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MARCH/APRIL 2022

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- Interview with **Romana Dernovšek**, President and CEO of Loterija Slovenije d.d.
- Back to the Future!
Summarizing the Highlights of the WLA/EL Marketing Webinar
- The Community of Lotteries standing for Solidarity, Resistance and Support for Ukraine
- Celebrating Two Decades of the Biggest Lottery Marketing Trends
- How Data and the “Digital Mentality” are Re-Shaping Lottery’s Future

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CONTENTS

FEATURED INTERVIEWS

10 What's Your Story??

Romana Dernovšek, *President and CEO of Loterija Slovenije d.d. The European Lotteries 2nd Vice President and Supervisory Chair of the Responsible Gaming and CSR Working Group*



FEATURED ARTICLES

9 A Plea for Solidarity and Resistance
And Statements of Support for Ukraine from the World and European Lottery Associations



14 Back to the Future! Celebrating 20 Years of Lottery Marketing Success –
Summarizing the Highlights of the WLA/EL Marketing Webinar

18 How Data and the “Digital Mentality” are Re-Shaping Lottery’s Future
Executive Summary of Roundtable Discussion at PGRI Lottery Expo Nashville; Moderated by Drew Svitko, Executive Director, Pennsylvania Lottery



20 The Future is Now for Lottery Retail Modernization
Executive Summary of Roundtable Discussion at PGRI Lottery Expo Nashville; Moderated by May Scheve Reardon, Executive Director, Missouri Lottery and President of the Powerball Group



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Next

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FEATURED ARTICLES CONT.

24 **The Cutting Edge Initiatives and Strategies Driving the Breakneck Growth of Digital Lottery Even in Non-iLottery States**

*Executive Summary of Roundtable Discussion at PGRI Lottery Expo Nashville; Moderated by **Matt Strawn**, Chief Executive Officer, Iowa Lottery*



28 **Celebrating Two Decades of the Biggest Lottery Marketing Trends**

***Ray Bates** Keynote EL/WLA Marketing Webinar, former Director of the Irish National Lottery, former President of the EL, and now Honorary President of EL*



32 **The Pandemic Is Over ...**

***Simon Jaworski**, Executive Vice President U.S. Operations, Leger*

36 **Add Some Magic to Your Holiday Game Strategy**
Scientific Games



40 **Infinite Innovation: Offering a new player experience through the remarkable possibilities of IGT's Infinity Instant™ Games**



46 **Empowered Partnerships as Unique as Your Lottery**

Pollard Banknote

48 **Get on the Path to Connected Play**
IGT

50 **Trust: Why “Zero Trust” is the Future**
NetFoundry

52 **Evolution in the Gaming World**
Rick Perrone, Founder & CEO, Gameology and Tournament One

DEPARTMENTS

8 **From the Publisher** *Paul Jason*



8 **PGRI Lottery Lifetime Achievement Award 2022 Honoree**

Sue Dooley, Director of Draws & Productions, Multi-State Lottery Association (MUSL)

22 **Drawings – A Cornerstone of MUSL Services**
MUSL NEWS (Multi-State Lottery Association)

62 **Spotlight on the Leaders of the Government-Gaming Industry**

Corporate Profiles of the Producers of PGRI Smart-Tech Miami



58 **Pulse of the Industry: Synopsis of Recent Gaming Industry News**

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and Stateswoman Award

Rebecca Paul Mentorship Award

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From the Publisher

Sigal Barsdale, recently deceased professor of management at the University of Pennsylvania's Wharton School, pioneered the study of how work-place emotions shape corporate culture and, by extension, enterprise productivity and effectiveness. **Emotional content** can take the form of acts of kindness, caring, and personal interaction that we used to take for granted. Facial expressions, body language, small talk and frivolous banter communicate feelings of approval, warmth, friendship, and respect (or perhaps inadvertently, disapproval, negativity, and disrespect). One aspect of life that has been disrupted over the last couple years is the physical work-place environment where much of this emotional content is working its magic. I would submit that Dr. Barsdale's insights do not suggest that we need to return to pre-COVID 45-hours-a-week in the office work-styles (that isn't happening). Just that we want to be deliberate and cognizant of the impacts on hard-to-measure factors of production like emotional content as well as the more traditional objects of study like supply-chain logistics. As Dr. Barsdale says "Emotions aren't noise – they're data."

The post-COVID world is beginning to take shape. Some of the issues we used to think are important are being replaced by new priorities. My interview with **Romana Dernovšek**, President and CEO of the Slovenian Lottery, traverses topics that would not have been discussed in the same ways even eighteen months ago. **Ray Bates** walks us through the big-picture lottery industry trends of the last twenty years to provide a context to help us negotiate our pathway forward. Along with the executive summary of the **WLA/EL Marketing Seminar**, our European colleagues provide a truly enlightened global perspective on where we've been and where we are headed. And thank you to all of our editorial contributors for sharing the insights that help us navigate in these most interesting of times.

The theme of **Smart-Tech Miami** is "2022: Converting Momentum and Execution into Results – How are the success-drivers of today different from two years ago, and what will they look like two years from now?" Let's build the data-sets that will enable us to gain a clear picture of how business will operate going forward. The future has never been richer with opportunity for creative, resourceful, inspired leadership to make a real difference to the way we live, work, and play. See you in Miami!

Paul Jason, Publisher
Public Gaming International Magazine



**PGRI IS VERY PLEASED AND HONORED TO
ANNOUNCE THE 2022 RECIPIENT OF THE**

PGRI LOTTERY INDUSTRY LIFETIME ACHIEVEMENT AWARD

Past recipients of the Award and current industry leaders concurred that Sue Dooley's dedication and contributions to the success of the lottery industry have been enormous and her efforts appreciated and deserving of this special recognition. Join us to celebrate the presentation of this award to Ms. Dooley at 4:45 pm on Weds April 20 at the PGRI Smart-Tech Conference in Miami. Visit PublicGaming.com, click on "Awards" at the top and "Lifetime Achievement" to read about this award and the bio's of previous recipients.

Sue Dooley **Director of Draws & Productions,** **Multi-State Lottery Association (MUSL)**



As the fourth employee hired at the Multi-State Lottery Association, Sue (Bilstad) Dooley has overseen the progression of draw services at MUSL for the past 34 years. The MUSL Board of Directors hired Dooley as a Draw Manager in 1988 when the Association had seven member lotteries and one weekly drawing for Lotto*America. Since joining the Association, Dooley has administered more than 35,000 lottery drawings on behalf of MUSL, including the Powerball drawing for the world record \$1.586 billion jackpot in January 2016.

During her tenure at MUSL, Dooley has witnessed the draw processes evolve from lotteries faxing sales and winner information on paper to the implementation of secure websites and automation. MUSL's draw schedule has also grown from one weekly drawing to multiple drawings performed every day of the year. Along the way, Dooley has been instrumental in drafting draw procedures for Powerball and other Association games.

In addition to scheduled drawings, Dooley also manages MUSL's emergency draw services and has performed every remote drawing for the Association, including the Powerball drawings at the Atlanta Summer Olympics, the Kentucky Derby, and most recently, the Powerball First Millionaire of the Year drawings on Dick Clark's New Year's Rockin' Eve with Ryan Seacrest on ABC.

As the Director of Draws and Productions, Dooley is responsible for testing and maintenance of all draw-related equipment and ongoing work to improve the draw process for MUSL and its members, along with continued performance of draws. Over the past 34 years, she has worked with hundreds of lottery officials from across the country in every department: drawings, information security, accounting, marketing, and communications.

Dooley earned a bachelor's degree in elementary education from the University of Northern Iowa in 1984. Her experiences reacting to the chaotic nature of the classroom prepared Dooley for the occasional draw night challenges.

WLA AND EL STATEMENTS ON THE WAR IN UKRAINE



World Lottery Association (WLA) Statement:

The world has reacted to the unprecedented invasion of Ukraine by Russia aided by Belarus.

The United Nation's General Assembly on March 2nd overwhelmingly denounced the actions of these governments as an aggression, violation and abuse of human rights, calling for the immediate withdrawal of military forces from Ukraine's internationally recognized borders. But it is not only the quasi-totality of the world's nations who have reacted to the horrors, global industries have as well and we are no exception. WLA members have ceased taking bets on Russian and Belarusian leagues and games. The WLA supports these measures and has also taken action.

The very principles on which the WLA is founded; territorial integrity, public order and morality are being called into question. Our By-laws clearly establish that a WLA member, in order to obtain and retain its membership must not only respect these three principles but also contribute to the respect of fundamental human rights.

WLA members counted one Russian lottery JSC Technology Company "Center" as well as a Belarusian lottery CJSC Sport Pari. Consequently, the WLA Executive Committee at its March meeting, in compliance with its By-laws, suspended the membership of JSC Technology Company "Center" as well as CJSC Sport Pari with a recommendation for their expulsion to be submitted at the next WLA General Meeting in October.

This means that as of March 17th JSC Technology Company "Center" and CJSC Sport Pari have lost all the rights and privileges associated with WLA membership; notably they no longer appear on the membership list, have no representation nor voting rights and no longer have access to any and all WLA activities and events including the member only section of WLA's online presence. They have been appraised of this.

Our thoughts and prayers are with Ukraine and its people. The bravery they have shown is an example for all.

A Plea for Solidarity and Resistance

A letter from **Evgeniy Vlasenko**, Vice President, MSL Lottery Ukraine to Paul Jason

Dear Paul,

Several times we have together dreamed of a better future for Ukrainian Lottery. Today the point is not about the lottery, it is about the bloody war that Russia and Belarus are waging against my country. This is the biggest war in Europe since 1939 when WW2 started. And the style of terror is the same.

The Great Patriotic War in 1941 (when the USSR was attacked by Germany) started with air raids and bombing of Kyiv. The same is happening right now at 4 am. We are in the 21st century, and nothing changed! Why couldn't we change?

And again, mass heroism of Ukrainians as it was in 1941.

I have the evidence that shows how Russians are using armaments forbidden by conventions to fight against civilians and simple people, killing kids and their mothers, not only soldiers. They shoot into schools, into children's play yards, kindergartens, and hospitals. And during this same time, Russians are told by their TV and other media, and children are told at their school, that Ukrainians are Nazis and who need to be destroyed. They are told that Ukrainians are killing Ukrainians and so therefore Russians can kill Ukrainians.

The world needs to know truth! This should be considered a warning for the entire world as Putin can start WW3 if we do not resist. The world needs to join us in our resistance now. Thank you, Paul, for sharing this plea for solidarity and resistance with your readers. I hope they listen because we all need to stand up boldly and shoulder to shoulder to spread truth and act together to fight against this evil.

EL Statement on the war in Ukraine:

As part of the global community, the European State Lotteries and Toto Association (EL) is deeply concerned about Russia's reasonless invasion of Ukraine and the resultant threats to peace, humanity and stability.

EL and its Members condemn the war acts of Russia against Ukraine. A true value of the EL Membership is to stand united for the benefit of society. As Ukrainian society is under violent attack, EL and its Members stand united against this war, call for peace, and share their solidarity with the EL Members in Ukraine and the people of Ukraine.

The situation has compelled the EL Executive Committee to recommend EL Members to stop taking bets on Russian and Belorussian teams and leagues. Furthermore, it has made the decision to suspend the membership of its Members in Russia and Belarus.

EL and its Members call for the immediate ceasing of the war and invasion by Russia on Ukraine and to instead build peace and dialogue. EL investigates the possibilities of further humanitarian support for the victims and refugees of this war.

WHAT'S YOUR STORY??

Romana Dernovšek,

President and CEO of Loterija Slovenije d.d.

The European Lotteries 2nd Vice President and

Supervisory Chair of the Responsible Gaming and CSR Working



PGRI Introduction: Romana Dernovšek, President & CEO of the Slovenian National Lottery, has more than twenty years of experience in business leadership positions, designing strategies and organizational cultures, developing people and new businesses. She has been trained in Business & Marketing at the Management Centre Europe in Brussels, holds a degree in Organizational Sciences/Human Resources from the University of Maribor, and is a certified Supervisory Board Member of the Slovenian Directors' Association. More recently, she upgraded her executive education with a certificate in Circular Economy and Sustainability from the University of Cambridge. She is the Director of the Association of Lotteries active in territories of former Yugoslavia. She was awarded by the Manager's Association of Slovenia for her contribution to the development of female management and diversity at leadership positions. She volunteers as a guide of a rescue dog and is a licensed missing person rescuer. Romana advocates progress, cooperation, sustainability, integrity and bettering the lives of everyone connected to the lottery business.



Paul Jason: Susan and I were so looking forward to meeting you at the celebration of the 580th anniversary of the first lottery in Bruges.

R. Dernovšek: There were some cancellations like yours, but it was still a wonderful event. Three days of activities to commemorate the invention of lottery in Bruges almost 600 years ago. There are records which report in detail the circumstances which inspired the idea to hold a raffle to raise funds to support a goal shared by everyone, a lottery to support the common interest of society. The exhibition was fabulous, the festivities enjoyed by hundreds of locals as well as those of us who work directly in service to the lottery and government. We are all very grateful to Jannie Haek (CEO of Belgium Lottery) and his team for his vision to revive and

promote the history and the essence of the lotteries.

The human quest for meaning is front-and-center now. The history of lottery in Europe is so storied, and it's great that the Bruges celebration made it come alive for us like this.

R. Dernovšek: The most valuable companies in the world all have a compelling story to turn their customers into fan-clubs. To me, the mission of Lottery is a better story than any of them because ours is not just a story. Our mission to serve society, to lead in RG (Responsible Gaming) as well as Sustainability and CSR (Corporate Social Responsibility), to affiliate with the broadest range of stakeholders imaginable – which is everyone, not just shareholders – is who we really are. Many companies have great products,

but their brand is embellished with a great story that does not necessarily have much to do with the products themselves. Lottery exists for the purpose of serving society. We are truly one with our story.

That is what was so thrilling about the celebration in Bruges. The essence of Lottery has not changed in 600 years. People were and still are collecting funds for a common goal and at the same time change someone's life on the basis of pure chance. That timeless, steadfast presence is a testament to the authenticity of our mission. Our story resonates with society because it is genuine. Our product and mission are truly one with our corporate "story". The celebration of the 580th anniversary in Bruges celebrated a game that people love to play – can you think of

any product with a life-cycle of more than half a millennium? But it is Lottery's mission of service to society that has kept the brand, the products, and the business so alive and relevant for hundreds of years.

Do players value Lottery's mission to serve society and good causes? Or do people really only play for the opportunity to win a jackpot?

R. Dernovšek: I think that is a false dichotomy. All state lotteries in Europe dedicate most of their GGR to public causes. They are a key source of finance for organizations that provide services for social purposes, sports, the disabled and the disadvantaged, health, culture, heritage and more. In 2020 members of EL collected 16 billion Euros for good causes. The fact that the motivational driver is to win a jackpot does not mean that the role of Lottery as leader in CSR with a mission to serve good is not integral to the brand, the message, and the playing experience itself. Are you buying a Tesla because you like the car or

The next generation of consumer is more sophisticated, more capable of recognizing authenticity and truth and seeing through marketing hype, and even brand 'story'.

because you affiliate with the values of the community of Tesla drivers? It's both, of course. You wouldn't buy it if it wasn't a good car; but the fact that it is a good car isn't really what motivated you to buy it. There are lots of good cars. The Tesla driver is buying into the shared experience of affiliating with millions of other Tesla owners with like-minded values. Apple makes great consumer products and Starbucks makes great coffee, but their success is based on a consumer connection that goes deeper than the specific attributes of the product. These companies combine great products with great stories.

Like you said, people are looking for meaning, perhaps now more than ever.

Successful companies know this and that is why they stretch to integrate a compelling story into their brand. And now social media has elevated the importance of meaning, purpose, and affiliation. People share their brand preferences, their likes and dislikes on all manner of topics and products, with

everyone. We want others to know who we are and what we stand for. We want to be a part of a like-minded community.

Behavioral economists have shown how our decision-making is driven by a multitude of factors, very few of which are "rational". Sure, the Tesla is a good car, the Apple a good computer, Starbucks a good cup of coffee. But the real buying impulse is driven by other factors, like the values, ethos, community that the products represent. And unlike these other consumer products, these values are already baked right into the Lottery playing experience. Or at least they should be. We need to appreciate the value that our "why"



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represents to the modern consumer, and find ways to make it come alive for the players, to make it be a part of the player experience.

And from an emotional point of view, who doesn't want to play the lottery? So, how can we connect the dots such that players affiliate with all the values that Lottery represents, causing them to feel good about playing the games, feel good about being a part of a community of millions who play the lottery?

R. Dernovšek: The key to connecting the players with all the values that Lottery represents is to unlock the potential of all of us who work within this industry. We need to start with ourselves, engaging all employees and lottery professionals to fully embrace the worthiness of our mission. It's not just about being good ambassadors for lottery. The next generation of consumer is more sophisticated, more capable of recognizing authenticity and truth and seeing through marketing hype, and even brand "story". We need to be the ones who genuinely live our cause. It is that strength of purpose and conviction that will inform the way we do business, the way we develop games and promotions and brand messaging. It informs all aspects of operations too – logistics, distribution, fulfillment, etc. – in ways that may not seem to directly shape our brand, but do in fact shine through to our audience. And insofar as CSR and support of good causes is in our own DNA, that will translate naturally into the work we do to produce the best player experience.

It's not enough to have a well-crafted 4-sentence company mission statement?

R. Dernovšek: Well, you need to start somewhere but effecting material changes in the culture is definitely a lot more than a nicely-worded mission statement. It's about everyone working together to inspire one another to truly embrace the mission with all their hearts and minds to unlock the potential of the organization to become much more than the sum of its parts. The culture supports everyone in their quest to be the best they can be. These aspirational goals may be easier said than done. But this kind of organizational cohesion is galvanizing successful enterprises all around the world to reimagine what can

be accomplished and achieve so much more. It may in fact start with an inspiring and on-point mission statement, which lotteries already have. Translating that into a cultural reality - our values, our ethics, our principles and high standards - that we live up to every day produces genuine value for the players and stakeholders. Collecting funds for public good is our cause. But that still only tells us where our money goes. It tells us nothing about how we came to earn that money in the first place. Was it by taking care of our players' wellbeing? Was it by taking care of our employees? The environment? Our impact on society as such? Was it by doing business with integrity? Demonstrating all of those is showing our values and our dedication. That is what builds communities. Let's work together to make lottery represent something positive and meaningful for every player and non-player.

People value being a part of something they can believe in, an enterprise that not only shares their values but is invested in changing the world for the better.

How have your studies at the University of Cambridge on circular economy and sustainability shaped your perspective as chair of the EL Responsible Gaming and CSR Working Group?

R. Dernovšek: Compared to the linear economy which uses natural resources for mass production and disposes these products after a single use, circular economy is a bigger picture philosophy that sees everything we do in an endless 360-degree cycle. It's a systemic shift driven by design, aimed to keep products and materials in use for as much as and for as long as possible, eliminate waste and pollution and regenerate nature. It is also an economic system for business to be more efficient, more resilient, bringing new business opportunities.

Instead of focusing on traditional calculus, circular economy and sustainability interventions can generate revenues, reduce costs, grow profit, improve cash-flow and

financial ratios, grow value of our brand and improve share price.

Yes, sustainability is a call to action to protect the planet and ensure societal inclusiveness and prosperity for all stakeholders, but it is at the same time a great vehicle of progress for the companies. It's a business imperative.

Lotteries are no exception. Besides caring about wellbeing of people in the working place and impacting the environment, our key externality to overcome is preventing addiction. By protecting minors and preventing excessive play we protect peoples' health.

All this deliver meaning to the talented employees within our own corporation. People value being a part of something they can believe in, an enterprise that not only shares their values but is invested in changing the world for the better. Sustainability includes all aspects of design, including the organic integration of employee morale and motivation with the value of the products and service and the mission and purpose of the enterprise.

Are consumers willing to pay more to support brands with a stronger commitment to CSR?

R. Dernovšek: Yes.

Consumers have indicated that they are willing to pay more to buy brands that reflect their values. And recent research indicates that the next generation of consumers is more willing than previous generations to truly walk-the-talk. Not only do consumers say they are willing to pay more, their commitment to supporting CSR is reflected in their actual buying behaviour – they are paying more to support a good cause. Patagonia, Veja, Tesla are companies whose products cost more than other comparable brands.

It is not easy, though, to build a story around your brand that is authentic and resonates with your audience. And it takes time. Lottery's brand is authentic – service to society, integrity, and fun is actually who we are. Lottery does resonate with the consumers – I think that has been demonstrated over the last twenty months of disruption especially. And we have been building our brand and our reputation for 580 years.

The thing is – sustainable design does not need to cost more. Just as commitment to quality may appear at first to increase costs, but the net long-term effect of doing things right is a reduction in costs as well as an increase in value to the consumer and sustainability for the benefit of all.

And the next generations of consumer are more sophisticated when it comes to discerning authenticity. There is no alternative than to live and breathe your dedication to sustainability. Of course, it needs to be thoughtfully integrated into the brand and even marketing communications. But generation Z and beyond are very unreceptive to anything that does not ring true. And their source of information and guidance is not messaging from the brand, it's communication with each other, which flows in non-stop unfiltered torrents on social media. So there is no alternative to making it real.

Lastly, while we do want to do the research and base decisions on evidence and data, we also need to realize that we will never have the whole picture. Decisions are always made with incomplete information. Industry leaders must have the vision and fortitude to make those decisions and forge ahead with confidence.

It occurs to me, though, that we should emphasize that everyone is in a position to lead, to take ownership of their own actions and ability to effect change and positive results. You don't need to be the loudest person in the room to be an effective leader. We are all working together on this, engaged in the business of making the world be a better place.

Over the last twenty-plus years, the EU Commission has chipped away at the authority of member states to decide how they're going to regulate gambling and lottery. Recently though, have they become more respectful of member states' rights to decide the best regulatory framework for their own country?

R. Dernovšek: I believe European Court of Justice (ECJ) has taken fewer "infringement" cases in which operators claim the government regulations are in violation of EU laws. The subsidiarity principle (i.e. authority to determine some matters of policy, like regulations of gambling and lottery, should reside with the member-state, not with the EU) is the position of the EU Commission and the ECJ. There needs to be a consistent application of the laws and regulations and they do need to comply with EU laws. But member-states

are entitled to a high degree of autonomy to ensure that regulations are consistent with their own gaming culture, public policy objectives, and preservation of Public Order. The balance between that and the principles of free-market competition and open borders was leaning too much the other way over the last twenty years and we hope it is leaning back in the direction of respecting the authority of member-states to determine the regulatory policy that is best for their citizens. Member-states have the right to manage the social costs of gambling and lottery and the manner in which the profits are channeled to help society as opposed to enriching private shareholders. The political and economic cultures of the EU are extremely diverse and should not be expected to all operate in the same way. The Slovenia gaming culture and market-place is nothing like that of the U.K or Denmark. Lottery or sports betting or gambling is not "just business" and shouldn't be treated as such. It's an economic activity with a particular nature, that should put people first and at the same time provide means for public good.

RG, CSR, and integrity are the highest values for members of the EL and WLA. A member state should reserve the right

Continued on page 55



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BACK TO THE FUTURE!

CELEBRATING 20 YEARS OF LOTTERY MARKETING SUCCESS



With many decades of lottery marketing behind us, EL and WLA brought together 370 participants to celebrate 20 years of their annual iconic marketing event, normally held in London and seen as the opening of the new lottery year. **Moderated by EL Secretary General, Arjan van't Veer and WLA Executive Director, Luca Esposito**, for the second year in a row the event had to take place online.

EL President Hansjörg Höltkemeier and WLA President Rebecca Paul opened the webinar highlighting how marketing has evolved over the last two decades. Technological advancements, innovation, behavioural change, responsible gaming and sustainability have all had a fundamental influence on marketing trends. During the pandemic, we can even say there has been a revolution in marketing. Partial or full closures of retail outlets and national lockdowns all had differentiating effects on the game verticals. Lotteries put contingency measures in place and found innovation solutions to continue regulated services to their players. The online channel

was further developed as a safe alternative with popularity continuing to grow in the post pandemic era. Marketing strategies have continued to be adapted to support society both financially and non-financially. Opportunities and challenges of course remain but the past years have shown the versatility, flexibility, and efficiency of national lotteries.

TWO DECADES OF THE BIGGEST LOTTERY MARKETING TRENDS

Ray Bates, Honorary EL President outlined a shift in marketing trends during his Keynote speech. From Amazon and Google in the late 90s to Facebook, LinkedIn, Twitter, Youtube and more recently Instagram, Snapchat and TikTok, the development of social media platforms has played a role in changing advertising and branding, also in the lottery sector. The attention span of individuals is much less and nowadays society and culture often dictate what "matters" and happens in branding.

As "Cultural Branding" depicts a lifestyle

that is culturally relevant to the brand audience, it has become more relevant, especially during the recent crisis where society falls back on "culture" to influence decisions. According to Ray, *"in 20 years, lotteries have shown resilience, innovation, and creativity, but within constraints of regulation, responsible gaming for the good of society. In the words of Leonardo da Vinci, lottery is like Art. Art lives from constraints and dies from freedom"*.

POST PANDEMIC ERA: THE GREAT MARKETING OUTLOOK 2022

The webinar was enriched by discussions with CEOs from lotteries and suppliers. **Moderated by Ray Bates**, the panel with lottery CEOs - **Gretchen Corbin, Georgia Lottery, USA and NASPL President; Romana Dernovsek, Loterija Slovenije, d.d., Slovenia; Hansjörg Höltkemeier, Deutsche Klassenlotterie Berlin and EL President, Germany; Mario Musa, Hrvatska Lutrija d.o.o., Croatia, and Francesco Parola, IGT Lottery S.p.A., Italy** – discussed interesting learnings





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from the pandemic. All CEOs agreed that their lotteries have become faster in their operations, more flexible, efficient, and motivated. Company culture has also become more important, for example with employees learning to work in different ways, retailers adapting to the new situation and internal communications evolving.

Regarding the growth of online play, this was not seen as an unnatural change, and it is agreed that additional players recruited to online play during the pandemic would stay. Although there will be players (generally older) who will revert back to their usual “habits” for example returning to their usual retail outlines, online play will continue to grow in the post-pandemic era. Ray Bates concluded the discussion with how retail “omnichannel” can be criticised as a term, but digitalisation of retail is a reality and would continue to expand. The panel agreed that lotteries must provide more interesting support at retail, and responsible gaming would remain high on the agenda.

Moderated by Rebecca Paul as WLA President, the panel with Suppliers’ Executives including **Jay Gendron, Chief Operation Officer Lottery, IGT, USA; Patrick McHugh, Executive Vice President & Group Chief Executive Lottery, Scientific Games, USA; and Doug Pollard, Chief Executive Officer, Pollard Banknote, Canada**, discussed actions being taken to ensure a sustainable industry that protects the environment and grows business responsibly, such as receiving WLA certification, adhering to the UN Global Compact, working on social programmes with employees and customers worldwide, and taking measures to reduce greenhouse gas emissions.

It was agreed that collaboration between suppliers and lotteries to consistently advocate the industry’s responsible operations and support of countless good causes around the world will help regulators differentiate lotteries from other gaming operations when legislating, and strengthen the fight against illegal betting operators present in many jurisdictions globally.

With the overall trend of digitalisation and the shift from broadcast advertising to one-to-one messaging, the panel highlighted the need for lotteries to engage closely and effectively with players to deliver the products players want and gain their loyalty. They noted the need to maintain point of sale advertising for retail, which is still very important, given the significant growth of instant ticket sales in many markets. They also reminded that they could help lotteries solve issues. The development of

innovative solutions, such as an app for cashless payment of winnings, speeding up payments and addressing the issue that retailers have less cash on hand than in the past.

FROM TV DRAWS, DIGITAL MARKETING TO RETAIL AND THE CUSTOMER JOURNEY

The event brought together diverse and inspiring marketing campaigns to share with participants. During the three consecutive sessions, lottery professionals and experts from different national markets around the world, reflected on important marketing themes such as TV game shows and live draws, advertising, sustainability, and digitalisation as well as looking ahead to future marketing trends, challenges, and opportunities.

El Gordo, the traditional annual Christmas draw by SELAE in Spain since 1815, tells a story all about the values of (Spanish) society – humanity, solidarity, and generosity. Presented by **María Núñez, Journalist & Press and Communications Secretary at SELAE**, El Gordo conveys heart-felt beauty to help us understand the underlying dynamics that make the game so powerful and uniquely important. The marketing is extremely clever as it focuses on the importance of sharing as the essence of the “brand” as well as the power of emotion, family, friends, togetherness, hope, and love.

Imme Rog, Chief Marketing Officer, Novamedia/Postcode Lotteries highlighted the importance of television to reach players. As the Postcode Lottery is 100 percent subscription-based (without points of sale) a sense of “disruption” in the marketing strategy is often felt. Television is one of the most visible and fun ways to reach out to players, reinforced by the well know hosts and ambassadors.

Regarding retail, **Roger Soleim, Head of Omnichannel distribution at Norsk Tipping**, focused on the state of play in Norway. Due to a rapid change in the market, there has been an increasing trend from retail to mobile. 90 percent of customers are already registered through digital channels which means Norsk Tipping digitalises the customer onboarding journey in retail as well. Concepts are tailored to different audiences and for different “arenas”. For example, the retailer receives a commission for a short time period if the customer plays through the digital platforms after registering with the



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RAY BATES

Continued on page 51



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EXECUTIVE SUMMARY OF ROUNDTABLE DISCUSSION
AT PGRI LOTTERY EXPO NASHVILLE

DATA AND THE “DIGITAL MENTALITY” ARE RE-SHAPING LOTTERY’S FUTURE

Long before offering eInstant and eDraw games online, the Pennsylvania Lottery was building a robust digital presence. A player’s club that collected data, including player locations and demographics, rewards for frequent play and ticket entry into an online site, and free-to-play games associated with key licensed games – these were all part of the lottery’s entry into the digital realm. So even before iLottery, the PA lottery was able to collect valuable data and use it to market to its players.

So, what better person to lead a panel titled “The Digital Mentality of the Data-Driven Future” than Pennsylvania Lottery Director Drew Svitko. Drew and his staff understand the power of data and how lotteries should use it. It has certainly worked for them, especially now that the lottery is fully immerse in the iLottery world.

“Let’s be honest, data is driving all of our businesses,” he said. “And look at the huge growth of companies like Facebook, Amazon, Netflix, YouTube, companies which are so effective at harnessing and applying the power of data. Even though not all lotteries are selling online, most are collecting data. One big question is ‘how do we decide which data is the most important to make business decisions?’”

Helping guide the discussion through this, and many other critical data-specific topics, was a panel of veteran lottery experts:

Trevor Allison, Marketing Manager, INTRALOT

Richard Bateson, Chief Commercial Officer, JUMBO Interactive

Andrew Crowe, SVP Business Development, Sightline Payments

Merv Huber, Senior Director, Digital Growth Marketing, Scientific Games

Brian Rockey, Director, Nebraska Lottery

“If we can optimize UX and UI in the digital space, there’s no reason we can’t take that same information and transfer it to the traditional lottery space.”

Merv Huber works directly with the PA Lottery on its digital lottery programs. Merv said you can never have too much data. “It’s all about taking stock of your goals and finding which data points are going to best help you achieve your goals,” he said. “What’s important is that you have the tools to actually make those data points actionable and the right experts who know how to use the data and tools together

to achieve those goals. For example, in Pennsylvania, we use predictive analytics to score players on their likelihood of taking certain actions. And we customize these analytics so we can send personalized messages to these players. What percent likely is a player to take a certain action based on their recent frequency of play and past winning experiences? We use the data collected from dozens of attributes and put them to good use in our CRM program.”

For INTRALOT, **Trevor Allison** takes the mountain of data he is provided and sifts through it for what is most valuable to his efforts to optimize the player experience. “Every morning I wake up with a brand new set of data that’s relevant to our customers and what it is that they’re doing,” he said. “We’re constantly testing to determine which data is best. We then use this data to send emails and push notifications through our Sales Force marketing tools. This allows us to control what messages we should send, what

promotional message will generate more opens, higher click rates, etc. AI and predictive analytics is transforming our ability to convert raw data into useful business intelligence.”

Sightline Payments, which works with lotteries on cashless payment and mobile solutions, collects data based on player purchases. **Andrew Crowe** explains how

Continued on page 56



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EXECUTIVE SUMMARY OF ROUNDTABLE DISCUSSION
AT PGRI LOTTERY EXPO NASHVILLE

THE FUTURE IS NOW FOR LOTTERY RETAIL MODERNIZATION

Another holiday of record-breaking online sales – both for home delivery and in-store pick-up - is further evidence of a trend that has been growing for a number of years: Consumers want the purchasing process to be easy and quick. And what is true for shoppers of clothes and groceries is also true for lottery purchasers. While the majority of lotteries continue to discuss an iLottery future, the traditional in-store retail experience is undergoing massive changes that have improved the shopping experience for players. And more advancements are on the way.

Missouri Executive Director and president of the Powerball Group **May Scheve Reardon** moderated a panel discussion which delved into the various aspects of the modernization of in-store retail sales of lottery products. She was joined by:

Max Goldstein, Vice President Sales - Americas, Carmanah Signs

Gary Grief, Executive Director, Texas Lottery

Matt Isaac, Senior Director, Lottery Marketing, Pollard Banknote

Terry Presta, Head of Business, North America, Abacus Solutions

Sara Taylor, Executive Director, Hoosier Lottery and President, MUSL

As a lottery director and president of MUSL, **Sarah Taylor** is in a unique position to comment on lottery activity

throughout the United States. She said that the economic and human resource shortages facing all businesses are also impacting lottery retailers. “Hiring is difficult. Both starting pay and gas prices are going up,” she said. “When we have a few good jackpot runs some retailers feel they don’t have the staff to help the people in line to purchase tickets. Retailers are looking to us to help solve the problem by making the in-store lottery experience more efficient. In Indiana, we equip our sales team with information to help the retail locations work more efficiently, perhaps by offering self-service. We see services like Door Dash and Instacart providing a great service to businesses. As more retailers go to ‘buy online and pick up in store,’ should we learn and engage how lottery can tap into this new channel of delivery services? There is a lot for us to consider and figure out.”

scratch ticket products,” he said. “That actually helps us be very focused on how we increase the sales of those two revenue drivers. We recognize that every retailer is different, and each has a different footprint for lottery. We need to provide solutions to apply to each situation. We are working with vendors on different initiatives, such as the Quick Ticket solution with InComm which is a gift card type product for Powerball and Mega Millions.

“At HEB Grocery we have integrated with IGT’s central system to sell the multi-state games on the checkout receipt. And we have partnerships with Blackhawk and Abacus to develop in-lane solutions with other large retail chains. This allows us to go from one point-of-sales location in a store to multiple POS’s in a single store, some even exceeding twenty or twenty-five. I really think that in-lane solutions are the

“iGaming and sports wagering have changed how customers, retailers and legislators perceive the gaming landscape.”

Gary Grief agreed with Sarah that the retailers are looking to their suppliers and commercial partners for assistance. And that’s what his team in Texas is providing. “As we can’t do iLottery, sports betting or keno, our big focus is in-lane, and our sandbox is limited to traditional draw and

holy grail for traditional lottery products. It will be our main driver of growth.”

As the former owner of a chain of convenience stores and former Executive Director of the Kansas Lottery, Terry Presta understands better than most the pressures faced by lottery retailers and how the industry

Continued on page 54

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DRAWINGS – A CORNERSTONE OF MUSL SERVICES

In the ever-changing landscape of the lottery industry, there is one core function that has remained constant at the Multi-State Lottery Association, from its establishment to present day – the drawings. With product launches, expansions and promotions, what’s new and upcoming has often been highlighted, but for MUSL, the draws and their integrity are central to the very being of the Association and the foundation for all other roles and services.

“Without the drawings, the MUSL we know today, simply wouldn’t exist,” said J. Bret Toyne, MUSL Executive Director. “Drawings are so ingrained in the fiber of the Association that everything else plays a supporting role.”

Sue Dooley, MUSL Director of Draws and Productions, has overseen the progression of MUSL’s draw services since the Association’s first multi-jurisdictional game, Lotto*America, in 1988. At the time, the game’s once-a-week drawing was held in a studio in downtown Des Moines, Iowa with limited technology. The process included faxing all sales and winner information to MUSL, which required auditors at each lottery reporting site for every draw.

“If you can imagine, we had to manually enter all data, then double-check that data with each of the lottery draw staff over the phone, so we’d typically complete the draw process around 1:30 am CT,” said Dooley. “We now have the technology and automation that allows us to administer multiple drawings on any given night.”



Meghann Emery, Sue Dooley, and Michael Angersola

Since that first drawing in 1988, MUSL has gone on to perform more than 35-thousand lottery drawings. This fiscal year, the Association is on track to complete nearly 1,500 drawings – up 51% since Fiscal Year 2021. The increase is in large part due to the newly introduced Monday night Powerball drawings, the Double Play add-on feature, and MUSL providing daily draw services for the Lucky for Life game.

Remarkably, MUSL’s draw team has kept up seamlessly with the demand for additional draw services. The draw team consists of nine staff members; three based at MUSL’s new highly-secured draw facility in Johnston, Iowa and the remaining six in Tallahassee where Powerball®, Double Play® and Lotto America® drawings are held at the Florida Lottery draw studio.

In addition to its scheduled multi-jurisdictional drawings, MUSL also

offers draw services to its member lotteries for their in-state draw-based games. The services include performing draws for state games on a regular, ongoing basis; one-time draw events, such as holiday raffles; and the ability to act as a disaster recovery location. MUSL currently serves as an emergency backup draw provider for 17 member lotteries. Historically, the Association has been called upon to be an emergency backup during severe weather events, natural disasters, and even lottery office closures caused by the pandemic.

“Protecting the health of our draw staff has been one of the top priorities over the past two years,” Toyne noted. “It was absolutely critical that we were able to provide a reliable emergency draw service for our members.”

There is no additional cost to member lotteries for emergency draw services

aside from auditor fees, which are accrued when a drawing is performed and the cost of programming and certification of lottery games onto MUSL’s Origin DDS systems from Smartplay. A primary benefit for members is the cost-effectiveness of the service since the programming cost is split between all participating lotteries. MUSL staff also work with each member lottery to finalize draw procedures as they pertain to their respective jurisdictions.

The MUSL draw team is now working to build more lines of communication with draw staff at member and licensee lotteries. Beginning this spring, the MUSL draw team will host quarterly information sessions, specifically for draw staff, on the draw process and other relevant topics. The Association already hosts working groups for other lottery functions, such as information security, legal and marketing, but saw value in providing meetings tailored for draw staff.

So far, there has been an overwhelming response from lottery draw staff to participate in the sessions. A preliminary survey revealed topics for discussion include lockdown and lockdown alternatives, as well as further explanation on some draw procedures and timing differences between games on draw nights. While education will be a top priority for the sessions, MUSL is really looking to build a dialogue with draw officials across the country.

“We hope to foster conversations that will allow us to gather feedback that we can use to evolve and strengthen our draw process,” Dooley said. ■

Speed and convenience has become the standard expectations for consumers, who want a fluid, integrated experience for all their retail needs.

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EXECUTIVE SUMMARY OF ROUNDTABLE DISCUSSION
AT PGRI LOTTERY EXPO NASHVILLE

DIGITAL LOTTERY GROWTH IS SKYROCKETING – EVEN IN NON-iLOTTERY STATES

INDUSTRY EXPERTS TAKE A LOOK AT WHAT IS FUELING THE SURGE

With so much attention paid to the current and future growth of iLottery among U.S. lotteries, an outside observer might surmise that online sales of lottery products has swept the country. The truth is that the majority of lotteries are not selling via digital avenues. How all jurisdictions, including non-iLottery states, can optimize their online presence was the topic of a panel at the PGRI conference in Nashville in late 2021: The Cutting Edge Initiatives and Strategies Driving the Breakneck Growth of Digital Lottery Even in Non-iLottery States.

Iowa Lottery Chief Executive Officer **Matt Strawn** tackled this timely topic, joined by a panel of industry experts:

Shannon DeHaven, Vice President, Digital Engagement, Pollard Banknote

Lynne Roiter, former President and chief Executive Officer of Lottery Quebec, and current Secretary General of the World Lottery Association

Darrell Smith, Vice President, Sales and Marketing, Smartplay

Rebecca Swindle, Vice President of Strategic Development, Intralot

Matt began the session by pointing out that Iowa is one of the jurisdictions that is limited by law in providing online offerings. So this topic hits close to home for him.

“To me, the answer to the question ‘what does online lottery encompass’ is that it

encompasses a universe far beyond merely selling products online,” he said. “I’m one of those states that doesn’t have an iLottery portfolio – not traditional instants that have moved online, not mobile draw. And this is not something our policymakers seem interested in addressing in the immediate future. But that hasn’t prevented us from taking an aggressive approach in the digital space in nearly every aspect of our operations. We are building for a day that perhaps policymakers will want to give the Iowa Lottery an online portfolio of products to sell.”

The lottery at which **Lynne Roiter** worked for more than 35 years is the polar opposite of Iowa. “Our vision of the digital world is that as it exists and used by consumers for wide range of activities the lottery should be a part of that,” she said. “Our players and potential players should be able to access to our games on line in a safe legal environment. The lottery should be an integral part of our customers’ online lives. We should allow players to transfer what they are doing at retail to online, make lottery available at times when retail is not available. Basically, this is a mirror of the banking industry , every jurisdiction has online banking allowing its customers access to their funds and information at any time and any place. Lottery should be provided the same access providing responsible gaming controls.”

Picking up on Lynne’s point about customer access, Darrell Smith said that the move to online is all about ease of use for customers. Smartplay develops, produces and operates drawing machines and other winning

number solutions for lotteries, and has been deeply involved with online solutions for its customers. “A term used frequently in digital marketing and sales is ‘frictionless experience’ and that is what is needed for lotteries,” he said. “When you reduce the friction for customers, you make everything faster, not just sales but also the conversion to online. It’s only natural that adding a robust digital experience will increase the customer base and, in the end, improve the bottom line. For lotteries that can’t sell online, an engaging digital world only enhances what they are doing at retail.”

For **Rebecca Swindle**, the information that is curated from offering a digital player experience is invaluable. “Raw player data alone is critical. However, we’ve got to look beyond just the stats and begin to understand the context - the decisions and behaviors of our players and the context in which their choices are made. We can think beyond just acquisition, just transaction and focus on the entire player journey with lottery brands and products.”

Shannon DeHaven has been involved with digital lotteries for more than 10 years, first with the Michigan Lottery’s iLottery program and now with Pollard Banknote. She said that while the Holy Grail is offering online sales, creating a digital ecosystem for any online scenario is critical. “The biggest piece of defining a digital lottery is to have an overall digital mindset and focus on the technology you can provide to players,” she said. “Are you using technology that allows future growth, whether that is online sales or

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simply an engaging experience? As Rebecca mentioned, the data you are provided is critical. Are you using that data to make relevant, quick decisions and pivot when necessary? Lotteries need to have a system and architecture in place that supports a complete digital mindset. If lotteries just take small steps, those small steps add up and you can just build from there.”

NO iLOTTERY, NO PROBLEM

With the majority of lotteries unable to offer the online purchase of lottery products, other digital avenues need to be explored. In Iowa, **Matt Strawn** has challenged his colleagues to do just that – create ways to use the Iowa Lottery’s online footprint to expand player interaction and data collection.

“While we can’t sell products online our VIP Club is one of our greatest assets,” he said. “We have more than 123,000 members which is over five percent of every person of lottery playing age in the state. This has afforded us the ability to be more efficient and frequent in our communication. So I say to my fellow lottery colleagues who can’t sell online: ‘let’s focus on what we can do’ because often it can be incredibly impactful to the player base and revenue growth.”

Rebecca added that lotteries now have the opportunity to redefine what a “traditional” lottery retailer looks like. “Now that so many of our retailers have an online presence, there really is no longer a traditional retailer,” she said. “Lotteries can work with the retailers to tap into their digital presence to expand the player base and achieve the cross-channel integration of digital and physical retail. This is known as unified commerce, where the customer is at the center of the retail experience and the product and merchandising are all tied into the same ecosystem. This approach can provide lotteries with a view of store visits and purchasing patterns and allows us them create online content and offers for each individual player digitally physically.”

Even without online sales, a digital presence creates reams of statistics. **Shannon** said lotteries then have to decide what to do with that data. “Are the rights tools in place to successfully turn the data into actions?” she said. “VIP Clubs are a critical piece of the online puzzle. Once it is in place, you need to have the tools that will allow you to grow

your members and then execute your plan. Otherwise, you’ll have a bunch of data but no real way to use it.”

Darrell pointed out that lotteries have a wealth of avenues for building the activity within their VIP Clubs, including using tools already at their disposal. “Personalizing the pathway to your digital offerings will only help increase the number of players you are servicing,” he said. “Finding opportunities within the sponsorships in which many lotteries participate will help you customize your offer to players. For us at Smartplay, we use the physical draw machines we provide to help lotteries move players to the digital world. Whether its festivals, state fairs or charity programs, the lottery machines attract attention that can then be leveraged to sign up players for online activity. We need to continue to find ways to move players back and forth between the brick and mortar and virtual worlds.”

As **Shannon** pointed out, technological advancements have allowed lotteries to reach players anywhere and anytime, but the messages must be clear. “Marketers now know that with the omnipresence of smart phones, coupled with membership in VIP Clubs, we can send messages to our players at the optimum moments,” she said. “Beacon technology tells us when a player has walked into a store, and we can send them a message geared just for them, perhaps a coupon for a ticket. And this technology isn’t just in lottery retailers, it’s all over. So, for example, if a player is attending a sporting event and the lottery has a relationship with that team, we can send them a message that is personalized to the experience and a product. This is an example of using data collected through a player’s online presence to promote future purchases.”

SPORTS BETTING IS HERE

While many lotteries can’t sell online, sports betting is nonetheless offered in these jurisdictions. **Matt** said this is the case in Iowa, where online sports betting operators along with 20 commercial casinos are bombarding his state’s consumers with advertising messages and marketing promotions. “We can’t ignore the growth of sports betting but from a digital standpoint, are there opportunities for us (lotteries who cannot sell online) in the aggressive posture

these groups take in customer acquisition?” he asked. “Should we be increasing our own outreach or do we build a moat around what we already have and try and keep these new entrants from poaching our share?”

At Pollard Banknote, **Shannon** said they encourage their customers to not get distracted by outside “noise.” “First and foremost, it’s critical to retain your current base,” she said. “You still have to think about acquisition but protecting your current base is important. The sports betting and iGaming companies are buying large amounts of advertising and we have limited budgets. How do we compete? That is why the loyalty programs and players clubs are so important. You are collecting data and understanding who the consumers are and what they purchase so you can send them timely, relevant information and protect your base. We can’t outspend these companies – in Michigan when iGaming launched, the casinos spent more on advertising in one month than the lottery spends in an entire year. Lotteries can’t compete with that type of spend. But if you’re smart about your marketing and use the data you’ve collected, lotteries can absolutely compete with the sports betting and iGaming companies.”

In Canada, the situation is a bit different because all gambling is controlled by the lottery. However, there is much competition from illegal operators and the steps they take to separate themselves from these entities can inform the actions of other lotteries. “We build that moat around our products by pointing out that everything we offer is 100% legal, backed by the lottery with state of the art RG measures”, Lynne said. “We also focus on player acquisition and retention. This takes many forms, including working with our sports team partners and targeted advertising.”

THINKING DIFFERENTLY

Matt wrapped up the panel by discussing the Iowa Lottery’s work with some of their retailers. One in particular, a medium-sized convenience store chain, was interested in adding lottery to their curbside pickup offers. They have age verification technology for liquor and tobacco and believe that lottery can be safely added to their “Amazon-like” delivery opportunities. “When you have retailers reaching out to us about engaging on these types of changes, you

Continued on page 57



SHEM'S

CELEBRATING TWO DECADES OF THE BIGGEST LOTTERY MARKETING TRENDS



Ray Bates Keynote EL/WLA Marketing Webinar, 2 Feb 2022
Ray Bates is the former Director of the Irish National Lottery, former President of the EL, and now Honorary President of EL

Facebook 2004, Youtube 2005, Twitter 2006, Instagram 2010, “Influencers” 2015, and Tiktok in 2015.

But, back to 2002. The changeover to the Euro for the 12 initial States and the 7 subsequent States who joined at later dates caused major upheaval for the Lotteries concerned. Why? Well, the entire portfolio of games had to be redesigned, realigned, and repriced for the new currency. The desirability and use of unitary pricing for the most part also caused difficulty in choosing appropriate price points. The Irish Government, for instance, was so obsessed with not adding to inflation at the changeover that we ended up with a lotto panel priced at 95 cent. Can you imagine how much we begged the Minister for Finance to allow us to round the price up to 1Euro? So, as a direct result of our most unfriendly price points, our sales in 2002 fell by 0.9% for the first and only time in my 18 years as Director.

PRICE POINTS

All of this shows the importance of developing a strategic approach to managing price points ... which leads to one of the first important trends over the past 20 years: the continued player interest in, and sales growth in, scratch card sales mostly driven by a gradual increase in the choice of scratch card game price points.

While scratch cards can sometimes be viewed as the “poor relation” of our family of games, we know just how important they are in some jurisdictions, particularly in North America.

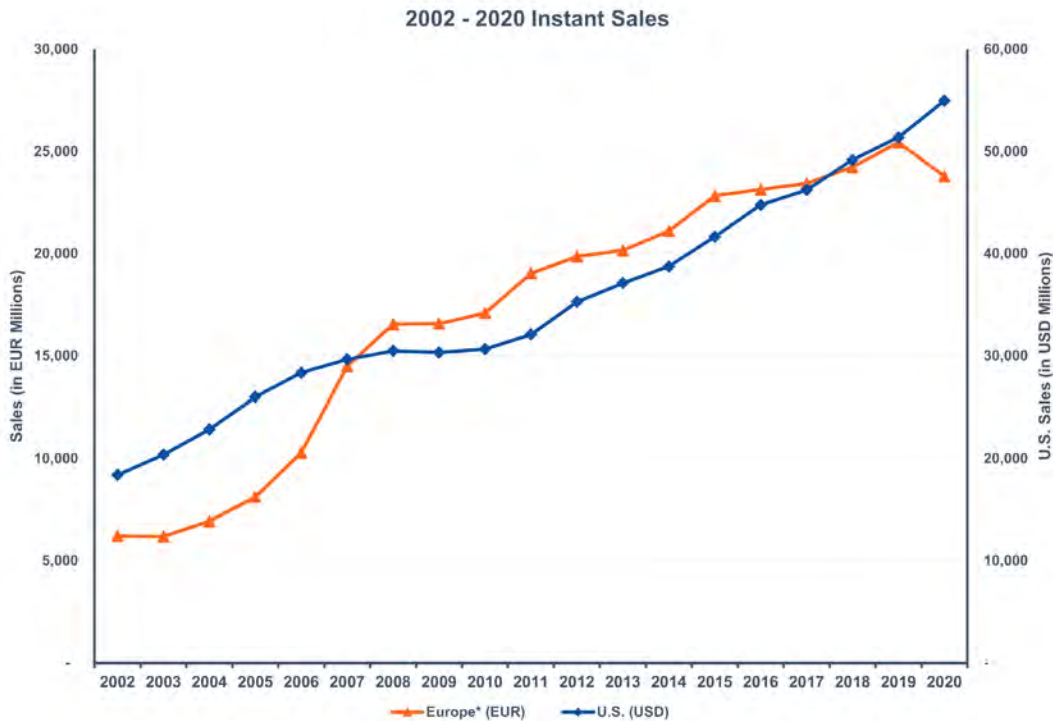
In 2021 62% of total lottery sales in the US were from scratch cards.

In 2020 30% of total lottery sales in EL Members were from scratch cards.

And the 2021 figure of \$65B sales in the US represented an 18% increase on fiscal year 2020 ... and all this in the height of a pandemic.

For WLA Members, this 20-year period was book-ended by the Y2K fears (remember back in 2000 when the date clocks in all computers switched over to 1 January 2000, and the world was supposed to stop) and Covid in 2020 ... when the world actually did stop. For EL Members, this 20-year period is also neatly book-ended by the Introduction of the Euro in 2002 and Covid in 2020 (with a financial meltdown in the middle – in 2008). On the technology side, while Amazon and Google were already up and running in 1994 and 1998, and the first Bloggers appeared in 1999, the social media landscape certainly exploded in our 20-year period with





Source: IGT Marketing Intelligence; La Fleur's Almanac; Worldwide Master Sales spreadsheets for Calendar Year 2002-2020
 *Top 15 European Instant Lotteries with Italy Loterie Nationale (EUR)

This graph of scratch card sales in EU and US 2002 – 2020 is impressive.

You can see the very strong growth in sales of scratch cards, both in the US and Europe.

But this is not an exclusively North American phenomenon. In France the percentage of their total sales from scratch cards was 62% for the first half of 2021.

In Italy, Gratta e Vinci instant games launched in 2004 and the product category grew to more than \$10 billion in annual retail sales by 2018, a more than 23% compound annual growth rate ... mainly driven by introducing higher and higher price points.

Guesses please, on how long it will take to see the launch of a mainstream \$100 scratch card...

DRAW BASED GAMES

Our second big trend concerned Draw Based Games (DBG).

We saw many changes in domestic Lotto Games - increasing price, adding extra draw nights, and adding extra features such as Megaplier, raffles or add-on draws ... but the big change in our 20 years was growth in Multi-jurisdictional games.

While the original Powerball and MegaMillions have been around since 1992 and 1996 ... we saw a major acceleration of North



American Multi-jurisdictional Games development with the introduction of cross-selling in 2009. Before 2009, each U.S. lottery sold either Powerball or Megamillions, but not both. Now all U.S. lotteries sell both Powerball and Megamillions.

While in Europe we saw the introduction of Multi-jurisdictional Games with Euromillions launched in 2004, followed by Eurojackpot in 2012. Both of these games had a significant impact on the sales figures in all participating jurisdictions. But they also posed a serious Marketing problem ... or “positioning problem” ... for the domestic DBG market in each of the participating countries.

These games were also responsible for the most noteworthy (or headline grabbing) DBG development in the 20 years, with the \$1.6 Billion Mega Millions

Jackpot in October 2018. This came from the North American model –similar to the Australian Oz Lotto – where the Jackpot is not capped. As we know, the European policy is to cap Euromillions or Eurojackpot Jackpots at a certain level to moderate the growth of the Jackpot. I have always argued for the European approach ... but then who is to say what is right?

Just a passing reflection on the top or call-out prizes: In 2002 there was a clear separation of DBG’s from Scratch Cards. This is best represented by the slogans which went “A Lotto win will change your life – a scratch card win will change your day”. By 2022, with scratch card top prizes as high as \$10million, or £4Million in the UK, this simple rule is beginning to look like a sad anachronism ... and the drive for bigger and bigger call-out’s on scratch games top prizes is destined to continue.

While this may be a trend, it is one of which I would not be a fan.

Sports Betting

In May 2018, the US Supreme Court overturned a 1992 law that prohibited states from legalizing sports gambling. This opened up the possibility for states to authorize their lotteries to enter the sports gaming market. Many States in the US are

From Retail (Line) to Online



In 2020 EL Members generated online GGR of €3.6 billion, representing 12% of total GGR in 2020 and a 25% year-on-year increase.

now regulating sports betting – or have legislation to allow betting on their books or waiting to be passed. Watch this space to see how this very special market develops.

SALES TO GGR

Another interesting change during the period might be glossed over as a simple accounting matter. But underneath it lies a significant development. There has been a move to reporting ticket sales figures in GGR (Gross Gaming Revenue) rather than straight Sales figures.

This change is a practical response to the changing product mix of lottery games. The more extreme representation of this would be when Veikkaus merged with ray (the Finish Slot-machine Association) and Fintoto (horse racing) in Finland in 2017. How could you possibly add together the sales from these three companies? It also reflects the general upward drift in % prize return to players and the move to integrate slot-type games with very high pay-out games. Of course, given the higher margins of traditional lottery, GGR also more accurately reflects the immense difference between lottery and all other games-of-chance sectors when it comes to net financial benefits to society or good causes.

Interestingly, in a related development, those administrations offering licences or private management contracts to third party operators are gradually changing to using percentage of GGR rather than Sales as a payment basis.

CSR-RG

Speaking of higher prize payouts and faster games bring us neatly from GGR to RG (and CSR)

Responsible Gaming

EL and WLA Certification started in 2008 and we now have almost 50 certified lotteries in Europe and over 100 in WLA. During this period, Lotteries began to realise that there was a business case to be made from Responsible Gaming.

The recent introduction of mandatory certification for all EL Members by 2022 is a sign of commitment to the certification system.

MOVE TO ONLINE

The trend of a move from retail to online over the 20 years hardly needs reporting. In 2002 there was very little online business being done by lotteries. Now there are some lotteries where more than 50% of their business is online and, during the pandemic, there has clearly been a shift to online from the retail channel. According to recent data from IBM's U.S. Retail Index, the pandemic has accelerated the shift away from general physical stores to digital shopping by roughly five years for what would have previously been one year's migration.

This leaves the difficult task of forecasting the behaviour of the Covid recruits to online gaming as things return to "normal". Will they behave as regular online newbies in the rate at which they

gradually tire of the new channel and revert to their old ways of playing? Time alone will tell. But one thing is sure ... online playing will continue on its inexorable growth path.

RETAIL

Retail has undergone serious change in the 20 years. It has moved from traditional to e-commerce to MultiChannel to OmniChannel. I am not personally comfortable with this latter term. I have difficulty with the term OmniChannel as I do not believe Lottery at retail is the same as a Macys or a Zara. We do not have showrooming of lottery products ... to try them out ...and we do not need to have the ability to return purchases to different purchase points. But we do have a development where a player could "buy" tickets at retail and "play" them later online. We also have the possibility of extended play by allowing play to happen either online or in retail outlets. I am happier with the term digitization of retail, or "phygital" ... a term FdJ has adopted to describe their developments in this space. I believe this model more accurately represents how the player journey should be enriched and managed in the new retail space.

Contactless payments and other innovations introduced by necessity during the pandemic will continue to offer an enhanced service to players at retail.

In-lane selling is beginning to have traction, with even the German discounters beginning to accept lottery at the tills. The



In-lane sales

reluctance by some lotteries to print lottery tickets on non-lottery paper stock at supermarket tills is gradually being overcome.

ADVERTISING

The classical and simple analysis of the changes in advertising over the period would be explained by a move from functional to emotional advertising. The Cadbury “Gorilla” TV ad from 2007 (<https://www.youtube.com/watch?v=NHtEyDrD4oA>) which resulted in a sales increase of 10%, and the two other ads from Norsk Tipping (<https://www.youtube.com/watch?v=2keNtOwZrny>) and EL Gordo (<https://www.youtube.com/watch?v=F-mgDksIoh0>) are two of my favourite lottery ads from the period ... neither of which look very happy (for lottery ads) but those of you who know the ads will know just how they pull at our heart strings.

In preparing this paper I asked the ex-CEO of the Irish Advertising Agency that we used in the Irish Lottery (and who is now a professor of Marketing in one of our Universities) what he saw as the main advertising changes over the period and his answer was brief ... “Ads”, he said, “have simply become less effective”. Admittedly, apart from being a cynic, he is a person obsessed with the effectiveness of advertising. So, while “Charlie Bit My finger” may have had 800 million views on Youtube in the past 14 years ... what other effect has it had? Or the recent guy on TikTok on a skate board in Arizona lip-synching to Fleetwood Mac and drinking cranberry juice ... has the cranberry juice company sold more product? So, while social media as a marketing tool may be mesmerising 20-something year-old advertising creatives ... my Professor of Marketing believes the problem is that they

only have a time horizon of one to two years and want to get a quick win and move on to their next agency ... without a thought about building long-term value for their brands. It is all about the next tweet and keeping up with the competition.

This might be seen as a cynical view ... or it might be exactly on the money. Who knows? One interesting FACT, however, is that Google ad revenue rose from an annual figure of \$0.4b in 2002 to

\$147B in 2020 ... up by a factor of 365. At the beginning of our period, Brand building consisted of companies working to give their Brands specific values that they thought were important and communicate them to their customers in interesting ways. With the development of social media, cultural communities or “tribes” in this new space were empowered to turn off ads; ignore corporate messaging and create their own view of the world of corporate brands. So the task of marketers now is to identify these Brand communities; form relationships with them and interact with them as much as possible. But, let’s be very clear ... this is not the same thing as simply hiring “influencers”. This phenomenon is sometimes referred to as “Cultural Branding”. I’m not completely happy with this term, but I think you get the message. This approach is particularly relevant as we emerge from the Pandemic. According to the experts, in times of crisis we fall back on “culture” as a way of making sense of our new reality and what our players now need most of all is reassurance and authenticity.

Two final trends that are worth noting ... **Draws and Market Research.**

As lotteries introduce more and more draws and, as we witnessed during the pandemic, the importance of having an alternative or backup method of producing our results is vital ... there is now an almost inevitable move to RNG-systems.

I used to be a firm believer in the value of physical draw machines – where players could witness “chance happening”, but I am changing my views on this matter.

For example, the live draw for EuroMillions (carried out in Paris) is not broadcast “live” by any of the participating lotteries. And I see the need for electronic draw systems to

produce results for the more frequent draws that are becoming more and more common. For example, Cash Pop, a new game that is gaining in popularity in the US, needs 5 drawings a day. This is simply impractical or infeasible with the full rigors of a formal physical draw process. So, changing requirements and more robust and auditable RNG systems will convince more and more lotteries to embrace this change.

From Market Research to Big Data and Data Analytics

With the advent of Big Data – a term born in the early part of our 20 years – and Data Analytics – a term that has been around for many years, but whose time has now come – there is a whole new way of analysing behavioural data to provide reliable models for predicting consumer tastes trends and behaviour. In 2002 you or your market research company developed a set of questions; surveyed a sample of the market and fed back information on which you based decisions about a price increase or whether to launch a particular new game. Using Data Analytics you can now have much deeper data, better analysed, which enables you to develop a relationship with your players and move from just analysing behaviour to suggesting purchasing behaviour ...

It has moved on from

“If you like that, you might like this” to

“People who bought the games you play also played this new game” or

“People like you, with your profile, also bought this new game”

So, to finish ...

When you review all the changes in our sector over the past 20 years, I see very strong evidence of resilience, innovation and creativity. The lottery sector is sometimes criticised for not being innovative enough. I normally defend the lottery position by pointing out that true creativity comes from a process with constraints. We have Regulators; we have Responsible Gaming, and we have our “for the good of society” brand values to sustain.

We are not free to do whatever we like.

However, sometimes it’s good to be in the box to be able to think outside it.

As Leonardo da Vinci put it

“Art lives from constraints and dies from freedom”

Bring on the next 20 years!

THE PANDEMIC IS OVER

Simon Jaworski, Executive Vice President U.S. Operations, Leger

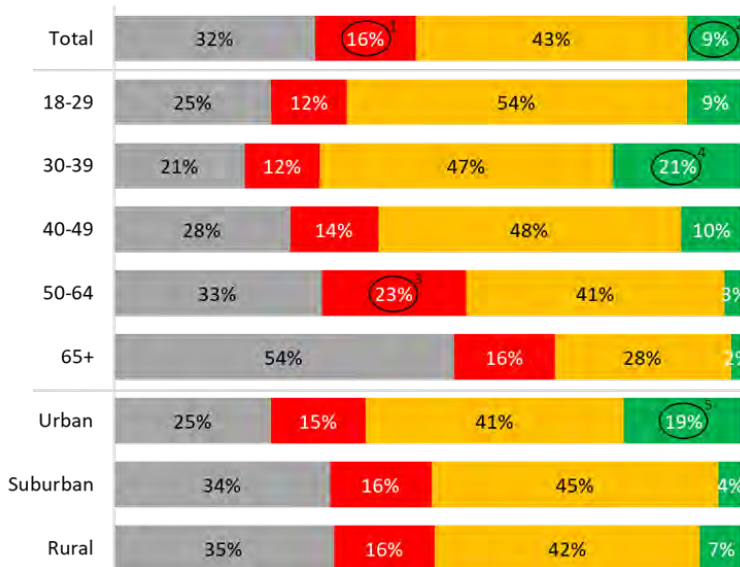


Ok, now that I have your attention, it is time to discuss where the U.S. Lottery industry sits compared to two years ago when the pandemic first made its mark on the industry.

Highs and lows follow similar patterns as the convenience stores, with those shopping less being driven by higher risk COVID groups 50-64 year-olds (31%8), who are traditionally in the sweet spot for Lottery draw games, while those shopping more are in the 30-39

Convenience Store Shopping Compared to 2 Years Ago

■ I don't shop at convenience stores ■ Shopping less often ■ Shopping the same amount ■ Shopping more often



Leger's research from December 2021 begins with the question 'how frequently and where have you been shopping?'. When talking about convenience store shopping, 16%1 of Americans are shopping less often at C-Stores, compared to 9%2 who are shopping more often, a net decline of -7%. This decreased shopping behavior is being driven by 50-64 year olds (23%3 of whom are shopping less).

However, two critical Lottery playing groups more than doubled the average number of their convenience store trips during the pandemic, with the 30-39 year olds (21%4) and those living in Urban areas (19%5) leading the way.

The trends are remarkably similar when looking at grocery shopping. Compared to two years ago, 24%6 of Americans are shopping less often at Grocery stores while 11%7 are shopping more often, a net decrease of -11%. Despite this, the groups driving the

year age range (19%9). Higher income Americans in their 30's provide the ideal target market for almost all discretionary spending categories in the USA today.

For the U.S. Grocery shoppers, times are a changing. COVID has likely forced the

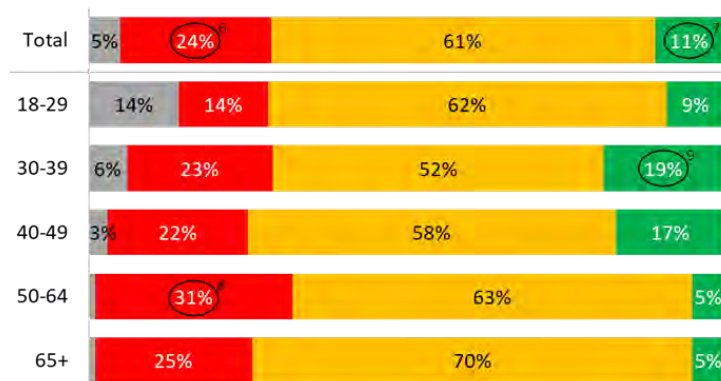
issue for some shoppers, but for the most part, changing habits were already being formed and the two-year pandemic has merely sped up the process. 40% of U.S. grocery shoppers have either "started to order online and pick up at the store" or "started to get my groceries delivered to my house". Of these two habits, home delivery is the more popular with 27% of grocery shoppers taking advantage of delivery services. From a physical perspective, perhaps with a focus on safety, it makes perfect sense, with four of the five key shopping elements (groceries into cart, onto the checkout, bagged and into the cart, and finally into the vehicle) being eliminated.

More than 50% of Americans shop online at least once a week, with this number significantly higher among the 30-39 year-old age group at 67%, and \$100k+ income groups at 69%.

However, the knock-on effect from fewer grocery shoppers in-store cannot be

In-Person Grocery Store Shopping Compared to 2 Years Ago

■ I don't shop for groceries ■ Fewer in-person grocery shops ■ The same number ■ More in-person grocery shops



discounted from a lottery perspective. Fewer in-store shoppers, or less frequent grocery store visits, ultimately means fewer chances for the casual player to buy a Scratch or jackpot ticket.

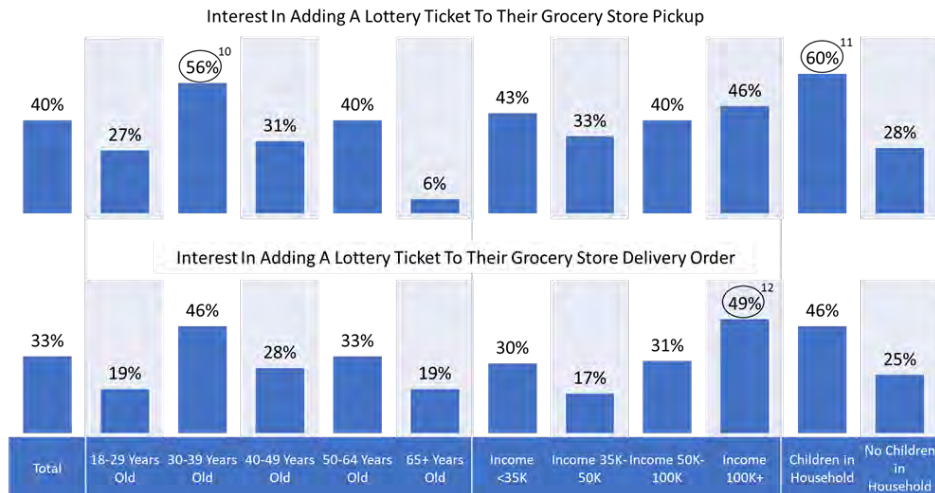
So what options can lotteries provide to ensure everyone who shops for groceries, whether in-person or online, has a fair chance of buying a lottery ticket? At least one third of online shoppers tell us that they want another alternative.

Among those who have started ordering groceries online and picking them up, 43% would like the option of adding a lottery ticket to their grocery pick up order, slightly higher than the 33% of those who would like to have a lottery ticket sent with their grocery delivery. The kicker? Those who want Lottery tickets added to their online grocery pickup order are the biggest proponents of their state lottery, with an average NPS mean score of 8.3/10, compared to a national average of just 4.6/10. At face value, this appears to be the classic win/win, especially if these lottery promoters are given the tools to spread the word about their new method of buying Lottery without even having to set foot in store.

Interest In Adding A Lottery Ticket To Their Grocery Store Pickup/Delivery



For both of these potential lottery sales channels, some key groups are significantly more interested in having Lottery added to their online purchase, including key consumers groups, notably those aged 30-39 years old (56%¹⁰ are interested in home delivery) and those households with children (60%¹¹).



In terms of 'adding Lottery to their grocery delivery', the highest income group (\$100k+) are the most interested at an impressive 49%¹² (an over-index level of 150, compared to the average).

Nevertheless, the next generation of Lottery players is going to be the most difficult to reach from a standard 'retail' Lottery perspective. Leger's survey asked whether Americans would prefer to purchase their Lottery tickets via their usual retailer, online via their laptop/pc or online via their smart phone/Lottery app, the differences by generation were eye-opening, yet logical.

Overall, the highest proportion of Americans would prefer to buy Lottery via a traditional retail outlet (35%), compared to 21% who would like to buy Lottery online, either online from home (17%) or via a mobile device (11%). There is a large crossover between these last two groups.

The biggest disparity is unsurprisingly among the more tech oriented, youngest age group. Compared to older age groups, significantly more 18-29 year olds would choose to buy Lottery online (24%¹³) than in a regular Lottery store (16%¹⁴), with older groups the polar opposite, with 41% of 50+ year olds enjoying the in-person experi-

ence, compared to only 6%¹⁵ of these older Boomers who would like an online option.

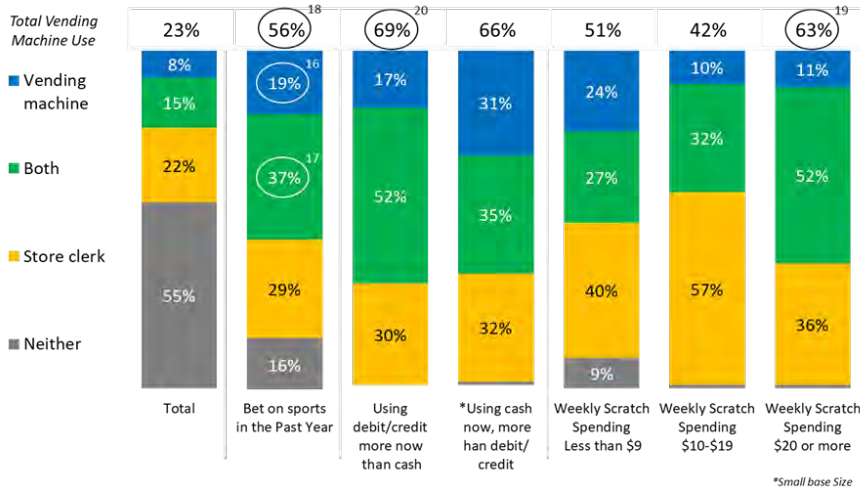
So, what does this mean for the Lottery industry? Quite simply, the industry has to ensure that the next generation of potential players has the option to buy Lottery in the method that is most convenient for them at the time and place. The COVID-19 pandemic has changed the way the ordinary American shops, with the total proportion of all shopping increasing to 15% (from 10% pre-pandemic) at its peak. This number is only going to rise as people's habits have inextricably changed in the last two years.

Compounding this is the fact that the competition for the discretionary dollar continues to widen, and that factor, coupled with the highest inflation rate (7%) since the Reagan administration, means the battle for that discretionary dollar is getting tougher. Currently, there are about 30 states where sports betting is now legal, including 18 that allow online sports wagering, dwarfing the eight states that currently have iLottery. This means more than 100 million Americans can place a legal wager where they live...and the crossover between sports betting and lottery, especially with the Lottery Scratch product, is notable. 84% of sports bettors purchase Lottery, a touch lower than the 89% of online

If your state lottery could sell lottery games online, how would you purchase lottery in the future?

	TOTAL USA	18-29	30-39	40-49	50-64	65+
Still at my regular lottery store	35%	16% ¹⁴	33%	38%	44%	38%
Online (Net)	21%	24% ¹³	29%	24%	18%	6% ¹⁵
Online, via my laptop or PC	17%	23%	24%	17%	14%	5%
Online, via my smart phone/Lottery app	11%	14%	18%	13%	7%	2%
None of the above	53%	68%	53%	48%	45%	57%

How are you currently buying lottery tickets?



gamblers. All these competitors are slowly becoming an integral part of consumers' lives, through their handheld devices and other online methods

However, a few key statistics appear to buck this trend, which could be very beneficial for lotteries in the short term. It's the ease of lottery purchase at retail that appears to appeal more to the sports bettor (and also the online gambler). 19%¹⁶ of sports bettors purchase only from lottery vending machines (compared to the average of 8%), with 37%¹⁷ buying from both the lottery vending machine or the clerk in store (compared to 15%), giving vending machines a net of 56%¹⁸. A number of key groups rely on vending machines even more... the higher spending Scratch player at 63%¹⁹, and those using debit/credit cards more during COVID to buy Lottery, a whopping 69%²⁰.

And what of prices points? Leger's research finds that 10%²¹ of past week Scratch players bought a \$20 ticket, with 5%²² purchasing \$30 or above, but this skews significantly higher among certain cross-over groups. (Cue Ferris Bueller's teacher, "Anyone? Anyone?"). Households with children (13%²³ for \$20, 13%²⁴ for \$30+) are significantly higher

than the national average for higher priced Scratchers, while \$100k+ income households reach the dizzying heights of 15%²⁵ for \$20, 13%²⁶ for \$30 and 6%²⁷ for the \$50 ticket.

When asked about their favourite Scratch ticket, patterns are relatively the same, with 24% of the \$100k+ households stating their favorite is a \$20 ticket or higher, compared to just 10% nationally. 17% of Sports Bettors prefer the \$20 ticket or above, echoing other research which has shown the crossover between sports bettors and higher priced Scratch ticket players.

Don't worry, there is still some good news "in-store" for you! Despite the fact that the competition for the entertainment dollar appears to be widening, one stronghold for the Lottery industry are the Americans who have increased their shopping at convenience stores or grocery over the past two years. The in-person shopper leads all key categories for lottery play, including average weekly spend on Scratch tickets (both key lottery shopping avenues are above \$50) compared to the average of \$23. In-person convenience store shoppers are twice as likely to use a debit or credit card to buy their lottery tickets than the average American at 29%, and two-thirds

of these shoppers are using debit/credit cards more often to buy lottery since the start of COVID-19.

This same group has also migrated to using Lottery vending machines significantly more often during the past two years at an astonishingly high rate (67%), compared to the national average among Lottery players of 31% which, let's face it, is still a big number.

So what does all this information mean for our state lotteries. Simply put ...

1. Ensure Lottery retailers are well stocked with the latest and most popular Scratch tickets
2. Guarantee that players (and especially casual players) can see the Lottery vending machine when they walk into the store. Lottery tickets cannot be sold if they cannot be seen.
3. Payments for lottery, especially on vending machines, should accept debit cards at the very minimum (yeah, I am looking at you New Jersey, my home state ...)

However, in-store options can be a double-edged sword, as these same retail shoppers we need to ensure are happy and catered to also happen to be the highest 'at risk' segment for Lottery, as half of this group heavily over-index on other 'competitive' gaming and gambling. These 'at risk' Lottery players (50%) are three times more likely than the average American to 'gamble at a Casino', 'bet on sports' or 'play fantasy sports', so the fight for their discretionary leisure spend will become tougher and tougher as more states legislate for legal sports betting and online gambling.

Based on Leger's research, it appears the best way forward is to ensure the next generation of Lottery players is supported as quickly as legislation will allow, meaning iLottery in every state, and innovation in hand-held Lottery options. In the interim, we need to focus on fine tuning ways that the current core and casual players have access to Lottery products with as little effort as possible. This includes cashless payments and additions to grocery shopping, whether this is a Scratch ticket being added to a home grocery delivery, or a simple in-lane Powerball or Mega Millions purchase at checkout, which could possibly lead to quick wins in a rapidly changing post-COVID environment.

Trust me – I am a researcher. ■

Simon Jaworski, EVP, Leger USA, Lottery & Gaming Research Guru

What price of Instant tickets did you buy this past week?

	TOTAL USA	Bet on Sports In the Past Year	Children in Household	No Children in Household	Income: <35K	Income: 35K-50K	Income: 50K-100K	Income: 100K+
ticket	34%	25%	19%	42%	46%	32%	32%	21%
ticket	40%	35%	31%	45%	43%	54%	33%	34%
ticket	22%	24%	28%	20%	28%	24%	23%	13%
ticket	48%	48%	56%	45%	44%	49%	55%	38%
ticket	24%	26%	46%	14%	18%	14%	26%	36%
ticket	10% ²¹	9%	13% ²³	7%	5%	27%	4%	15% ²
ticket	5% ²²	12%	13% ²⁴	1%	1%	6%	3%	13% ²
ticket	1%	5%	4%	0%	0%	0%	0%	6% ²

SG INSTANTS

The Games Might Be Instant
But Their Impact Can Last a Lifetime

Last year in North America alone, players won more than **\$43 billion** in instant game prizes.

Even better, instant games generated more than **\$17 billion** for good causes.

Let's keep changing lives. Together.

Reimagine
Next



Reimagine Next

Estimated based on Calendar Year 2021 instant game sales for North America.
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Add Some

Magic

TO YOUR

❧ Holiday Game Strategy ❧

Holiday instant games can be as beautiful as a postcard, but it's not just about appearance. Every price point, playstyle, color and product enhancement in a holiday portfolio is strategically planned by lottery product managers. Market analytics come into play to make sure it's just the right balance of games with that special magic to deliver sales performance.

"There's an opportunity to strategically enhance every holiday game with a touch of magic," says Danielle Hodges, Director of Global Product Innovation & Development, for Scientific Games, who has been working with instant games for 10 years. "The goal is to create just the right mix of games that pop at retail, appealing to core players as well as occasional and infrequent players—and gift-givers who are looking for that extra special something in the games they choose."



Danielle Hodges

Players are more open to purchasing higher price point games during the holiday season. In a recent *ONE Segmentation Study*, 45% were open to purchasing \$10 games throughout the holidays. Prize structure is also a crucial component for holiday games. With higher price points, players expect premium products.

Scientific Games' analysts study performance trends from game launch through the entire lifecycle and prepare customized marketing plans as part of each customer's strategic account management. Lottery product managers can also access games and data through the *Game Gallery* customer portal.

Behind the scenes at Scientific Games, creative teams collaborate with market analysts to make sure lotteries have the best holiday games for their portfolios with new playstyles, and shimmering, glimmering specialty finishes. Engineers, chemists and production specialists are testing new inks and papers. Ultimately, product marketing experts select the best of the best games for the company's annual holiday games catalog.

"During the holidays, lotteries really want their games to deliver a memorable experience," Hodges explains. "Delivering that experience brings the player back to the retailer to engage further, and creates loyalty with the lottery's brand."

"With millions of products competing for attention during the holidays, standing out at retail becomes more challenging every year," says Hodges. "For this reason, strategic enhancements have never been more popular."

In 2021, the company's holiday games represented more than 73% of holiday game retail sales in the U.S. Scientific Games produced 115 different holiday games for U.S. lotteries – about 7,500 miles of product on giant rolls of paper stock sourced from sustainable forests and printed with water-based inks.

Here are some of the newest games and top performers from the 2021 holiday season, all with strategic enhancements to create a special experience.

MASSACHUSETTS LOTTERY

Holographic Blowout Game

Talk about a blowout. With snowflakes shimmering on a silver holographic stock and red ribboned bundles of cash, the Massachusetts Lottery's \$10 *Holiday Cash Blowout* was the number one performing 2021 holiday game in the U.S. (based on weekly per capita sales). Proving the popularity of the blowout game concept, the three-tiered prize level game was loaded exclusively with \$50, \$100 and \$500 cash prizes and 20 chances to win. The game indexed at 155 (performing 55% better than an average \$10 game in Massachusetts) and generated \$171 million in retail sales.



GEORGIA LOTTERY

Sparkle + Scratch My Back Family Duo

Product managers at the Georgia Lottery added an extra enhancement to a duo of holiday games that already offered something extra. \$10 *Holiday Silver 50x the Money* and \$20 *Holiday Gold 100x the Money* were both *Scratch My Back* games with play opportunities on the front and the back. The top prizes were enough to get players' attention during the holiday season, but bonus play on the back made them even more appealing. With the added *Sparkle* enhancement, the \$10 game glimmered in silver and the \$20 in gold. Indexing at 150, the \$10 game sold out just after the holidays, and the \$20 game sold out of orderable inventory in just eight weeks. The duo combined to become the best-selling higher price point holiday games in the Lottery's history.



PENNSYLVANIA LOTTERY

Sparkle Select

The Pennsylvania Lottery has a history of innovation with *HD Games* featuring high definition play and prize symbols, and this year enhanced the \$1,000,000 *Merry and Bright* game with *Sparkle Select*. The Lottery combined *HD Games* holiday light symbols with *Sparkle Select*, choosing a gold with a twinkle pattern (one of the 2021 holiday season's most popular). The result was a bright, warm, reflective \$20 game that perfectly captured *Merry and Bright*—and that premium holiday appeal. The game performed nearly 40% higher than all of the Lottery's \$20 games launched over the past five years, generating more than \$90 million in the first 12 weeks (compared to an average of \$65 million for other \$20 games over that same period).



NORTH CAROLINA EDUCATION LOTTERY

Gigantix Die Cut and Sparkle

The North Carolina Education Lottery wanted a premium holiday gift giving option in its 2021 holiday lineup, and this oversized wreath design was the perfect product to complete its portfolio. Produced as a die-cut *Gigantix* game to resemble a holiday wreath, *Winter Winnings* shone at retail with the shimmer added by the *Sparkle* option. The game was an instant player favorite, becoming the Lottery's most successful \$20 holiday scratch-off to date.



OHIO LOTTERY AND MASSACHUSETTS LOTTERY

Holographic

Scientific Games' *ONE Segmentation Study* indicated that 66% of players nationally are open to purchasing \$5 games, positioning the price point as an important one for holiday game portfolios. Both the Ohio Lottery and Massachusetts Lottery used holographic stock to add some magic to their \$5 holiday games, and the results paid off. The 2021 version of the *Holiday Lucky Times 10* Scratch-Off game, which has been a core holiday game for more than 20 years, was the highest selling \$5 holiday ticket in the Ohio Lottery's history.

The Massachusetts Lottery also offered a second chance promotion to support its holiday lineup. The promotion generated over 3.6 million entries, the highest level of participation of any previous holiday promotion offered to date.



Holiday *Magic* Fun Facts

#1

The highest performing 2021 holiday game in the U.S. was produced by Scientific Games
(based on weekly per capita sales).

80%

16 of the top 20 highest grossing 2021 holiday games provided by Scientific Games
(based on weekly per capita gross gaming revenue).

76%

The percentage of 2021 holiday game retail sales in U.S. generated by Scientific Games products.

44%

Higher performance by Scientific Games 2021 holiday games than holiday games from other providers.

Visit »



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INTRODUCING DIMENSION



Coming soon in 2022 is the new *Dimension* strategic enhancement – a Scientific Games exclusive and just the right touch of magic for holiday games – and higher price point games year round. Featuring an array of color under a clear, glossy layer, the *Dimension* pattern appears both above and beneath the artwork, adding a depth and premium look to any game.



INTRODUCING

INFINITE INNOVATION

Mississippi, Nebraska, Rhode Island, and West Virginia lead the way in offering a new player experience through the remarkable possibilities of IGT's Infinity Instants™ games.

If you were tuning-in to watch your favorite TV show, would you rather view it on a black-and-white set with “bunny-ears” antennae or on a full-color 4K ultra-high-definition screen?

Lottery players might naturally ask themselves a similar question when it comes to the games they love. Scratch tickets drove about 68% of total retail U.S. lottery sales in 2021, a 15% increase over 2020. And, like the medium of television, this enduringly popular form of lottery entertainment must continue to evolve to retain players and add new ones.

IGT's new Infinity Instants™ games advance the instant-play experience by leaps and bounds with patented digital printing technologies unlike any other in the industry. The result is not one

new game title but a whole new category of games that offer lotteries an extraordinary level of customization, jaw-dropping resolution, and the ability to enhance virtually all elements of an instant ticket.

“Infinity Instants™ games are a transformative innovation that fundamentally enhances product value and the player experience,” said Keith Cash, IGT Vice President Global Instant Ticket Services. “The technology opens a new world of opportunity for designers and lottery product managers to create game mechanics and customized graphics as never before possible. Infinity goes well beyond the simple notion of high-definition, black printing by bringing vibrant color, scene variety, and ticket-level customization to the instant product. True to its name, the possibilities are infinite.”



Infinity Instants™ games are produced on a physical press, but the preparation process is all digital. In place of a station with a plate and a cylinder producing an identical product millions of times over, the technology allows for a full level of customization – every ticket can be different, side by side, with unique scenes or artwork.

Lotteries can even extend design and color underneath the play area, which has always been “the land of gray.” As shown in the examples here, the possibilities open up whole new avenues of use by lotteries and are completely compatible with all industry standard quality and security requirements.



The Covered Artwork

DISPLAY GRAPHICS Display graphics can extend beneath the scratch-off coating, creating a “wallpaper” effect where the image becomes visible once the game is scratched.

INSTRUCTION SYMBOLS Symbols in the play instructions can now be imaged in full color and can be varied, so that each scene in a multi-scene game can have a specific symbol that matches the scene.

CUSTOMIZATION Opportunity for customization within a print for retailer exclusives and other promotions.

SCENES The number of scenes in a pack can extend well beyond what can be achieved with traditional printing technologies.

The Uncovered Artwork

FONTS A variety of fonts that match the look and feel of the overall game.

GAME & PRIZE SYMBOLS High-resolution digital imaging provides symbols with distinct characteristics and colors.

CAPTIONS Easily identifiable, high-resolution, full-color symbols make the use of captions optional and enables the use of smaller “micro captions.”

PLAY AREA BACKGROUND The game design can be extended beneath the scratch-off coating. A solid color can also be used to provide striking contrast between the play symbols and the background graphics.

FLOAT Fully compliant with industry standard float requirements.



The Ticket Back

GRAPHICS Back graphics can be imaged to complement the overall look of the game and can also support customized imaging and barcodes, such as retailer coupons and other promotions.

SYNCHRONIZATION Back images can be synchronized to the front image.

ADDITIONAL PLAY AREAS Will support additional play areas on the back of a ticket in conjunction with IGT’s Playback™ technology.

UNIQUE CUSTOMIZATIONS With high-resolution imaging on the ticket back, lotteries can include eye-catching messaging for either the cross-promotion of additional lottery games or for third-party coupons.

Optimizing

Success with

Infinity Instants

IGT supports customers in every aspect of their instants business. Beyond game innovation and printing, IGT teams work with customers to assist with portfolio planning, ticket design, and prize-structure development, instants warehousing and distribution, marketing and inside sales/ordering, retail execution, research and analytics, and more.

In preparing to release Infinity Instants™, the company made sure to give customers suggestions about field support and retail execution tailored to this new game type, drawing on IGT teams' experience launching new products.

"We recognized that players would be looking at something completely new and different when they first encounter an Infinity Instants™ game," said Matt Benoit, Senior Account Manager Instant Ticket Printing and Services. "In some cases, the designs are so vivid and such a dramatic step forward that we knew players could wonder, 'Is this an actual scratch ticket?'" Beginning with a soft-launch in Rhode Island, an IGT team worked with the Lottery to develop an informational sheet to be

distributed to retailers and the sales force prior to launch, to prepare them for any questions from players.

Four U.S. lotteries have now offered players an exciting new experience via Infinity Instants™ games. The creative freedom enabled by the technology also promises to revitalize the instants proposition. "At the first scratch, the innovation is so visible that it becomes a self-selling proposition," observed Giancarlo Perrotta, IGT Vice President Global Instant Ticket Innovation. "If the product itself establishes the idea in consumers' minds that lottery is doing something new and even better than they remember, then that supports engagement and repeat play. We're just beginning to explore the potential. For example, our team is working on new play mechanics that have been impossible until now. This is a very exciting new technology, and each market execution is a step in helping our customers understand what a particular advancement could mean for product designers and our customers' consumer segmentation planning."

Rhode Island

The Rhode Island Lottery had an exciting idea for its Mythical 7s game, and Infinity Instants™ technology provided a creative set

of paintbrushes that allowed the designer to vividly expand on it.

Mythical 7s launched on July 31, 2021, with a print quantity of approximately one million tickets bearing 10 different scenes per pack of tickets on the front and back – a feat that is not possible on a ticket this size with traditional printing methods.

Among many enhancements, the display graphics for Mythical 7s extend beneath the scratch-off coating, and the tickets feature vibrant and highly distinguishable game symbols. The capabilities of Infinity technology also eliminated the need for symbol captions, which take up valuable space on the ticket.

Mythical 7s has had strong performance during the first few months on the market, even without additional marketing support for the game.



An exciting concept for the Rhode Island Lottery's Mythical 7s game (left) was enhanced further with the capabilities of Infinity Instants™ technology (9 of 10 scenes shown right).

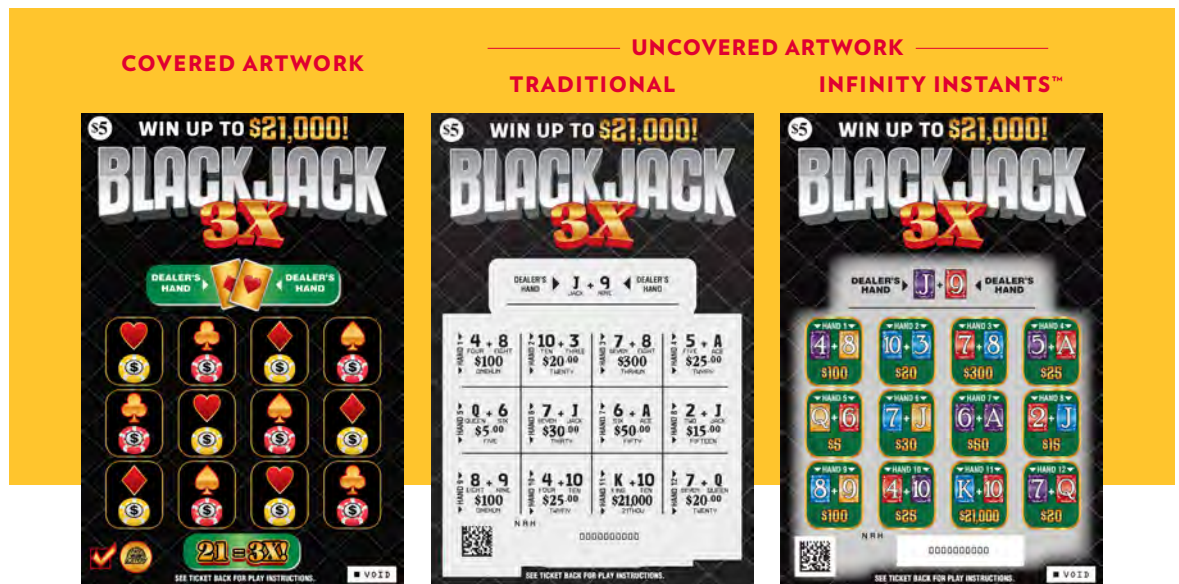
West Virginia

Players in the Mountain State experienced their first Infinity Instants™ scratch-off game starting December 28, 2021, with the \$5 High Roller game. A second pulse will follow with \$5 Blackjack 3X.

The launches are the latest in a successful instant ticket strategy led by Michael Thaxton, Product Development Manager, West Virginia Lottery, to continually add variety to a very diverse portfolio and to deploy innovation strategically and enhance the play experience for target consumer segments. “Being a smaller jurisdiction and knowing that players can tire of games

quickly, we strive to maintain variety in our game mix and in everything we do to keep our players interested in our lottery products,” said Thaxton.

With an enthusiasm and willingness to bring innovation to players, Thaxton saw that the possibilities of Infinity Instants™ technology could be used to augment what might normally be seen as traditional games. “IGT designers built them to be something with a new twist and more attractive,” he observed. “We’re excited to get these games in the product mix for our players.”



West Virginia's \$5 High Roller Infinity Instants™ game launched first in the state, to be followed by \$5 Blackjack 3X.

Nebraska

“We weren’t planning to launch an Infinity Instants™ scratch game as early as this, then IGT shared with us some of what was possible,” said Brian Griesenbrock, Product Manager, Nebraska Lottery. “We thought it could really pump up our Super Gold Rush \$5 game, because it was a key symbol match, and the

ability to enhance symbols under the scratch coating is one of the things that’s so appealing about this technology.”

Nebraska’s \$5 game was tied to another key-symbol-match game, \$1 Gold Rush. The Lottery took the opportunity to make both games even better for players and supplied retailers with sales sheets to let them know that the new games were coming and to make them aware of the new feature.

Both games launched January 25. With only a few weeks’ worth of data at press time, the \$1 game is doing well, and the \$5 game might be a record-breaker. “We’re keeping a close eye on it and gauging consumer reception,” said Griesenbrock. “Players are loving the look of the game and how it plays. It feels like an evolution of the scratch ticket.”

UNCOVERED ARTWORK



Mississippi

Now in its third year of operation, the newest U.S. lottery faced many COVID-related challenges soon after it began selling instant tickets in November 2019. But the enormously successful Mississippi Lottery team not only met those challenges head-on they have also taken advantage of every opportunity to create excitement for players. When presented with the chance to offer IGT’s Infinity Instants™ games, Angie DiGrazia, Senior Manager of Gaming, jumped in with both feet, confident the games would excite the current player base and attract new players. “Infinity Instants are fun to play,” she said. “The colors are vibrant, and most exciting of all, they deliver something new and unexpected.”

The Lottery launched its first Infinity Instants™ game in November 2021. The \$5 game, Holiday Wishes, delivered in a big way to both players and the Lottery. Players particularly loved to talk about it on various social media platforms. The bright festive colors and playstyle made it a perfect holiday gift for friends, coworkers and loved ones. The game sold through quickly and was cleared from most retail locations early in the new year.

Holiday Wishes was designed using a single, retro-style display area featuring colorful and iconic holiday play symbols, including candy canes, gingerbread figures, stockings, stars, and ornaments. The colorful back of the tickets boasted a series of seven different cookie ornaments.

“You don’t know what a difference Infinity Instants™ technology makes until you scratch the latex and see the symbols and colors underneath these tickets,” said Brian Griesenbrock, Product Manager, Nebraska Lottery. “We wanted it to be a ‘wow’— a fun surprise for players.”

UNCOVERED ARTWORK



The Mississippi Lottery launched its first Infinity Instants™ game (shown) in the 2021 holiday season. It was designed to create a memorable experience for any player who encountered it during the season, whether as a gift or purchase.

What's Different About



Improved and More Appealing Graphics for Players, with the ability to include a higher number of scenes per pack than traditional printing

Enables **More Innovative Play Styles and Game Mechanics**

Provides for More Color and **Unlimited Scene Variety on the Front and Back of a Game**

Offers the **Ability to Customize** Even Smaller Print Runs – for example, for **specific events or retailer chains**

Highly Distinguishable, Vibrant Play Symbols - clearly convey the results of the game and are tied more effectively into the overall theme

Completely Compatible with All Industry Standard Quality and Security Requirements

Eliminates the Need for Symbol Captions, which take up valuable ticket space

In February, the Lottery launched its second Infinity Instants™ game, Lucky Shamrock, which quickly became a social media star as well. With its array of St. Patrick's Day icons, the game has been a success out of the gate. The Lottery is currently developing its third Infinity Instants™ game, set to launch in June, and in the fall will take advantage of the unlimited scene-variability opportunities of the technology to support a new licensed property game.

"The Mississippi Lottery strives to bring the very best products to our players and retailers," said Jeff Hewitt, President, Mississippi Lottery. "We know IGT's Infinity Instants™ technology helped us accomplish that goal based on the tremendous feedback we've received. We're thrilled with the results of the Infinity Instants™ games and equally excited about the vast possibilities going forward."

Just Scratching

the Surface

As these lotteries lead the way in identifying what kind of impact Infinity Instants™ games will have, it's clear that there are unlimited possibilities for the games and for introducing them into the marketplace. A lottery can market an Infinity Instants™ game as a fun innovation at any price point, on a new price point, on a family of games, on a classic playstyle such as a key number or symbol match, with any newly developed play mechanics, and more. The beauty of these games is that the creative potential is wider than ever.

Infinity Instants™ games are sure to usher in a new era of how lottery players view scratch tickets. "We always want to create opportunities to give regular players something new and give occasional players something that will be exciting to them, which helps support retailers as well," said Tony Lucci, IGT Account Manager Instant Ticket Innovation. "Infinity Instants™ is the latest example of how we think about bringing innovation into the marketplace for everyone's advantage, and we're excited to share it."

Talk with your IGT account representative today to create your lottery's path to bringing these exciting games to market. ■



Empowered Partnerships as Unique as Your Lottery

Pollard Banknote has spent more than three decades building strong partnerships with lotteries around the globe, collaborating with them in their efforts to raise money for the good causes they support. This expertise has sharpened, and significant momentum has been built in recent years as the Company has focused its efforts across the three areas that underpin lottery success: Outstanding Games, Retail Excellence, and Digital Innovation.



Outstanding Games.
Retail Excellence.
Digital Innovation.

Pollard Banknote understands, however, that one size does not fit all—a lesson most famously taught by none other than the classic fairytale, Cinderella. Pollard Banknote takes the same approach for every lottery by listening, understanding market and regulatory constraints, and ultimately ensuring the solutions provided are the perfect fit for the needs of each jurisdiction.

This philosophy is the basis of Pollard Banknote's Empowered Partnership model; a collaborative methodology that seeks the optimized combination of products, services, and consultation for each unique lottery. The model has revealed its success in many different forms—from launching some of the industry's most novel and successful games, to innovative merchandising products, as well as cutting-edge digital solutions for both players and lottery operations.

This synergistic approach has resulted in many of Pollard Banknote's clients becoming some of the fastest-growing and most successful lotteries in the industry with a wide range of offerings to attract the most diverse player base possible.

Holistic Approach in Michigan



The long-standing relationship built between the Michigan Lottery and Pollard Banknote is a robust example of an Empowered Partnership. Over the last 25 years, this Empowered Partnership has evolved to encompass all three key dimensions for lottery success including a broad portfolio of outstanding and innovative games, effective retail initiatives, a host of engaging digital games, as well as the most successful iLottery program in the U.S. Combined, these strategies have propelled the Lottery to extraordinary success as the fastest-growing Lottery in the U.S.—rising from 24th in 2011 to sixth in 2021—in instant ticket sales per capita ranking.

The majority of the Lottery's instant tickets are printed by Pollard Banknote, and the company collaborates with the Lottery to strengthen and complement its core games category with well-timed introductions of new price points, novel play concepts, optimal prize structures, and innovative printing methods.

The Michigan Lottery has a keen focus on retail enhancements, introducing revenue-driving merchandising systems such as the Lighted Ticket Menu Boards from Pollard Banknote's Schafer Retail Solutions + portfolio, which, when deployed pre-pandemic, increased sales by 32%, and have since been installed across the state.

The Lottery has leveraged Pollard Banknote's Space Between™ solutions and multichannel strategies for core games like Crossword,

Bingo, and Wild Time™, earning them Best New Instant Game of the Year from NASPL in 2012 for its very first Space Between™ Crossword app, and setting the stage for iLottery.

Almost a decade ago, the Lottery, together with NeoPollard Interactive, Pollard Banknote's joint venture company, launched one of the first and most successful iLottery programs in the United States and set the gold standard for iLottery in North America. The solution features a full suite of interactive instant and draw-based games and a broad range of managed services, which fuel engagement and drive growth, resulting in greater contributions to support education in the state.

Propelling Growth in Ontario



The Ontario Lottery and Gaming Corporation ("OLG") is recognized as one of the most innovative lotteries in the industry. Pollard

Banknote has worked with the Lottery for three decades to help curate its unique product offerings and sales-driving strategies. Pollard Banknote not only supports OLG in maximizing economic benefits for the people of the province through lottery, but in direct investments, including the operation of a finishing plant in Sault Ste. Marie, and a regional office in Stoney Creek, with almost 170 people employed across the two Ontario locations.

OLG has worked with Pollard Banknote on strategies to increase ticket price points and strengthen core games in their instant ticket portfolio. This includes Crossword games, which have been hugely successful,

comprising 28% of their sales in 2021, with OLG ranking in the top ten for sales per capita in North America for Crossword games.

Digital engagement also plays an important role in OLG's success. Cross-channel games have built on the success of traditional instant tickets. For example, the 2021 Jackpot family of games, the multi-jurisdictional game launched in collaboration with other regions in Canada, featured a unique second chance program and gave players a chance to play a fun slots-style Space Between™ game, with almost 1.7 million tickets entered.

Pollard Banknote is also a proud partner for the Lottery's mobile app which powers its iLottery platform, offering players across the province the ability to conveniently purchase and scan lottery tickets, play their favorite casino games, as well as a host of other features.

Electronic Break Open Ticket dispensers remain an important source of revenue for OLG and we continue to install, operate, and service the related dispensers and systems in market, most recently launching an exciting Provincial Bonus Jackpot progressive game, giving players a chance to win a significantly higher top prize.

Innovation in Arizona



For almost twenty-five years, Pollard Banknote has partnered with the Arizona Lottery for instant ticket games, including introducing and printing its highly successful Crossword category, which accounted for 22% of instant ticket sales in 2021. In recent years, this partnership has expanded to bring new products to market that meet the evolving needs of the Lottery and its players, as well as drive operational efficiencies.

The Lottery's efforts to enhance and modernize its retail landscape have been supported by Pollard Banknote, such as implementing a variety of products from

the Schafer Retail Solutions + portfolio, including eye-catching signage at fuel stations. The upcoming launch of scanACTIV™—an innovative in-lane solution exclusively from Pollard Banknote—will help expand the Lottery's retail footprint by making instant tickets available to sell in an in-lane retail environment.

Pollard Banknote partnered with the Lottery to help them create opportunities in the digital space. Several years ago, the Lottery transitioned to Pollard Banknote's proprietary gameON™ 2nd Chance platform and mobile app. This enhanced the Players Club by introducing 2nd Chance promotions for its Scratchers category and online draw games, as well as providing a much-improved player communication channel, culminating in the Lottery's Players Club winning a Center for Digital Government Award. In September 2020, the Lottery upgraded its Players Club to Pollard Banknote's proprietary playON®, providing its players with greater choice in terms of rewards and offerings, deeper engagement possibilities, and more robust analytics. Pollard Banknote is currently working with the Lottery to develop a completely unique Loyalty program extension, Lucky Lounge.

Beyond player-facing products and services, Pollard Banknote also manages warehousing and distribution of the Lottery's instant tickets and pull-tab products ensuring the right stock gets to the right retailer at the right time using its proprietary sureTRACK™ lottery management solution from the suite of Pollard Banknote Lottery Optimization Tools.

A Full Suite of Options for Tabcorp



Tabcorp is another jurisdiction leveraging Pollard Banknote's industry-leading Lottery Optimization Tools and is currently in the process of upgrading to the newest version of sureTRACK™ after using the lottery management software to support the core distribution function of instant tickets across Australia for the past ten years.

The Lottery has worked with Pollard Banknote to integrate solutions across other important operational areas of the lottery business that they strongly believe, when integrated, will elevate service levels and overall operating efficiency. Pollard Banknote's proprietary launchPLAN™ tool, an intuitive game management platform, harnesses the power of data to intelligently create game schedules and drive more efficient multi-jurisdictional game maintenance practices. An optimized retailer ordering platform, retailerHUB™, which will be embedded into an existing retailer communication platform, will also be implemented in the very near future.

Pollard Banknote is the Lottery's primary instant ticket partner and the Company has worked with the Lottery to grow sales through a robust portfolio of innovative games.

Empowering Lotteries

Pollard Banknote works with lotteries to define and deliver a uniquely crafted set of solutions to suit each of its clients' needs to a tee. These Empowered Partnerships have enabled lotteries to offer the best games the industry, expand their ecosystem to attract and retain both new and existing players and retailers, as well as prepare for lottery modernization both digitally and at retail.

"For us, each one of these Empowered Partnerships with our lottery clients looks different, because each jurisdiction faces unique organizational and regulatory environments and unique market challenges," explained Jennifer Westbury, Executive Vice President, Sales & Customer Development. "We aren't looking to force a preconceived approach onto clients; we are looking to listen and understand how to help lotteries best grow their markets and revenues. This means that each partnership looks different because each client is different, and we embrace that."

Just like a personalized glass slipper, Pollard Banknote works with lotteries around the world to customize products and strategies based on their specific situations and competitive frameworks, to help them raise more money for good causes. Your perfect fit awaits!

GET ON THE PATH TO CONNECTED PLAY

Lottery operators can see, for the first time, player-level retail lottery purchases by implementing a program of solutions from IGT. And that's just the beginning of many benefits to players and operators.

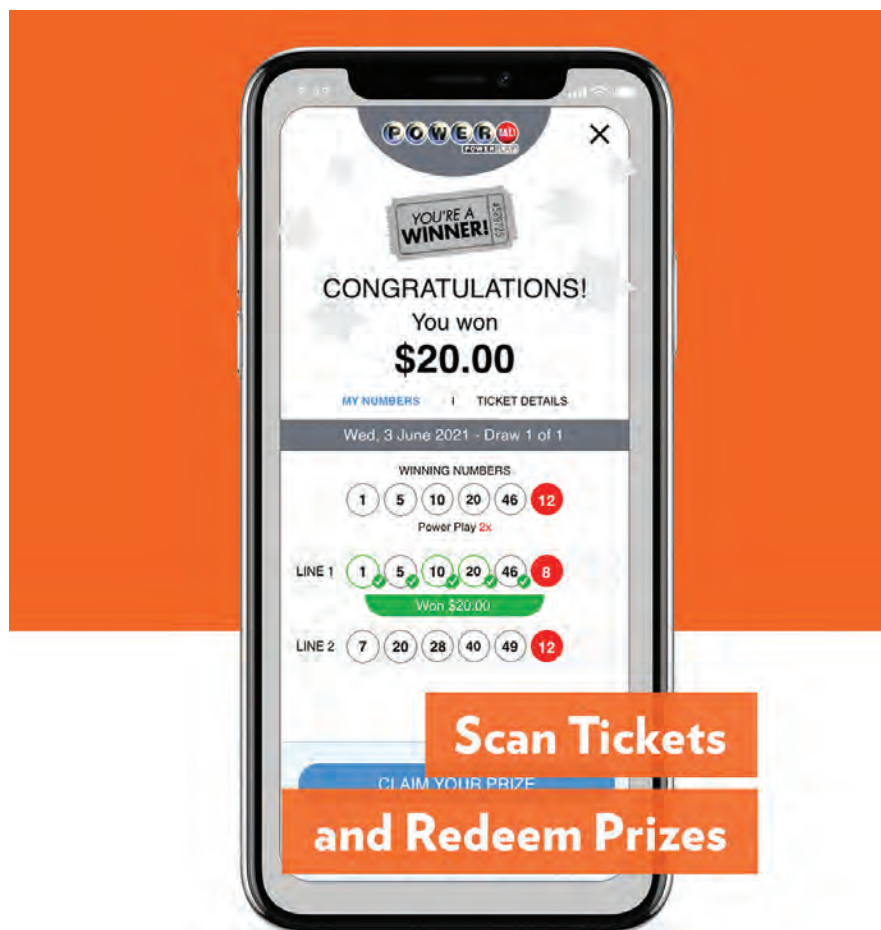
Last year, a popular U.S. restaurant chain launched its next-generation bakery-café restaurant design in Missouri with the intention of recognizing that today's consumers have different preferences when it comes to the pace of their experiences.

The retailer's prototype space not only incorporates a dine-in craft bakery experience and a traditional drive-thru option, but also a further lane dedicated to the brand's signature Rapid Pick Up® service, which involves online pre-ordering and curbside collection. Inside the café, guests

also have the option to order either at a traditional register or via a digital kiosk. And if they do come indoors, customers will find an immersive experience that respects social distancing. The chain is in step with a trend toward what IGT trend-spotting partner Foresight Factory describes as offering different product lines to serve different pace preferences.

How is this different from players purchasing lottery products? Lotteries also offer consumers choices to accommodate their preferred pace. At retail, players can either buy their lottery products in-lane (where enabled), at the check-out counter, or from a

Connected Play is IGT's vision for helping lotteries deliver new player experiences via engagement with digital touchpoints and refresh lottery's relevance for new audiences — and it's available to any lottery whether regulated to offer internet wagering or not.



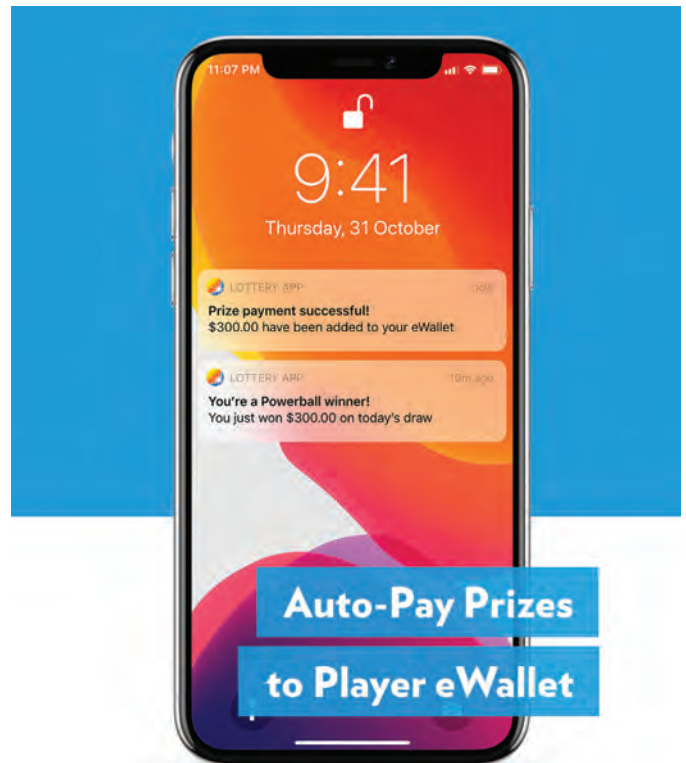
self-service vending machine. In states regulated for iLottery, players can purchase products directly from their computer or mobile device.

However, IGT has enhanced the consumer experience a step further and reinvented the lottery journey at retail using a 360-degree, holistic approach. Importantly, this approach accounts for the fact that not everyone is regulated to offer iLottery, but all lotteries can benefit from the enhanced player connection that digital solutions enable.

"We looked at the challenge not just from a player's perspective, but from the perspective of the retailer and lottery operator, too," said Srimi Nedunuri, IGT VP, Global iLottery.

Beyond digitizing the retail journey, IGT applied its operator experience and deep cross-functional knowledge to solve the problem that lotteries have wanted to solve for decades. As Nedunuri describes it, "We can enable a full, end-to-end, 360-degree view of the player, recording every lottery transaction whether at retail or online."

IGT calls this Connected Play.



Connecting

the Dots

This exciting vision is brought to life by IGT's Connected Play offering, which digitizes the retail lottery experience, delivering greater convenience for players and retailers. And because digitization delivers data on lottery transactions, lottery operators can see, for the first time, player-level retail lottery purchases, opening the door to in-depth analysis and new ways to build player relationships and enhance player loyalty and retention.

The addition of retail data is transformational: with the player's consent, lotteries can capture data on a transactional level.

There are five components to this first phase of IGT's Connected Play program:

1. Light Registration – Quick player-account creation using a single piece of personal data.

2. Digital Playslip – Makes it fast and easy for players to select and store their numbers from anywhere they choose. When the digital playslip is scanned at retail, the player's unique ID is captured, and the wager is associated with the player's profile in the database.

3. eWallet – Players can use their eWallet to pay for lottery purchases in a retail transaction that is 100% cashless, as players can accept winnings into their digital wallet.

4. Digital Ticket – Delivered and associated with the player's account within the lottery's mobile application, tickets can be paperless and secure, with the option to auto-pay wins if the player chooses.

5. Scan and Redeem – Players scan any physical draw or instant ticket to immediately determine if it is a winner. Prizes at certain levels, as determined by the lottery, can be applied back to the player's eWallet to withdraw funds to a linked bank account or retain them within the lottery ecosystem for future lottery purchases.

"We can finally provide lotteries with an enhanced data set and remove the guesswork from retail purchases and basket analysis," said Nedunuri. "This treasure trove of data now enhances personalized marketing efforts. Players will benefit not only from choices that fit their reimagined lifestyles, but also from relevant offers based on actual purchase history. This is just the beginning as we continue to modernize the retail journey and digitize player experiences to grow player engagement."

IGT's player-centric, 360-degree program, Connected Play, is available now. **For more information regarding Connected Play and IGT's award-winning mobile app, contact your Account Manager.** ■



TRUST: WHY “ZERO TRUST” IS THE FUTURE



Games of chance are inherently all about trust. Today's lottery and casino operators are highly focused on ensuring integrity and security of the games because cyber threats continue to mount. But how do operators handle the accelerating digital transformation while ensuring they are not in the news headlines for the wrong reasons? Shifting to a secure-by-design approach using embedded “Zero Trust” will greatly reduce the attack surface of any application based on *authorize, before connecting* – i.e. the system cannot be subject to external network level attacks. Beyond the major security gains, operators can now ensure security and compliance keep pace with the velocity of automation, and innovation, not slow it.

Risk Today, software applications are often accessed through networks known as Virtual Private Networks (VPNs). While VPNs and firewalls are common, using networks exposes systems to exploitation from billions of malicious actors. According to IBM's Security *“X-Force Threat Intelligence Index 2021”* network access is now the #1 initial cyber-attack vector; “Scan open networks and exploit”. Log4Shell is a very notable recent example, one of the worst cyber incidents of all time. With more apps, more users, and an increasingly digital operating enterprise, the risks are escalating.

A Zero Trust approach changes this risk profile by removing all open ports in your firewalls. Now, access is authorized **before** a connection can be made. System operators can apply application level micro-segmentation, least-privileged access and gain the power of programmable, visible and policy-based security. Not only is the external network attack surface gone, but should a breach occur any risk is dramatically reduced.

Agility Embedded Zero Trust benefits from being “Secure by Design”, built in at the start, not bolted on later. This means the software itself contains everything needed for end-to-end secure connections. In an industry demanding faster response to consumer preferences and market opportunities, a software-only, cloud-native solution removes many of the traditional constraints to faster innovation. Replacing the traditional hardware-centric networking model of proprietary islands with a software-first, APIs model, eliminates infrastructure dependencies and speeds agility. Underlying edges, clouds, and networks no longer present innovation friction. Minimize friction between features and security, we can have both. For example, lottery apps for player claims, gaming websites and business applications like digital licensing platforms, can be secured with embedded “Security as Code”.

Business Case Organizations are adopting “Security as Code” not just for the power of Zero Trust, but also because it enables a path toward the replacement of legacy private network solution components with

a single, unified, zero trust, scalable, cloud native Network as a Service solution. Areas for realizing savings include both capital and ongoing operational expenses; MPLS, SD-WAN, VPN and data center switches to major cloud providers. Additional savings are often realized in areas such as multi factor authentication and other cyber security tools and resources.

What's Next Now is the time to see how Zero Trust “Security as Code” can work for your organization. The increasing federal and state momentum toward Zero Trust security requirements, and the demand for faster cycles of automation and innovation opens the door for a better way; one that simplifies security, reduces complexity, and augments agility.

Best of all, there is no need to replace anything or change the way you do business. You can test Zero Trust, “Security as Code” with no risk. ■

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retailer. Norsk Tipping has completely digitalised its sport betting product with 95% of customers using the digital channels for sports betting. In early February, betting program and play slips were no longer printed. For Norsk Tipping, three strategic objectives include actively contributing to a society with less problematic gambling behaviour, creating Norway's best digital customer experience and developing a flexible, agile and efficient organisation.

From retail to the customer journey, **Shannon Dehaven, Vice President, Digital Engagement, Pollard Banknote, Canada** focused on how optimising the digital connection that is transforming the industry goes beyond retail and online sales in order to understand the modern consumer behavior. It is all about delivering players what they want, wherever they are. Dehaven noted that the more information lotteries have about their players, the more they can understand them, tailor offerings, as well as watch for and inform them about potential problem gaming. Today's players define their own journeys. They care about relevance, simplicity, convenience, and seamless transitions between digital and offline channels. Dehaven stressed that lotteries should develop both retail and digital channels of products that are easy to purchase, since many players carry out activities in both settings.

Andrew Varley, Head of Performance Marketing & Alistair Pitkin, Performance Marketing Manager, Tabcorp, Australia presented on future digital marketing. Privacy is a hot topic in Australia as the government reviews the Privacy Act. With amendments expected on personal information, consent and the right to erasure of personal data, it may no longer be possible to track behavioral data through cookies. Varley and Pitkin underscored the need to reassess marketing approaches. It will be key to know your audience by growing customer registration to legally access their data and better understand who they are; start developing cookie replacement solutions that help reach customers, and finally build an audience-first measurement approach by tracking addressable customer rates.

Sharon Duncalf, Vice President, Global Insights & Planning, IGT, UK outlined what has been learnt about player motiva-

tions and behaviour impacting lottery play over the past years. Speaking of global trends, global lottery has developed rapidly due to accelerated digital transformation and technology advancements like the Cloud and artificial intelligence. Duncalf highlighted a key finding from the Foresight Factory report on new trends that will shape consumer demand and behavior in 2022, of an overall change in personal pace coupled with the need to focus on what really matters in life. Building on this, lotteries can demonstrate their broad portfolio of in-home entertainment with games that appeal to different paces; consider end-to-end digital journeys for audiences that prefer not to be in stores, and offer entertainment to players where and when they choose. Duncalf also touched on ways the lotteries can embrace the metaverse and apply digital proxies to their brand to promote and educate in virtual worlds and find new audiences.

Peter Ter Weeme, Chief Social Purpose Officer & VP, Player Experience, BCLC, Canada emphasised how social purpose can future proof a business. A Social Purpose Company is a company whose enduring reason for being is to create a better world. It is an engine for good, creating social benefits by the very act of conducting business. Its growth is a positive force in society. The benefits of social purpose include attracting, retain and engaging customers, recruiting, retaining and motivating employees, enhancing stakeholder relationships, strengthening social capital, improving financial performance and increasing innovation. Emerging themes from the BCLC

social purpose journey including building a world where everyone has an equal chance, to grow happiness and wellbeing through play and to bring people and communities together to raise everyone's game.

Finally, **Chris Allen, VP Marketing, Scientific Games, UK** reviewed the great success of scratch cards which have grown in many markets over the past twenty years, surpassing 50 billion dollars alone in the US, in 2019. Almost 35% of all lottery sales globally are generated from paper scratch cards in an industry whose growth has gone from millions to billions. 45 years of industry innovation has focused on players, produced new price points, products, and experiences. Lotteries have embraced new technologies for changing player behavior. This innovation has allowed growth while connecting players to the lotteries and the social causes they support.

The advent of the Internet and high uptake of mobile phones has changed the way people live, work, play and interact through social media and other similar platforms. In concluding, Allen noted that the future would revolve around data, which drives expansion and digital engagement of players and offers the patterns for the future to optimize portfolios across all games.

EL and WLA would like to thank all speakers and participants, as well as CIBELAE, ALA and NASPL, for the fruitful discussions and support. Both associations hope to reconnect in person in 2023 for the next edition of the EL/WLA Marketing event! ■

Visit the websites of the European Lottery Association and the World Lottery Association to learn about their Mission, Educational Seminars, Conferences, Trade Shows, information resources, members, industry and association news, and much more.

european-lotteries.org | world-lotteries.org

EL Twitter @EuropeLotteries & LinkedIn "The European Lotteries"

WLA Twitter @wla_org & LinkedIn "World Lottery Association"

EL & WLA have the pleasure to invite you to the first joint physical event in two years!

The "EL/WLA Sports Betting Seminar: Running your Sportbook - Market trends, illegal betting, data rights, integrity and responsible practices", takes place in Seville, Spain from 17-19 May 2022. Check out the EL/WLA websites for more information and how to register!

EVOLUTION in the GAMING WORLD

Rick Perrone, Founder & CEO, Gameology and Tournament One

W GAMEOLOGY®

hen we hear the word evolution, we might think of an animal like the giraffe and how its neck got to be 500% bigger than its original size-taller than the average man in the world's "tallest country"- which scientists believe started out regular size. How does a neck (or anything for that matter) transform so radically, and what does a giraffe neck have to do with the Gaming industry? The first answer is that it doesn't. The transformation is the result of smaller changes, repeated across time to meet current conditions.

Due to environmental conditions, giraffes faced increasing competition for easily reachable vegetation sources. With natural genetic variation, some giraffes had slightly above-average neck lengths and got to eat the few higher up leaves other animals couldn't reach. Over time there was a domino effect. Better nutrition meant better health, which meant more and healthier offspring, increasing the incidence of the long-necked trait in the gene pool. As longer-than-average-necked giraffes mate, the longer-neck trait not only becomes dominant, but with each generation the average neck size grows a little, until finally, we have our six-footed-neck giraffe.

Just as the giraffe had to evolve in complex ways to continue its very existence, so too has the Gaming business.

The difference is that our modern, digital world is in a period of radical transformation. We're asked to quickly adapt to meet new (and sometimes extreme) conditions such as COVID-19. So how can we even fairly use the word evolution in Gaming, when we're operating on a completely different, condensed timeline? Evolve is what we all do every day and what we must do, as our very survival depends on it. It's the path I've followed with Tournament One and Gameology, its evolutionary successor.

EVOLUTION OF A GAMING COMPANY

I founded Tournament One in 2004 to meet the growing demand for high-quality, engaging content in the nascent online Lottery and Gaming space, with a focus on sports-oriented games. From my 20+ years as a Cable TV Systems owner, I understood the importance of entertaining and engaging content to both attract and retain customers willing to spend



money and time, for the right kind of quality entertainment. Our games went a step further and offered the chance to win prizes.

We've had a number of firsts, such as developing a Rubic's Cube game for IGT and the GA Lottery. With Pop Cap Games (now EA) and IGT, we converted 5 Bejeweled games and 2 Plants Versus Zombie games from skill games to predetermined games with Lottery fixed odds. After the launch of our first Bejeweled game, Debbie Alford, President, Georgia Lottery, said "...just that one game was responsible for producing 25% of all Online E-Instant revenue for the Georgia Lottery." Tournament One was awarded four patents for various gaming mechanics and proprietary algorithms we created for the project.

These are actively used in our games in the marketplace which continue to earn a steady stream of revenue, with multiple titles generating over





progressive jackpot payout timelines, second chance bonus contests and exciting Big Win Celebrations.

Our games are attractive to our customers not only due to the engagement they offer to consumers, but because of the flexibility we've built into our products. We offer variable prize tiers, fixed odds or RNG support, over 25 different patented game mechanics including Strategy, Match, Bingo, Keno and Sports. Games are available on monitor networks, self-service kiosks and consumer devices. Branding and themes are customizable and in-game support is available for multiple languages and currencies. We bring extensive experience integrating our games with proprietary lottery platforms with IGT, Scientific Games and Intralot.

seven figures per month. Sports still play an important role in our company as we continue to build sports-themed games and own trademarks for several sports titles, including the American backyard summer favorite, cornhole!

As part of our evolution, I realized that we needed a distribution capability for our content. The development of technology, such as a streaming system for our horse racing game Race to Riches[®], became an integral part of our business. We grew from having multiple servers to host games to a Remote Gaming Server (RGS) for speed of development and integration, connected to a Lottery or casino RGS via APIs to provide access to our game content. Our goal has been to foster play any time, any where and any way with online games for all main consumer device types. We also developed technology to bring our games to lottery terminals, kiosks and gaming machines.

As Lottery evolved to include online play, lottery game distribution was a natural fit for us, as we were already producing online games for casinos.

EVOLVING INTO GAMEOLOGY

With all of the changes we had undergone as a company, we felt that Gameology[®], a trademark we were awarded by the USPTO in 2010 to refer to our game-creation process, better represented the true essence of who we are and what we do. The process isn't just part of our company, it is our company. It describes what we do on a daily basis—create compelling games and the technology that brings them to life.

Our games offer many compelling features for consumers such as state-of-the-art graphics, multiple price points, various

Gameology[®] has provided games to 8 lotteries to date including Massachusetts, Ohio, Pennsylvania and Washington D.C. We're currently working with the Ohio Lottery and Intralot to produce an exciting Caddy Shack[®] game.

Our games continue to be great revenue producers as we roll out many exciting NextGen games. We continue to evolve our company every day to meet market demands and adapt to ever-changing conditions. Please reach out to me to learn more about the exciting path we continue to forge, and how our paths might come together! ■

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Contributions by Rebecca Docimo

can help. “Whether you have a single store owner or a chain with dozens of stores, there are pressures faced by all lottery retailers,” he said. “You’ve got to be profitable, and you have to protect your market share. Your costs go up every year, and that’s why they are looking to increase sales and margins. The lottery industry can help here by providing technology which reduces the workload for retailers to sell our products. As in-lane grows in popularity, we’ll see more retailers use these programs to help overcome some of the issues they face. This will help make it a simpler customer experience and remove a large portion of the cost for retailers to sell lottery products. I believe that this is the way that lottery will be sold at retail in the very near future because it is a better business model than what we have now. It also creates a better customer experience which is the key to ever increasing sales in the future.”

Of course, any discussion of modernizing and improving the retail experience should also include how you get players through the doors. That’s where Carmanah Signs excels, and Max Goldstein provided some guidance on this important piece of the retail puzzle.

“Consumers expect a digital experience at retail - if lotteries don’t deliver this experience, they risk hiding in plain sight,” he said. “With consumers making fewer visits to retailers, lotteries need to engage consumers while they’re actually in-store. Dedicated lottery merchandising space must be optimized to maintain existing footprint or risk losing it. Carmanah provides the digital communication platform at retail, which enables lotteries to provide fresh, targeted content where and when they want it - be it Digital Menu Boards, Digital PlayStations, and/or small footprint Interactive Tablets.

“To accomplish this, lotteries need to plan and budget for these executions to compete with other fast-moving consumer products. Now is the time for lotteries to invest in retail modernization to ensure future growth after two years of record sales.”

“We have to move from where we like to sell our products to where the consumers like to buy them.”

Matt Isaac of Pollard Banknote said that expanding the retail footprint is key to increasing sales, and technologies both big and small can help here. “We are testing Select 4™, our four-game instant ticket vending machine, in non-traditional locations such as bars, restaurants and fraternal organizations which might not currently have the foot traffic to support a larger type of product offering,” he said. “If we focus on expanding into these types of locations where people are spending time, and perhaps reaching people who aren’t as familiar with our products, we can start to incrementally expand our base. For a ticket printer like Pollard, working with technology companies helps us expand our footprint by reaching customers where they are spending their money. An example of this is the growth we’ve seen in dollar stores, and we’ve been very focused on different ways of selling product to reach that trade style. Retail solutions like ScanActiv™, Scratch and WINDOW™ and introducing games that have a digital component are all examples of technology we can utilize to succeed adding players to our lottery base.”

Sarah Taylor said that attracting customers to the lottery through different initiatives is critical given the increasing competition many states are facing. “iGaming and sports wagering have changed how customers, retailers and legislators perceive the gaming landscape,” she said. “But lottery is unique where most of the money goes to designated causes. So, when we look at initiatives that could deliver lottery products directly to customers, like Amazon, Door Dash, or grocery curbside along with their products, we need to consider working with our stakeholders

so we can compete in the modern retail environment.”

This need for flexibility is a driving force behind Abacus’ work. “We have invested enormous resources integrating with retail systems such as Toshiba, Fujitsu and NCR,” Terry said. “We want to make sure that no matter what system the retailer uses, we can work with it to bring lottery directly to where the customers are making their purchases. Initiatives like self-serve lottery have been happening in Europe for many years. The marketplace is changing fast, and lotteries should rely on their vendors to quickly and efficiently modernize their systems and make sure lottery is not left behind as the retail environment changes.

Gary wrapped up the panel with comments similar to the adage “fish where the fish are.”

“We need to blanket the market at this point, hit every possible retail and consumer touch-point we can,” he said. “We have to move from where we like to sell our products to where the consumers like to buy them. And there are so many locations where we’re just not in yet. I’m not yet measuring sales in revenue from in-lane because I don’t care about sales. I’m measuring the breadth of deployment. We just need to get our foot in the door, establish the business relationship with the retailers who will deploy this technology. The sales will come, and we’ll be a stronger industry for having deployed the technologies of retail modernization.” ■

to place a higher value on those principles than on maximizing GGR like the private operators are usually inclined to do.

And then there are the synthetic lotteries.

R. Dernovšek: Synthetic lotteries, and illegal operators in all gaming categories, exist to stimulate demand and over-consumption. They channel money away from benefiting good causes to benefiting their businesses. It's an unethical thing to do. Private shareholder interests of illegal operators should not be allowed to violate the well-being of the general public.

But it's not our role to regulate that. That is a role of the policy-makers. Our role is to do our own thing. And do it perfectly. Taking our commitments super seriously, leading the way, be the first in trustworthiness, most advanced in our services and first in caring for players and society.

Private operators claim that they are just as capable as state-owned operators to implement RG protocols.

R. Dernovšek: In our free market system, the company is not really required to care about the consumer. They're required to comply with all laws and regulations. And that is fine as far as it goes. But it does

not meet a standard of dedication to RG that can only be achieved by genuinely embracing the spirit of the law, not just the legally enforceable technicalities of the law. As we can see, the U.K. Gambling Commission frequently must penalize companies for violating laws that protect the consumers. I was just reading the most recent research on sport betting and in some countries that have opened sports betting market for competition more than 40% of under 18-year-olds play sports betting every week. That is 40% of underage youths who regularly gamble. No one should be profiting at the expense of society and good causes, as the players suffer and society incurs the cost to take care of addicted players. For most consumer products, the goal is to maximize consumption. The competition typically drives down costs for the consumer and often even increases quality at the same time. But competition in our industry doesn't mean better but a more addictive product. In a race for the players products are "improved" by introducing highly addictive elements. The goal of gambling and lottery is not to maximize consumption. It is to maximize a balance between players expectations and business results

while preventing excessive play, protecting minors and other vulnerable groups as well as preventing fraud and money laundering.

I sometimes feel like industry leaders want RG to be an end in itself, and not leveraged as an asset that differentiates lottery from its competition. I think we should be more aggressive about leveraging all assets, certainly including the higher standards we set for RG and CSR, to appeal to our audience of players, optimize the perception of value, and differentiate ourselves from commercial operators.

R. Dernovšek: I agree. I hope that our political constituents and general media appreciate the higher standards upheld by their own our lottery operators. Of course, player protection is an end in itself apart from any out competitive agenda. We want to represent something positive for everyone. But there is no reason the standards employed by the WLA members to continually re-set best-practices for responsible gaming, sustainability, security and integrity couldn't be applied for others to follow. ■



Houston, have you seen the latest issue of Public Gaming Magazine?

data is used to determine patterns and changes in play. "Sometimes a player will make purchases outside of their pattern of play. It's important to review the behaviors leading up to that user activity to encourage responsible play," he said. "Analytics tools help us focus on the correct data and take actions that are informed. Sightline sits at the intersection of digital and brick and mortar lottery. This position enables us to help our customers broaden the view and use of the data they're collecting."

JUMBO has been in the digital business for almost two decades and has operated across the globe. "It's incredible to look back on how the number of data points we utilize has grown over the years," **Richard Bateson** said. "We started off small but the data has grown exponentially to effectively serve as guardrails for lotteries. We've invested heavily in data because we needed to understand what the best activities are to adapt and maximize the opportunity to increase sales or onboard a new player. For me as a marketer, I find these tools fascinating in that they allow me to receive a much more advanced view of the player. The result is that my decisions are much more focused on exactly what the player wants."

Brian Rockey oversees a lottery that doesn't presently offer iLottery but has a robust players club. "We have a few hundred thousand players registered and active in our MVP Club and we interact with those players often," he said. "When we do our segmentations and psychographic work, we try to delineate and identify the varying degrees of loyalty. This can be done by looking at lottery spend as well as what else the player does for entertainment. We know, for instance, that 40% of our players have visited a casino in the past year. So our question is 'will they stick with us when casinos open in Nebraska next year or will we lose them, or lose a portion of their spend?' We need to know how much of their daily activity we consume and determine what we can do to keep them as customers."

Drew Svitko moved the conversation to

the next step. "Many of us are collecting data but not every lottery is selling online or accepting cashless payments," he said. "So what can we do with all this data that we have collected to inform the rest of our business, the traditional retail side of the business? How does this data help those that aren't selling online or perhaps aren't accepting cashless payments?"

"The use of credit cards transforms the transaction from an anonymous cash purchase, in which nothing is known about the player, into a record and data-point that can help the player be more aware and manage play more responsibly."

Merv Huber said that the reality of the situation is that the majority of lotteries still don't sell products online, including most of Scientific Games' clients. "Most of the CRM programs we run are for lotteries that don't have online sales," he said. "They have loyalty programs and second chance programs. But we learn a lot about those players that are just entering tickets into the system. What games do they like to play? Are they hitting the responsible gaming limits that are set within the system? We know the retail behavior of many players from the record of their second chance game entries, or if they're funding their digital accounts at retail locations. So we can gain a lot of valuable information from different digital activities, even from those who are not actually purchasing games online."

Trevor Allison believes an important point is often missed when looking at data. "I think when most people think of CRM they're thinking strictly retention," he said. "But that thinking misses a big piece of what CRM can do, which is also capture User Experience and User Interface information. And if we can optimize UX and UI in the digital space, there's no

reason we can't take that same information and transfer it to the traditional lottery space. INTRALOT is doing that now. A recent launch of sports betting for one of our customers includes applying the information to different parts of the lottery, not just digital. We now understand the player fully and we work to keep a balance between supplying them with promotional information and bonuses that will drive purchases and not annoy them."

Richard Bateson believes data leads to evidence-based decision making, which is what all businesses need, not just lottery. "I think it's a misconception that if you're not selling through iLottery you're not transacting online and you don't have a digital program," he said. "Actually, some of the lotteries who are prohibited from offering iLottery have fairly advanced digital programs and capabilities. Whether it is understand-

ing the player experience and interface or their use of CRM tools through a loyalty program, I've been quite impressed with how advanced the non-iLottery lotteries have become. They then use this data to make the same evidence-based decisions as lotteries with iLottery programs."

Brian Rockey runs one of those non-iLottery states and he agrees that they have become creative. "Our data comes to us in different forms," he said "We use coupons a lot, both at retail and through our loyalty program and we are able to gauge player patterns through the coupon redemption. We are able to reward players for purchases and see if we can drive certain consumer behaviors. We also have had a mobile app for many years and we are working to continue to add as many features as possible, short of selling through the app. Then we can learn as much about the app user as possible."

Drew Svitko steered the discussion to a final and very important component of the digital lottery world – responsible gaming, asking "We've determined that the data collected can be used on both the digital and traditional sides of the business. How can the data also be used to allow lotteries

to act in a responsible manner as we work to attract players and promote purchases?”

Andrew Crowe said that at Sightline, we have years of experience with how the public views the use of credit cards. Applying insights from that experience to the lottery industry, Andrew spends much time working to show how cashless transaction technologies contribute to responsible play. “The use of credit cards at lottery vending machines is a great illustration of how we can use data for all facets of lottery business,” he said. “At first blush, many of our stakeholders think that allowing credit cards is irresponsible and perhaps shouldn’t even be allowed. But the use of credit cards transforms the transaction from an anonymous cash purchase, in which nothing is known about the player, into a record and data-point that can help the player be more aware and manage play more responsibly. Decisions on both the lottery and player sides will be more informed from that data.

“Once you start to have digital activity, the consumer now has better visibility into how much they are spending and are in a better position to self-regulate. Another benefit that is often overlooked is that the banks are also now involved in monitoring. They know the player’s debt- to-income ratio,

their credit score, income levels, normal behaviors, etc. and they know this is a gambling transaction. The bank is making a decision about the risk tolerance of this player at a transactional level. For lotteries, we’re not looking to squeeze the extra nickel out of the player. It’s about growing responsibly, empowering the consumer behave responsibly and working with you to make decisions that comport well with all other aspects of players’ lives.”

For **Richard Bateson**, the question is “How far do you want to take your responsible gaming policies? We have the data on our players’ patterns. So you can either commercialize it, do something with it to protect players or, even better, both. We know what works to promote purchases and we also know our at-risk players. How do we help this small population? It’s actually easier with digital than at retail. We owe it to our players and communities to offer safeguards that will protect them.”

Merv Huber said responsible gaming is a part of Scientific Games’ predictive analytics program. “We score every player on the percent likelihood that the player will self-exclude X months into the future,” he said. “It’s a powerful tool but how do you put it into use? Do you throttle back your marketing? Test and measure?

You could send your responsible gaming message to a group you’ve identified as likely to self-exclude a few months in the future. Send the message to half those players and hold a control group back. And then after three months, score them again. What did the predictive analytics say about the players who got the message versus those who didn’t? Did you improve that score? What did self-exclusion look like for those pools of players who did or did not get a responsible gaming message? It’s important to use the same tests and measure for responsible gaming that we use for all other marketing activity.”

Drew Svitko wrapped up with a few thoughts on data. “Obviously data is important to all of us and our businesses, and in some cases it’s because we can use it to do the right things and in other cases drive our businesses forward,” he said. “Data is the present and the future of our business. For those not selling online currently but see it in their future, please reach out to the lotteries which are able to offer online sales. We have our own data that could help inform your decisions. Even if online sales are not in your future, the data collected from other states might help your decisions, both with your current digital program and your traditional lottery sales.” ■

Digital Lottery Growth is Skyrocketing continued from page 26

realize that you must think and act differently,” he said. “For us, with no iLottery on the horizon, there are incremental things we can do to help our retailers and add players.”

Rebecca added to this idea of re-imagining the retail experience to include any type of digital. “There is no need for us to use the same trade styles, to limit ourselves in reaching our players,” she said. “We know our customers aren’t limiting themselves as the multiple retailers with which they interact are always selling them something and reaching them through their smartphones and other means. So let’s make sure we act like any other retail brands and send our customers offers on their phones and move them back and forth between in-person retail and digital.”

Darrell reiterated the importance of optimizing loyalty programs and VIP Clubs, particularly for lotteries which cannot sell

products online. “Let’s make sure we make our sign-up as simple as those in other industries,” he said. “As you look at what other industries, you see simple processes for joining their digital worlds, and certainly many lotteries have similar processes. But if you use a Facebook sign-on or just ask for email information and then start collecting information, you have simplified the process and you’ll see a greater conversion rate for players. In the end, it’s all about convenience.

Shannon emphasized that digital isn’t only about online sales and VIP Clubs. “There are a number of lotteries that have embraced the opportunities with social media and are creating some great content and have an entire personality around their brands,” she said. “Other are creating paid content that doesn’t really look like paid content which is important because it still has authentic-

ity. And that is critical. We want to engage our customers but not turn them off with overtly ‘sales-y’ content. Provide them with authentic content and you’ll keep them coming back.”

And as **Matt** said to conclude the panel, “For all us, even those who can’t sell online, there are opportunities to use digital to promote our businesses and reach players. We all need to figure out how we can best engage players in a mobile/digital world and demonstrate we’re relevant to their lives. Let’s become more efficient and more successful, always keeping in mind that the better we do, the better the good causes we support will do.” ■



PULSE of the Industry

These news stories comprise a very small fraction of the gaming and lottery news stories posted every day to PublicGaming.com. Too, these stories are the highly edited short versions. You can visit our news website PublicGaming.com and access all of its departments for free, including search to read the full version of the articles. Sign up for our free e-newsletter by sending your e-mail address to sjason@publicgaming.com.

NORTH AMERICAN NEWS

Kelly T. Gee Appointed Acting Executive Director, Virginia Lottery

Kelly has spent the last decade in public service, including eight years in the General Assembly, culminating in her role as Deputy Chief of Staff to the 55th Speaker of the House. For the last three years, she served as a member of the Lottery's leadership team as the Manager of Government Relations. She was responsible for managing the strategy and execution of legislative outreach efforts and played an active role in policy creation and implementation.

Vincent Sadusky is appointed Chief Executive Officer of International Game Technology PLC (IGT) and serves on its Board of Directors.

Prior to taking on his current role at IGT in January, 2022, Sadusky served from 2018 to 2020 as CEO and board member of Univision Communications, the largest Hispanic media company in the US, operating multiple broadcast and cable networks, local TV and radio stations, digital video and audio streaming. Prior to Univision, he was CEO and board member from 2014 to 2017 of Media General, a local TV station and digital media company with more than 50 TV stations and 5,000 employees. From 2006 to 2014, he was CEO and board member of LIN Media, a local TV station broadcaster and digital media company. He also served as CFO of LIN Media from 2004 to 2006. He was also CFO of Telemundo Communications from 1999 to 2004.

Mark William Bracken to serve as interim executive director of the Massachusetts Lottery as Michael Sweeney is departing

Bracken has worked in the Treasury since 2011. He is currently an assistant treasurer and director of the state's Unclaimed Property Division.

Marc J. Marseglia has been appointed as the new Deputy Executive Director of the Lottery

Scientific Games Lottery congratulates Light & Wonder on re-branding announcement



In preparation for the Scientific Games Lottery group becoming a stand-alone company, the company's Gaming and iGaming groups have rebranded as Light & Wonder. Scientific Games will continue our successful path as a global lottery company and partner of choice for government lotteries as Light & Wonder carves its own path forward to become the leading global gaming company. Scientific Games lottery organization will keep the iconic Scientific Games name, and the company's Gaming and iGaming business units are moving forward as Light & Wonder. Light & Wonder's rebranding does not impact the company's lottery business or 130 customers in 50 countries worldwide. The sale of Scientific Games' Lottery business to Brookfield Business Partners is expected to close in late March, and Scientific Games Lottery Executive Leadership team will remain in place with some additions to support functional areas as it becomes a stand-alone company.

Ontario set to Launch regulatory framework for iGaming in April

The Illinois Lottery FY22 half-year sales are up 20% on the first half of FY21

IGT Signs Comprehensive 20-Year Contract Extension with Rhode Island Lottery

IGT Delivers Industry-Leading Technology to Missouri Lottery via Three-Year Extension

As part of this agreement, IGT will deploy 175 new cashless GameTouch™ 28 self-service vending machines, expanding the Lottery's retailer base and allowing for a more dynamic user experience among players. IGT will also support the Lottery's launch of IGT's highly successful proprietary Cash Pop™ draw game that offers flexibility for operators and players with its easy-to-play mechanics.

IGT PlayDigital Expands Footprint to West Virginia's iGaming Market



High-performing IGT PlayCasino games such as Fortune Coin, Siberian Storm, and Cleopatra make West Virginia debut

Online sports betting now available in Arkansas, mobile betting soon to follow

New York State Senator Introduces Bill to Legalize iGaming

Indiana lawmakers halt online lottery expansion

Iowa Cashless Gaming Bill Passes State House, Would Also Legalize Esports Betting

The 5 key elements in the new Minnesota sports gambling proposal

New York and Kentucky Lawmakers Consider Online Poker

Kentucky House passes sports betting bill

Oklahoma takes another step towards sports betting at casinos

Texas Lottery expands in-lane ticket sales to Texas Kroger stores

IGT Introduces Wheel of Fortune® Electronic Bingo to the Charitable Gaming Market in Ontario

IGT to Deploy Enhanced INTELLIGEN Central System Technology to Manitoba VLTs

IWG and Loto-Québec Sign New Contract



Under this contract, IWG will continue to supply its full suite of InstantGames™ digital eInstants. IWG has been an eInstant supplier to Loto-Québec since 2015.

NePollard Interactive Integrates With Pariplay To Offer Content In Alberta



NePollard Interactive Signs New Content Deal to Supply Industry-Leading Games to the Atlantic Lottery Corporation

Inspired Entertainment's popular online gaming content has gone live in Michigan with GAN Limited



Inspired Entertainment launches Tin Can Cash™, a funfair-themed, 5x3 reel online and mobile slot game that plays across 20-win lines.

INSPIRED LAUNCHES CATCH OF THE DAY, A FISHING-THEMED ONLINE & MOBILE SLOT GAME

Inspired Entertainment, Inc. that its online gaming content has gone live in Michigan with GAN Limited

Sightline Payments Introduces Mobile Loyalty Powered by IGT

Sightline

The new app will offer casino patrons a unified enhanced experience.

Szrek2Solutions and IGT Launch Szrek's Automated Trusted Draw System for Florida Lottery

New Hampshire Lottery Launches State-of-the-Art Mobile App

Gaming Went From COVID to Best Year in Industry History, says AGA

theLoter.com Minnesota website offers courier service for resident of Minnesota to play top Minnesota Lottery draw games online

theLoter.com Minnesota operates as an independent, secure courier service for Powerball, Mega Millions, Lotto America, Gopher 5 and Northstar Cash and the official Minnesota Lottery tickets are sold to Minnesota residents.

BCLC Lottery Corp. calls foul as 'grey market' gambling companies target British Columbia market The Kentucky Lottery Corp. says Illegal gaming machines hurt Kentucky Lottery sales

KY Lottery Corp. President and CEO Mary Harville told state lawmakers lottery sales are down 3% in places that have the machines, compared to being up 4% in places that don't have machines. Lottery Corp. outside counsel John Goldberg called the machines "blatantly illegal."

Missouri: casino cities urge state authorities to crack down on "pre-reveal" gaming machines

The debate on the legality of "pre-reveal" games has been a long-standing one, and bills seeking to ban these machines have been introduced in the last few years, and earlier this year as well.

The machines, which have become popular throughout the state, have also led to several pending prosecutions.

SPORTS BETTING AND CASINO GAMBLING

The Nevada Gaming Control Board announced that roughly \$179 million was wagered over Super Bowl LVI, compared to \$135 million wagered over 2021's Super Bowl

Betting upstarts need to spend big bucks to attract new users — but like a gambler chasing a huge payday, companies can easily get in over their heads with marketing and acquisition costs if they're not careful. That challenge was on full display with DraftKings, whose shares plunged nearly 20% Friday despite sales that topped expectations and a boosted outlook. Investors are clearly concerned that the company is expected to continue losing money this year as it spends heavily on ads and promotions. And DraftKings also said first-quarter sales would be lower than Wall Street forecasts. Meanwhile, DraftKings faces tough competition from FanDuel — owned by UK-based sports betting company Flutter Entertainment (PDYPF) — as well as traditional casinos such as MGM (MGM), Caesars (CZR) and Penn National Gaming (PENN), which has a big minority stake in Barstool Sports. The crowded field forces rivals to try to out-promote one another other, often luring them with limited offers of free bets. The hope is to gain a loyal and frequent customer, but such promotions eat into short-term profits.

Maryland Lottery and Gaming Commission Approves Bingo World, Rush Street for Sports Wagering

Gov. Evers signs deal allowing sports betting at Wisconsin Potawatomi Tribal Gaming facilities

Joe Cunningham, candidate for governor, proposes legalizing sports betting in South Carolina

Proposed Bill would give Maine tribes exclusive rights to lucrative mobile sports gambling market

Senate Bill Would Allow Sports Betting Kiosks Inside New York Stadiums

Arkansas Mobile Sports Betting Advances After Profit-Sharing Rule Approved

IGT Grows Sports Betting Leadership in Washington State via Agreement with Kalispel Tribal Casino

Illinois ends in-person registration requirement for sports betting, opening floodgates for online sportsbooks ahead of March Madness

Kentucky's sports betting bill clears first legislative hurdles

Apollo considers merging Yahoo Sports with betting companies

Apollo Global Management, the private equity firm that acquired Yahoo from Verizon for \$5 billion last year, is having preliminary discussions with sports-betting companies to merge their assets with Yahoo Sports, according to people familiar with the matter. All talks at this stage are early, and no deal is imminent, said the people.

Gambling ads continue to get more airtime in the US

Sports betting is here to stay, in the US and around the world. Like any industry, gambling operators want to be able to advertise to attract more customers. However, some believe that there is too much advertising. Countries like Italy, the UK, Australia and others are tightening up on how much – and when – gambling advertising is allowed. The same restrictions will soon enter the US market as well.

Lawmakers expect sports gambling bill to pass in Minnesota this year

New York generates \$70M in revenue in first 30 days of mobile sports betting Survey Reveals 65% of Kentuckians Support Legal Sports Betting, 26% Opposed

Legislation could make sports gambling legal in North Carolina

Legislation introduced in Hawaii to offer sports wagering to residents and tourists of the islands

Tribes join expensive California sports betting fight

Mobile Sports betting resolution

heading to South Dakota Senate floor

WORLD NEWS

European Parliament adopts position on new digital rules; EL welcomes new provisions to fight illegal online gambling

“EL Members strongly believe in a high level of consumer protection and are fully committed to the fight against illegal online gambling. The DSA (Digital Services Act) foresees a number of new provisions that could be beneficial to this end. EL hopes that these will be at the disposal of its Members, most notably an improved notice-and-action mechanism, the concept of trusted flaggers and enhanced consumer protection and know-your-business-customer requirements.” says Arjan van 't Veer, EL Secretary General.

The DSA is a future EU regulation with the aim to create a safer digital space in which users' rights are protected through rules to tackle illegal products, services or content online; enhance the accountability and transparency of algorithms; and deal with content moderation. With the European Parliament now having reached its position, the path is paved towards the so-called “trilogues” – negotiations between all the three institutions which will see the final text of the future regulation hammered out. DSA rules could come into force as soon as 2023. EL will continue to closely monitor and – as appropriate – get actively involved in this discussion in the best interest of its Members.

Allwyn Entertainment, the new group-wide brand for SAZKA Entertainment AG -now is listed on New York Stock Exchange Listing in Partnership with Publicly-Traded Cohn Robbins Holdings Corp (CRHC)

UK Gambling Commission recommends Allwyn/Sazka as winning bidder for National Lottery

The Gambling Commission has announced Allwyn Entertainment Ltd as its preferred applicant for the lottery's next licence, which starts in 2024. It said it had received the highest number of applications to run the National lottery since the first licence was awarded in 1994. Camelot has been named as the "reserve applicant" after four firms applied. Allwyn is a UK-based subsidiary of Europe's largest lottery operator Sazka, which is owned by Czech oil and gas tycoon Karel Komarek. It signalled its intent to run the National Lottery by launching in early 2021. Its board includes former members of the London 2012 Olympics organising committee, Lord Coe and entrepreneur Sir Keith Mills, who sit on its advisory board.

La Française des Jeux (FDJ), France's leading gaming operator, announces its

2021 results, its outlook for 2022 and its 2025 targets

Stéphane Pallez, Chairwoman and CEO of FDJ, said: “The year 2021 marks FDJ's return to its pre-crisis growth trajectory for all its activities.

2021 revenue of €2.3 billion, up 10% compared with 2019, based on an 11% increase in stakes to €19 billion - Growth in offline stakes (+5% vs 2019) and strong momentum in online stakes (+42% vs 2020)

- 2022 targets: revenue growth of nearly 5% and EBITDA margin above 23.5%

Svenska Spel Year-end report 2021: Continued growth despite strong impact of pandemic

Hungary Introduces iGaming Legislation to End State Monopoly

Hungary's parliament has introduced online gaming legislation which opens the market to private online operators, bringing an end to the current state monopoly on sports betting. Any operators who have offered iGaming in Europe without a licence during the ten years before their application will be prohibited from operating in Hungary. Changes to the legislation are designed to ensure a higher standard of player protection. Recognising that a more competitive gaming market could encourage excessive gambling, the bill stipulates that a player protection plan be drawn up by the operator “in accordance with the principle of responsible gaming and the protection of players”. The bill is subject to a standstill period following its notification to the European Commission, which runs until 4 May.

Scientific Games Large-scale Lottery Retail and Digital Sports Betting Solution Now Live in Azerbaijan

International Game Technology PLC Reports Fourth Quarter and Full Year 2021 Results

- 2021 revenue increased 31% to \$4.1 billion on double-digit growth across segments; met or exceeded all 2021 financial goals with key financial metrics above 2019 levels

- Full year operating income of \$902 million, the highest in Company history, on strong Global Lottery operating leverage and company-wide structural cost savings

- Generated over \$1.0 billion in cash from operations and \$770 million in free cash flow in 2021, including record-level cash flows for a quarterly period in the fourth quarter, on strong performance and disciplined capital management

- Reduced net debt by \$1.4 billion; leverage improves to 3.5x, the lowest level in Company history, achieving the 2022 leverage target a year early

- Reinstated shareholder returns in the fourth quarter with payment of \$0.20 quarterly cash dividend and over \$40 million in share repurchases

- Reaffirming full-year 2022 guidance provided at recent Investor Day

"Our 2021 financial results reflect the best revenue, profit, and cash flow performance in the last four years, meeting or exceeding target levels on strong performance across the portfolio," said Vince Sadusky, CEO of IGT. "We made important progress on several strategic objectives, and I am excited to be leading IGT in the next chapter of its evolution. We have set aggressive but achievable multi-year goals and we have a focused strategy to maximize value for all stakeholders."

IGT Fortifies Lottery Leadership in Mexico with Expanded Agreement

Company to provide Mexican national lottery innovative end-to-end services including instant tickets and sports betting until Sept. 30, 2024.

IGT Expands Instant Ticket Business in Germany via Contract with Staatliche Toto-Lotto GmbH Baden-Württemberg

IGT selected as Malta National Lottery technology provider

Colin Cole-Johnson appointed CEO of Bede Gaming

Cole-Johnson joins Bede from Entain plc, where he was Gaming Product Director. Bringing with him over 20 years of experience, Cole-Johnson has been a major figure in the online gaming industry with director-level roles at some of the sector's biggest operators including, Ladbrokes, William Hill and The Rank Group.

His appointment to the leadership role at Bede Gaming is the latest in a series of notable announcements from the software supplier, which became part of the Gauselmann Group in March 2020. Since 2011, Bede has proven its strength in the provision of digital technology for the online gaming industry. In the past five years, as well as becoming part of the German international conglomerate, Bede has grown to over 250 staff, established offices in multiple locations and has customers across three continents. As well as counting one of the world's largest lottery and gaming organisations amongst its customers, Bede now boasts the handling of over £50bn in annual stakes through its platform, highlighting the company's impressive growth in recent years. Coupling this solid technical foundation with Cole-Johnson's commercial & customer expertise will build upon Bede's recent global expansion

and enable the software supplier to evolve its premium platform offering into the ultimate operator-focussed product.

Jumbo Interactive delivers strong growth in 1H22 with positive momentum across all business segments

NeoGames Fourth Quarter and Full Year 2021 Results

The total of Revenues and the Company's share in NPI revenues was \$84.5 million during 2021 compared to \$58.7 million during the prior year, representing an increase of 43.9% year-over-year. Revenues were \$50.5 million for 2021, compared to \$49.2 million for the prior year. The Company's share in NPI revenues was \$34.1 million for 2021, compared to \$9.5 million during the prior year.

Australia Illegal Gambling Sites Crackdown Sees 12 More Websites Blocked

The Australian Communications and Media Authority (ACMA) continues its efforts to remove unlicensed online betting operators from the country. It has sent a request to ISPs to block 12 sites, which will add to the 14 that were already blocked in December. ACMA has accused the dozen sites blocked of breaching the country's Interactive Gambling Act of 2001. The list includes 7 Reels, 21 Dukes, Arlekin Casino, Horus Casino, Johnnie Kash Kings, Lucky Star, Slot Vibe, Tangiers Casino, Thebes Casino, Winward Casino, Zebet, and Zeturf. When the ACMA received permission to go after unlicensed operators in 2017, 160 sites subsequently decided to voluntarily exit. A recent study by the ACMA showed that online gaming and betting continue to find greater popularity in the country. The agency still has a difficult time enforcing the regulations it has to uphold. It can make requests and seek support from ISPs and others. But it doesn't have the authority to demand intervention or action.

Online Casinos Coming to North Rhine-Westphalia, Germany in Legislation

The North Rhine-Westphalia state parliament passed a law to allow the issuance of gambling concessions to online casino operators. The bill outlines a number of features. One of the main themes is the desire to reduce black-market activity in the region. The new laws will reduce the risk of fraud, manipulation, and illicit advertising behavior, according to policymakers. The bill endorses the claim that gaming designs and formats can to lower the addictiveness of content offered by outside providers.

Tabcorp Awarded Victoria 20 Year Digital Keno Licence

The current exclusive 10-year retail-only licence held by Tabcorp, which was awarded in 2012 for a price of \$60 million, will expire on April 15, 2022, and will be replaced by the new licence. Sue van der Merwe, Managing Director of Lotteries & Keno, stated: "Tabcorp is pleased to continue its partnership with the Victorian Government with the longer term and expanded channel flexibility offered under this licence. The new structure will allow us to continue offering Victorian players a world class Keno product and responsibly grow the game further, backed by our extensive retail and brand presence and the expertise gained from our existing Keno online business."

Online gambling operator 888 to pay a £9.4m fine after a Gambling Commission investigation revealed social responsibility and money laundering failings.

Rank Digital Gaming (Alderney) – trading as bellacasino.com, grosvencasino.com, meccabingo.com and meccagames.com – will pay a £700,557 regulatory settlement for social responsibility failures.

Annexio (Jersey) – trading as lottogo.com – will pay £612,000 regulatory settlement for both social responsibility and money laundering failures.

Trinidad and Tobago now has its own gambling regulator. After the Caribbean territory approved updated gambling laws last year, lawmakers have now successfully introduced its new Gambling (Gaming and Betting) Control Commission.

Veikkaus' financial profit remained on previous year's level –

Sustainability actions and the coronavirus epidemic had a negative effect on the gross gaming revenue.

Gaming revenue in the Philippines grows by double digits in 2021

Is Gambling in the Cards for the UAE?

"The metaverse will change gambling from highly transactional and solitary to more entertainment-based and social"

SPOTLIGHT ON THE LEADERS OF THE GOVERNMENT- GAMING INDUSTRY

It's the collaboration between operators and their commercial partners which drives innovation and progress and makes this industry work. PGRI endeavors to support and nurture that relationship, confident that together we can all build successful businesses that meet the needs of our stakeholders and customers. The leaders of the commercial community play a vital role in our industry and we are thankful for their invaluable contributions to the exchange of ideas that happens at PGRI conferences, and all industry events and conferences. Their products and services are the result of a tremendous investment in R & D, and their insights and capabilities are informed by a deep experience in all aspects of the lottery business. Following is their story. Please also visit the conference website (www.PGRItalks.com) to see their presentations from PGRI conferences.

DOUBLE-PLATINUM INDUSTRY LEADERS

INTERNATIONAL GAME TECHNOLOGY PLC (IGT)

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A global leader in lottery and gaming, IGT is uniquely positioned to deliver unrivaled gaming experiences that engage players and drive growth.

To support player-driven innovation and growth for our customers, we leverage a substantial investment in player insights, a wealth of premium content, operator experience, and leading-edge technology. Our Global Lottery, Global Gaming, and Digital & Betting organizations respectively support four key business segments:

Lottery – IGT's pioneering and award-winning solutions encompass all aspects of the lottery business, including iLottery. We're the trusted source of fully integrated product roadmaps and advanced solutions to accelerate the convergence of retail and digital. We continually refine and optimize our systems and tailor distinctive game content to help our customers strengthen their relationships with the players they serve.

Gaming – We deliver dynamic games, systems, gaming machines and other growth-driving innovations to gaming venues around the world. IGT's distinctive systems solutions give operators the control and flexibility they need to optimize their gaming floors, offer cashless gaming and manage robust loyalty programs.

Digital – IGT PlayDigital is dedicated to delivering growth-driving solutions that advance digital play across the global iGaming sector. From content and systems technologies to critical support services, our PlayCasino portfolio is integrated, modular, and flexible.

Sports Betting – The IGT PlaySports solutions portfolio was created specifically to meet the needs of North American casino and lottery operators. The proven, award-winning platform is versatile, and annually processes billions of dollars in wagers through retail, mobile, and self-service technology.

IGT's commitment to responsible gaming is woven into the fabric of our product development, services, programs, and policies. IGT was the first lottery vendor to receive the WLA's Responsible Gaming Standards for Associate Members, covering IGT's lottery and digital operations, and was the first gaming vendor in the world to achieve responsible gaming accreditation from the Global Gambling Guidance Group (G4) for both its gaming and digital operations.

IGT is a member of the United Nations Global Compact network to align strategies and operations with universal principles related to human rights, labor, the environment, and anti-corruption. We also support the United Nations' Sustainable Development Goals (SDGs).

IGT is dedicated to creating a fair and inclusive culture that values unity, diversity, and belonging in our people, players, customers, and communities. We received a perfect score on the Human Rights Campaign Foundation's 2022 Corporate Equality Index earning us the "Best Place to Work for LGBTQ+ Equality" designation. IGT was one of 325 companies across 50 industries selected for the 2020 Bloomberg Gender-Equality Index (GEI).

DOUBLE-PLATINUM INDUSTRY LEADERS

INTRALOT

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www.intralot.com

The logo for Intralot features the word "intralot" in a bold, lowercase, sans-serif font. The letters "i", "n", "t", "r", "a", "l", "o", and "t" are in black, while the letter "l" is in a dark blue color. A thick, horizontal orange brushstroke underline is positioned beneath the text.

INTRALOT, Inc.

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Sokratis Kokkalis, CEO, INTRALOT
Chris Sfatos, Group Deputy CEO, INTRALOT
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Chryssa Amanatidou, Group Corporate Affairs Director, INTRALOT
Byron Boothe, Chief Executive Officer, INTRALOT, Inc.
Chris Tzoumaras, Senior Vice President Operations and Chief Operations Officer, INTRALOT, Inc.

Year of inception: Greece (Parent Company) 1992; United States 2002

Contact: contact@intralot.com

INTRALOT, a publicly listed company established in 1992, is a leading gaming solutions supplier and operator active in 41 regulated jurisdictions worldwide. With a global workforce of approximately 3,400 employees in 2020, INTRALOT is committed to redefine innovation and quality of services in the lottery and gaming sector, while supporting operators in raising funds for good causes. Uniquely positioned to deliver **state-of-the-art technology** across geographies, the company has developed an advanced ecosystem that serves all verticals enabling the digital transformation of gaming operators and offering players an unparalleled gaming experience.

As a member of the **UN Global Compact**, INTRALOT is a global corporate citizen committed to integrity and responsibility. Also, it has been awarded the prestigious Responsible Gaming Framework certification by the World Lottery Association and is certified under the WLA Security Control Standard.

INTRALOT contributes decisively to the industry's future developments, being a Level I Associate Member of NASPL and an associate member of the major lottery and gaming associations around the world.

INTRALOT has an established presence in the USA market through its subsidiary, INTRALOT, Inc., employing more than 570 employees, and has secured 16 contracts - three of which are Sports betting - in 13 jurisdictions nationwide to provide online systems and services, warehousing, and distribution of instant tickets, and VLT/COAM monitoring. Currently, INTRALOT, Inc. has contracts with the state lotteries in Arkansas, DC, Georgia, Idaho, Illinois, Louisiana, Massachusetts, Montana, New Hampshire, New Mexico, Ohio, Vermont and Wyoming.

Scientific Games

www.scientificgames.com



As a world leader in lottery entertainment, Scientific Games' mission to empower our customers by creating the world's best lottery experiences. Our lottery retail and digital games reach players wherever they are, whenever they want to play.

Since 1973, Scientific Games delivers what customers and players value most: trusted security, creative content and innovative technology. Beginning with the world's very first secure lottery instant game in 1974, we are a trusted business partner to 130 lotteries in 50 countries around the globe.

Headquartered in Atlanta, Scientific Games serves our customers from production and commercial facilities on five continents. We offer a fully-integrated portfolio of technology, platforms, content and services for lotteries.

Scientific Games' history of success is driven by our highly experienced professionals who are committed to excellence and innovation. Our products are developed by some of the world's top game designers, mathematicians, market analysts and technologists.

We are an industry leader in market research, analytics and consumer insights that help lotteries gain a deeper understanding of player demand and preferences. As a result, we continue to generate new ideas and innovative solutions that provide players with exciting experiences – and retailers with operational efficiencies.

Scientific Games is committed to corporate social responsibility, and we work closely with our customers, governments, regulators and industry associations to support responsible gaming through Healthy Play™.

We drive the global lottery and gaming industry forward by maximizing our customers' performance with a proven portfolio of products, technology and services featuring:

- Instant, draw and hybrid games
- Digital and iLottery games
- Sports betting
- 2nd chance games and promotions
- Licensed brands
- Loyalty programs + online rewards store
- Gaming systems technology
- Retail point-of-sale technology
- Mobile apps
- Internet platform + CRM
- Retail development programs
- Managed services

Visit www.scientificgames.com

PLATINUM INDUSTRY LEADERS

ABACUS Solutions **International Group Solutions for** **Innovators** www.lotteryeverywhere.com



Abacus' mission is to ensure our solutions are simple to use and enable consumers to buy lottery everywhere. Our entire ethos is built around thinking differently. The Abacus gateway connects consumers, retailers, vendors and lotteries, bridging the gaps between the different parties for frictionless ticket sales and gameplay. Abacus believes the future of lottery lies in integrating with existing retailer and consumer infrastructures. We enable this by providing a highly secure transaction gateway. Abacus has a strong focus on speed to market, simplicity of implementation, and reducing its customers' overheads, delivering a seamless integrated solution to drive increased sales. Unlike other providers Abacus integrates directly into a retailer's point of sale, giving both the retailer and the lottery full control over the lottery category – down to lane level. Moving to an in-lane solution will help eliminate shrink and reduce retail labor costs; reduce debit and credit costs associated to lottery; print a ticket on a retailer's receipt paper; dispense instant tickets securely through every point of sale; offer digital game play through a mobile or a retailer terminal. Easy, smooth, instant: a virtual terminal in every lane.

So let Abacus show you how we can transform your lottery products into a new category for retailers at all levels of engagement.

Our fully managed service offering includes:

- Lottery In-Lane, Self-Checkout, and Self-Serve
- Instant ticket sales and validation through our gateway
- Ticket by ticket delivery of instants where supported by your CGS
- Sports Betting where supported by your CGS
- Online delivery through e-commerce and mobile (where allowed by State law)
- Abacus games portfolio, including Bill Paid™
- Retailer loyalty solutions, follow-on promotions & second chance draws
- Dedicated management portal: control and monitoring of all services and reporting

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Jumbo Interactive Limited www.jumbointeractive.com



Jumbo is a dedicated digital lottery software and services company, providing its proprietary lottery software platform and lottery management expertise to the government and charity sectors in Australia and globally.

Our mission is 'Making Lotteries Easier', and our vision is to be 'the number one choice in digital lottery and services to the government and charity lottery sectors.'

Jumbo's innovative and player-centric approach to digital lotteries and online retailing, makes us the platform of choice for millions of players supporting over 9,300 good causes worldwide.

Founded in 1995, Jumbo pioneered e-commerce in Australia after developing and launching one of the world's first online shopping malls. The company was listed on the ASX in 1999. In 2000, the company began selling lottery tickets online, and now focuses exclusively on the sale of official government and charity lotteries via digital platforms developed and promoted entirely in-house. At Jumbo, we are united by a love of technology and committed to providing engaging and entertaining experiences for our customers.

Jumbo's high-performance team has generated around 20% year-on-year growth over the past five years. Our decision-making is underpinned by Artificial Intelligence, machine learning and sophisticated digital analytical tools. In combination, this facilitates superior experiences for our players and customers.

In the United States, Jumbo offers two world leading national and state lottery solutions: Jumbo iLottery® and Jumbo iRetailer® powered by our proprietary lottery software platform – Powered by Jumbo (PJ).

The iLottery proposition provides lotteries with an integrated digital lottery channel that is more efficient and effective than most industry peers. The iRetailer proposition provides lotteries with a standalone digital channel that's self-sufficient and does not require operating costs or marketing budgets to be diverted from the lottery's main operations. The iRetailer model applies to all lotteries, big or small. It enables Lotteries with restricted marketing budgets to run a successful iLottery channel.

The pandemic has forced players to reassess their lottery purchase behaviour. Consequently, there have been sizable shifts in the number of players registering and playing games online. Jumbo is one of the biggest lottery resellers in the industry, with over A\$1.5bn in tickets sold in the last five years. Our experience means we are well placed to develop, manage and grow your digital lottery sales.

Jumbo is an ASX300 listed company with the appropriate governance, resources, and credentials to develop and sustainably grow your iLottery program.

For more information contact:

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Carmanah Signs, a Division of **STRATACACHE** www.carmanahsigns.com



Carmanah Signs is the Lottery & Gaming Division of STRATACACHE, the leading provider of intelligent digital media and in-store marketing technology. Serving 55+ lottery customers on four continents, Carmanah Signs has over 200,000 networked sign installa-

tions at lottery retailers worldwide.

The company offers a variety of products and services designed to optimize the lottery retail experience and increase sales. Carmanah's offerings include digital signage content management and distribution software, media player and display hardware, interactive touch tablets, jackpot and gaming signs, and a complete suite of digital sign services including network hosting, network monitoring, content creation and scheduling, and specialized field services.

PLATINUM INDUSTRY LEADERS

Jackpocket

Founded in 2013, Jackpocket is a technology company helping to modernize and grow state lotteries.



As a zero-cost turnkey platform, Jackpocket helps lotteries drive incremental revenue benefitting essential state programs by engaging traditional players while also attracting new customers like millennials. Through Jackpocket's best-in-class lottery app, players can securely order tickets for their favorite games, check lottery results, join lottery pools with other Jackpocket players, and be notified automatically when their ticket wins a prize. Jackpocket is the first third-party lottery service to receive responsible gambling certification from the NCPG's Internet Responsible Gambling Compliance Assessment Program and is the 2019 winner of the NCPG's "Corporate and Social Responsibility Program." A registered lottery courier service in New Jersey and New York, the company is also the first lottery courier to be officially licensed in a U.S. jurisdiction.

Features:

- Ticket Orders: Age-verified and geo-located players can place orders for official state lottery games such as Powerball and Mega Millions

directly from the app.

- Ticket Scanning: With Jackpocket's proprietary ticket-scanning technology, players can view a scan of their lottery ticket right in the app. They also receive a confirmation email with their ticket serial number.
- Lottery Pools: Players combine their tickets in a shared pot for better odds. They can create private groups with friends, or join thousands of players across multiple jurisdictions in Jackpocket's Powerball and Mega Millions pools.
- Autoplay: Players can set up automatic orders to enter drawings using Quick Picks or their favorite numbers, so they never miss a drawing.
- Responsible Gaming: Consumer protections such as daily deposit and spend limits, self-exclusion, and in-app access to problem gambling resources and support hotlines promote responsible play.

Lottery customers:

Jackpocket is currently available for ticket orders in 10 jurisdictions: Arkansas, Colorado, Minnesota, New Hampshire, New Jersey, New York, Ohio, Oregon, Texas, Washington D.C.

EQL Games: First Name in Draw Games

www.EQLGames.com

Contact: Brad Cummings brad@eqlgames.com



If you could build a new draw game in 4 minutes, what would you do with the rest of the month?

"We believe draw games should learn from the scratch off category. That means making them less expensive to develop, faster to market, and easier to win. Most importantly, we must keep the catalog of draw games consistently fresh to give players the variety they expect in other product lines." – EQL Games CEO Brad Cummings

Since our inception, we have grown from a single game concept to a full draw game studio. We are best known for our live sports catalog of games

backed by iconic brands such as MLB, NBA, NHL, NASCAR, and Team USA. We proudly launched Win Place Show, the first ever daily draw game based on a live sporting event, in August 2020 through the Kentucky Lottery.

These games are powered by a fully modern technology stack led by our Secondary Draw System (SDS) which enables the creation of new draw games in less than 4 minutes. Influenced by our executive team's experience in global billion-dollar industries such as finance and healthcare, we have created streamlined solutions to today's lottery problems that can significantly reduce expenses, shorten timelines, and give lotteries more control over their draw game content.

We proudly launched Win Place Show, the first ever daily draw game based on a live sporting event, in August 2020 through the Kentucky Lottery. In 2022-23, we will be launching new games based on mainstream sports through lotteries both domestically and internationally.

Instant Win Gaming (IWG)

www.instantwingaming.com

IWG is the world leader in supplying digital e-Instant and instant win games to NASPL and WLA-member lotteries. It has 20 years' experience of making award winning, top selling games.



Each year, IWG develops more than 300 new InstantGames™ for its global base of lottery customers. Its games consistently perform at the highest level, engaging and retaining players while driving superior sales results. It has the knowledge to deliver winning game portfolios, and the experience to make them grow.

IWG delivers an end-to-end solution covering all aspects of e-Instant development and portfolio management. The Company's InstantRGS™ (remote game server) delivers its content in multiple regulated jurisdictions from data centers in the United States, Canada, United Kingdom and Gibraltar. It has a broad library available via its InstantRGS with games covering many proven themes and mechanics that can be developed into an ideal offering for a partner's e-Instant and/or instant win program.

Inspired Entertainment

inseinc.com
Engaging the next generation of Lottery Players



Inspired offers an expanding portfolio of content, technology, hardware and services for regulated gaming, betting, lottery, social and leisure operators across land-based and mobile channels around the world. The Company's gaming, virtual sports, interactive and leisure products appeal to a wide variety of players, creating new opportunities for operators to grow their revenue. The Company operates in approximately 35 jurisdictions worldwide, supplying gaming systems with associated terminals and content for approximately 50,000 gaming machines; virtual sports products through more than 32,000 retail venues and various online websites; interactive games for 170+ websites; and a variety of amusement entertainment solutions with a total installed base of more than 16,000 gaming terminals. Inspired is the creator and best-in-class for award-winning Virtual Sports that are extremely popular worldwide. Inspired's proven online and mobile interactive slots are currently some of the highest-performing games. And as a large gaming provider, Inspired produces machines that deliver a winning combination of innovative technology, hardware, content and services.

PLATINUM INDUSTRY LEADERS

Pollard Banknote Limited www.pollardbanknote.com



Pollard Banknote is a full-service provider of industry-leading print, retail, and digital lottery products and services to lottery clients worldwide. As the lottery partner of choice, we empower our clients, working with them to provide the unique combination of support and tools they need to grow their business responsibly, and increase proceeds for good causes.

Our team of talented lottery specialists is dedicated to delivering on three key dimensions for success: outstanding games that excite loyal players and attract new ones, retail excellence through effective in-store strategies and retail network expansion, and digital innovation that cultivates a true integrated experience. Our steadfast commitment to innovating in these three areas has allowed us to grow exponentially. To best serve our clients, Pollard Banknote has a global family of companies, spanning 18 locations with more than 2,000 employees working together across more than eight countries.

Pollard Banknote provides our global lottery partners an ever-evolving portfolio of innovative products and services to help accomplish their business objectives and maximize proceeds for good causes. Our marketing strategies and related services are designed with the express goal of elevating our lottery clients and creating the ultimate player experience to grow their player base. Our revenue-driving games have set a new standard for the industry, providing innovative eye-catching designs, offering unique playstyles, and extending entertainment beyond the tickets themselves. Our retail-focused products include industry-leading instant ticket merchandising and dispensing, POS display solutions, warehousing and distribution for lottery and charitable games, including patented and proprietary offerings, as well as innovative tools and services for optimizing lottery operations. Our full suite of digital solutions includes world-class mobile application development, interactive games, player engagement platforms, iLottery systems and services, plus a variety of software solutions to help lotteries manage their operations effectively and efficiently. From outstanding game design and innovative merchandising to in-lane solutions and one-to-one marketing, Pollard Banknote continues to be a driving force in the lottery industry.

GOLD INDUSTRY LEADERS

Sightline Payments

6750 Via Austi Pkwy #130, Las Vegas, NV 89119
www.sightlinepayments.com
Phone: 401.369.1051



Year of inception: 2008

Sightline Payments is a dynamic FinTech company enabling the next generation of cashless, mobile and omni-channel payments ecosystems for gaming, lottery, sports betting, entertainment and hospitality. From Las Vegas' first completely cashless resort (Resorts World Las Vegas) to a dynamic funding mechanism integrated into numerous sports betting and iLottery platforms (Play+), Sightline continues to responsibly modernize the concept of funds movement in the gaming industry.

As U.S. and Canadian lottery industries evolve, Sightline is partnering with gaming operators and vendors to enhance the versatility of the iGaming payments stack, extend methods and channels of disbursement in claim

centers and retail, and realize the full potential of mobile.

Sightline currently processes more than \$5 billion annually, supports more than 1.5 million accounts, and has 80+ partners across iGaming, sports betting, lottery, and integrated casino resort sectors. Integration at its core, Sightline maintains partnerships with many industry leaders including International Game Technology, Scientific Games, Konami, Aristocrat and several others.

Their executive team brings more than 50 combined years of leadership roles in gaming and in payments. Sightline has been responsible for innovative and award-winning products that have advanced payments in gaming over the last 14 years.

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Gameology

Gameology.net



Gameology is the

evolutionary successor to

Tournament One Corp. which was founded in 2004 by Rick Perrone to meet the growing demand for high-quality, engaging digital gaming content, within the nascent online wagering market. Gameology is headquartered in the extended NYC Metro Area, in CT's second-largest and fastest-growing city. From Rick's 20+ years in the cable TV industry as a senior executive at Time Warner, he understood the importance of creating highly compelling content to attract and retain players. Our management team combines decades of experience in diverse areas including marketing and sales, software architecture, digital art and animation and beyond, to create a sum that is far greater than its parts.

Gameology designs, produces and licenses exciting, interactive betting games and the software and patented technologies to run them. We are a leader in Keno, Bingo and Monitor games for lotteries, supplying

content to multiple US States, with multiple games generating revenue over \$1,000,000 per month. Features that allow us to stand out are varied and innovative game play mechanics, advanced mathematical modeling, state-of-the-art graphics, exciting bonus features and multi-level progressive jackpots, intuitive gameplay, themes for every demographic and games tailored to our customer's needs. Our games are available for online and mobile operators, touch screen kiosks, large monitor game networks, Slots, VLTs and ITVM's. Gameology holds 5 patents, with more pending.

Our mission, using our trademarked Gameology® process, which merges art and the science of technology with entertainment in every product, is simple: to offer the best quality games to provide maximum value to our customers- so you can provide maximum value to yours.

Contact: CEO & Founder, Rick Perrone

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