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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: November 20, 2025

SUBJECT: Report for the November 2025 Commission Meeting

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

1. Sales

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

		Draw	Monitor	Fast Play/Instant	Combined
STATE	2025	\$76,181,116	\$49,733,945	\$95,088,466	\$221,003,527
	2024	\$73,236,120	\$47,407,410	\$92,440,194	\$213,083,723
	Difference	\$2,944,996	\$2,326,536	\$2,648,272	\$7,919,804
	%YoY +/-	4.0%	4.9%	2.9%	3.7%
INDEPENDENT	2025	\$53,022,684	\$41,673,576	\$56,104,941	\$150,801,201
	2024	\$52,135,807	\$39,591,588	\$54,832,088	\$146,559,484
	Difference	\$886,877	\$2,081,987	\$1,272,853	\$4,241,717
	%YoY +/-	1.7%	5.3%	2.3%	2.9%
	% of State Sales	69.6%	83.8%	59.0%	68.2%
CORPORATE	2025	\$23,158,432	\$8,060,370	\$38,983,525	\$70,202,326
	2024	\$21,100,313	\$7,815,821	\$37,608,106	\$66,524,240
	Difference	\$2,058,119	\$244,549	\$1,375,419	\$3,678,087
	%YoY +/-	9.8%	3.1%	3.7%	5.5%
	% of State Sales	30.4%	16.2%	41.0%	31.8%

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 on October 15, 2025.
 - a. Six (6) scratch offs were launched, featuring \$1, \$2, \$3, \$5, \$10 & \$20 price points.

- b. In conjunction with our instant products, two promotions were highlighted in the form of our *ThanksWINNING Promotion* and our *Holiday Raffle*.
- 2. District Managers with the best new launch week numbers by region/territory (year-over-year) for October:

• Jon Braithwaite	T-11
• Cindy Limbert	T-27
• Rob Auster	T-33 (Awarded the DM of the month)
• Steve Corbin	T-45
- 3. Sales Management continues to prioritize the illegal “gray” machine initiative. A process has been developed and put into action to address these machines located at Maryland Lottery retailers.

ii. Upcoming tasks for this period:

- 1. Execution of strategies and initiatives for the December instant ticket launch. The December launch will feature four (4) tickets at the \$2, \$5, \$10 and \$30 price points.
- 2. Continued action regarding the “gray” machine initiative.

b) Field Activities

i. Key accomplishments last period:

- 1. District Managers made 6,462 retailer communication contacts during the month of October, which includes store visits, phone calls and emails.
- 2. The field sales team supported the Ravens games on October 12, 2025 and October 26, 2025 at M&T Bank Stadium.
- 3. The Sales team supported the Endless Cruisin’ event in Ocean City, MD from October 9th through October 11th with Friendship Food Mart as the selling retailer.
- 4. The team supported The Power of Age Expo at Timonium Fairgrounds on October 29, 2025 with York Rd. Plaza Wine & Spirits as the selling retailer.

ii. Upcoming tasks for this period:

- 1. District Managers will continue to update contact information (email and cell phone numbers) as well as store photos.
- 2. Sales will continue to work with the OAG and Lottery Security to identify any “gray” machines located at lottery retailer locations.
- 3. The field sales team is assisting with targeting prime retailer locations for Digital Menu Boards and Debit Card Readers for the Debit on the Counter expansion.
- 4. During home games, the field sales team will continue to support sales on RavensWalk with retailer J Convenience.
- 5. Retailers will continue to receive communication about current holiday promotions through January 2026.
- 6. Support for the Holiday Raffle launch in November has begun with retailer education and point of sale distribution.

c) Retail Recruitment

i. Key accomplishments last period:

- 1. Recruitment results: Seven (7) independent applications were processed and locations installed in the month of October.

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

1. 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 December 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. Continued execution of the recruitment strategy and expansion of the SCiQ instant ticket ecosystem program. The utilization of our central systems vendor partners marketing team to help cast a wider net has proven beneficial for recruitment and will continue for the foreseeable future.
3. Execution of the final three Fall Retailer Advisory Board meetings (six sessions) located in College Park, Waldorf and Linthicum. We finished with a 99% attendance rate, up 2% from the 2024 Fall sessions.
4. Continued distribution of the Lottery jackpot towers. This new marketing tool has received a great response from retailers and players alike.
5. Ongoing allocation of our self-service vending units. With limited inventory now available due to the resounding success of the self-service program, our focus will be to identify underperforming units/locations across our network to develop strategic plans for supporting sales growth. If sales growth cannot be achieved, our focus will then shift to relocating said units to retail locations with greater sales potential to maximize revenue.

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

1. Begin planning of the Spring Retailer Advisory Board in Ocean City, MD.
2. Support and execution of two Baltimore Ravens home game selling events.
3. Continue implementation of our adjusted self-service allocation plan.
4. Continue working with our Corporate and Field Sales teams to expand both our SCiQ instant ticket ecosystem and Digital Menu Board programs to additional retailer locations.

e) Corporate Sales

i. **Key accomplishments last period:**

1. Fiscal YoY Performance (as of 10/31/25):
 - a. FY26 - \$292,710,096
 - b. FY25 - \$200,629,680
 - Up 9%
2. The Corporate Sales team continues to hold retailers accountable for high out-of-stock occurrences with regard to inventory replenishment at their respective vending locations.
3. Retailer buy-in to the importance of minimizing out-of-stocks has increased. They are aware of the Lottery's recourse in the event that out-of-stock rates do not improve and have communicated this to their management teams. This has resulted in the implementation of delegated tasks for store associates to complete on a proposed regular basis.

4. The Corporate Sales team continues to prioritize equipment in the field to retailers that properly maintain appropriate inventory levels.
5. Business reviews were completed with the following chains:
 - a. High's of Baltimore
 - b. Sheetz
 - c. Walmart
 - d. Wawa
 - e. Food Lion
6. Corporate Sales, in conjunction with Creative Services and Product Development, will continue to execute retailer based second-chance promotions in FY26 to generate additional Lottery sales. These promotions help to facilitate player interaction with the Maryland My Lottery Rewards Program.

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

1. Corporate will continue to facilitate the launch of multiple promotions throughout FY26.
2. Corporate is continuously working to onboard new retail chains.
3. Corporate continues to monitor out-of-stock rates and is prioritizing Lottery equipment/resources away from underperforming retailers.

f) **Sales Force Automation**

i. **Key accomplishments last period:**

1. Gem Intelligence:
 - a. All units were upgraded to Windows 11 successfully.
2. Gem Office:
 - a. New Bonus application process is going well. Retailers are now seeing their bonus in the portal, creating greater transparency.
 - b. Bonus Check process is down to 30 days for completion. With the help of surrounding departments, checks are now flowing to retailers on a regular basis.
3. Training:
 - a. Training Manager position has been posted. Interviews will begin mid-November.
4. GOV Delivery:
 - a. New location email addresses continue to be added. This remains a valuable way to communicate promotions and relevant information.

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

1. Interview potential candidates for Training Manager position.

2. **Product Development**

a) **Scratch-Off Products and Promotions**

i. **Key accomplishments last period:**

1. *Ravens Second-Chance Promotion:* The third drawing was held 10/16/25, 964,348 entries were received. The fourth drawing was held 11/14/25; as of 11/10/25, 773,074 entries were received.
2. *Unlock the Cash Live Game Second-Chance Promotion:* The third and final drawing was held 11/6/25; 188,848 entries were received.

3. *JURASSIC PARK Second-Chance Promotion*: The first drawing was held 10/14/25, 1,794,930 entries were received. The second drawing was held 11/13/25; as of 11/10/25, 1,566,095 entries were received.
4. *Holiday 2025 Second-Chance Promotion*: The first drawing was held 10/28/25, 857,833 entries were received. The second drawing was held 11/4/25, 1,692,937 entries were received. The third and fourth drawings were held 11/13/25 and 11/18/25; as of 11/10/25, 2,259,151 entries have been received.
5. *Closed Game Activity*:

Game	Price	Game Name	Total Sales	Prize Expense	Gross Margin	Final Claim Date
677	\$3	Bonus Crossword 6th Edition	\$7,379,028	\$4,984,534	\$2,394,494	9/22/2025
678	\$5	Power Cash	\$14,543,210	\$10,472,566	\$4,070,644	9/22/2025
679	\$10	\$250,000 Cash Winfall	\$23,320,140	\$17,480,777	\$5,839,363	9/22/2025

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

1. December Scratch-Off Launch (12/5/25)
 - \$2 – *Harlem Globetrotters*®
 - \$5 – *Money Maker*
 - \$10 – *Red 5s Doubler*
 - \$30 – *200X The Cash*
2. *Ravens Second-Chance Promotion*: The fifth drawing will be held 12/12/25.
3. *JURASSIC PARK Second-Chance Promotion*: The third drawing will be held 12/9/25.
4. *Holiday 2025 Second-Chance Promotion*: The fifth drawing will be held 11/25/25.
5. *Harlem Globetrotters*® *Second-Chance Promotion*: Starting 12/5/25, players may enter non-winning *Harlem Globetrotters* scratch-off tickets into My Lottery Rewards for a chance to win a game experience on March 15th at the Chesapeake Employers Insurance Area (Thirty (30) Front-Row experience winners plus guest; One (1) VIP Bench Seat winner plus guest).

b) Draw and Monitor Game Products and Promotions

i. **Key Accomplishments last period:**

1. *ThanksWINNING All-Games Promotion* [11/3/25 – 11/30/25]: The All-Games Promotion, *ThanksWINNING* is back! Beginning 11/3, on an Nth ticket basis, players could receive \$2 or \$5 Instant Win Vouchers or free \$1 Reindeer Riches FAST PLAY tickets automatically, just by playing their favorite terminal-based games.
2. *2025 Holiday Raffle* [11/3/25 – 1/1/26]: Maryland Lottery launched a *Holiday Raffle* on November 3rd that features over 10,000 winners, with a \$1 Million top prize. Ticket sales will end 1/1/26 or when all tickets (325,000 total) are sold, whichever comes first. Ticket cost is \$20. There will be three (3) early bird drawings (11/24, 12/8 and 12/22) for one \$50,000 prize each and one final drawing on 1/2/26 for over 10,000 prizes including the \$1 Million top prize.

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

1. *Holiday Keno Sprinkler* [12/1/25 – 12/28/25]: From 12/1 through 12/28, players could receive Doubler or Tripler messages on their Keno tickets – any prizes won on those tickets will be doubled or tripled.
2. *Pick 3 Pick 4 Pick 5 Let it Snow* [12/1/25 – 12/28/26]: Any Pick 3, Pick 4 or Pick 5 purchase may generate (on an Nth basis) a \$2 or \$5 instant win voucher, or free \$5 Snowflake Ca\$h FAST PLAY tickets, just for playing their favorite Pick games.

3. *Racetrax Race Into 2026* [12/29/25 – 1/4/26]: The popular \$6 for \$5 Racetrax promotion will help ring in the new year. Beginning 12/29, players who purchase \$6 increments of Racetrax will receive \$1 discounts – maximum discount is \$5 on purchases of \$30 or more.

c) FAST PLAY Products and Promotions

i. Key accomplishments last period:

1. November FAST PLAY Launch (11/3/25):
 - \$1 – *Reindeer Riches (Relaunch)*
 - \$5 – *Snowflake Ca\$h (Relaunch)*
 - \$10 – *Holiday Money Match (Relaunch)*
2. *Unlock the Cash Live Game Second-Chance Promotion* [8/22/25 – 11/5/25]: Please see section a)i)2. above for details regarding this promotion.
3. *Holiday 2025 Second-Chance Promotion*: Please see section a)i)4 above for details regarding this promotion.
4. *Closed Game Activity*:

Game	Price	Game Name	Total Sales	Prize Expense	Gross Margin	Final Claim Date
034	\$3	Monopoly Game Tokens	\$6,865,026	\$4,589,140	\$2,275,886	9/28/2025
037	\$20	Monopoly Properties	\$14,839,160	\$10,940,252	\$3,898,908	9/28/2025
044	\$5	Sevens	\$4,862,200	\$3,409,774	\$1,452,426	10/5/2025
039	\$5	Home Run Riches Bases Loaded	\$8,992,910	\$6,331,637	\$2,661,273	10/8/2025

i. Upcoming tasks for this period:

1. *Holiday 2025 Second-Chance Promotion*: The fifth drawing will be held 11/25/25.

3. Creative Services

a) Traditional Advertising

i. Key accomplishments last period:

1. *Mega Millions*:
 - The Lottery supported the increasing Mega Millions jackpot with radio and digital out-of-home advertising through 10/31/25.
2. *Holiday Scratch-Offs*:
 - The *Holiday Scratch* media plan was approved. The media began on 11/3/25 and will continue through 12/24/25. Media includes TV, cable, OTT, radio, streaming audio, and various digital and out-of-home tactics.
 - The *Holiday Scratch* television commercial is complete and will begin airing the week of Thanksgiving. All other creative materials have been approved and are in various stages of production.
3. *Holiday Raffle*:
 - The Lottery's *Holiday Raffle* television commercial is complete and began airing on 11/3/25. All other creative materials (i.e., radio, out-of-home, digital and social) are also complete.
 - The *Holiday Raffle* media plan began on 11/3/25 and will continue through the end of the year. The media plan includes TV, cable, OTT, radio, streaming audio, digital media, social media and out-of-home.
3. *Harlem Globetrotters*:
 - The *Harlem Globetrotters* point-of-sale has been approved and is in production.
 - Additional graphics, social media concepts and radio scripts have also been approved.

4. *Team USA Keno Promotion:*
 - a. The Lottery began planning for *Team USA Keno Promotion* point-of-sale and other marketing materials with GKV.
5. *Multiplier FOG Scratch-Offs:*
 - a. The Lottery began planning for the *Multiplier FOG* point-of-sale with GKV.
6. January – June Planning FY26
 - a. The Lottery is working with GKV to finalize a promotional television campaign that will allow for the advertising of several initiatives throughout the remainder of FY26. The spots will be utilized to promote scratch-off launches and/or promotions like *Team USA*.
 - b. The Lottery has identified and budgeted for January through June advertising initiatives. We have also developed a point-of-sale plan for the second half of FY26.

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

1. *Holiday Raffle:*
 - c. The Lottery to monitor sales of the *Holiday Raffle* and make decisions about creative rotations and media placements as we approach sell-out.
 - d. The Lottery to promote each early bird drawing as well as the \$50,000 winners following each drawing.
2. *Harlem Globetrotters:*
 - a. The Lottery to produce all *Harlem Globetrotters* creative materials.
 - b. The Lottery to review the media plan from Media Works and provide feedback/approval.
3. *Team USA Keno Promotion:*
 - a. The Lottery to finalize point-of-sale for the *Team USA Keno* promotion point-of-sale.
 - b. The Lottery to work with GKV and Media Works to develop an advertising plan to support the *Team USA* promotion.
4. *Multiplier FOG Scratch-Offs:*
 - a. The Lottery to finalize the *Multiplier FOG* point-of-sale.
5. *FY'26 January – June Planning:*
 - a. The Lottery will continue working with GKV to develop the promotional television campaign.
 - b. The Lottery to begin planning for the new \$50 scratch-off that will launch in February.
6. *Orioles & MASN-TV Sponsorships:*
 - a. The Lottery and Media Works will work with the *Orioles* and *MASN-TV* to develop 2026 sponsorships.

b) **Web, Digital and Social**

ii. **Key accomplishments last period**

1. Promoted the *Holiday Scratch-Offs* and *Second-Chance Promotion*, *Holiday Raffle*, *Ravens Scratch-Offs* and *Second-Chance Promotion*, *ThanksWINNING Promotion*, *Giant Holiday Second-Chance Promotion*, high jackpot as well as various winners and events through social media and the website.
2. Updated our email templates to cross-promote current jackpots and promotions.

3. Promoted the *Ravens Second-Chance* winners' shopping spree at the Ravens Team Store on social media.

iii. Upcoming tasks for this period:

1. Execute social and digital plans for the *Harlem Globetrotters Scratch-Off* and *Second-Chance Promotion*.
2. Develop social media and digital plans for the *X the Cash Family of Games Scratch-Offs* and *Second-Chance Promotion*.

c) My Lottery Rewards

i. Key accomplishments last period:

1. In October, the program saw 42,949 active users, a 13.3% decrease from the previous month. However, while active users were down, the average number of entries per player increased by 26.06%.
2. There were 6,966 new registrations in October, a 50.03% decrease from the previous month (which was a high-registration month). Most of these new registrants are in the 25-44 age range. The program currently has 472,686 eligible members.
3. *Jurassic Park* was the most entered Scratch-Off game for October with 151.4K entries from 15.8K unique players. *Pick 4* continues to be the most entered draw game with 1.53M entries from 12.6K players.
4. October featured five active second-chance promotions: *Hall-o-WIN*, *Holiday 2025*, *Jurassic Park*, *Ravens 2025*, and *Unlock the Cash*. For the month, 29,305 unique players entered a second-chance promotion, a 26.15% increase from last month.
5. The MLR mobile app had 74,856 total users in October, a 26.93% decrease from the previous month. The users are split 73.1% iOS and 26.9% Android.

ii. Upcoming tasks for this period:

1. Finalize FY26 Q3 Points for Drawings promotions.
2. Prepare for upcoming launches of the *Harlem Globetrotters Scratch-Off*, *X The Cash Family of Games* and *Keno Team USA Second-Chance* promotions.