

Maryland Lottery and Gaming Control Agency

Wes Moore, Governor • John Martin, Director



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TO: Maryland Lottery and Gaming Control Commission
John Martin, Director

FROM: Solomon Ramsey, Managing Director, Sales and Marketing

DIVISIONS: Sales and Marketing

DATE: April 24, 2025

SUBJECT: Report for the April 2025 Commission Meeting

Following is the status update of ongoing and special projects in Sales, Product Development and Creative Services, for March.

1. Sales

March 2025, Year over Year Comparison Product Category by Store Segment

		Draw	Monitor	Fast Play/Instant	Combined
STATE	2025	\$75,641,223	\$54,755,377	\$104,666,388	\$235,062,988
	2024	\$95,403,690	\$53,903,157	\$108,233,122	\$257,539,969
	Difference	(\$19,762,467)	\$852,220	(\$3,566,734)	(\$22,476,981)
	%YoY +/-	-20.7%	1.6%	-3.3%	-8.7%
INDEPENDENT	2025	\$53,746,197	\$45,534,678	\$61,801,862	\$161,082,736
	2024	\$63,206,982	\$44,688,334	\$64,473,515	\$172,368,830
	Difference	(\$9,460,785)	\$846,344	(\$2,671,653)	(\$11,286,094)
	%YoY +/-	-15.0%	1.9%	-4.1%	-6.5%
	% of State Sales	71.1%	83.2%	59.0%	68.5%
CORPORATE	2025	\$21,895,026	\$9,220,700	\$42,864,526	\$73,980,252
	2024	\$32,196,708	\$9,214,823	\$43,759,607	\$85,171,138
	Difference	(\$10,301,682)	\$5,876	(\$895,081)	(\$11,190,887)
	%YoY +/-	-32.0%	0.1%	-2.0%	-13.14%
	% of State Sales	28.9%	16.8%	41.0%	31.5%

Instant ticket sales are based on recorded weekly settlements and may not agree with other Instant ticket sales displayed in other reports that may reflect activations or validations.

a) Sales Management

i. Key accomplishments last period:

1. The monthly sales meeting was conducted in person March 19, 2025.

- a. Four (4) scratch offs were launched, featuring \$2, \$5, \$10 (2) price points.
- b. In conjunction with our instant products, we highlighted five promotions in the form of our *Spring Fling*, *Keno Sprinkler*, *Pick 3/4/5 Play Every Day*, *CASH POP Birthday Party* and *Racetrax Triple Crown \$6 for \$5* promotions.
2. District Managers with the best new launch week numbers by region/territory (year-over-year) for March:
 - Jon Braithwaite T-11
 - Chuck Hamrick T-25
 - **Tim Perry T-39 (Awarded the DM of the month)**
 - David Rogers T-49
3. Launch Team initiative meeting was conducted. This month's focus was on the development of a strategic sales plan for our April instant games.
4. Sales Management continues to prioritize the illegal "gray" machine initiative. A process has been developed and put into action to address these machines located in Maryland Lottery retailer accounts.
5. Final preparation completed for upcoming Spring Retailer Advisory Board meeting on 4/10.

ii. Upcoming tasks for this period:

1. Execution of launch strategies and initiatives for the April instant ticket launch. The April launch will feature four (4) tickets at the \$3, \$5, \$10 & \$30 price points as well as a \$1 soft launch game scheduled for release on 4/14.
2. Execution of our Spring Retailer Advisory Board meeting to be held April 10 in Ocean City, MD.
3. Continued action regarding the "gray" machine initiative.

b) Field Activities

i. Key accomplishments last period:

1. District Managers made 6,414 retailer communication contacts during March, which includes store visits, phone calls and emails.
2. The field sales team continues identifying illegal "gray" machines located in Maryland Lottery retailer accounts. Once identified they are tagging them in Gem Intelligence, and reporting them to the Sales Management team.
3. The field sales team continues to update all photos of retailer accounts during their visits with the goal of having all accounts with CY2025 photos.
4. The field sales team continued distribution of phase 2 of our XCAP rebranding initiative which included the XCAP LED signs.

ii. Upcoming tasks for this period:

1. The field sales team will continue distribution of XCAP LED signs to all XCAP retailers to aid in identification and further establish their presence in the market.
2. The sales team will continue to communicate with retailers regarding the game changes to *Mega Millions*. This includes monitoring feedback from both retailers and players while in the field post launch.
3. District Managers continue updating contact information (email and cell phone numbers) as well as store photos.
4. Sales continues to work with the OAG and Lottery Security to identify any "gray" machines located at lottery retailer locations.

c) Retail Recruitment

i. Key accomplishments last period:

1. Recruitment results: Nine (9) independent applications were processed and locations installed in the month of March.
2. Continued recruitment and discussions with two new restaurants in Region 2 are underway.

ii. **Upcoming tasks for this period:**

1. We continue monitoring turnaround time for application processing to allow us to identify any issues or possible areas of improvement which in turn will facilitate more efficient processing.
2. Recruitment will continue to focus on high foot traffic locations and chain accounts where rapid development and retailer expansion opportunities exist.

d) **Sales Support/Self-Service Vending Units**

i. **Key accomplishments last period:**

1. Preparation for and execution of merchandising initiatives for our April instant ticket launch which includes development of POS as well as identification of both types and quantities of pieces to be distributed to the field.
2. Successful execution of our *Mega Millions* game changes initiative. This included all consumer and retailer facing point of sale pieces and information sheets as well as direct terminal messaging to retailers reminding them of upcoming changes and necessary action items on their end.
3. Final preparation for our Spring RAB meeting being hosted in Ocean City on 4/10 for our Eastern shore retailers. All logistics and communication have been completed and retailer commitments/attendance sign up is underway.
4. Continued distribution of our XCAP LED signs with more than half of our XCAP retailer locations completed.
5. Successful launch of our Digital Menu Board pilot program. Twelve initial locations have been installed and are up and running. Program feedback from retailers has been positive thus far. We will begin to monitor/track sales performance data for future analyzation.
6. In conjunction with our Regional Management team, we continue vetting, planning and allocating PHD and PEX self-service units. Our focus will be on placement of available PEX units at social establishments.
7. We continue to prepare for the upcoming launch of the Lottery jackpot towers pilot program in select retail locations.

ii. **Upcoming tasks for this period:**

1. Completion of Spring RAB meeting and assisting with addressing any retailer suggestions, challenges or concerns.
2. Continued development of the distribution plan for the Jackpot Tower pilot program (125 units). Work with vendor partner to develop routing/distribution of units for installation.
3. Continued vetting, scheduling and distribution of the self-service units with a priority placed on PEX units in social establishments and locations with high monitor and online sales.

e) **Corporate Sales**

i. **Key accomplishments last period:**

1. Fiscal YoY Performance (as of 3/31/25):
 - a. FY '25- \$619,325,342
 - b. FY '24- \$661,209,034
 - Down 7%

2. The Corporate Sales team has finalized preparation for the launch of our third retailer based second-chance promotion for the fiscal year; partnering with Royal Farms.
3. Corporate is executing a strategy to reinforce our relationships with various retail partners, hence increasing partner buy-in with regard to Corporate sales initiatives across the state.
4. The Corporate Sales team is currently onboarding the Wicomico County Liquor Board's retail locations.

ii. Upcoming tasks for this period:

1. Completion of the onboarding process for the Wicomico County Liquor Board retail locations.
2. Corporate will continue to work with stakeholders of respective chains on improvements for inventory replenishment within vending locations. Continued conversations are being had regarding the implementation of delegated task for store associates to complete specific tasks on a proposed regular basis.

f) Sales Force Automation

i. Key accomplishments last period:

1. Gem Intelligence:
 - a. New data field were successfully added to accommodate the *Mega Millions* game changes.
 - b. Taking photos from the Surface Go has proven to be an issue do to low resolution. We have discussed with field team and providing additional training/guidance.
2. Gem Office:
 - a. Successfully tested multiple JIRA's this month which included requested reporting features to assist Agent Administration in managing the data base more efficiently.
3. Training
 - a. Sales training manager is developing additional refresher courses to be added to the training program for our field sales team.

ii. Upcoming tasks for this period:

1. Continue to work with our vendor on several JIRAS awaiting testing.
2. Finalize onboarding and training process outlines for new position hires.

2. Product Development

a) Scratch-Off Products and Promotions

i. Key accomplishments last period:

1. April Scratch-Off Soft Launch (4/14/25):
 - \$1 – *Lucky 13*
2. April Scratch-Off Launch (4/21/25):
 - \$3 – *Press Your Luck*®
 - \$5 – *Let's Make a Deal*®
 - \$10 – *Ice*
 - \$30 – *Fire*
3. *Monopoly*™ *Second-Chance Promotion*: The third drawing was held 4/8/25, 11,287,107 entries were received.
4. *Back to the Future*™ *Second-Chance Promotion*: The first drawing was to be held 4/22/25; as of 4/13/25, 58,195 entries were received.

5. *Let's Make A Deal® Second-Chance Promotion*: Starting 4/21/25, players may enter non-winning *Let's Make A Deal®* instant tickets into My Lottery Rewards to enter the contest for a chance to win a cash prize (\$5,000 X 20 winners total) or VIP trip to Los Angeles, CA to attend a taping of the show (5 trip winners total). Entries will be cumulative and will carry over after each drawing.
6. *Closed Games Activity*:

Game	Price	Game Name	Total Sales	Prize Expense	Gross Margin	Final Claim Date
632	\$10	Money Bag Multiplier	26,407,240	19,416,230	\$6,991,010	3/3/2025
643	\$1	Ca\$h Crush	2,520,560	1,512,840	\$1,007,720	3/3/2025
644	\$5	Gold Bar Bingo 4th Edition	15,177,110	10,857,705	\$4,319,405	3/3/2025
663	\$5	Winning 7	19,104,785	13,761,177	\$5,343,608	3/3/2025

ii. Upcoming tasks for this period:

1. May Scratch-Off Launch (5/19/25):
 - \$1 – *Lucky 7s*
 - \$2 – *Lucky 7s Doubler*
 - \$5 – *Lucky 7s Tripler*
 - \$10 – *Lucky 7s Multiplier*
 - \$20 – *Lucky 777*
2. *Monopoly™ Second-Chance Promotion*: The fourth drawing will be held 5/6/25; as of 4/13/25, 11,646,883 entries have been received.
3. *Back to the Future™ Second-Chance Promotion*: The second drawing will be held 5/13/25.
4. *Let's Make A Deal® Second-Chance Promotion*: The first drawing will be held 5/20/25.

b) Draw and Monitor Game Products and Promotions

i. Key Accomplishments last period:

1. *Pick Games Play Every Day Promotion* [4/14 – 5/11/25]: For 4 weeks, players who purchase Pick 3, Pick 4 or Pick 5 tickets will have the chance to win a free Pick 3 ticket. Pick 3 tickets will be awarded on an Nth ticket basis. Players may win up to a 7 draw .50 box Pick 3 ticket.

ii. Upcoming tasks for this period:

1. *Racetrax Triple Crown \$6 for \$5 Promotion* [4/28 – 6/22/25]: The popular *Racetrax \$6 for \$5* promotion is coming back for the 2025 Triple Crown racing season. This eight week-long promotional period will coincide with the Kentucky Derby, Preakness, and Belmont Races. This promotion will offer \$1 discounts on every \$6 purchase (maximum discount is \$5 on a purchase of \$30 or more).
2. *Cash Pop Birthday Party Promotion* [5/6/25]: This One-Day promotion is designed to reinforce the drawing schedule for CASH POP. On an Nth ticket basis, players may receive a free \$1, \$2, \$5 or \$10 4-Draw CASH POP ticket just for playing their favorite terminal games!
3. *Slingo De Mayo Promotion* [5/5/25]: May 5th, 2025 is widely known as Cinco De Mayo. To celebrate, we will be launching SLINGO De Mayo! We will be randomly awarding free Slingo FAST PLAY tickets during a selected Happy Hour period. Between the hours of 3pm and 8pm on 5/5/25, players purchasing any terminal game could receive a free \$3 Slingo FAST PLAY ticket. Tickets will be awarded on an Nth ticket basis.

4. NASCAR® Powerball Promotion [5/12 – 6/30/25]: Starting on 5/12/25, any Powerball tickets purchased and entered during the promotional period are eligible for entry into My Lottery Rewards. This is a national promotion; each participating state selects finalists to be entered into the Playoff Drawings to win cash prizes or a VIP trip to Phoenix for the 2025 NASCAR Championship Weekend at Phoenix Raceway™. There are two parts to this promotion:
 - *Maryland Drawings*: The Maryland Lottery will select 35 finalists, all of whom will receive \$1,000 for being selected. They then go on to participate in the Playoff Drawings, conducted by MUSL.
 - *MUSL Drawings*: The Playoff Drawings are a series of drawings from a national pool of entrants that mirror the elimination rounds of the NASCAR Playoffs. They will determine the four finalists who will win a VIP trip for two to NASCAR Championship Weekend at Phoenix Raceway, 10/31 – 11/3/25, and entry into the \$1 million drawing. Maryland is not guaranteed to send a player to the event.

c) FAST PLAY Products and Promotions

i. Key accomplishments last period:

1. April FAST PLAY Launch (4/7/25):
 - \$2 – *Roulette*
 - \$3 – *Scrabble®*
 - \$10 – *Willy Wonka & The Chocolate Factory™*
2. April FAST PLAY Launch (4/14/25):
 - \$1 – *Press Your Luck®*
3. *Contestant of the Game Second-chance Promotion*: The first drawing to select 31 contestants was held 3/24/25, 42,744 entries were received. The second drawing to select 27 contestants was to be held 4/22/25; as of 4/13/25, 93,982 entries were received.
4. *Closed Game Activity*:

Game	Price	Game Name	Total Sales	Prize Expense	Gross Margin	Final Claim Date
053	\$1	We're 50 Win 50	\$2,609,733	\$1,534,531	\$1,075,202	2/2/2025
067	\$3	Battleship	\$1,245,249	\$839,098	\$406,151	2/2/2025
068	\$5	Yahtzee	\$2,847,635	\$1,946,185	\$901,450	2/2/2025

Game	Price	Game Name	Total Sales	Prize Expense	Gross Margin	Final Claim Date
058	\$1	Lucky Star	\$2,235,164	\$1,324,740	\$910,424	3/2/2025
066	\$2	Connect 4	\$1,533,786	\$971,982	\$561,804	3/2/2025
020	\$3	Why Did the Chicken Cross the Road	\$2,438,655	\$1,611,835	\$826,820	3/2/2025

ii. Upcoming tasks for this period:

1. *Contestant of the Game Second-chance Promotion*: The third drawing to select 27 contestants will be held 5/27/25.

3. Creative Services

a) Traditional Advertising

i. Key accomplishments last period:

1. *Back to the Future Scratch-Off*:
 - a. All creative assets, including radio, out-of-home and digital were finalized.
 - b. The media plan was finalized and began running on 3/31 and will conclude on 4/27.
2. *Home Run Riches*:

- a. GKV completed the production of all television, radio, out-of-home and stadium assets.
- b. The media plan was finalized and began running on 4/7 and will conclude on 4/27.
3. *Mega Millions Game Changes*:
 - a. GKV completed the production of all radio, out-of-home and digital creative assets.
 - b. The media plan was finalized and began running on 3/31 and will conclude on 5/4.
4. *Let's Make a Deal Scratch-Off*:
 - a. 9Rooftops presented a media plan that includes television, radio, streaming audio, various out-of-home and digital components that will run from 4/28 – 5/25 and 6/9 – 6/22.
 - b. GKV shot the television commercial on 4/2 and is in the process of editing the spot for an air date of 4/28.
5. *7s Family of Games Scratch-Offs*:
 - a. The Lottery finalized the point-of-sale for the *7s FOG*.

ii. Upcoming tasks for this period:

1. *CASH POP*:
 - a. GKV to produce new radio spots that focus on the number CASH POP winners each day.
 - b. 9 Rooftops to present a media brief for the planning of the May flight of media in support of the *Birthday Party Promotion*.
2. *Back to the Future Scratch-Off*:
 - a. Lottery to approve the media plan and 9 Rooftops to move forward with placing all media.
 - b. GKV to produce all creative materials including radio, out-of-home, digital, and social media.
3. *FY'25 Sports Sponsorships*:
 - a. The Lottery to approve the *University of Maryland* sponsorship for the 2025-2026 season.
 - b. The Lottery and 9Rooftops to begin discussions with the *Washington Commanders*, *Morgan State University* and *Towson University* for the 2025-2026 season.

b) Web, Digital and Social

i. Key accomplishments last period

1. Promoted the *Let's Make a Deal Scratch-Off*, and second-chance promotion, *Back to the Future Scratch-Off* and second-chance promotion, *Mega Millions* game changes, *FAST PLAY Home Run Riches Walk-Off Winnings* game and *Contestant of the Game* second-chance promotion, *Fire and Ice Scratch-Offs*, and various winners and events through social media and the website.
2. Completed updates on the MD Lottery website and mobile app to reflect the *Mega Millions* game changes.
3. Continued work on the redesign of the *Retailer Corner* website.

ii. Upcoming tasks for this period:

1. Develop social media and digital plans for the *Lucky 7's Scratch-Offs*.
2. Ongoing development and review of all copy that will be included in the *Retailer Corner* website redesign.
3. Implement updates and improvements to the MD Lottery app based on analytics and reporting.

c) My Lottery Rewards

i. Key accomplishments last period:

1. In March, there were 41,999 active *My Lottery Rewards* users, a 4.8% increase from last month. Higher jackpots are thought to be the main reason for the increased activity.
2. There were 2,053 new program registrations in March. This represents a 23.5% increase from the previous month.
3. The MLR mobile app saw 74,794 active users in March; 74.7% iOS and 25.3% Android.
4. In March, and for the third month in a row, the most entered scratch ticket was \$5 - *Monopoly™ X20*, with 139.4K entries from 13.8K unique players.
5. The most entered draw ticket continues to be *Pick 4*, with 1.3M entries from 11.2K unique players this month.
6. The overall coupon redemption rate continues to be 65%. March's coupon redemption rate was 67%.

ii. Upcoming tasks for this period:

1. Prepare for the upcoming launches of the *Let's Make a Deal Scratch-Off* and *Royal Farms Free Gas Giveaway* second-chance promotions.
2. Launch a survey to gain insight from players about *Points for Drawings* prize options.