of use and a wide range of possibilities in terms of play-slip design.

The "On-the-Fly" imaging device is based on the most advanced image capture and recognition technologies.

Being a full service online terminal, ELITE can read any existing bet slip (even crumpled), standard 1D/2D barcodes on receipts and instant tickets, or any type of document regardless of the format.

Additionally, the ELITE optical scanner illuminates the usual play-slip design constraints (color, shape, thickness), enabling a wide range of marketing opportunities.

Morpho has used its extensive expe-



rience in the field of gaming terminals to optimize the design, reliability and durability of this new terminal.

With its scalability and modular design, ELITE meets all the rigorous requirements of lottery organizations.

The ELITE enhances Morpho's comprehensive range of gaming terminals as an ideal alternative to the S8 (Morpho's online terminal with mechanical scanner). Both terminals share several modules (main unit, printer, displays) improving lottery organization's versatility and flexibility.

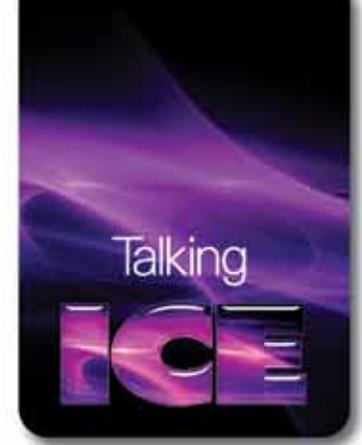
The ELITE also offers an innovative customer interface module that offers players a new and exciting interactive experience that will strengthen the relationship between lotteries and its customers.

SCIENTIFIC GAMES

The award-winning Flair™ terminal was developed to solve one of the key issues facing retailers around the world: the challenge of limited countertop space in the lottery retail environment. Creating the smallest footprint all-in-one terminal in class



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**Zarko Zuvela,
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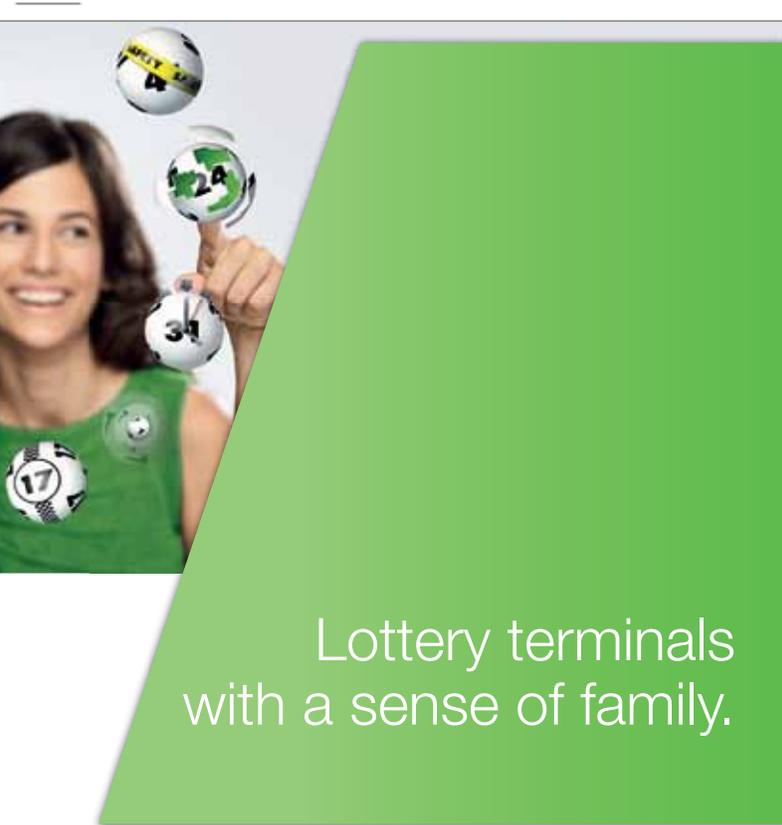


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- KEBA AG
Website: www.keba.com
- Morpho
Website: www.morpho.com
- Scientific Games
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CORPORATE PROFILE: BALLY TECHNOLOGIES

The global video lottery terminal (VLT) market is undergoing tectonic changes that promise to alter the landscape of this emerging and dynamic end of the lottery industry. Technology and necessity form the confluence of the seismic changes.

In two wide-ranging interviews, *La Fleur's Magazine* editors sat down with Richard Haddrill, CEO, Bally Technologies, to explore what's ahead for VLT jurisdictions.

Haddrill reasons the interactive market is set to erupt in a wave of new and next-generation offerings.

"The budget problems around the globe, but particularly here in America, are making video lottery attractive for revenue enhancement," Haddrill said. "VLTs are a great way for the states to compete, not only with other gaming devices but in the broader world of other entertainment options and social media."

Few people know the geology of the lottery and VLT industries better than Haddrill. He is best known as a turnaround artist, digging deep within organizations to emphasize their strategic points of differentiation for the benefit of customers and shareholders. Haddrill started his gaming career with Powerhouse Technologies (the parent company of Automated Wagering and Video Lottery Consultants), later acquired by Anchor Gaming. He managed the sale of Powerhouse before exiting the gaming sector to run Manhattan Associates, Inc. In 2005, he returned to refocus Bally Technologies as its CEO.

"When I came to Bally, we had a lot of disparate technologies," Haddrill said. "For example, we were developing games on seven different platforms, which made it relatively inefficient, so we consolidated into a single platform. Then we reorganized the game teams into 'studios,' each with mathematicians, graphic artists, programmers, and game designers. This created internal competition, team

spirit, and energy."

Haddrill is the kind of leader who draws people to him. "I like people and I don't have to be the center of attention," he explained. "I can hire people and let them do good things and get out of their way. One of the reasons I was excited to come back into the gaming business was because I felt like game content and systems were going to converge, and Bally was in the right spot."

He sees VLTs as an excellent source of revenue for states while meeting lotteries' social-responsibility requirements. However, twin specters of partisan politics and industry competition often conspire, resulting in slow adaptation for new jurisdictions, he added.

System convergence with game content has the potential to create a greater community experience while allowing more personalized player interaction.

Advanced systems can incentivize players with personalized bonuses and premiums. "We are seeing state lotteries become savvier about rewarding players at the point of play," Haddrill said.

In venues with a limited network of VLTs, downloadable games offer a cost-efficient way to offer more variety to the player. Bally developed curved LCD technology, so even stepper-style games can be downloaded. Lotteries can use the database functions to track responsible-gaming initiatives. "Right now, we are seeing more energy in the area of VLTs than in the last eight or 10 years," Haddrill said.

Meeting stakeholders' needs is critical to Bally's success. "Whether it's state and provincial governments, tavern owners, or casinos, our market research methodology is similar," Haddrill said. "Some government agencies are more interested in responsible gaming, while others are interested in how to manage across smaller venues."

Giving a gaming device time to reach its full potential is critical, but

some casino operators will pull a machine if it doesn't meet revenue goals in the first month of operation.

VLT jurisdictions tend to be more thorough in selecting games for markets and more patient with games in the field. "That's a positive aspect for VLTs," Haddrill said. "You have to allow patrons time to discover and learn the unique features of the new games."

Haddrill said he is very excited to see initiatives by several of the Canadian provinces to replace or upgrade their current VLTs with new games.

In 2009, Bally created a team for the VLT market. One of their areas of focus is the iVIEW player communications network. "This is an area where we're seeing a lot of interest in the lottery industry," Haddrill said. "As an industry, VLT jurisdictions are a little behind the leading casinos, but the U.S. Virgin Islands has created a jurisdiction-wide player network of small venues. That has become very attractive to players."

Bally recently acquired MacroView Labs, the leader in mobile applications for the gaming industry. Game apps allow free play so players can familiarize themselves with games before they ever enter the venue. Push messaging allows the venue to promote directly to the player. The company's next phase will be Internet free games.

Bally plans to place its "for-wager" games on both the iVIEW network and on the Internet in jurisdictions where it is legal. The company will license its customers to run their own B-to-C online wagering.

"The pace of change is faster than ever," he said. "I'm particularly excited that in recent months we're seeing our customers shake off the initial economic downturn so that they can stay current with technology and compete in the entertainment sector." 



WILL PROFILE: ALICE GARLAND

Alice Garland, executive director of the North Carolina Education Lottery (NCEL), used to jump on her bike and roam for hours when she was a little girl. As the youngest of four children, Garland was free to explore her world without any restrictions.

"It was a time that truly engendered self-sufficiency," recalled Garland. "I am sure my parents were watching my decisions, but they let me make decisions—and suffer the consequences."

An avid reader of Nancy Drew mystery novels, Garland sought out adventures. "The series opened me up to the possibility of girls/women being smart and being heroes and having independence," she recalled.

Garland attended public school and public colleges. Her teachers had high expectations for her, so they let her know when they thought she was underperforming. Becoming editor of the school yearbook helped shape her more than anything else in school.

What rules did her mother impart about what women could achieve? "My mom was one semester short of finishing college and worked as a homemaker," said Garland. "But she was always active outside the home. She volunteered for Little Theatre, Red Cross, the History Museum, Meals on Wheels and like organizations. She taught me the importance of giving of your self to others and to the community and to present yourself with grace and humility. I never heard her say, 'Girls can't do that.' She supported all our projects and activities."

Garland earned an Urban Studies degree at William & Mary and a Masters in City Planning from University of North Carolina at Chapel Hill.

She steered clear of science classes in college, an area where she felt weak. She said she dropped out of advanced biology in high school because she didn't have the stomach to dissect a fetal pig. While she did extremely well in math in high school, she was

advised away from taking math classes in college.

"Math is my strong suit. I love numbers," said Garland. "When I got to college, my math skills were discounted, I believe because I was a woman. I believe that had I been a male, I would have been steered to an engineering degree. I think one of the reasons I like lottery work so much is because it is all about the numbers."

Her career has followed a winding path. She started in state government at the Department of Transportation and then switched to another state agency. With a change in state administration, she moved over to the state employees association. She also did brief stints as the state director for a U.S. Senator and at the North Carolina Department of Commerce. "It was the Commerce job that put me in the right place for the lottery job," said Garland.

Garland didn't take time off to raise her three children. "I was a working mother and did my best to balance home and work," she said. "I made it to almost every school event, soccer game and dance recital, so I think I did OK."

Of course, there was the occasional mishap. "The only time I really lost it was when I was traveling and my then middle school daughter was on the phone walking me through her attempts to 'fix' the home computer. Before I could say 'NO!', she erased the hard drive and everything on the computer. We still talk about that event," said Garland, laughing.

A DIFFERENT BREED: THE SOUTHERN WOMAN

Garland believes women are generally viewed as more nurturing than men, which is both good and bad. "Some folks respond to nurturing, others see it as a sign of weakness," conceded Garland. "I am a Southern woman which is a different breed. We have ingrained in us to always smile and 'play nice.' So we have learned to smile while delivering a very tough message. This can work to our advantage because it



can disarm the person receiving the tough message. But it can also mean the message isn't always received as wanted because we are smiling. It is an interesting dichotomy."

Do women differ from men in their management style? "Without a doubt, especially my generation," said Garland. "We likely had majority responsibility for raising children which means juggling competing schedules, refereeing fights, getting chores done, all while setting a good example. I believe as a result of these experiences, women are more collaborative, more open to being challenged, more likely to involve others in making decisions. I have a small granite sign on my desk that reads, 'Well behaved women rarely make history.' I truly believe this. We must take risks. We must be willing to try new things."

Garland has never been afraid to stumble as she climbed the ladder of leadership. "It is OK to let people make mistakes because they can learn from their mistakes," she stressed. "Ask the question, 'What's the worst that can happen?'"

For her leisure time, Garland enjoys reading, gardening and movies. Her favorite woman writer is Jane Austen.

What advice would she give to a 20-something woman starting her business career? "Learn everything you can about your subject matter so you become the expert," said Garland. "Build relationships both within and without your organization. Volunteer to take on new assignments. Take risks in personal and professional life. If you don't like what you are doing, find something else." 

WEST VIRGINIA LOTTERY WILL PULSE CHIA-PET SCRATCH TICKET

The West Virginia Lottery will pulse six different tickets featuring Chia Pet, under its license from Alchemy3. The first ticket features a Holiday Chia Pet adorned with gold bows.

"With the approval of Joseph Enterprises, Inc., Alchemy3 was able to create a clean look and play style that we thought would work well in the field," said Nikki Orcutt, deputy director, marketing, West Virginia Lottery. "We selected the Chia Pets that would be the most recognized with certain holidays or the seasons in which they would launch."

The Chia Pet ticket features six scenes in conjunction with the following holidays, seasons or special events: Christmas, Valentine's Day, St. Patrick's Day, Spring, West Virginia State Fair and Halloween.

"The game is designed to be a 'limited time only' ticket for each pulse," said Orcutt. "We received roughly 500,000 of each scene and each pulse is expected to be fully distributed to retailers within two weeks or less."

DIAMOND GAME DEVELOPS LOTTERY ITVMS FOR BAR & TAVERN MARKETS

With North American lotteries seeking new ways to broaden their player base and retailer base, they are turning to Diamond Game, a leading manufacturer of ITVMs (instant ticket vending machines). Diamond Game's ITVMs dispense instant tickets just like other ITVMs that most lotteries have deployed, but in addition displaying the instant game results on a video monitor and streamline buying and cashing of winning tickets.

Positioned by the company as the ideal ITVM for bars and taverns, lotteries now have access to a product that allows them to enter segments that have traditionally been difficult to penetrate.

In fiscal 2010, bars and taverns represented only 7.2% of the total U.S. lottery agent network and generated 6% of total lottery sales, according to *La Fleur's 2011 World Lottery Almanac*. "Most lotteries have not fully tapped the bar market to expand its retailer



Launching during the holidays optimizes the brand synergies between Chia Pet and the scratch ticket. "Chia Pet is only advertised during the fourth quarter," said Jeff Schweig, chief marketing officer, Alchemy3. "It is synonymous with the holidays."

The West Virginia Lottery has been pulsing scenes within the same scratch game to keep it fresh since 2006. It also wanted a game that would sell well at the \$1 price point that could be pulsed seasonally.

"We wanted a brand that was fun, but different from what you would

expect to see on a lottery ticket," said Orcutt. "Chia seemed to fit that category."

"It is very cost-efficient if a lottery licenses a brand and produces all the different scenes under one print run," added Alchemy3's Schweig.

In terms of sales, Orcutt noted that "it is a hard game to index with the limited quantities. It is a 'created' demand and will show sales for a couple of weeks, then prior to the new scene, sales will slow down significantly in anticipation of the next pulse." 

base, thus the revenue from our ITVMs in that market would be considered 'new' revenue for the state," said Bill Breslo, vice president, sales and marketing, Diamond Game.

Breslo sees greater acceptance of more modern ITVMs as a natural progression. Traditional ITVMs have progressed to now contain video monitors, scanners to read and credit winnings, and the ability to purchase both instant and online tickets through the video interface. Diamond Game's ITVM displays the game result on a video monitor. "With our ITVM, the sounds and animated video display add to the entertainment of the game, but have no impact on the outcome," said Breslo. "The video display is merely present to enhance the playing experience and broaden the lottery's customer base by appealing to a new set of players." Most lotteries can implement Diamond Game's ITVMs under existing laws and regulations.

Diamond Game was founded on the spirit of innovation. "We have developed a line of product innovations and features intended to suit any lottery's needs," said Breslo. "Features such as multibet (which allows a customer to determine the price point for any given ticket), a variety of cabinet styles and display styles (video scratch, popping animation and spinning symbols), different ticket styles (scratch or pulltab), and other customizable features can be mix and matched to create just the product a lottery needs to expand its retailer and customer base." 



PLANTS VS. ZOMBIES: "GET READY TO SOIL YOUR PLANTS"

Not to be ghoulish, but two U.S. lotteries think they were dead-on in selecting PopCap Games' Plants vs. Zombies for scratch tickets.

Licensed from GTECH Printing, Plants vs. Zombies was the biggest iPhone game launch ever. "Since its debut in 2008, the Plants vs. Zombies game has been a big hit," said Adriana Binns, marketing director, New Mexico Lottery. "We knew the brand could help reach a younger audience of new or infrequent players."

The Plants vs. Zombies Facebook page has 5.3 million fans and a great many are between 18-to-24 years old. "Research showed that this concept appealed to two of our desired Virginia consumer groups: 18-34, slightly male skew and 30-50 female (primarily busy moms)," said Gwen Dean, marketing director, Virginia Lottery. "We decided to pilot the concept, printing a very small run for the Halloween season," said Dean.

Since the New Mexico Lottery always offers a Halloween-themed game in the fall, Plants vs. Zombies filled the

seasonal entertainment niche. But Binns added that it will "have staying power well after October 31."

In addition to the Halloween tie-in, the New Mexico Lottery turned its claim center waiting room into a zombie lounge with freestanding characters from Plants vs. Zombies.

"After Halloween, we gave the standup characters away to players," said Binns. "We gave away t-shirts with the Plants vs. Zombies tagline 'Get Ready to Soil Your Plants.'"

The Virginia Lottery's sales force and social media team gave away downloadable coupons at "Zombie Walks" in two major metro areas.

"The game was promoted via social media through the month of October to bring in more fans/followers," said



Dean. "Zombies are becoming very popular (and are projected to grow in popularity), so the Plants vs. Zombies theme is very timely, especially for Halloween."

By aligning with the casual game category, lotteries can leverage their social media presence to attract the emerging player market and increase player participation.

"Our focus is to become more relevant to designated consumer segments," said Dean. "Trendy social media brands can help create the bridge between social and interactive experiences and lottery games."

In its first year, Plants vs. Zombies was voted PC Game of the Year, Strategy Game of the Year and Casual Game of the Year.

"It's all about relevance," said Binns. "Associating with brands that are top of mind right now helps make lottery games top of mind right now. It introduces people to another form of exciting entertainment that they might not have thought to explore otherwise." 

EDEMOL EXTENDS DOND LICENSING CONTRACT WITH SPIELO INTERNATIONAL

SPIELO International USA, LLC has announced that it has signed a contract with Endemol to continue as the exclusive third-party licensor of the successful DEAL OR NO DEAL™ (DOND) brand in the land-based gaming sector.

The contract gives SPIELO International the rights to use additional Endemol-owned brands in its gaming content and products. It also includes provisions for SPIELO International to expand its DOND licensed products into new markets beyond the commercial casino gaming segment and across other gaming channels.

The agreement marks the third contract between Endemol and SPIELO International dating back to 2003. In those eight years, SPIELO International has placed eight different versions of DEAL OR NO DEAL games in casinos in five continents and 49 countries, including the U.S. and Canada. The products—DOND Rapid Link™,

DOND TheExperience™, DOND Mega Deal™, DOND What's Your Deal™?, DOND Passion™ 3-Reel, DOND Passion™ 5-Reel, DOND Multigame Bonus™, and DOND Banker's Wheel™—have been featured in more than 400 North American properties.

SPIELO International's latest DOND licensed product, DEAL OR NO DEAL™ Join'N Play™, is the most anticipated product launch in the company's history, with approximately 100 casinos signing on as the first to carry this North American title, with many more expected.

Host Howie Mandel guides players through this entertaining, fully-themed DEAL OR NO DEAL Join'N Play linked community game. Offering a unique time-based Community Bonus that's guaranteed for qualified players, an innovative multiplier sixth reel, the max-bet-activated Howie Jackpot, and three base game Mystery Bonuses,

Join'N Play is rich with features, challenges, and surprises that every player will find thrilling. The giant wall of five 46-inch LCDs creates a big impact, while new Vu Slant™ cabinets provide optimal viewing angles and comfort for players.

"The DEAL OR NO DEAL brand represents SPIELO International's most successful licensed brand to date. When players see the DOND brand, they immediately associate it with an opportunity for excitement and entertainment," said Walter Bugno, president and CEO of SPIELO International.

"SPIELO International has generated impressive synergies between our brands over the last eight years," said Oliver Gers, CEO of Endemol Worldwide Brands. "Their designers have taken the qualities that make DEAL OR NO DEAL an international TV hit and skillfully conveyed them into entertaining games." 

NEW HOLIDAY GAME HITS GOLD THIS SEASON

When the game design team at Scientific Games added the 4" x 4" Holiday Gold game to the company's 2011 Holiday Catalog, the company's creative directors anticipated it would do well—but it has turned out to be one of 2011's holiday season favorites.

A total of 11 lotteries—Florida, Illinois, Kentucky, Louisiana, Minnesota, Pennsylvania, South Dakota, Tennessee and Texas in the U.S., as well as Golden Casket and New South Wales in Australia—selected the new Holiday Gold.

The lotteries that are retailing Holiday Gold, which is a popular key number match game, have launched it this season primarily at the \$2 price point, although three lotteries launched the game at \$1 and another featured it as the inspiration for a pouch game at a much higher price point.

What's made Holiday Gold so appealing? "With its vibrant holiday colors, the game stands out well in dispensers and player self-service machines," said Rhonda Gillen, vice president of creative and customer service

at Scientific Games. "Holiday Gold will make a great gift because it looks rich and expensive. We've

noticed lotteries gravitating to designs in our catalogs that appear upscale as part of their mix, and they've been very popular and successful."

Scientific Games began its Holiday Catalog in 2001 with about 50 designs and the catalog has now grown to feature more than 150 designs each year. The catalog includes a wide array of designs to fit a lottery's holiday game plan. Gift tags are included and play action is kept simple enough for light or first time-players who may receive the games as holiday gifts, yet offers enough value for current lottery players who are buying the game for themselves.

The Holiday Catalog also features



games that have more longevity with imagery and themes that are seasonal but not holiday specific. The design concepts provided in the catalogs are designed based on the company's research findings. The game design team works closely with Scientific Games' marketing and research teams to ensure that game design best practices reflect what has performed well for lotteries in the past and what resonates with players.

"Many lotteries wait to do their game planning until they see the Holiday Catalog. It has really become an anticipated event every year," said Gillen. "Lotteries have a hard time deciding which games to select because there are so many that have strong appeal. Also, once lottery product managers see games we print for other lotteries—especially those that index well—they tend to select those games for their lottery the following holiday season."

Scientific Games typically releases an additional two to three instant ticket design catalogs throughout the year.

DAZZLING 7'S DOUBLER: THE GAME THAT KEEPS ON GIVING

Its holly berry leaves, rich burgundy and dazzling gold design are classic holiday. But Dazzling 7's Doubler isn't the holiday season's typical instant game. The game offers holiday players scratch play opportunities on both the front and the back of the festive 6" x 4" ticket.

Launched early in the 2009 holiday season by the Kentucky Lottery Corp. (KLC), Dazzling 7's Doubler's sales totaled \$12 million. This was approximately 15% higher than other \$5 games launched by the lottery that year.

With traditional holiday symbols like Christmas trees, holiday lights, bells and sleighs, Dazzling 7's Doubler also features dual-color imaging that offers more exciting game play—another added value for the consumer.

This holiday game is part of Scientific Games' patented Scratch My Back™ family of tickets that routinely sells well throughout the year—so well

that KLC has launched a total of seven Scratch My Back games since 2007, all at the \$5 price point. An eighth game is coming in December 2011.

"The lottery feels—and our players agree—that Scratch My Back games add value and added play experience to the game," said Steve Casebeer, senior vice president, sales and marketing, KLC. "Based on the strong performance of this type of game, we have made it a base game that our players and retailers want on the street at all times."

Lotteries are constantly faced with the challenge of keeping the game product mix new and inviting, par-



ticularly during the holiday season when competition for the consumer spend is at an all-time high. Scratch My Back games like Dazzling 7's Doubler feature a patented instant game enhancement that offers play on both the front and the back of the ticket, all validated with one barcode that can be positioned on either side of the ticket. With the same thickness and weight as other instant lottery games, these games can be dispensed through all traditional instant ticket devices.

"Overall, Scratch My Back games have performed about 19% better than other games launched by a lottery at the same price point within the same calendar year," says Jeff Martineck, vice president of instant product development for Scientific Games. "The games are the perfect way to enhance higher price point instant games in a lottery's portfolio by adding value for the consumer."

MDI ACQUIRES "MARVEL'S THE AVENGERS" FILM RIGHTS FOR INSTANT GAMES

MDI has reached an agreement with Marvel Entertainment, LLC, to offer instant lottery games featuring characters and themes from the widely anticipated film "Marvel's The Avengers," due for release on May 4, 2012.

The film already is receiving considerable press coverage and is being called "the ultimate Super Hero movie," as it unites several of Marvel's most celebrated characters: Thor, Iron Man, Hulk, Captain America, Hawkeye, Nick Fury and Black Widow.

The Avengers characters have been loved by generations of comic fans since they were first presented as a team in 1963.

This new film promises to deliver an exciting 3D experience for viewers, as it continues the epic adventures started in the box office hits "Iron Man," "The Incredible Hulk," "Iron Man 2," "Thor" and "Captain America: The First Avenger."

These films were released in theaters between 2008 and 2011, and all



opened at the top of the box office charts.

"Movie properties have worked well for lotteries in the past, and this is a very special opportunity," said Steve

Saferin, president, Properties Group and chief creative officer for Scientific Games. "This could be the movie of the summer for 2012, and it's already being covered in the media, so we expect a lot of excitement surrounding this property by the time it hits theaters in May. This excitement, combined with the attention-grabbing artwork Marvel has provided for instant tickets and point-of-sale pieces, presents lotteries with a terrific opportunity."

"Marvel's The Avengers" features a cast of Hollywood superstars with wide demographic appeal including Robert Downey Jr., Mark Ruffalo, Chris Hemsworth, Scarlett Johansson, Jeremy Renner and Samuel L. Jackson.

MDI has the worldwide rights to use character images on instant tickets and promotional items. Avengers merchandise also will be available to lotteries for prizing and promotional giveaways. Additional promotional tie-ins with the film are in development as well. 

INTRALOT SIGNS VIDEO LOTTERY MONITORING SYSTEM CONTRACT IN OHIO

After an initial record-setting two-year operations contract with the Ohio Lottery and another two-year renewal of that contract, INTRALOT has been awarded a contract option to supply the Ohio Lottery with its cutting-edge Video Lottery Terminal (VLT) Electronic Monitoring System for a period up to approximately eight years to run concurrent with the online contract.

Under the added option, INTRALOT will continue to supply existing equipment and services to the Ohio Lottery while adding additional functionality with the electronic monitoring system.

Up to 17,500 VLTs in seven Ohio racetracks will be connected and monitored by INTRALOT's central monitoring system which will combine with the current infrastructure INTRALOT has been operating in the State of Ohio for the lottery.

INTRALOT's systems and operations in Ohio includes jobs for over 200

people in administration, operations, marketing, manufacturing, assembly and service statewide and with its facilities in Mason and Strongsville, INTRALOT will provide the state with the capabilities to meet its future needs.

"We are very pleased with INTRALOT's deployment and operation of state-of-the-art gaming systems and equipment in Ohio over the past biennium," said Dennis Berg, interim director, Ohio Lottery. "We look forward to our continued partnership and believe the option represents excellent value for the State of Ohio and the lottery as it moves Ohio forward."

INTRALOT USA expects that a January 2012 rapid startup combined with innovative technology will also provide the state of Ohio with much needed revenue and much needed shovel ready jobs.

"The decision by the Ohio Lottery Commission to award the VLT central system monitoring option to INTRA-

LOT further reinforces our proven performance partnership with the Ohio Lottery to maximize the benefit to education within the State," said Tom Little, president and CEO, INTRALOT USA. "We look forward to continued support of the Ohio Lottery through the application of advanced technologies, innovative new games, and further strengthening of an already great partnership."

"Our Group is extremely satisfied with the decision of the State of Ohio to choose INTRALOT's cutting edge VLT monitoring system," added Constantinos Antonopoulos, CEO, INTRALOT Group. "The proven technology and extensive know-how in the operation of large scale projects has turned INTRALOT Gaming Division into a leading supplier worldwide. We are very proud of our successful cooperation with the Ohio Lottery and are looking forward to supporting their next phase of growth." 

TECH THE HALLS

The Western Canada Lottery Corp. (WCLC) is experimenting with a new Internet scratch promotion, called Tech the Halls. It is modeled after the successful Tech the Halls program run by the Iowa Lottery.

"This is the first Internet contest WCLC has done with a Scratch 'N Win (SNW) focus in a number of years," said Ginger Novakowski, manager, extended play products, WCLC. "It looks like it is off to a great start and we look forward to seeing where it nets out. It is definitely a way to add new interest to our product at the most important sales season for the product."

It is offered exclusively on seven Christmas-themed scratch games—\$1 Happy Holidays, \$2 Countdown to Christmas, \$3 Silver Bells, \$4 Lucky Twelves, \$4 Lucky Lines Christmas Edition, \$5 Stocking Stuffer and \$20 Player's Choice.

"This is a Christmas promotion so it is only offered on Christmas-themed scratch off tickets," said Novakowski. "This affords the ability to have the contest in the market for a specific time. The contest numbers are programmed with the games."

The holiday SNW tickets feature a detachable portion which contains a contest number play area under latex. Players go online to enter their alpha numeric code.

"There are QR codes on the POS which will take the consumer straight

to the Internet registration and entry page on a mobile friendly website," said Novakowski.

In January, WCLC will hold a draw to award 52-inch Sony® 3D TV sets, C\$1,000 Future Shop Gift Cards and Hand Held Tablets.

"We did not go the way of a [corporate] tie-in for this promotion," said Novakowski. "It is a straight purchase of merchandise if the consumer opts for the item over the cash equivalent. The Gift Cards are straight purchase without a cash equivalent option."

Tech The Halls started on October 1, 2011 with the release of the first game (\$20 Player's Choice) and will end on January 10, 2012.

MOMMY BLOGGERS

The Atlantic Lottery Corp. (ALC) is rounding up the "Top 10 Mommy Bloggers in Atlantic Canada" to blog about its C\$20 Holiday Mega Pack.

"This campaign will take advantage of the conversation around the gift-giving season by spreading the word about the Holiday Mega Pack," said Brigitte Porelle Bourque, instant brand manager, ALC. "The bloggers will create an entry on their blogs about the Holiday Mega Pack."

The theme of ALC's Holiday Mega Pack campaign is "It's A Gift So Good, It's Hard to Give Away."

"The creative concept demonstrates the emotional journey of a gift giver," said Bourelle. "We took a humorous look at the thought process one might go through if they were to give a gift they really want for themselves."

All digital mediums will link to ALC's Facebook page where the lottery will offer a C\$2 coupon off the Holiday Mega Pack.

"This builds on the creative concept because the player can choose to keep the coupon or send it to a friend," said Bourelle.

The primary callout for Holiday Mega Pack is "Guaranteed Winner in Every Pack" which is reinforced in all mediums.

"The campaign includes TV, radio, online and mobile advertising," said



Bourelle. "We will also be using 'hype cards,' which is POS that will be placed on vehicles in Shopping Centre parking lots."

RICH & ROYAL

Following the success of premium holographic tickets launched in 2009 and 2010, the B.C. Lottery Corp. is featuring its C\$20 Rich & Royal ticket as part of the 2011 holiday games.

"Silver & Gold indexed at 1.14 compared to our only other recent C\$20 ticket—All That Glitters—which was launched in 2009," said Heather Tryon, brand manager, instant games, BCLC. "As the \$20 ticket becomes more accepted, and even demanded, by our core players, we are expecting Rich & Royal to index above Silver & Gold."



BCLC switched from BMW vehicles to Audi and Mercedes vehicles with Rich & Royal. "We were able to capitalize on synergies with our Casino group, which carries Audi and Mercedes vehicles in its inventory," said Tryon.

The lottery will be supporting the entire holiday lineup through the BCLC.com website, as well as in mall posters. "Rich & Royal is a feature ticket in this holiday campaign," said Tryon.

Tryon projects the ticket will sell through until March 2012. Over the life cycle of the ticket, weekly sales are estimated at C\$400,000.

"Based on the past successes we've had with our C\$20 tickets, we are now beginning to consider launching multiple C\$20 tickets per year," said Tryon. "It's very exciting for our category, as we have been working to move our players up the price point ladder."

CELEBRATION 2012

Loto-Québec will return the perennial favorite, Celebration 2012, as part of its holiday lineup. It costs C\$20.

"This game is a real success in Québec and has a lot of exposure," said Elaine Thivierge, product, director-lotteries, Loto-Québec. "The awareness is very high. We can't compare this game with any instant product. It's a product that is offered as a Christmas



gift. The pouch gives it a special look. There are lots of promotions at point of sales with this product."

The first edition of Celebration was launched in 1990 as a national product. But now, it is sold only in Québec.

"The other Canadian lotteries don't have an equivalent product like Celebration," said Thivierge. "They tried it in the past but never had our success. That is why we launch it alone."

Thivierge stressed that Celebration is not a pouch of tickets. "It is a pouch-ticket presented in nice aluminum packaging," she said. "It is one ticket."

Celebration 2012 features four portions: a grand prize draw, a merchandise prize draw, daily draws and instant-win prizes.

"The particularity of this product is that we make a millionaire live on TV," said Thivierge.

GIFT PACK

Ontario Lottery & Gaming (OLG) will market seven holiday-themed scratch tickets in 2011, ranging from C\$1 to C\$10 in price.

"This will mark the second year of offering our \$C10 Gift Pack after removing it from market in fiscal 2008," said Eric Harnden, brand manager, instant games, OLG. "When we brought it back last fiscal year, we increased the payout to 65% to match our blended instant payout and removed the guaranteed win."

Now a customer will win a minimum of a C\$10 prize with the Gift Pack. "This was changed based on customer feedback and resulted in less overall complaints regarding this product than in the past when we had a small guaranteed win," said Harnden. "We achieved C\$14.7 million in \$10 Gift Pack sales last fiscal year."

KIWI X-FACTOR

On September 21, NZ Lotteries launched The X Factor ticket, under license from FremantleMedia Enterprises.

"The X Factor is a worldwide television phenomenon and the first-ever



U.S. version hit New Zealand screens in early September 2011," said Kirsty Larsen, marketing manager, instant and daily games, NZ Lotteries. "This is Simon Cowell's first season with The X Factor and he represents a significant draw card for the franchise."

The X Factor ticket is completely outperforming other top-ranked scratch tickets, such as Rob the Bank and Code Cracker.

"The game has been on sale for eight [full] weeks and is currently selling 20% more tickets than we initially forecast," said John Alexander, brand manager, NZ Lotteries. "After starting with six pools of 250,000 tickets, we have had to re-order three subsequent pools to meet demand and carry us through until the completion of the TV show."

NZ Lotteries has actively pursued partnerships which engage a slightly younger (25-35) target for Instant Kiwi, including the MINI brand and Rugby7's (a huge sporting event).

"Entertainment brands tend to be highly visible, extremely well known and typically carry quite a bit of credibility with the younger market and thus provide a bit of a shortcut for the lottery," said Larsen. "However, the partnership needs to be fully leveraged, with the ticket and on-air visual components having as much synergy as possible."

NZ Lotteries' broadcast sponsorship rights (covered separately with the TV station that secured the rights to the show) include opening and closing graphics for its instant ticket, promotional consideration on the show and tickets to the live final. 

GLI-23 VLT STANDARD

Gaming Laboratories International, LLC, the world's leading gaming test lab, has released the initial version of its "GLI-23 Video Lottery Terminals Technical Standard." GLI-23 is the latest in GLI's exclusive line of standards, all of which serve as a valuable guide to suppliers, regulators and operators.

"GLI-23 was created in response to an overwhelming industry request for a comprehensive technical standard covering these unique devices. While VLTs are similar in many respects to traditional casino games, VLTs are required to support distinct technical attributes. Those attributes are the primary drivers for this important technical standard," said Patrick Moore, GLI director of technical compliance, GLI. "We believe GLI-23 will be a tremendous resource for industry stakeholders requiring a base guideline for the regulation of VLTs."

The original draft version of the GLI-23 standard was provided to thousands of industry stakeholders for feedback. These stakeholders were inclusive of gaming and lottery regulators, industry suppliers, industry operators and industry trade associations.

GLI reviewed and processed the comments received from these industry stakeholders, provided direct consultation to these same parties and applied comments and suggestions accordingly.

Each standard in the GLI Standard Series is a culmination of industry best-practices and is continually updated. In addition to assisting regulators, the standards are of tremendous value to suppliers who use the standards as a guide in their R&D process; saving time and expense. All standards are available for free download at www.gaminglabs.com.

ADVISORY COMMITTEE

Kambi continues to strengthen its position as the leading B2B supplier of fully hosted online sports betting solutions to the gaming industry.

As a continued measure to support

the process of preparing Kambi in becoming a fully independent company, an advisory team with extensive experience from the gaming/lottery and related businesses has been established to provide strategic direction. The goal for Kambi is to be an independent and preferred partner to larger private operators and to the state lotteries around the world.

"The creation of a separate Advisory Committee is one important step in the process of making Kambi an independent company," said Kristian Nylen, CEO of the Kambi Group. "Operationally the Kambi management team runs the Kambi business separately from Unibet's B2C business. We continue to work with SEB Enskilda to evaluate strategic options for Kambi as the business develops."

To secure and supervise this process, the Kambi Advisory Committee was formed in the third quarter of 2011. Furthermore, all Kambi London staff will move to their own offices in Hammersmith during December.

Members of Kambi's Advisory Committee include: Reidar Nordby Jr., former president and CEO of Norsk Tipping and former president of the World Lottery Association, Lars Stugemo, president and CEO of HiQ International AB, Anders Ström, founder and chairman of Unibet Group and Stefan Lundborg, board member of Unibet Group plc and former managing director of Stockholms Travsällskap.

TINTIN LICENSE

License2win has signed a contract with Loterie Nationale du Belgium for the launch of a licensed property instant ticket game based on "The Adventures of Tintin."

The film premiered in Europe on October 26, 2011. The *Hollywood Reporter* described the film as "a visually dazzling adaptation of the legendary—at least outside the U.S.—comic book series by Belgian artist Hergé."

"License2win is very pleased of its partnership with the National Lottery of Belgium," said Guillaume Baudry, managing director, license2win. "Bel-



PICTURED: STEVEN SPIELBERG (LEFT) AND DIDIER REYNDERS (RIGHT)

gium is definitely the place where Tintin had to be launched."

During the Award of the insignia of Commander of the Order of the Crown in Belgium, film director Steven Spielberg held up the Tintin scratch ticket. He was joined in the ceremony by Belgium Deputy Prime Minister Didier Reynders.

license2win is the first European licensing agency for gaming operators. Its clients are mainly European national lotteries. The firm provides licenses, printed products (scratch tickets, snapNwin™, stricket™) and dispensers for scratch cards.

3D SCRATCH CARD

NeoGames has launches Horoscope, the first 3D scratch card in a series of next generation games.

It presents all 12 astrological signs through advanced 3D animations. Players choose their own sign and play up to four cards in one game with the aim to match three identical astrological signs. Furthermore, the player can read the horoscope for each sign on a daily updated basis.

Horoscope is available in multi-language and multi-currency, with a top award of 200,000 currency units.

COMPLIANCE TESTING

Betware announced its gaming platform has passed all the tests necessary to receive a certification for the application process of general licenses in Spain. The tests, performed by BMM, are part of the new gaming regulations introduced recently in Spain and are a mandatory requirement for each gam-

ing operator applying for a general license.

BMM International's European laboratory, BMM Spain, has been accredited to test and certify iGaming platforms for the Spanish Gaming Authority. BMM's detailed evaluation process revealed that Betware's Central Regulatory Storage (CRS) system complies with requirements set forth by the regulator. This ensures that Betware's CRS is the appropriate solution for any operator applying for a license in Spain.

"For over 15 years Betware has been focused on providing top quality products that follow the strictest regulations set forth by authorities. Our major goal is to offer products that allow our customers to focus their efforts on marketing and selling games to their players with Betware ensuring all regulatory requirements," said Stefan Hrafnkelsson, CEO, Betware.

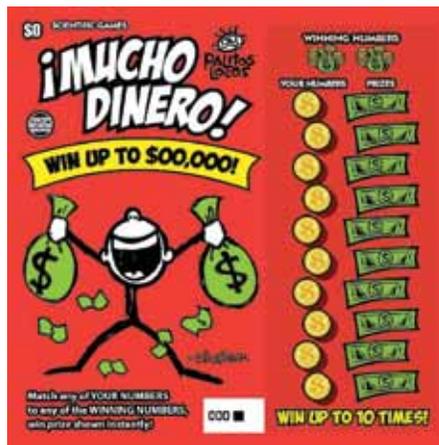
PALITOS LOCOS™

MDI Entertainment, LLC has inked a deal with Dreamin8, LLC so it can offer images, themes, logos and phrases from the popular Palitos Locos™ art property to lotteries for use on instant games.

Palitos Locos™, literally translated as "Crazy Sticks," was created for (but is not limited to) the young, hip and cool Hispanic population. Designed by artist Billy Attinger and emanating from his popular Stick World® brand, the stick figures portray personalities and phrases well known to the Hispanic community, speaking to its audience in assertive, fun and creative ways.

As part of the agreement between MDI and Palitos Locos, the entire collection featuring hundreds of Palitos Locos characters is accessible to lotteries. In addition, Attinger is available to create customized artwork for lotteries desiring specific looks or themes tailored to consumers in their regions.

To make games featuring this brand even more attractive to players who do not read English, lotteries may choose to have bilingual instructions printed on tickets utilizing Scientific Games'



patent-pending Understand™ printing option.

"It's no secret that there is significant potential for lotteries within the Hispanic segment," said Steve Saferin, president, Properties Group and chief creative officer for Scientific Games. "We've seen other traditionally Hispanic brands like Loteria® perform very well as instant games."

SOCIAL INSTANTS™

Pollard Banknote has introduced its patent-pending Social Instants™ product. Aimed at helping lotteries appeal to the 18-to-34-year-old emerging market and other users of mobile technology, Social Instants harnesses the marketing power of mobile and social media with traditional instant tickets to facilitate winner awareness messaging and group play.

"While instant tickets have achieved growth of about 136% over the past 10 years, emerging technology offers the opportunity for significant growth, particularly in the younger demographic," said Doug Pollard, co-CEO, Pollard Banknote.

The exclusive Social Instants mobile app will interface with instant tickets via Quick Response (QR) codes printed on the physical ticket. Using Pollard Banknote's patent-pending Quick Link™ technology, players will use smartphones to scan the QR code which will prompt them to share winning moments and experiences with friends, or enter a second-chance draw which may also integrate with a lottery's VIP club. Social Instants also offers players the opportunity to in-

crease their prize eligibility by creating teams where each eligible ticket entry contributes to the team's chance to win a collective prize pool.

CONSULTING GROUP

GLI has formed a new dedicated global lottery consulting group. The new group will consult with lottery organizations globally on issues relating to the audit and security of all of their lottery products, including VLTs, their online games, iGaming, scratch tickets and conformance with World Lottery Association (WLA) standards.

The Lottery Consultation group will be based in Moncton, New Brunswick, Canada, and will be headed by GLI's new director of lottery services, Gregory Doucette, formerly of Tyrne Enterprises, Inc. and the Atlantic Lottery Corporation, and Doucette's long-time business partner Daniel Charlong.

CALSHARK.COM

Sciplay International SARL, a joint venture of Scientific Games Corporation and Playtech, has announced the launch of CalShark.com, the free-play online poker site established for the California Online Poker Association.

PROPERTIES PLUS®

MDI announced it will be providing its Properties Plus loyalty rewards program to the Missouri Lottery. The program was included as an option in a recently signed instant ticket agreement between the Missouri Lottery and Scientific Games, and the lottery has decided to exercise that option.

As part of the agreement, MDI will be providing upgrades and enhancements to the existing "My Lottery" players' club website, including the addition of MDI's Points for Prizes® player loyalty rewards program.

The lottery also will receive Scientific Games' patent-pending Easy Entry™ system, which allows players to enter non-winning instant tickets to accumulate points that can be redeemed for rewards in the Points for Prizes store. 

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