

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: James B. Young, Director of Sales
Jill Baer, Director of Creative Services
Kate Airey, Director of Product Development

DIVISIONS: Sales and Marketing

DATE: December 18, 2025

SUBJECT: Report for the December 2025 Commission Meeting

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

1. Sales

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

		Draw	Monitor	Fast Play/Instant	Combined
STATE	2025	\$79,265,649	\$46,282,022	\$92,468,806	\$218,016,477
	2024	\$71,552,174	\$46,427,437	\$91,884,302	\$209,863,913
	Difference	\$7,713,476	(\$145,415)	\$584,504	\$8,152,564
	%YoY +/-	10.8%	-0.3%	0.6%	3.9%
INDEPENDENT	2025	\$53,929,777	\$38,672,156	\$55,145,884	\$147,747,817
	2024	\$50,873,628	\$38,655,592	\$55,124,523	\$144,653,743
	Difference	\$3,056,149	\$16,564	\$21,361	\$3,094,074
	%YoY +/-	6.0%	0.0%	0.0%	2.1%
	% of State Sales	68.0%	83.6%	59.6%	67.8%
CORPORATE	2025	\$25,335,872	\$7,609,866	\$37,322,922	\$70,268,660
	2024	\$20,678,546	\$7,771,845	\$36,759,779	\$65,210,170
	Difference	\$4,657,327	(\$161,979)	\$563,143	\$5,058,490
	%YoY +/-	22.5%	-2.1%	1.5%	7.76%
	% of State Sales	32.0%	16.4%	40.4%	32.2%

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 November 12, 2025.
 - a. Four (4) scratch offs were launched, featuring \$2, \$5, \$10 & \$30 price points.
 - b. In conjunction with our instant products, two promotions were highlighted in the form of our *Pick 3, Pick 4, Pick 5 Let It Snow Promotion* and our *Holiday Keno Sprinkler Promotion*.
2. Sales Analysis: Currently have achieved 41% of the FY26 sales goal: \$1,093,739,554 through 11/30/25. This is a 5.2% YoY increase for the fiscal year to date.
3. District Managers with the best new launch week numbers by region/territory (year-over-year) for November:
 - Nicole Sample T-13
 - Chuck Hamrick **T-25 (Awarded the DM of the month)**
 - Rob Austera T-33
 - David Jones T-41

ii. Upcoming tasks for this period:

1. Execution of strategies and initiatives for the January instant ticket launch. The January launch will feature five (5) tickets at the \$1, \$2, \$5, \$10 and \$20 price points.
2. Continued monitoring and enforcement regarding the “gray” machine initiative.

b) Field Activities

i. Key accomplishments last period:

1. District Managers made 5,449 retailer communication contacts during the month of November, which includes store visits, phone calls and emails.
2. The field sales team supported selling with our retailer at the Ravens homes games on November 23rd and November 27th and sold in the Ravens Purple Evening event on November 3, 2025 at M&T Bank Stadium.
3. District Managers are providing support and drive for the Snow Much Fun Retailer Incentive, which ends on December 31, 2025.
4. Sales will drive communication and awareness of our Holiday Raffle game that launched on November 3, 2025.

ii. Upcoming tasks for this period:

1. 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.
2. During 2 home games in December, the field sales team will continue to support sales on RavensWalk.
3. Continued support for the Holiday Raffle sales through December with retailer and player education and awareness.

c) Retail Recruitment

i. Key accomplishments last period:

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

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 January 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. In conjunction with our vendor partner, we continued support of the Debit on the Counter initiative which included development and review of retailer training segments to be added to our e-learning training platform. This will allow us to more efficiently train retailers, allow retailers 24/7 access to provide training to their staff and increase deployment and expansion of the program. This e-learning module is expected to be finalized and made available in December.
3. Preparation for the launch of a \$25 instant ticket in February. This is a new price point for our portfolio and requires several changes to be made across our systems to include specs, allocations, facing adjustments and other minor updates within the systems to ensure we are ready for launch.

ii. Upcoming tasks for this period:

1. Finalize the debit on the counter e-learning module.
2. Continue initial planning of the Spring Retailer Advisory Board meeting in Ocean City, MD.
3. 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 11/30/25):
 - a. FY26 - \$362,950,954
 - b. FY25 - \$332,364,090
 - Up 9%
2. The Corporate Sales team continues to drive sales by minimizing out-of-stock occurrences and holding retailers accountable for high out-of-stock rates with equipment prioritization.
3. The current Second-Chance promotion is a holiday offer with Giant Foods. This promotion has been running for four weeks, has more than 4,000 entries from over 1,200 players and is growing weekly.

ii. Upcoming tasks for this period:

1. In an effort to continuously address the out-of-stock efforts, Corporate will work with retailers to create incentives to maintain acceptable inventory levels on a more consistent basis.

f) Sales Force Automation

i. Key accomplishments last period:

1. Gem Intelligence:
 - a. Changes to temporary assignment features installed and working. Request for changes for \$25 price point for February launch is being worked on. All surface units have been updated to windows 11. Some units experience major issues and required IT assistance.

2. GMS:
 - a. Report Group for Debit on the Counter retailers has been created and is being updated by Scientific Games.
3. Training:
 - a. Training Manager interviews were completed week of 12/1/25. Offer extended week of 12/8/25 to have candidate hired before Christmas.
- ii. **Upcoming tasks for this period:**
 1. Onboard new Sales Training Manager.

2. Product Development

a) Scratch-Off Products and Promotions

i. **Key accomplishments last period:**

1. December Scratch-Off Launch (12/5/25):
 - \$2 – *The Original Harlem Globetrotters®*
 - \$5 – *Money Maker*
 - \$10 – *Red 5s Doubler*
 - \$30 – *200X The Cash*
2. *Ravens Second-Chance Promotion*: The fourth drawing was held 11/14/25, 966,608 entries were received. The fifth drawing was held 12/12/25; as of 12/8/25, 785,692 entries were received.
3. *JURASSIC PARK Second-Chance Promotion*: The second drawing was held 11/13/25, 1,898,270 entries were received. The third drawing was held 12/9/25; as of 12/8/25, 1,159,275 entries were received.
4. *Holiday 2025 Second-Chance Promotion*: The third and fourth drawings were held on 11/13/25 and 11/18/25, with 2,880,551 and 3,532,874 entries received. The fifth and sixth drawings were held on 11/25/25 and 12/2/25, with 4,437,256 and 5,326,635 entries received. The seventh and eight drawings were held on 12/9/25 and 12/16/25; as of 12/8/25, 6,038,859 entries were received.
5. *Closed Game Activity*:

Game	Price	Game Name	Total Sales	Prize Expense	Gross Margin	Final Claim Date
683	\$2	PAC-MAN	\$5,901,552	\$3,780,533	\$2,121,019	11/3/2025
685	\$10	Bingo X10 7th Edition	\$25,729,020	\$19,173,266	\$6,555,754	11/3/2025
686	\$10	\$150,000 Extreme	\$16,112,370	\$12,079,444	\$4,032,926	11/3/2025
714	\$2	It's Gold Outside	\$3,826,844	\$2,447,650	\$1,379,194	11/3/2025
715	\$3	Peppermint Payout	\$6,156,723	\$4,200,732	\$1,955,991	11/3/2025
716	\$5	Holiday Luck Doubler	\$15,464,330	\$11,146,689	\$4,317,641	11/3/2025
717	\$10	Snowflake Tripler	\$18,443,750	\$13,491,603	\$4,952,147	11/3/2025

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

1. January Scratch-Off Launch (1/9/26):
 - \$1 – *5X The Cash*
 - \$2 – *10X The Cash*
 - \$5 – *20X The Cash*
 - \$10 – *50X The Cash*
 - \$20 – *100X The Cash*
2. *Holiday 2025 Second-Chance Promotion*: The ninth drawing will be held 12/23/25.
3. *Ravens Second-Chance Promotion*: The sixth drawing will be held 1/5/26.

4. *JURASSIC PARK Second-Chance Promotion*: The fourth and final drawing will be held 1/7/26.
5. *X The Cash Second-Chance Promotion*: Starting 1/9/26, players may enter non-winning X The Cash Family of Game tickets into My Lottery Rewards for a chance to win cash prizes.

b) Draw and Monitor Game Products and Promotions

i. Key Accomplishments last period:

1. *Holiday Keno Sprinkler Promotion* [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 – 12/28/25]: 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. *2025 Holiday Raffle* [11/3/25 – 1/1/26]: Maryland Lottery launched a \$20 Holiday Raffle which features over 10,000 winners, with a \$1 Million top prize. Tickets went on sale 11/3/25 and sales will end 1/1/26 or once all tickets (325,000 total) are sold, whichever comes first. The game also features three early bird drawings (11/24, 8/8, 12/22); the final drawing will be held on 1/2/26.
4. *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.

ii. Upcoming tasks for this period:

1. *Team USA 2nd Chance Drawing*: Beginning January 5th, players who purchase and enter Keno tickets into My Lottery rewards will have the chance to win one of five VIP trips to the LA28 Olympic Games or merchandise packs. The final of five drawings is scheduled for February 23, 2026.

c) FAST PLAY Products and Promotions

i. Key accomplishments last period:

1. *Holiday 2025 Second-Chance Promotion*: Please see section a)i)4 above for details regarding this promotion.
2. *Closed Games Activity*:

Game	Price	Game Name	Total Sales	Prize Expense	Gross Margin	Final Claim Date
683	\$2	PAC-MAN	\$5,901,552	\$3,780,533	\$2,121,019	11/3/2025
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717	\$10	Snowflake Tripler	\$18,443,750	\$13,491,603	\$4,952,147	11/3/2025

ii. Upcoming tasks for this period:

1. January FAST PLAY Launch (1/5/26):
 - \$1 – *Three Card Poker Progressive*
 - \$2 – *Baccarat FAST PLAY Edition Progressive*
 - \$3 – *Craps*

- \$5 – *World Championship Poker® Progressive (Relaunch)*
 - \$10 – *High Roller Blackjack Progressive (Relaunch)*
 - \$20 – *Casino Cash Progressive*
2. *Holiday 2025 Second-Chance Promotion*: The ninth drawing will be held 12/23/25.

3. Creative Services

a) Traditional Advertising

1. Launched strong advertising campaigns for the *Holiday Raffle* and the *Holiday Scratch-Offs*. Both campaigns began on November 3rd and will continue through late December.
2. Finalized the *Harlem Globetrotters Scratch-Off* media plan. Produced radio, digital, out-of-home, and point-of-sale materials to support this launch.
3. Currently developing the media plan and creative materials to promote the *Team USA Keno* promotion. A television spot was shot on December 10th that will highlight this Keno promotion, as well as other promotions and game launches throughout the fiscal year. Media supporting this promotion is scheduled to run in early January for two weeks.
4. High jackpot support for *Powerball* began on December 5th. Media included television, radio, and out-of-home, as well as continuing digital, email and social efforts. A newly developed television spot will run within this flight of media.
5. Finalized creative for the new *Multiplier FOG Scratch-Offs* point-of-sale.
6. Developing sponsorships with the *Orioles* and *MASN-TV* for the 2026 season

b) Web, Digital and Social

1. Promoted the *Holiday Scratch-Offs* and *Second-Chance Promotion*, *Holiday Raffle*, *Harlem Globetrotters Scratch-Off* and *Second-Chance Promotion*, *Ravens Scratch-Offs* and *Second-Chance Promotion*, *Keno Sprinkler Promotion*, *Let It Snow Promotion*, high jackpots as well as various winners and events through social media and the website.
2. Launched our first social media influencer campaign, promoting *Holiday Scratch-Offs*. Three local influencers created videos promoting the tickets.
3. Promoted gifting Lottery tickets responsibly during the holiday season.
4. Promoted our second-chance winners' experience on the Ravens away trip to Cincinnati with social media posts and a Facebook live video.
5. Began planning for the *X The Cash* social and digital campaign.

c) My Lottery Rewards

1. In November, MLR had 44,512 Monthly Active Users; a 3% increase from the previous month. Players entered a total of 6.48M tickets, equating to \$35.08M in retail value.
2. The top scratch-off entered in MLR in November was *\$5 Festive Fortune* with 151K entries from 16K unique players.
3. The most frequently entered draw game in November was again *Pick 4* with 1.1M entries from 11K unique players.
4. In November, we issued 40,059 coupons to players and saw the highest monthly redemption rate yet at 89%. We are continuing to send emails and push notifications to players who have coupons expiring soon to encourage redemption.

5. There were 2,718 new MLR registrations in November, bringing the total membership count to 475,012.
6. The MLR app saw 77,136 active users in November, with 74.4% and 25.6% split between iOS and Android, respectively.