



Product Overview

# Video Lottery Product Overview

01 The History

02 The Numbers

03 The Ecosystem

# Video Lottery: The History



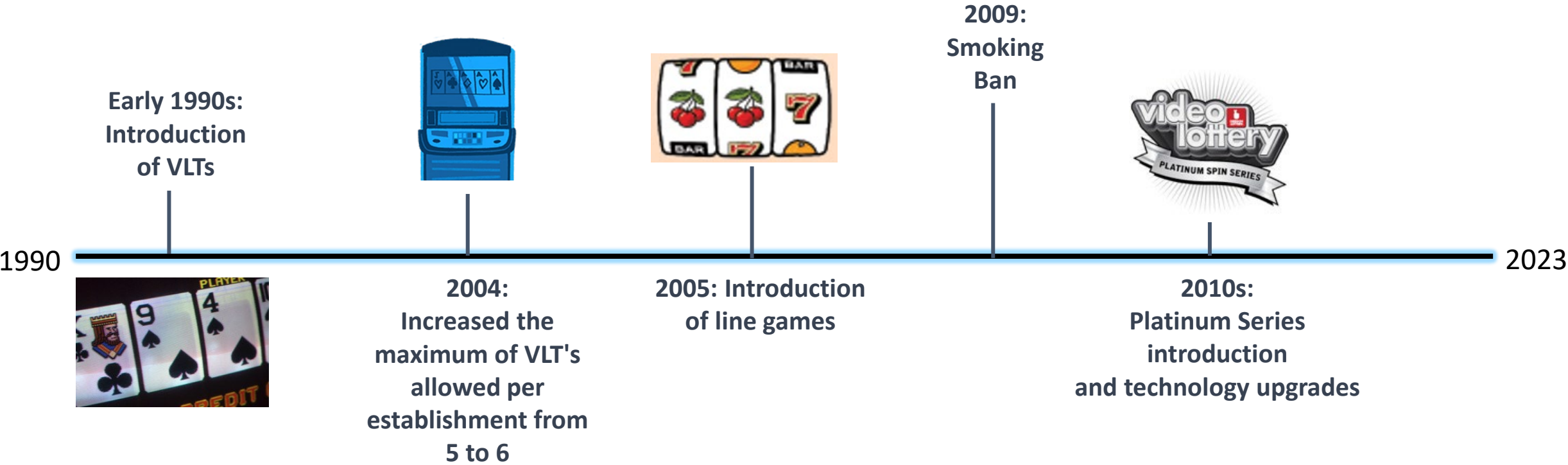
# Video Lottery Industry Growth

- The first state to adopt video lottery terminals (VLTs) was South Dakota in 1989. The machines are owned by private companies but monitored by the South Dakota Lottery.
- VLTs appeared in Atlantic Canada in 1990.
- Eventually, nine Canadian provinces would offer VLTs through their lotteries. U.S. would see expansion as well in states like Oregon (March 1992), Montana, and South Dakota where VLTs were placed in liquor-licensed establishments. States like Delaware, Maryland and West Virginia saw lotteries place VLTs in actual casino environments
- Growth in Greece, Italy, Bulgaria
- Changing laws in Illinois and Pennsylvania led to recent video gaming terminal (VGT\*) expansion

*\*VGTs are terminals not operated by a lottery. Route operators (Illinois) and truck stops (Pennsylvania)*



# Oregon Legislative Milestones Impacting Video Lottery

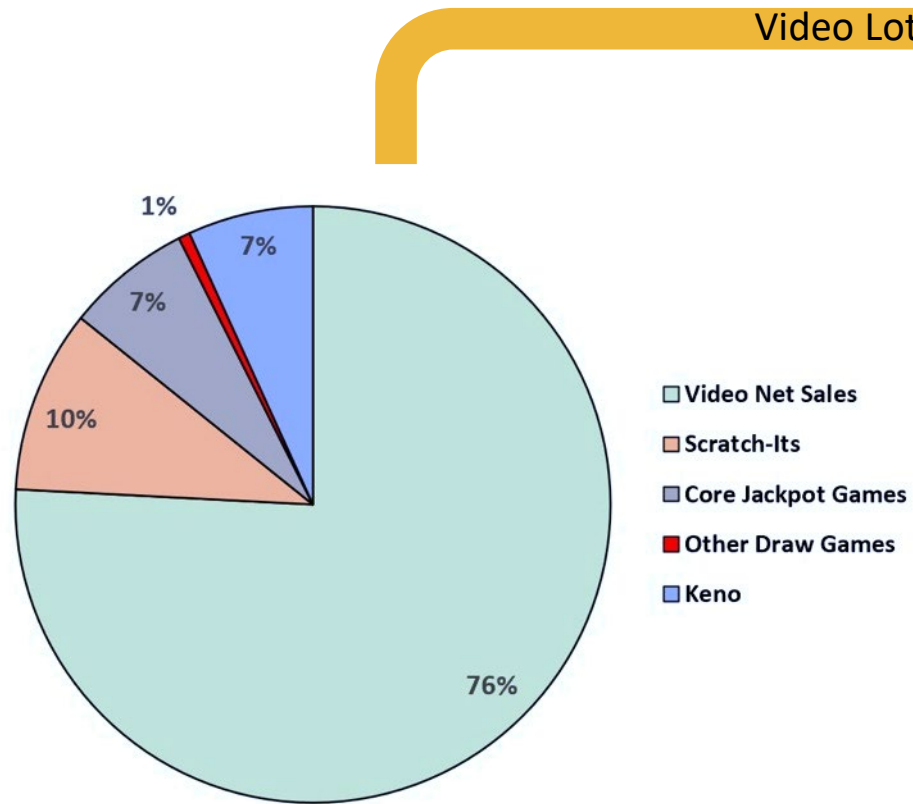






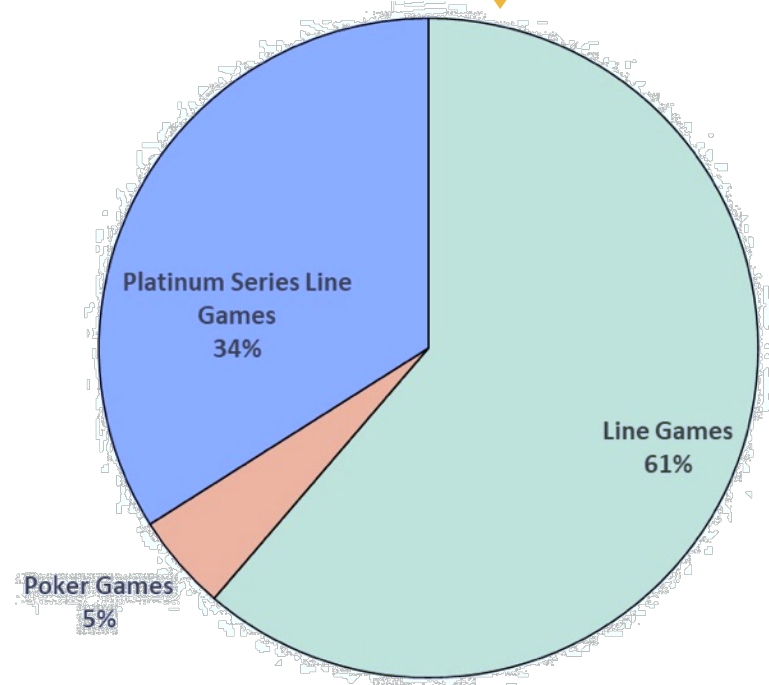
## Video Lottery: The Numbers

# Sources of Revenue: Business Year 2022 (July 2021 – June 2022)



**Lottery Revenue by Product**

- Video Lottery accounted for 76% of total Lottery revenue in BY22



**Video Revenue by Game Category**

- Line games represent the largest share of both dollars played and game titles offered

# Breaking Down the Numbers

BY22 Breakdown  
Record Sales Year:  
\$16.6 billion  
Dollars Played

**Prizes**  
\$15.3 billion  
(92.5%)

**Transfer**  
\$812 million  
(4.9%)

**Retailers**  
\$279 million  
(1.7%)

*Average Video Lottery  
retailer commissions per  
establishment is about  
\$125,000 per year.*



**Remaining Funds**  
\$154 million  
(0.9%)

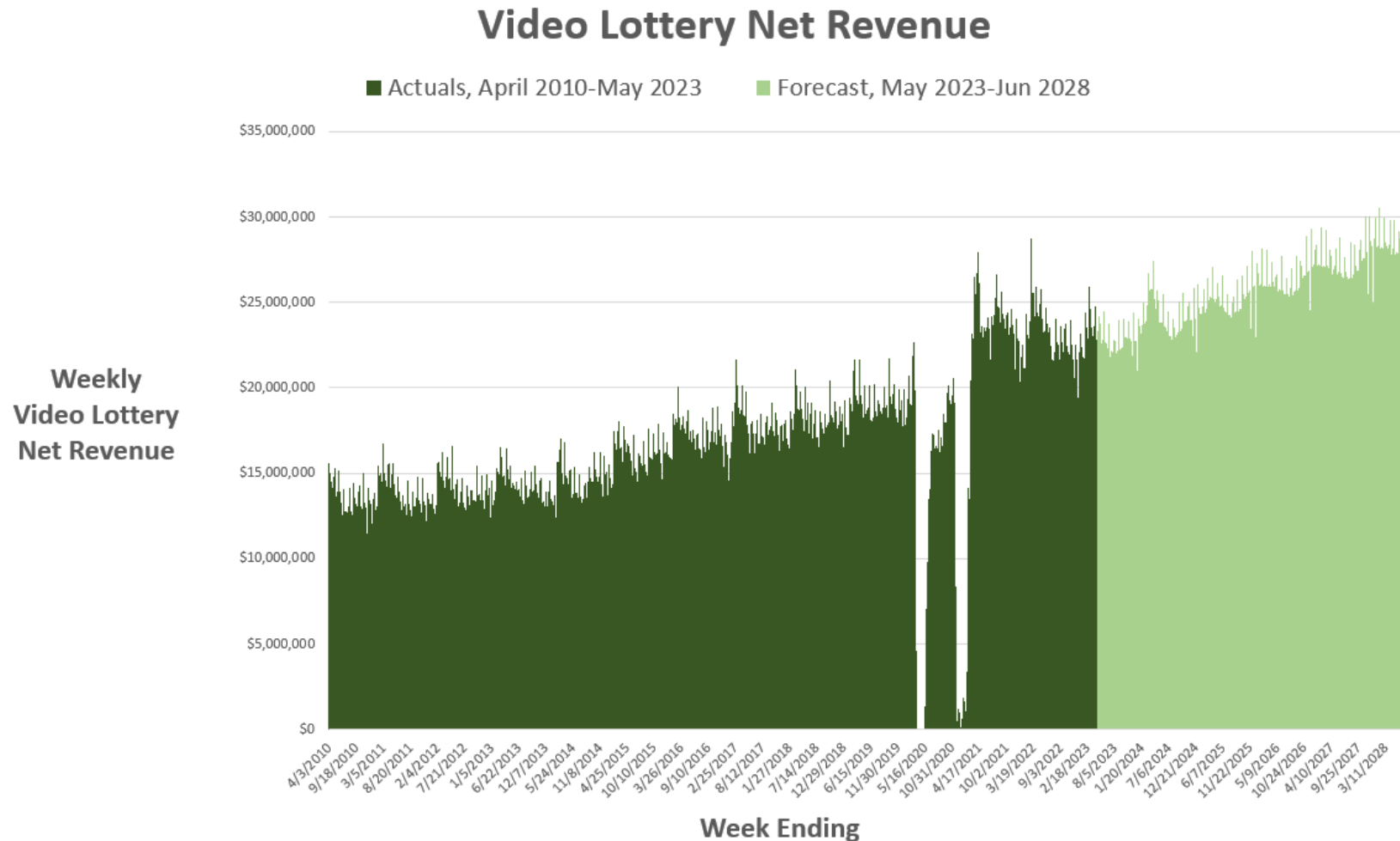
Funds for advertising,  
public information,  
sales support, wages  
& benefits, services &  
supplies, equipment,  
depreciation, and  
future investments.

**Vendor**  
\$0.5 million  
(<1%)



# Revenue Trends

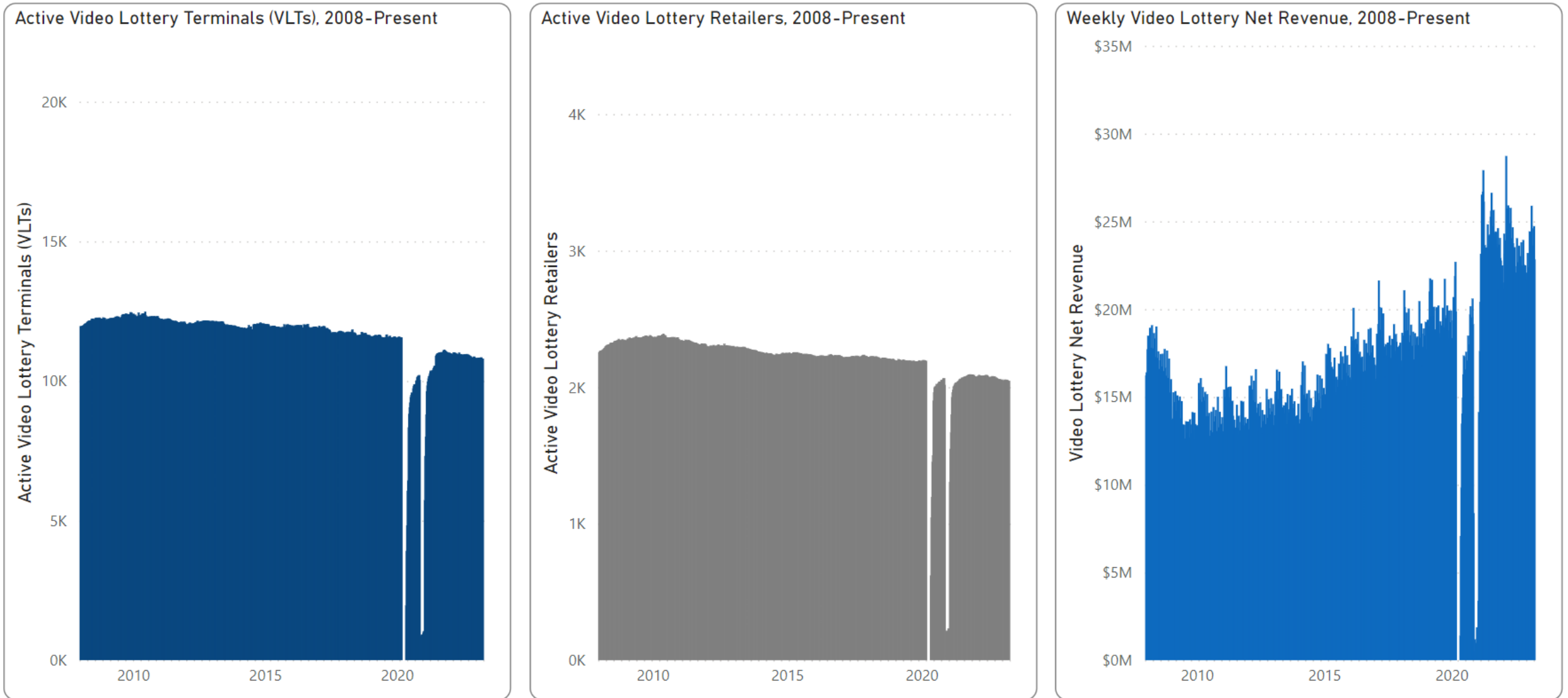
Office of Economic Analysis develops Video Lottery revenue forecast



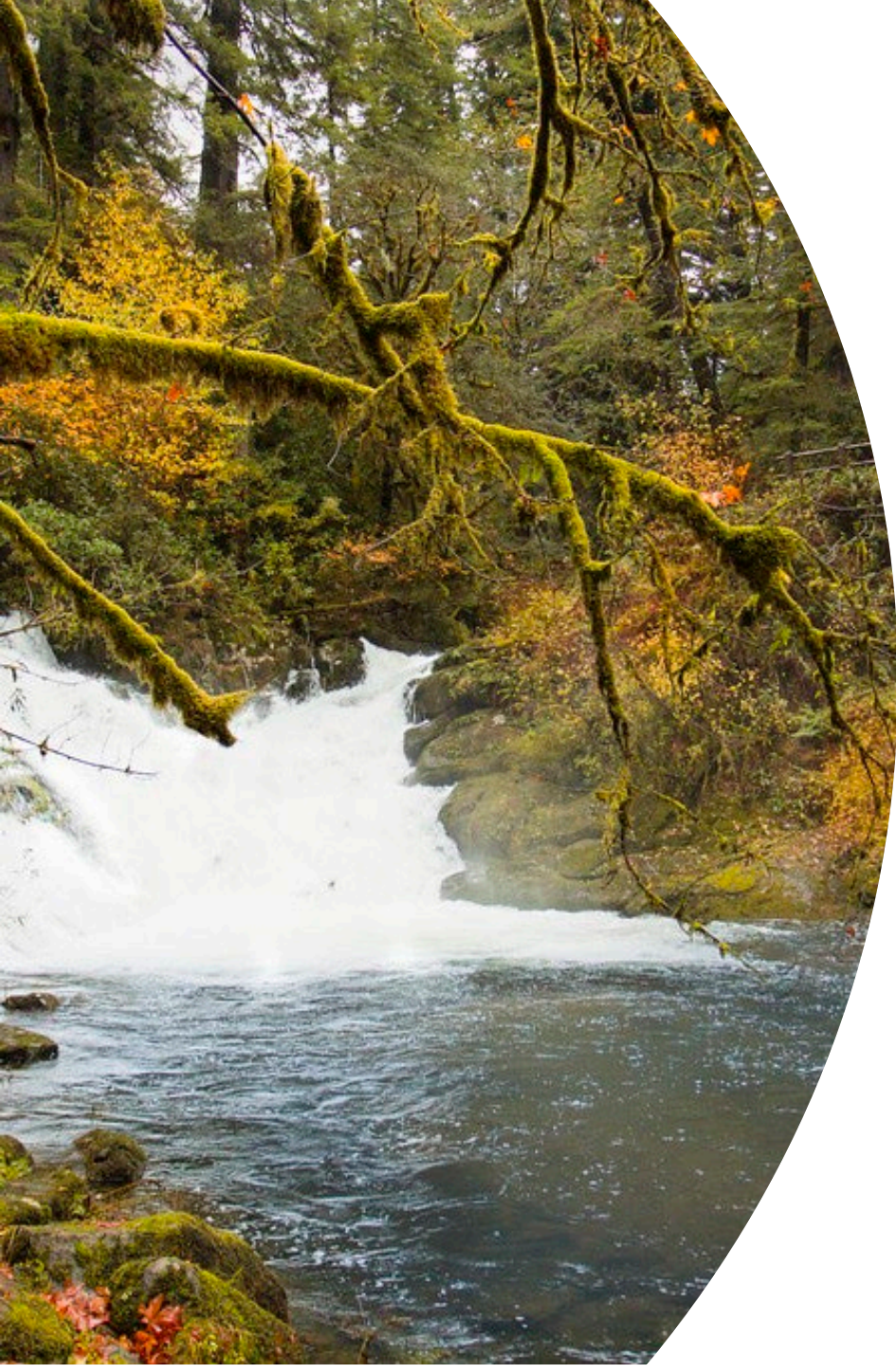
Source: May 2023 OEA Lottery Forecast 04.25.2023

# Video Lottery Historical Terminal Counts, Retail Counts, and Revenue, 2008-Present

There are 10,855 Video Lottery terminals active in 2,077 retail locations as of 4/20/2023.

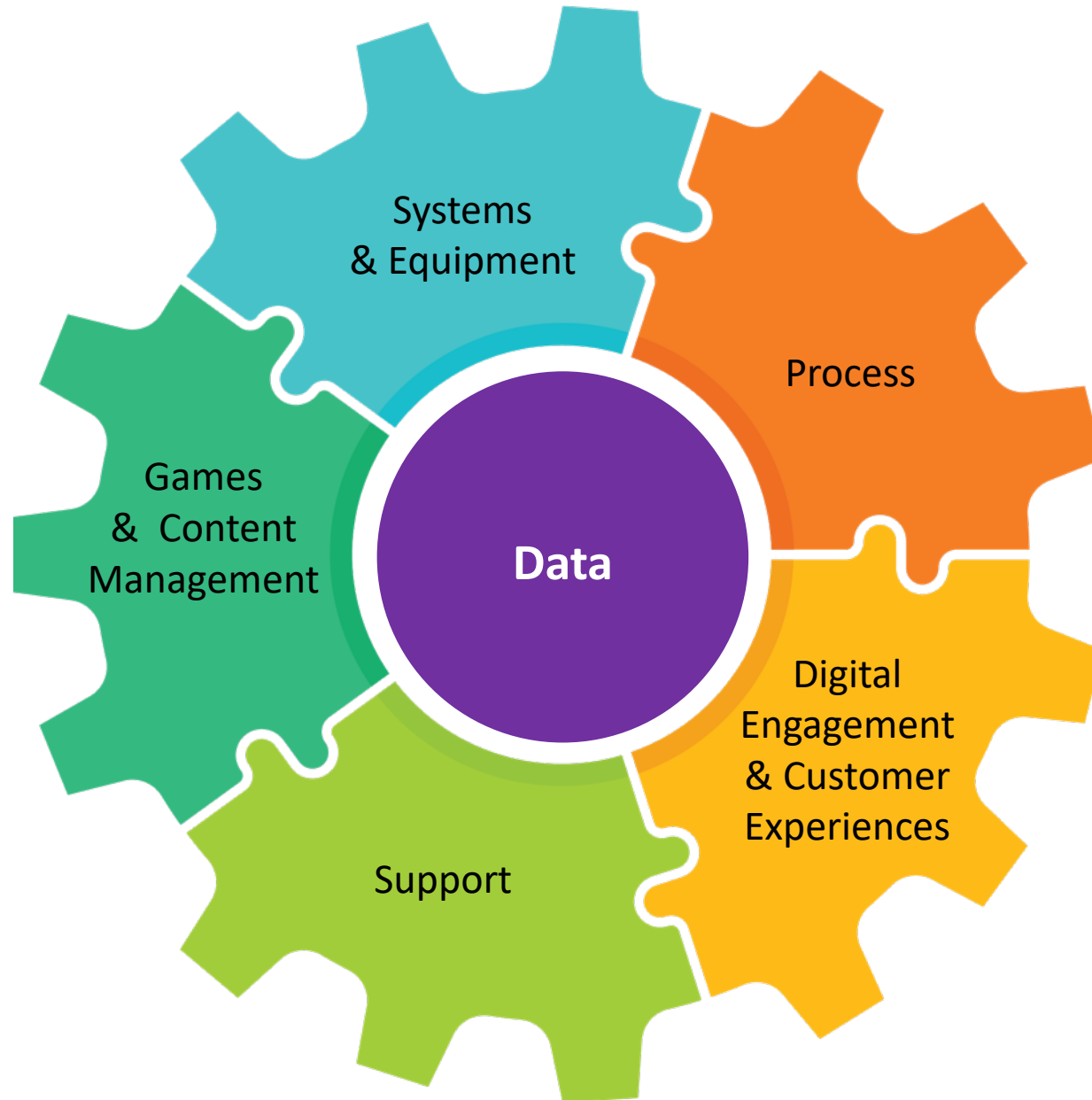


Source: Oregon Lottery Data Warehouse, accessed 4/20/2023



# Video Lottery Ecosystem

# Video Lottery Ecosystem: Overview







## Systems + Equipment

4 current VLT  
models

Nearly 11,000  
VLTs in the  
market

Across over  
2,000 Retail  
Locations

Managed by  
a central  
gaming  
system

Through a  
private  
gaming  
network



## VLT Trends

- Diverse mix of terminals found in the market at any time, representing several gaming vendor partners
- Each multi-game VLT has 8-12 games available for play
- VLTs are currently cash in, ticket out
- Each model typically has 2,000 – 3,500 units in the market
- Retailers may have up to 6 VLTs in a single establishment
- New models are field tested prior to large-scale purchases

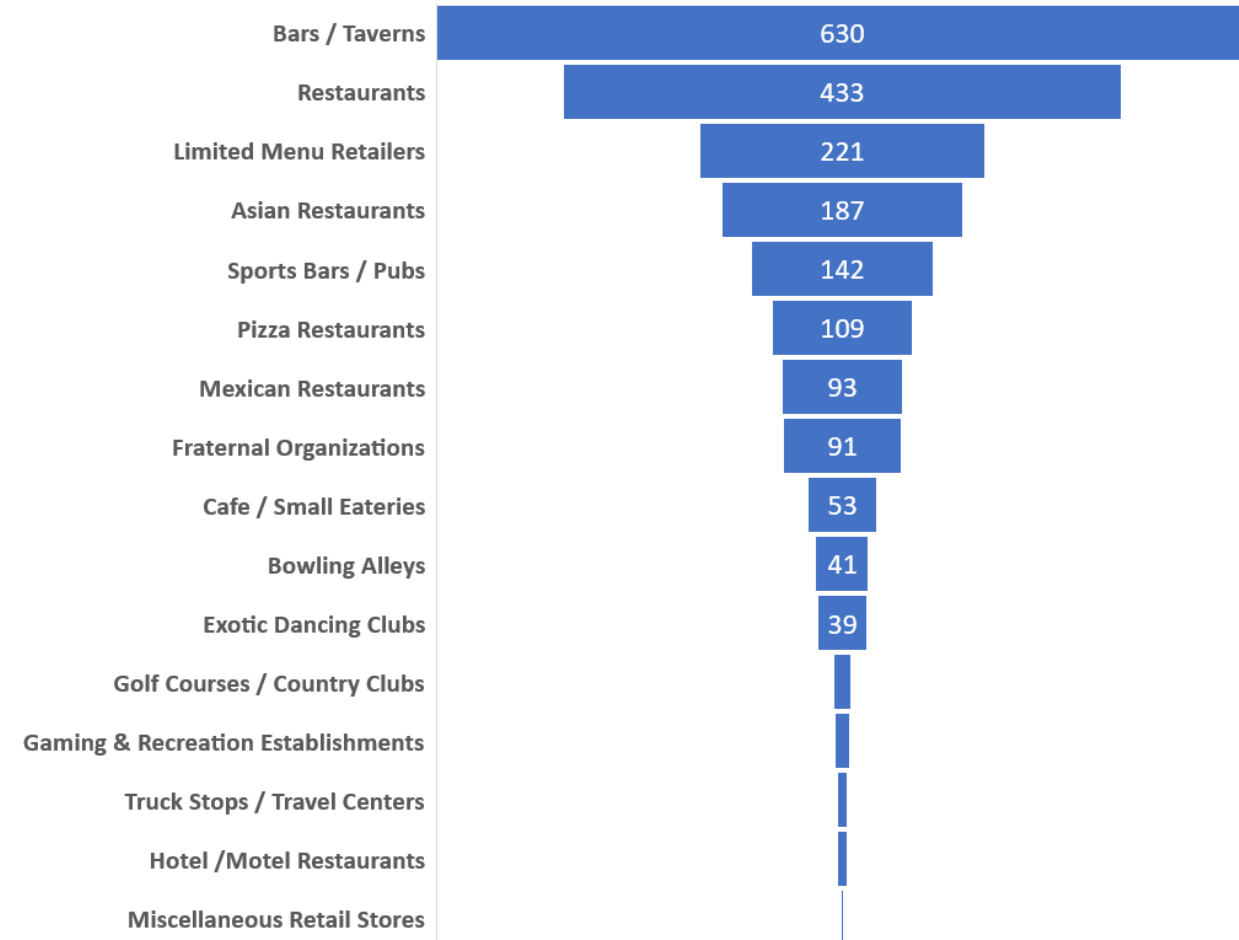
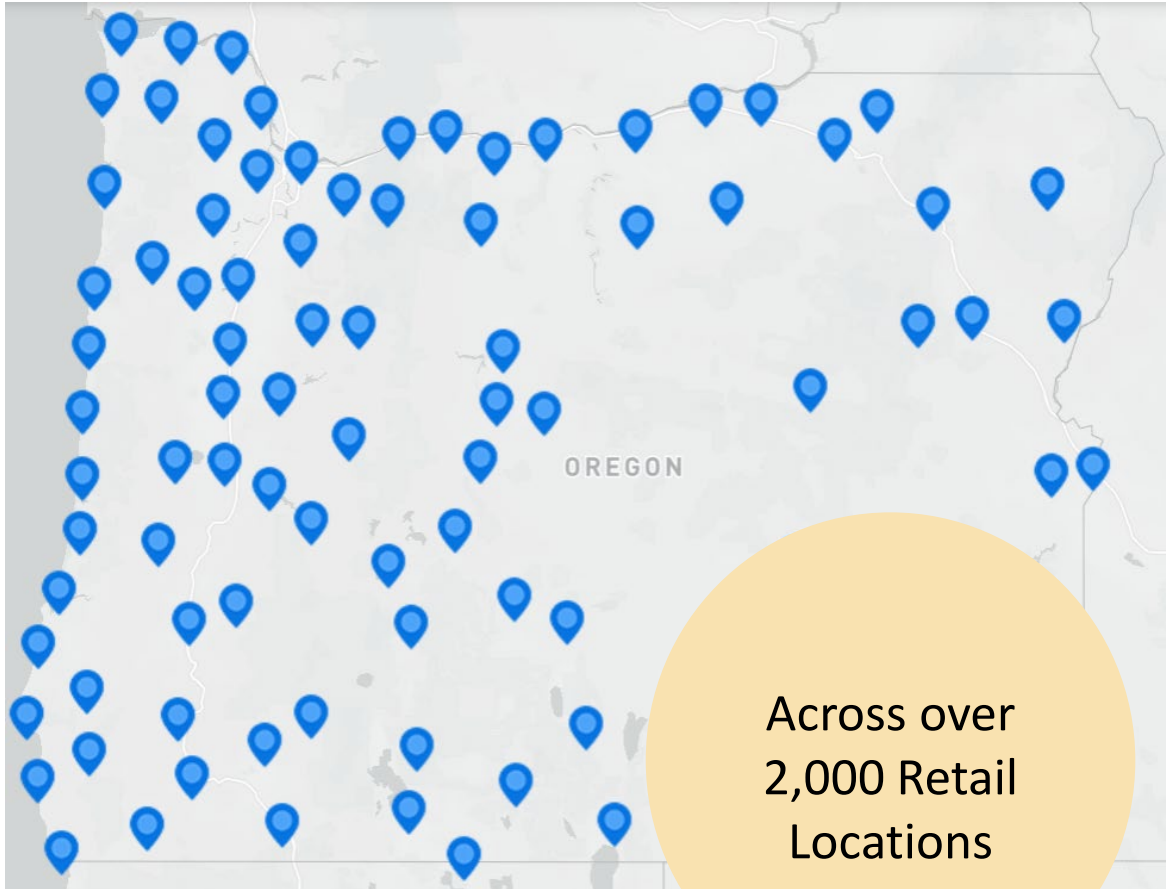
4 current  
VLT  
models

Nearly  
11,000 VLTs  
in the  
market





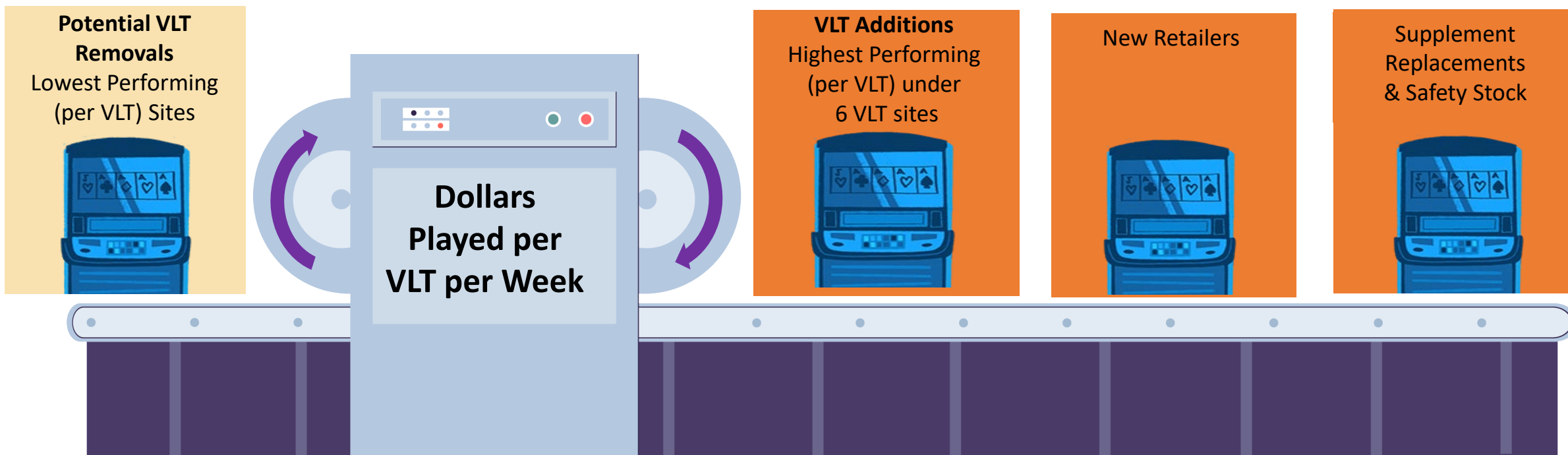
# Video Lottery Retailer Base





# Equipment Management

- Goal: Optimal number and allocation of terminals to meet demand
- Strategy: Conveyor Belt Model
  - Reallocation of VLTs from the lowest-performing “per VLT” retail sites
  - The removed terminals may then be reallocated for purposes such as outfitting new retailers, adding to existing retailers with the greatest utilization of current VLT inventory, safety stock, and/or obsolete terminal replacements







Content is King.

Remain relevant and sustainable by offering fresh games and features that appeal to a diverse gaming audience





# Games + Content Management

Video Lottery offers dozens of games with varying themes and animations, and engaging game play in both line and poker game play styles.



## Video Lottery Line Games

- Currently, players can wager between \$.01 - \$5.00
- Standard games have prizes up to \$600 per game.
- Platinum Series versions of line games offer players the opportunity to win higher jackpots, currently up to \$25k.



## Video Lottery Poker Games

- Currently, player can wager between \$.01 - \$2.50
- Poker games have prizes up to \$600 per game.



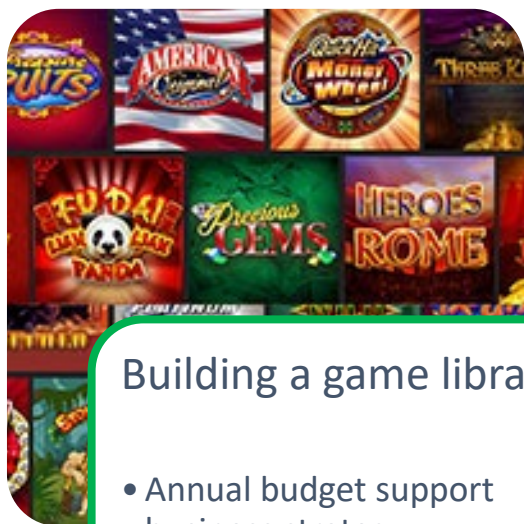


## Games + Content Management





# Games + Content Management



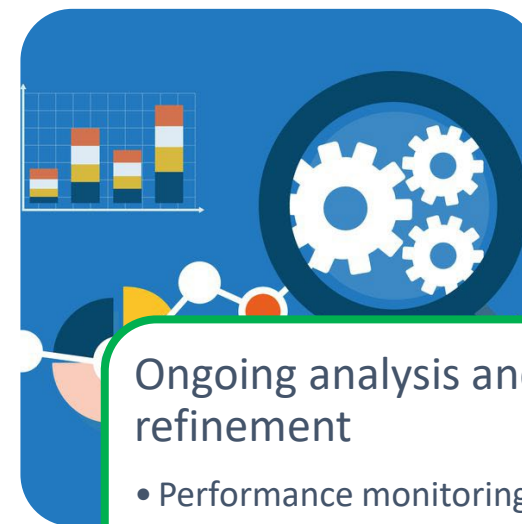
## Building a game library

- Annual budget support business strategy
- Mix of new and legacy content
- Variety of styles and features across portfolio



## Quarterly game launches

- Download capability for ease of management
- Analysis to determine need by product and across portfolio
- Launch new content during peaks and lulls









## Ongoing analysis and refinement

- Performance monitoring
- Player feedback
- Feedback and recommendations from other jurisdictions + vendors
- Test and learn opportunities





# Digital Engagement + Customer Experiences

		Adult Oregonians 21+ (n=1450)	Video Lottery Players (n=218)																								
Age 	21 to 24 25 to 34 35 to 54 55 to 64 65 or older	<table><tr><td>21 to 24</td><td>7%</td></tr><tr><td>25 to 34</td><td>18%</td></tr><tr><td>35 to 54</td><td>34%</td></tr><tr><td>55 to 64</td><td>14%</td></tr><tr><td>65 or older</td><td>27%</td></tr></table>	21 to 24	7%	25 to 34	18%	35 to 54	34%	55 to 64	14%	65 or older	27%	<table><tr><td>21 to 24</td><td>6%</td></tr><tr><td>25 to 34</td><td>22%</td></tr><tr><td>35 to 54</td><td>50%</td></tr><tr><td>55 to 64</td><td>15%</td></tr><tr><td>65 or older</td><td>7%</td></tr></table>	21 to 24	6%	25 to 34	22%	35 to 54	50%	55 to 64	15%	65 or older	7%				
21 to 24	7%																										
25 to 34	18%																										
35 to 54	34%																										
55 to 64	14%																										
65 or older	27%																										
21 to 24	6%																										
25 to 34	22%																										
35 to 54	50%																										
55 to 64	15%																										
65 or older	7%																										
Gender Identity 	Male Female Non-binary/Non-conforming	<table><tr><td>Male</td><td>48%</td></tr><tr><td>Female</td><td>51%</td></tr><tr><td>Non-binary/Non-conforming</td><td>1%</td></tr></table>	Male	48%	Female	51%	Non-binary/Non-conforming	1%	<table><tr><td>Male</td><td>59%</td></tr><tr><td>Female</td><td>41%</td></tr></table>	Male	59%	Female	41%														
Male	48%																										
Female	51%																										
Non-binary/Non-conforming	1%																										
Male	59%																										
Female	41%																										
Ethnicity 	Hispanic <u>Non-Hispanic</u> Caucasian/White African American/Black Asian/Pacific Isl. Native American Multi-Race/Other	<table><tr><td>Hispanic</td><td>6%</td></tr><tr><td>Non-Hispanic Caucasian/White</td><td>83%</td></tr><tr><td>African American/Black</td><td>2%</td></tr><tr><td>Asian/Pacific Isl.</td><td>3%</td></tr><tr><td>Native American</td><td>2%</td></tr><tr><td>Multi-Race/Other</td><td>4%</td></tr></table>	Hispanic	6%	Non-Hispanic Caucasian/White	83%	African American/Black	2%	Asian/Pacific Isl.	3%	Native American	2%	Multi-Race/Other	4%	<table><tr><td>Hispanic</td><td>9%</td></tr><tr><td>Non-Hispanic Caucasian/White</td><td>81%</td></tr><tr><td>African American/Black</td><td>3%</td></tr><tr><td>Asian/Pacific Isl.</td><td>3%</td></tr><tr><td>Native American</td><td>1%</td></tr><tr><td>Multi-Race/Other</td><td>3%</td></tr></table>	Hispanic	9%	Non-Hispanic Caucasian/White	81%	African American/Black	3%	Asian/Pacific Isl.	3%	Native American	1%	Multi-Race/Other	3%
Hispanic	6%																										
Non-Hispanic Caucasian/White	83%																										
African American/Black	2%																										
Asian/Pacific Isl.	3%																										
Native American	2%																										
Multi-Race/Other	4%																										
Hispanic	9%																										
Non-Hispanic Caucasian/White	81%																										
African American/Black	3%																										
Asian/Pacific Isl.	3%																										
Native American	1%																										
Multi-Race/Other	3%																										
Education 	High School or less Some college/tech school Bachelor degree Graduate degree	<table><tr><td>High School or less</td><td>20%</td></tr><tr><td>Some college/tech school</td><td>42%</td></tr><tr><td>Bachelor degree</td><td>23%</td></tr><tr><td>Graduate degree</td><td>15%</td></tr></table>	High School or less	20%	Some college/tech school	42%	Bachelor degree	23%	Graduate degree	15%	<table><tr><td>High School or less</td><td>23%</td></tr><tr><td>Some college/tech school</td><td>44%</td></tr><tr><td>Bachelor degree</td><td>23%</td></tr><tr><td>Graduate degree</td><td>10%</td></tr></table>	High School or less	23%	Some college/tech school	44%	Bachelor degree	23%	Graduate degree	10%								
High School or less	20%																										
Some college/tech school	42%																										
Bachelor degree	23%																										
Graduate degree	15%																										
High School or less	23%																										
Some college/tech school	44%																										
Bachelor degree	23%																										
Graduate degree	10%																										
Income 	Under \$50K \$50K to less than \$75K \$75K to less than \$100K \$100K or more	<table><tr><td>Under \$50K</td><td>43%</td></tr><tr><td>\$50K to less than \$75K</td><td>17%</td></tr><tr><td>\$75K to less than \$100K</td><td>18%</td></tr><tr><td>\$100K or more</td><td>22%</td></tr></table>	Under \$50K	43%	\$50K to less than \$75K	17%	\$75K to less than \$100K	18%	\$100K or more	22%	<table><tr><td>Under \$50K</td><td>40%</td></tr><tr><td>\$50K to less than \$75K</td><td>14%</td></tr><tr><td>\$75K to less than \$100K</td><td>24%</td></tr><tr><td>\$100K or more</td><td>22%</td></tr></table>	Under \$50K	40%	\$50K to less than \$75K	14%	\$75K to less than \$100K	24%	\$100K or more	22%								
Under \$50K	43%																										
\$50K to less than \$75K	17%																										
\$75K to less than \$100K	18%																										
\$100K or more	22%																										
Under \$50K	40%																										
\$50K to less than \$75K	14%																										
\$75K to less than \$100K	24%																										
\$100K or more	22%																										
Geography 	PDX MSA / I-5 Corridor Deschutes County Other	<table><tr><td>PDX MSA / I-5 Corridor</td><td>76%</td></tr><tr><td>Deschutes County</td><td>4%</td></tr><tr><td>Other</td><td>20%</td></tr></table>	PDX MSA / I-5 Corridor	76%	Deschutes County	4%	Other	20%	<table><tr><td>PDX MSA / I-5 Corridor</td><td>79%</td></tr><tr><td>Deschutes County</td><td>4%</td></tr><tr><td>Other</td><td>17%</td></tr></table>	PDX MSA / I-5 Corridor	79%	Deschutes County	4%	Other	17%												
PDX MSA / I-5 Corridor	76%																										
Deschutes County	4%																										
Other	20%																										
PDX MSA / I-5 Corridor	79%																										
Deschutes County	4%																										
Other	17%																										

Source: 2022 AAU Tracking Study

## Players/Key Drivers of play...

- It's fun and exciting to play
- The chance to win more than you started with
- There's a chance to win a big, life-changing prize
- You like to dream about what you will do if you win
- More convenient to play than going to a casino



*This is the best choice for my leisure time. The ease of being able to play anytime and anywhere. I kept winning, so I kept playing.*

*There is one close to my house. I budget to play once a week and sometimes we win, and sometimes we don't. We get our exercise. Way easier than going to an actual casino.*





# Responsible Gaming (RG) – Video Lottery

All Lottery games are developed, produced and marketed following the [Oregon Lottery Responsible Gaming Code of Practice](#) and [RG Marketing Guidelines](#).

RG practices specific to **Video Lottery** include:

- Age verification: To play Video Lottery Terminals, players must be 21+ years. All machines must be within an age-controlled area that is not visible to minors.
- Cash Slip Messaging: Treatment referral messaging appears on the back of terminal cash slips. *"Gambling problem? There's hope. Visit [opgr.org](#). Help is free, confidential and it works."*
- Equipment: The problem gambling helpline information is prominently placed on every VLT.
- Monitor Messaging: Oregon Lottery runs four-minute Keno in locations that include Video Lottery. In between draws, advertising and RG messaging run on the TV monitors.
- Product Advertising: RG specific Video Lottery advertising includes messages that are contextually integrated into campaigns. They include focused safer gaming strategies like deciding how much to spend before beginning to play.
- VLT Topper: Several VLT models feature attract screens which rotate RG messaging along with games promotion.
- How to Play (HTP): Detailed information on how to play our games is featured on the Lottery web site and app. RG behaviors are integrated into each step. For example, the [Video Lottery HTP](#) webpage includes a digital image carousel with step-by-step guides and each step incorporates RG.
- In Venue Collateral: All video Lottery locations are supplied with posters and brochures detailing available resources for players with gambling issues.





# Support + Process

## *It Takes a Village*

Over 100 employees dedicated to supporting Video Lottery

- Video Product Team – manages the ecosystem strategy, selection, development, and purchase of Video Lottery products
- Technical Services – manages the deployment, maintenance, technical support, and parts repair for VLTs and associated equipment from purchase to disposition

Other Support Functions: *Retail Channel, Finance & Accounting, Contracts, Marketing, Procurement, IT, Distribution & Facilities, Player Services, Customer Support, Analytics & Insights, Business Operations, Security, Internal Audit*



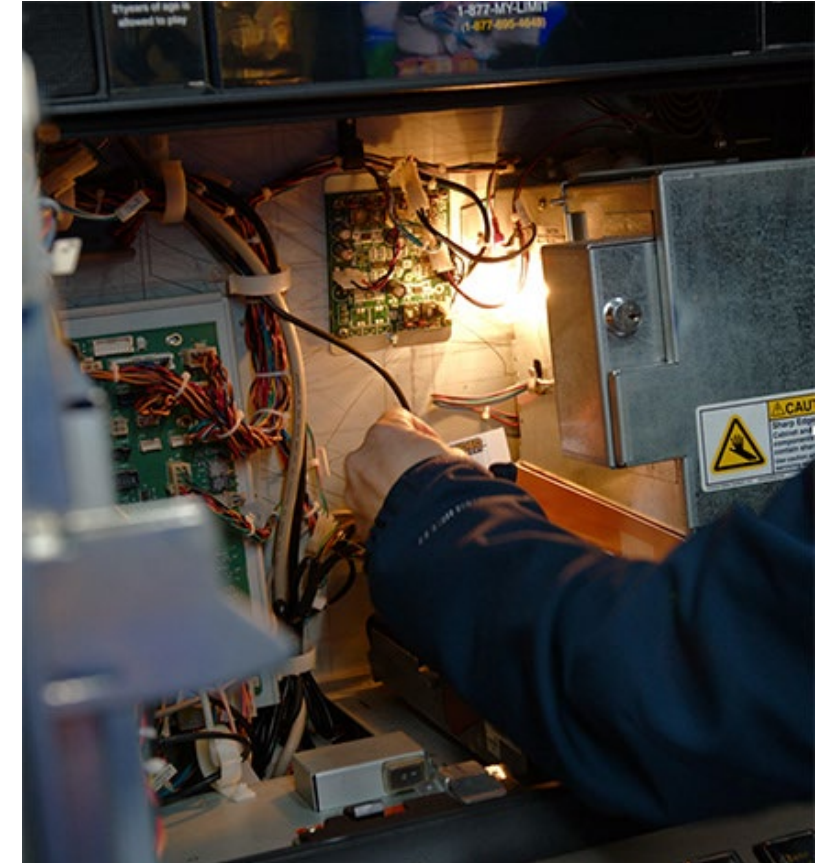


# Product Services + Support: Technical Services

Single year: Dispatches, repairs, replacements, deployments, phone calls, etc.

## Business Year 2022 (July 2021-June 2022):

- 51,000 Video Lottery service requests
- 30,000 Video Lottery service requests resolved without dispatch
- 21,000 Video Lottery service requests dispatched
- 22,000 preventative maintenances performed (approximately 1 per VLT every 6 months)
- 8,500 VLT parts replaced and repaired
- 6,000 VLTs touched for varying projects
- 4,000 VLT parts cleaned & calibrated
- 850 VLT parts aligned & adjusted
- 2,500 VLTs installed (includes VLT swaps, retailer remodels, changes of ownership, new retailers, etc.)
- 3,100 VLTs removed (includes VLT swaps, retailer remodels, changes of ownership, termed retailers, etc.)
- 1,500 new VLTs accepted (886 Crystal Dual and 605 Helix)







## Product Services + Support: Retail Contracts

- Post-pandemic review of Video Lottery ecosystem included revisions to the contract process and requirements for current and prospective new retailers
- Critical to optimize the overall number and placement of VLTs while also balancing player demand and VLT availability across the state.
- Like with equipment management, small changes will be implemented and analyzed as we move forward
  - New retailer interest form to manage prospective new retailers/locations
  - Minimum standard criteria and limited temporary contracts to better ensure long-term viability
  - Quarterly review and allocation of inventory to determine number of applicants to begin process





## **FISH: Fairness, Integrity, Security and Honesty**

- All products (hardware and software) must conform to product and industry specifications and are tested by a third-party testing vendor to ensure they meet the specifications
- Random number generators (RNG) that determine the outcome of each Video Lottery game are certified by a third-party testing vendor
- Video Lottery terminals are classified as a major procurement, therefore all qualified vendors are required to participate in a vendor disclosure and background investigation in accordance with ORS 461.410-Vendor Disclosure for Major Procurements
- Background checks are done for all key Video Lottery vendor personnel

# Appendix

# Glossary

- **Dollars Played:** The total amount of money wagered by players on Oregon Lottery VLTs. It is a measure of the overall gambling activity on the machine(s) and can be used to analyze revenue, player behavior, and machine performance.
- **Dollars Won:** The total amount of money paid out to players as winnings on Oregon Lottery VLTs. It represents the cumulative amount of prizes awarded to players and is an important metric for analyzing the performance of the machines, payout ratios, and overall player experience.
- **Dollars In:** The total amount of money inserted into Oregon Lottery VLTs.
- **Dollars Out:** The total amount of money paid out to players, including winnings and any unspent credits that are cashed out.
- **Net Revenue:** The total amount of money generated by Oregon Lottery VLTs after deducting the payouts made to players. It represents the profit made by Oregon Lottery.
- **VLT:** A Video Lottery terminal, or VLT, is a type of electronic gambling machine that is like a slot machine and typically operated by a state lottery agency.
- **Payout Percentage:** Also known as Return to Player (RTP), refers to the proportion of the total amount of money wagered on Oregon Lottery VLTs that is returned to players as winnings over an extended period. It is an important metric that helps ensure the machines operate fairly and within established guidelines. It is important to note that the payout percentage is a long-term average and does not guarantee a specific return for any individual gaming session.
- **Hold:** The inverse of the Payout Percentage. Hold refers to the percentage of the total amount wagered that Oregon Lottery VLTs retain as profit over an extended period.

# Product Performance

## Business Year 2022 (July 2021 – June 2022)

- Dollars Played: \$16.6 billion
- Dollars Won: \$15.3 billion
- Net Revenue: \$1.2 billion (approximately \$315 per terminal per day)
- Games Played: 14.9 billion
- Average Wager: \$1.11 per game played
- Prize Payout Percentage: 92.5% (has ranged from 92.2% to 93.9% 2000-2023)
- Retailer Commissions: \$279 million (approximately \$125,000 per retailer)
- Transfer: \$812 million (89.5% of all OSL gaming transfer)



# Terminal Utilization

Highlights the availability of data to help determine utilization for equipment management purposes

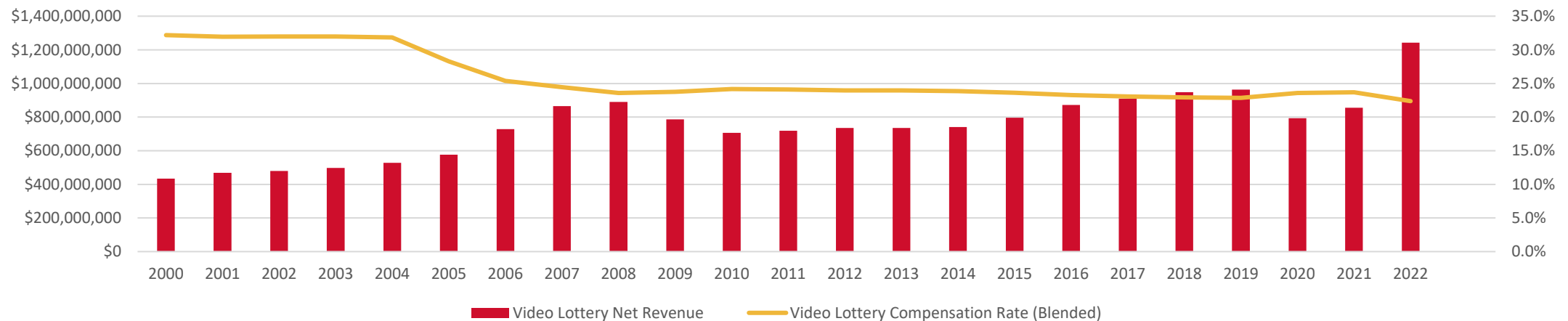
Minutes Played per Hour Across All Terminals

CalendarDate	Midnight	1 AM	2 AM	7 AM	8 AM	9 AM	10 AM	11 AM	Noon	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM	11 PM	Total
Wednesday, March 01, 2023	239	280	163			12	96	26	49	42	20	125	49	177	189	103	100	142	272	79	2,162
Thursday, March 02, 2023	202	132	41	26	87	136	137	70	22	120	96	119	160	167	54	157	150	153	241	151	2,424
Friday, March 03, 2023	167	142	113	12	113	154	214	160	172	117	63	97	146	244	287	141	245	168	219	163	3,136
Saturday, March 04, 2023	237	257	35		28	142	256	176	116	76	230	177	68	176	269	303	269	287	310	272	3,682
Sunday, March 05, 2023	290	221	65		44	117	121	125	47	89	136	187	233	194	224	183	258	260	165	142	3,103
Monday, March 06, 2023	152	147	73		54	66	5	122	126	85	104	125	132	187	121	146	112	135	72	109	2,073
Tuesday, March 07, 2023	95	19	28				6	39	18	43	112	171	279	263	192	103	107	140	138	78	1,830
Wednesday, March 08, 2023	44				78	112	32	85	50	146	203	99	119	125	119	274	317	163	113	232	2,310
Thursday, March 09, 2023	128	149	47	35	28	22	36	81	58	131	150	95	105	235	113	113	25	273	182	177	2,181
Friday, March 10, 2023	192	218	96	10	66	169	257	197	142	99	164	176	158	171	233	251	184	199	224	300	3,507
Saturday, March 11, 2023	248	240	127		11	137	121	113	134	115	126	110	71	275	147	134	194	237	224	291	3,057
Sunday, March 12, 2023	317	301	8	0	79	160	51	97	89	127	156	187	204	134	117	174	172	224	237	203	3,037
Monday, March 13, 2023	227	157	76				3	55	101	82	121	133	105	170	136	144	96	66	87	38	1,797
Tuesday, March 14, 2023	40	115	135		5	82	135	170	124	62	109	142	247	183	134	132	189	200	171	83	2,459
Wednesday, March 15, 2023	60	52	14		75	146	88	120	81	89	145	75	90	100	70	144	158	211	209	212	2,139
Thursday, March 16, 2023	208	241	90		69	54	181	201	149	72	67	246	225	208	205	163	72	96	151	193	2,891
Friday, March 17, 2023	269	157	49		19	91	41	78	110	110	233	168	132	206	125	129	128	165	29	227	2,468
Saturday, March 18, 2023	228	146	118		122	245	212	193	85	18	104	168	253	257	167	55	181	243	233	206	3,235
Sunday, March 19, 2023	262	328	120		16	85	89	80	167	80	156	60	56	89	22	56	90	262	241	132	2,390
Monday, March 20, 2023	183	145	6		47	203	86	80	63	88	92	164	153	215	226	196	77	161	16	66	2,264
Tuesday, March 21, 2023	103	167	33							69	103	104	149	234	194	194	111	112	88	111	1,773
Wednesday, March 22, 2023	31	2	0		33	73	82	114	110	31	92	116	147	160	159	199	90	174	202	114	1,928
Thursday, March 23, 2023	8	41	30		62	185	181	90		101	173	258	171	218	228	221	155	203	239	192	2,756
Friday, March 24, 2023	85	117	26		99	153	135	114	51	64	175	180	212	140	84	134	249	235	296	299	2,848
Saturday, March 25, 2023	214	230	72	9	55	51	121	164	109	77	75	118	171	44	74	11	12	176	154	142	2,080
Sunday, March 26, 2023	190	144	100		75	109	161	124	144	182	117	116	114	206	126	52	218	231	216	235	2,859
Monday, March 27, 2023	112	172	129		23	143	103	60	69	129	103	71	73	83	188	124	273	266	235	104	2,461
Tuesday, March 28, 2023			0		11	27	188	139	165	270	295	235	256	249	83	123	229	215	220	152	2,857
Wednesday, March 29, 2023	164	136	40	5	41	49	48	82	203	177	67	106	69	112	174	134	144	189	132	43	2,114
Thursday, March 30, 2023	9			4	96	102	126	83	43	113	121	116	98	169	222	139	185	268	204	176	2,274
Friday, March 31, 2023	54	92	98		4	77	10	63	85	117	176	166	192	194	266	108	87	195	168	99	2,252
<b>Total</b>	<b>4,757</b>	<b>4,548</b>	<b>1,933</b>	<b>101</b>	<b>1,441</b>	<b>3,103</b>	<b>3,321</b>	<b>3,303</b>	<b>2,881</b>	<b>3,121</b>	<b>4,084</b>	<b>4,409</b>	<b>4,637</b>	<b>5,585</b>	<b>4,947</b>	<b>4,539</b>	<b>4,876</b>	<b>6,052</b>	<b>5,688</b>	<b>5,023</b>	<b>78,348</b>

# Retailer Compensation History

## History:

1. Video Lottery began in 1992 and the compensation rate was a flat 35% of net sales.
2. In July of 1995, the Commission adopted a tiered compensation rate structure which results in an overall rate of approximately 33%.
3. In July of 1999, the Commission expanded the tiered rate structure and the overall compensation rate declined to about 32%.
4. In 2004, the Commission adopted a revised tiered rate structure that required retailers to choose Option A or Option B each business year. The overall compensation rate declined to about 28.3%. Advocates for lower compensation rates filed a petition in the Oregon Court of Appeals for review of the administrative rule that adopted the compensation rates. The case, *Wolf v. Oregon Lottery Commission*, was resolved by the Oregon Supreme Court, unpholding the validity of Lottery's administrative rule, the compensation rates adopted by the Commission, and the process by which the Lottery Commission determined the appropriate rates.
5. In 2005, an alternative compensation rate structure was established for those retailers who opted to sell both line games and video poker games. Under the new rate structure, the overall compensation rate dropped to about 25%.
6. In 2007, the Lottery Commission lowered video compensation rates for those retailers selling line games. The overall compensation rate dropped to about 23%.
7. In 2010, the tiered compensation structure was unchanged. The overall compensation rate was near 24%.
8. In 2015, the tiered compensation structure was unchanged. The overall compensation rate was near 23%.
9. In 2020, the tiered compensation structure was changed to be a percent of dollars played instead of net sales and there was no longer an Option A or an Option B selection. The overall compensation rate was near 24%.





# Mapping player journeys reveals opportunities to improve the player experience through convenience and value-added entertainment



## CONSIDERATION

- ✓ (Core player) Playing Video Lottery is part of their entertainment routine
- ✓ (Light player) Play Video Lottery as part of a social night out
- ✓ Motivated by having fun, passing time, and winning some extra cash



## BUY

- ✓ Lottery retailers and games are available across the state
- ✓ Easy to purchase favorite games and they enjoy trying new games

### Desired Enhancements:

- Variety of options for bet size and prize amounts
- Having favorite games (new and legacy) available to play anytime



## GAME PLAY

- ✓ Players find Video Lottery games easy and fun to play
- ✓ Enjoy playing alone and with friends
- ✗ Not winning is disappointing if play experience is short

### Desired Enhancements:

- Easy way to switch machines without having to cash out (TITO)
- In-game features that extend the playing experiences (small wins, bonus rounds)



## OUTCOME & CASHOUT

- ✓ Easy to know if they won and generally easy to collect their prize at the retailer
- ✓ / ✗ Collecting a large prize is easy, but inconvenient - must drive to payment center
- ✓ Win or lose, players value giving back to Oregon.

### Desired Enhancements:

- Digital prize claim and payment



## RE- ENGAGEMENT

- (Core player) Will play Video Lottery again on next visit to retailer
- May keep cash, or use winnings to play more Video Lottery on same visit

- ✓ Positive (what's working)
- ✗ Not so positive (pain points)



# Perceptions of Lottery Games

Lottery conducts ongoing research with Oregonians to evaluate satisfaction with their Lottery play experiences. Metrics reflecting OSL’s Customer Experience (CX) attributes are presented below.

## How Video Lottery Players Rate Lottery Games on CX FIRE Attributes

