

Product Performance Update

Q3 of Fiscal Year 2025
(01/01/25 - 03/31/25)





SAFER PLAY (RG) PROGRAM UPDATE

Safer Play is a less stigmatizing, more inclusive, way of looking at Responsible Gambling. It suggests that gambling is offered as entertainment or play for adults, and safer recognizes that it's an activity that carries risk.

Agenda

Safer Play Program Overview

- Our Goals and Code of Practice
- Areas of Focus

2024 Safer Play Program Impacts Report

- Annual Program Metrics
- Key Accomplishments & New Initiatives

The Oregon Lottery Code of Practice

The *Safer Play* Program is Guided by the *Oregon Lottery Code of Practice* and commits Lottery to:



Provide information and tools that help customers **to make informed choices about playing Lottery games**



Promote a shared sense of responsibility with our retail partners, **engage with the Responsible Gaming community**. Ensure **cultural relevancy and diversity**. demonstrate a **commitment to the communities in which we operate**.



Ensure that players and affected others know **how to access available resources for gambling issues**, and that free, professional help is available



Measure & report performance. Develop new practices in response to emerging **research, evolutions in technology, emerging market trends**



Devote energy, funding, and resources to have the **most positive impact** on the promotion of safer gaming practices and awareness of resources.

Safer Play Program Focus Areas

01

Investment in Research

06

Online Gaming

02

Employee Engagement

07

Player Education

03

Stakeholder Engagement

08

Treatment & Referrals

04

Retailer Engagement

09

Advertising & Promotion

05

Retail Gaming

Safer Play Program Annual Data Impacts Report

- Annual measurements look at year-over-year trends
- Key accomplishments document non-repeatable activities
- Using combination of internal monitoring and independent assessments

2024 RG BY THE NUMBERS



\$148+ MILLION
PROBLEM GAMBLING FUNDING
SINCE 1999



\$730,000+
ADDITIONAL PLAYER EDUCATION
MARKETING & OUTREACH SPEND



24.5
TIMES THE AVERAGE OREGONIAN
VIEWS RGPG MESSAGING



2135
CALLS TO THE HELPLINE



400+
OREGON LOTTERY STAFF
TRAINED ANNUALLY



84.2+ MILLION
TOTAL DIGITAL MEDIA IMPRESSIONS



4023
LOTTERY PRODUCT RETAIL
EMPLOYEES TRAINED, AVERAGE OF
2.4 AT EACH RETAILER



2024 Annual Program Metrics

- Brand Promise
- Marketing & Advertising
- Required Training

Brand Promise

Awareness of Funding

Awareness of Lottery Funding

Oregonians' awareness of Lottery revenue funding Problem Gambling services remains high. About 3-in-4 remain positive about Lottery's support of these services.



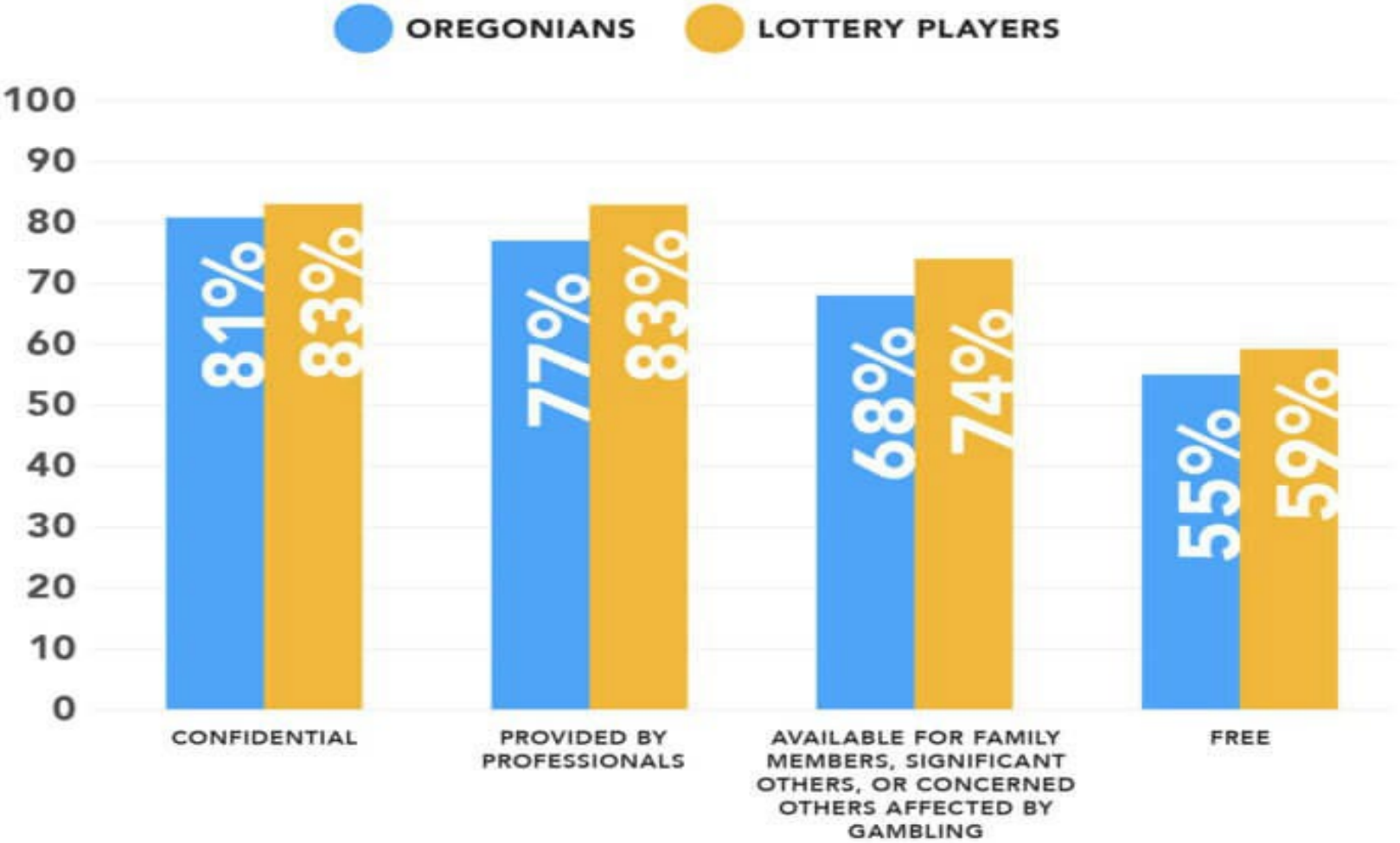
73%

Of Oregonians know
Problem Gambling
Counseling and
Treatment receives
funding from Lottery

Source #1

Brand Promise

Awareness of Treatment Features



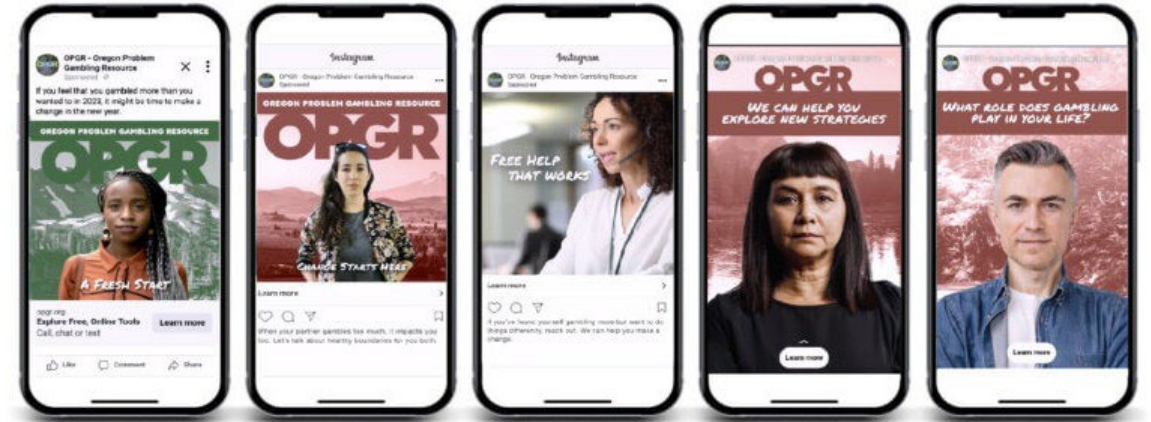
Brand Promise

New Tools & Resource Awareness

New Resources Promoted in 2024	Total Oregonians	Players
Information and tools for people who want to make a change to their gambling	33%	40%
Online communities, chat groups, blogs for people experiencing problems with gambling	20%	20%
DraftKings responsible gambling and Safer Play messages	-----	74%

Marketing & Advertising

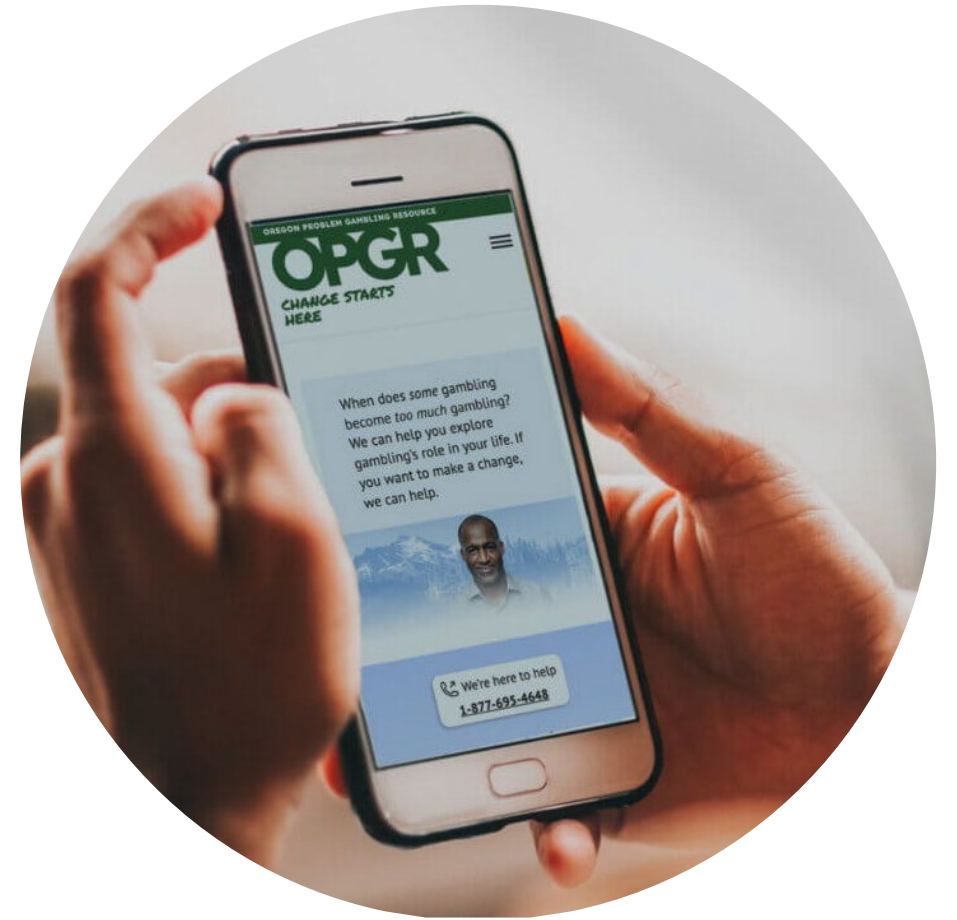
What is OPGR.org? A non-branded online resource site. Developed, maintained and promoted by Oregon Lottery. Lottery also develops the advertising that directs help seekers to the site.



Marketing & Advertising OPGR.org Site Sessions

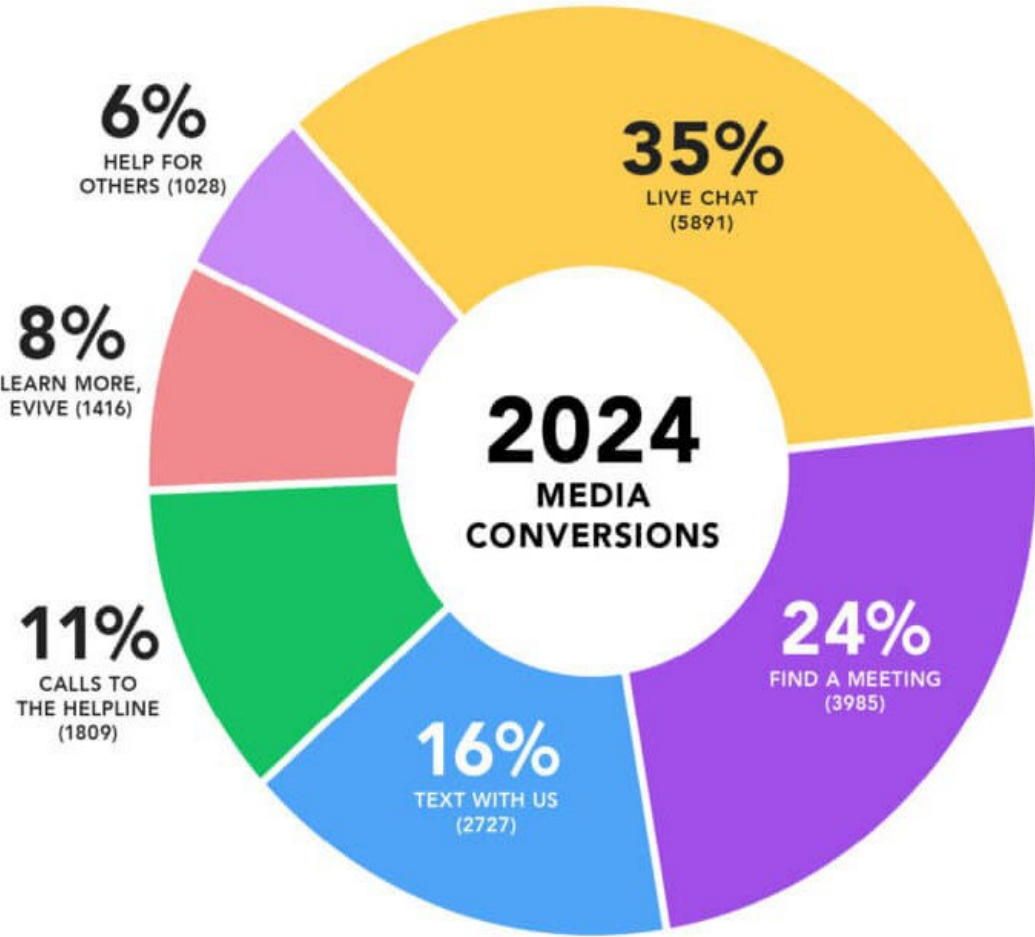
In 2024 OPGR.org had **644,000** site sessions - up over 200% from the previous year.

OPGR advertising developed by Lottery is responsible for over **95%** of all site sessions.



Marketing & Advertising Engagement and Conversions

	2024	2023
Site Sessions	644,000	285,000
Conversions	16,856	6,902
Conversion Ratio	2.61%	2.42%



Marketing & Advertising

Connecting to a Professional

Calls, Chats & Texts to the Helpline

In 2024 we began promoting connecting with a professional “just to chat”



2,135

Calls to the Helpline



404

Referrals to Treatment



123

Helpline Text



846

Helpline Live Chat

Required Training Lottery Retailer

Lottery Product Retailer Training 2024

- **4023** Lottery Product retail staff trained
- **2.4** average staff trained per retailer
- Most retailers strongly agree that promoting responsible gaming is a shared responsibility between Lottery retailers and Oregon Lottery



“ I have been selling lottery games for almost thirty years and I learned things today from this site I never knew! It was very helpful. **”**

“ I was happy to see this video, as I know, myself, I've wondered how to handle certain situations when it comes to customers & where my responsibility lies. **”**



Required Training Lottery Employee

All Lottery Employee Training 2024

- **450** Employees trained
- **Over 98%** of all Lottery employees agree that promoting Safer Play (RG) is good for business
- Staff were able to connect the training to their role as a Lottery brand ambassador



“Personally, I love the usage of "Safer Play". It doesn't sound negative and or give the stigma of having an addiction. Lottery has advanced positively on its approach to this sensitive topic with impacted Oregonians.”

“I am glad to see the name shift away from Responsible Gambling to Safer Play. This definitely highlights the activity in a more realistic way.”





2024 Key Accomplishments & New Initiatives

- Research
- New Marketing Campaigns & Content
- Role Specific Staff Training

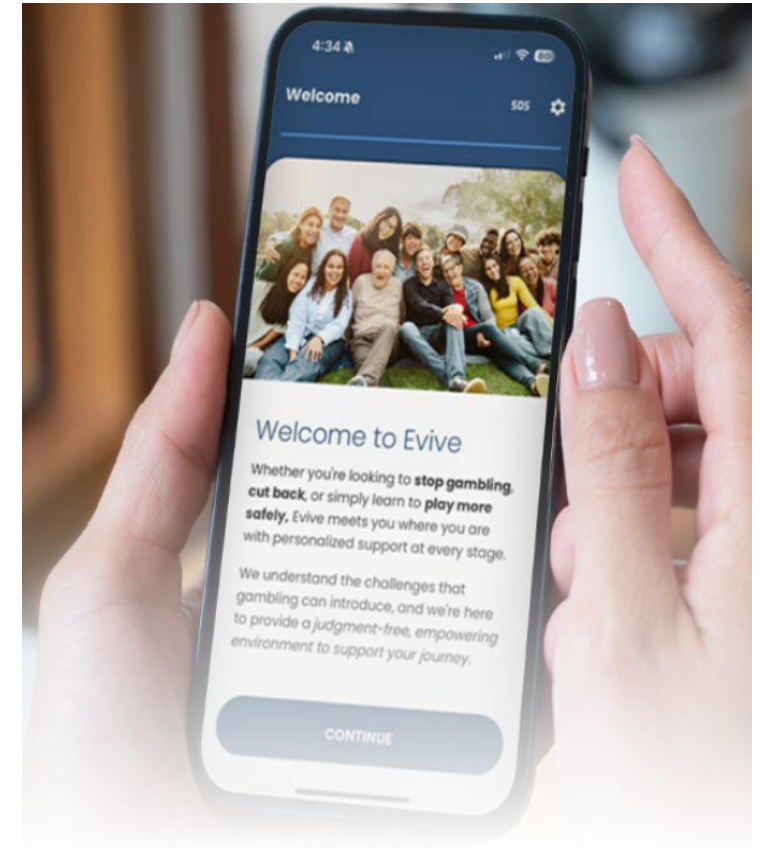
Key Accomplishments & New Initiatives

Early Support Research

- **Environmental Scans** & SME interviews
- **Digital Diaries** completed by 57 participants. Motivations for seeking help, information or help they explored, actions they took or considered
- **Online One-On-One Interviews** with 26 participants. Explored resources and services helpful to early stages of help seeking. Gave feedback on OPRG “Help with Moderation” webpage

Outcomes from the research included:

- **Piloted a gambling specific health app** EVIVE for cessation, reduction, and prevention, in partnership with OHA
- **New Content & Tools** including video’s, quizzes, and community resources
- **Affected Other (AO) Research:** A multi-phased study began in 2024 and will conclude in early 2025.



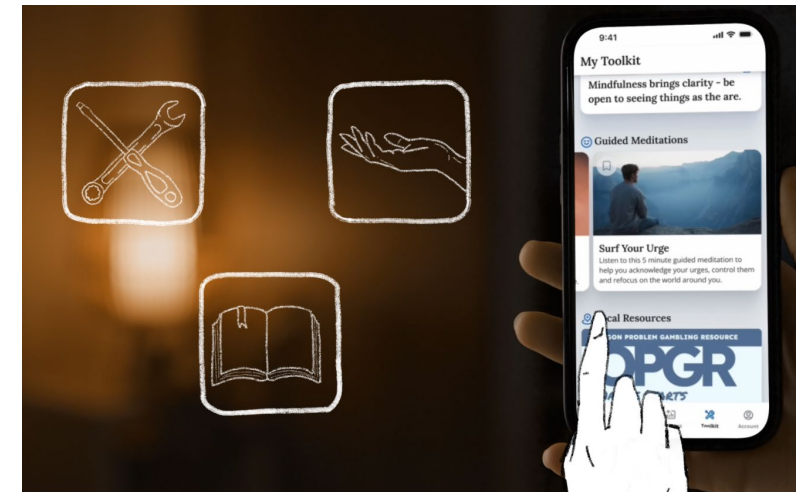
Key Accomplishments & New Initiatives

New Marketing Campaigns & Content

- **Marketing messages** designed to address barriers to help seeking and answer the big questions players have when contemplating a change.
 - [How Much is Too Much](#)
 - [Setting a Change Goal](#)
 - [When You Are Ready](#)
- **Calls to action:** EVIVE app, Safer Play Guidelines and Taking a Risk Assessment.



Click links to watch each video



Key Accomplishments & New Initiatives: Advanced Lottery Staff Training

Safer Play in the Field on the Go

This voluntary training included multiple scenarios on how to respond to retailers and players with exercises designed to increase confidence in having successful safer play conversations.

- 15-minute on-demand training module
- 183 staff were identified as having player & retailer facing roles.
- 52% voluntarily completed the module.

Self-Care & Advanced Skills Training

Self Care pilot training focused on providing skills and strategies to help staff practice self-care while promoting safer play.

- In person instructor led training
- 46 staff participated, representing 5 different functional areas
- Over 80% found the training useful and relevant to their role.



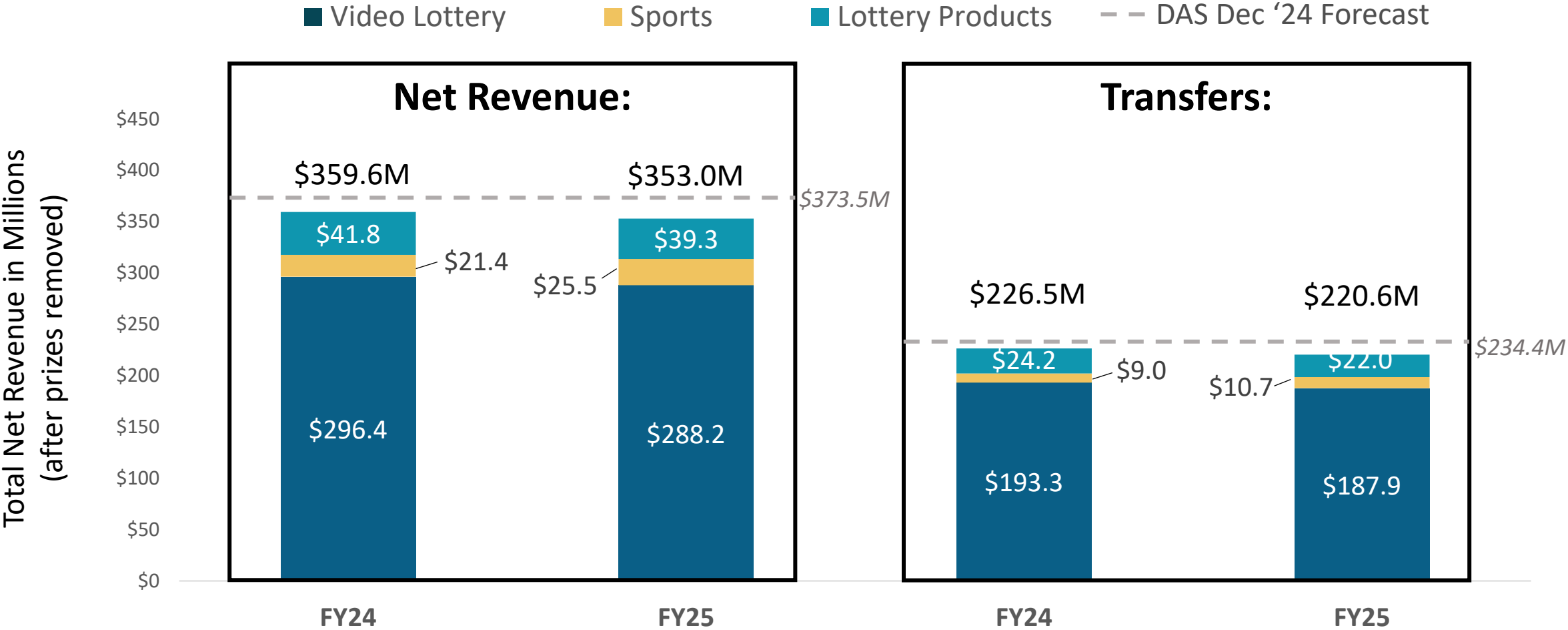


Focus in 2025

- Affected Others Research and Marketing
- New Lottery Product Retailer Training
- Culturally Relevant Retailer Training
- WLA Certification

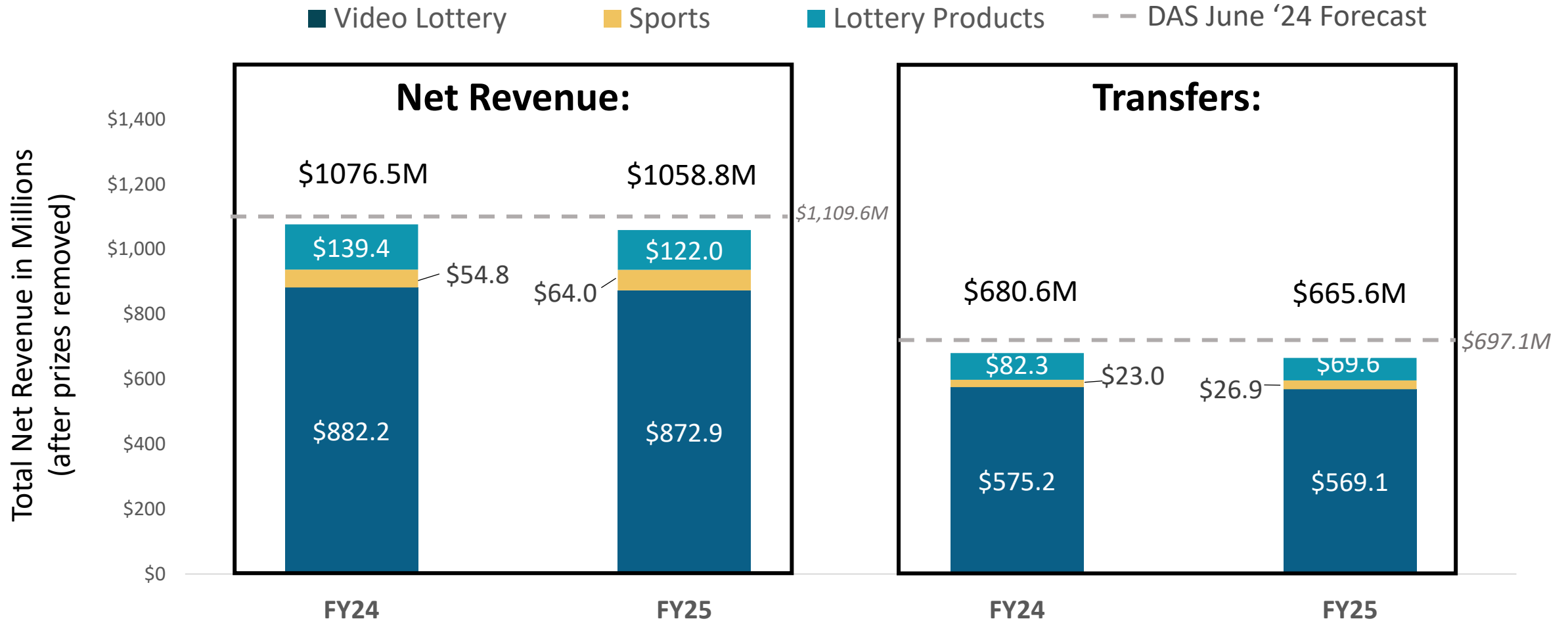
Financial Insights

Lottery Q3 Net Revenue and Transfers: FY24/FY25 Comparisons



Note: Presenting latest OEA forecast figures published at the beginning of this quarter

Lottery **Q3 YTD** Net Revenue and Transfers: FY24/FY25 Comparisons



Note: Presenting latest OEA forecast figures published at the beginning of this FY

FY25 Year-to-Date Net and Gross Revenue Across Game Portfolio

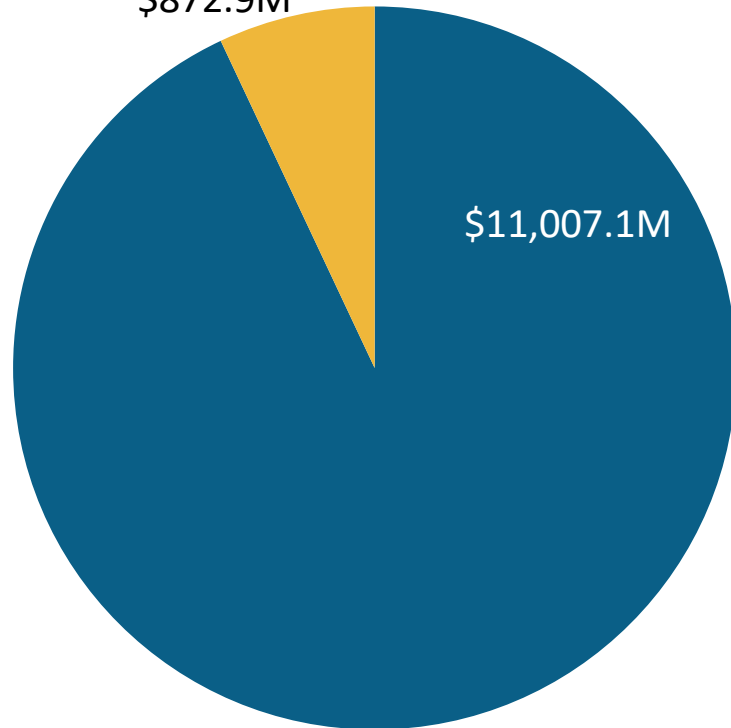
■ Prizes ■ Net Revenue (prizes removed)

Video Lottery Gross Revenue:

\$11,880.0M

\$872.9M

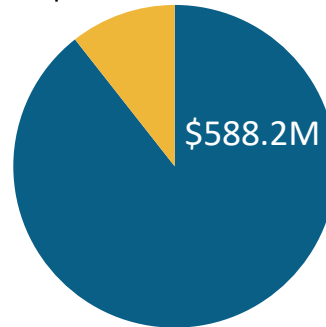
\$11,007.1M



Sports: \$652.2M

\$64.0M

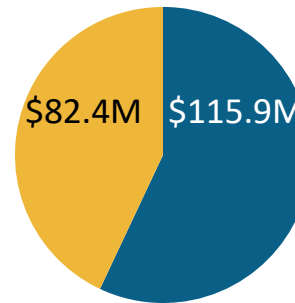
\$588.2M



Jackpot: \$198.3M

\$82.4M

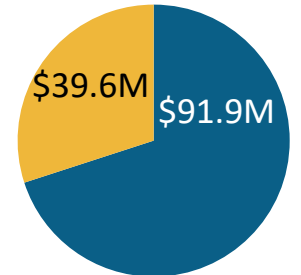
\$115.9M



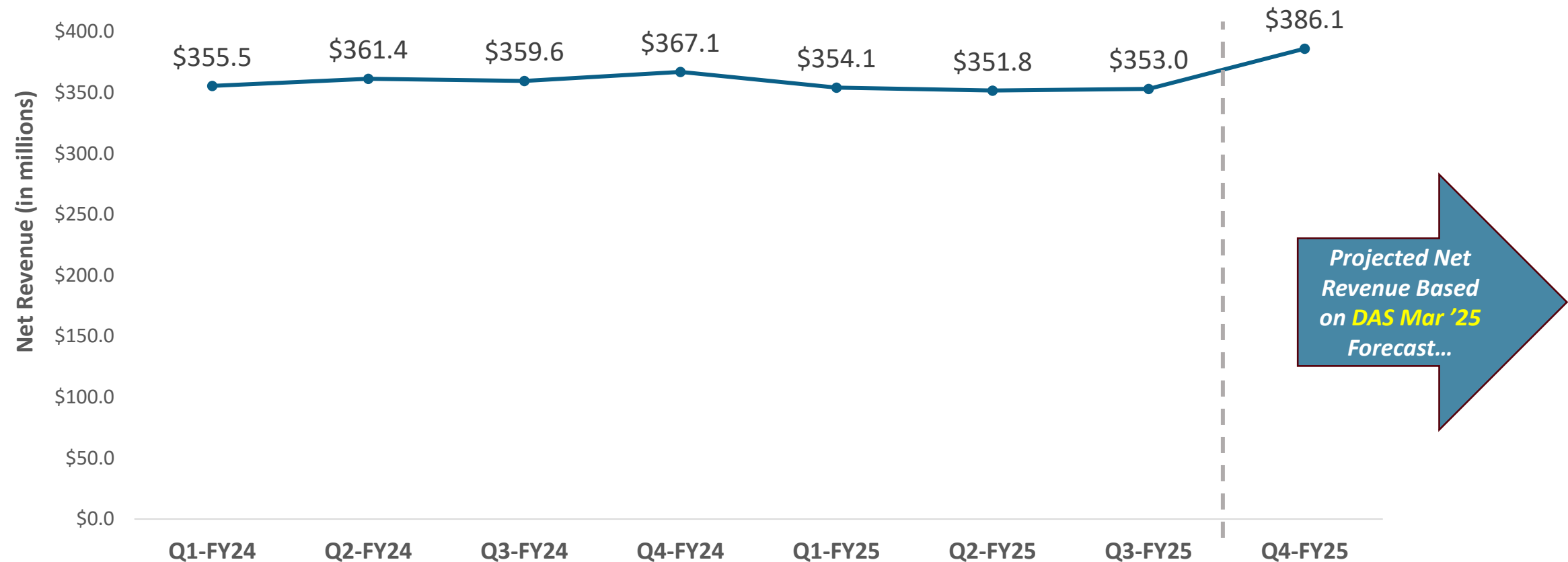
Scratch-its: \$131.5M

\$39.6M

\$91.9M



Quarterly Net Revenue Over the Biennium



LOTTERY PRODUCTS QUARTERLY UPDATE

Scratch-its Quarterly Performance

Highlights:

Year Over Year Information

\$44.7M

Sales

15.12%

Percentage Difference

\$4.56

Average Purchase Price
(BY 2025)

Top 5 Sellers – Q3



\$30 | 40th Anniversary



\$10 | Crossword Cove



\$20 | 50X



\$10 | Bunches of \$50 or \$100



\$20 | Double Strike

Jackpot Games & Keno Quarterly Performance

Highlights:

Year Over Year Information



\$17.4M

Sales

0.54%

Percentage Difference*



\$7.3M

Sales

-53.71%

Percentage Difference*



\$6M

Sales

-18.21%

Percentage Difference*



\$27M

Sales

1.24%

Percentage Difference**

*The percentage difference is influenced by the volatility of the jackpots

** The percentage difference is influenced by the volatility of the 8-spot rolling jackpot



VIDEO PRODUCTS QUARTERLY UPDATE



Video Lottery Quarterly Performance

Q3 Revenue

\$288 Million

Video Net Sales Q3 FY25

-2.77%

Percentage difference to Q3 FY24

Q3 E-20 Update:

- Replaced 298 E-20, 436 remain in the field

Q3 Launches:

- Bao Zhu Zhao Fu –Helix and Regal Riches –Crystal Dual

Q4 Launches:

- Rich Little Piggies –Kascada

FY26:

- Beaver State Bonus Bonanza
- Sierra



SPORTS BETTING PRODUCT QUARTERLY UPDATE

Sports Betting Quarterly Performance

Highlights:

\$219.2M

Dollars Wagered/Turnover\$

\$29.5M

Gross Gaming Revenue

Total Year Over Year Information By Category:

+6.8%

of Bets

+5.8%

Turnover\$

+18%

Gross Gaming Revenue

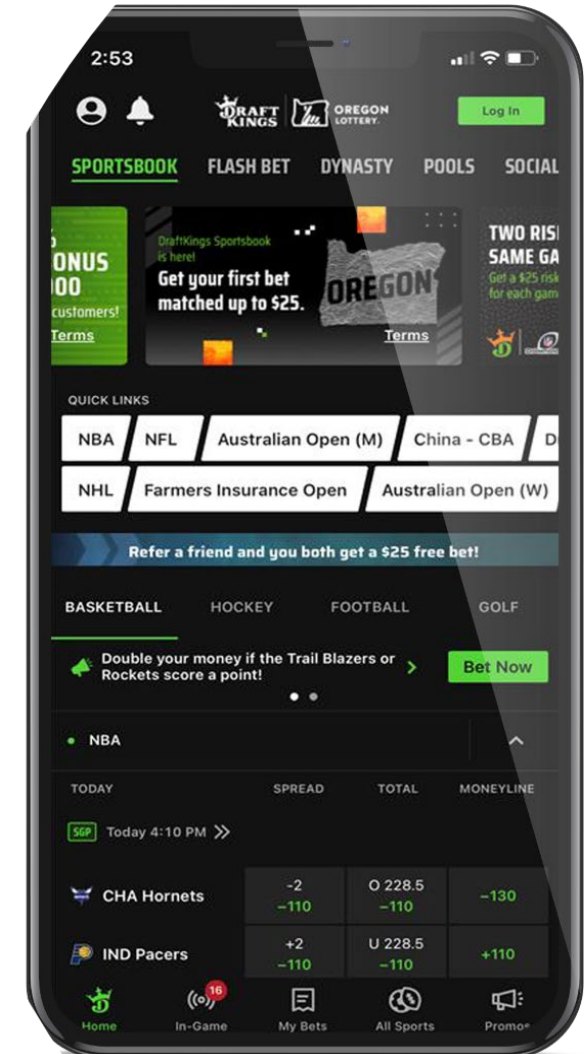
+12.2%

Unique Active Players

Primary Sports in Quarter:

Football and Basketball – made up 59% total Turnover\$ and 69% total GGR for quarter

- Super Bowl LIX(59) put up record numbers driven by over 67,000 users betting on the game, which accounted for more than 456,000 wagers.
 - Gross Gaming Revenue for the game: \$2.9M
 - Super Bowl YOY increases:
 - Turnover\$: +7.3%
 - # of Bets: +7.5%
 - GGR: +88%
 - Unique Active Customers: +8.6%





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