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CHANGING THE CONVERSATION: CONNECTING WITH THE MODERN CONSUMER AND THE NEXT GEN' PLAYERS

Harold Mays

Director, Illinois Lottery

President, North American Association of State
& Provincial Lotteries



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Tonya Beenders
Arizona Lottery



Richard Bateson
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CONTENTS

FEATURED INTERVIEWS

10

CHANGING THE CONVERSATION: CONNECTING WITH THE MODERN CONSUMER AND THE NEXT GEN' PLAYERS

Harold Mays

President, North American Association of State & Provincial Lotteries



16

BUILD THE MUTUALLY BENEFICIAL RELATIONSHIP WITH YOUR RETAILERS THAT DRIVES LOTTERY TICKET SALES

Tonya Beenders

Chief Sales Officer, Arizona Lottery



18

INNOVATING THE FUTURE OF LOTTERY: INTRALOT'S PATH FORWARD

Richard Bateson

Chief Executive Officer, Intralot, Inc.



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FEATURED ARTICLES

22

2025 HOLIDAY GAMES: UNWRAP THE MAGIC OF NEW PRODUCTS
Scientific Games

26

INTRODUCING IGT LOTTERYLINK™, THE AWARD-WINNING SOLUTION THAT LETS RETAILERS QUICKLY AND EASILY SELL LOTTERY GAMES IN-LANE ON THEIR OWN POINT-OF-SALE DEVICES.



30

MODERNIZING LOTTERY GAMES TO MEET EVOLVING CONSUMER EXPECTATIONS

Helmut Becker, *Chief Executive Officer, ZEAL*



32

EINSTANTS GETTING SLUGGISH? DIVERSIFY! THE CHALLENGE FACING ILOTTERY PROGRAMS IN THE U.S.

Pollard Banknote

DEPARTMENTS

8

FROM THE PUBLISHER

Paul Jason

34

PREPARE FOR THE PARADIGM SHIFT IN PLAYER BEHAVIOR

Simon Jaworski, *Chief Executive Officer, Lotto Research*
Lorne Weil, *Executive Chairman, Inspired Entertainment*

36

BOOST PLAYER ENGAGEMENT, INSTANT TICKET SALES, AND OPERATIONAL EFFICIENCY WITH THE NEW DIGITAL MENU BOARD SOLUTION FROM IGT



42

BREAKING BOUNDARIES — INNOVATIVE APPROACHES TO TRADITIONAL MARKETING CHALLENGES: HIGHLIGHTS FROM EL/WLA BARCELONA 2025



46

PULSE OF THE INDUSTRY:

Synopsis of recent gaming industry news

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From the Publisher

Our “Pulse of the Industry” news section offers a streamlined look at key stories from the past six weeks. For the complete list of unedited articles, visit our news website at PublicGaming.com.

It's always revealing to see which themes emerge as I distill the news into the limited space we allocate for this section. In my last publisher's note, I highlighted one such theme: the ongoing lack of support that the government-run lottery sector receives from policymakers and regulators. While government stakeholders have never been particularly vocal champions of the lottery, the policy-making trends of recent years have been especially perplexing—such as the push to legalize sports betting, including online platforms, while simultaneously restricting iLottery, cashless payments, and other lottery innovations.

Insofar as lottery is a much less harmful form of gaming than casinos and sports betting in terms of problem gambling, and deliver far more economic benefit to society, these contradictions are hard to reconcile—until we consider the influence of campaign contributions and lobbying, which seem to outweigh the interests of the general public in the minds of legislators.

That said, the past couple of months have brought a wave of stories highlighting legislative efforts to crack down on sweepstakes, internet cafés and online gambling schemes disguised as non-gambling activities, unlicensed gambling machines, and other forms of illegal gambling. Hopefully, this signals a shift toward prioritizing public interest and the support of good causes over the agendas of commercial operators and illegal enterprises.

I asked **Harold Mays** whether we're now competing more directly with other forms of gaming than we were twenty years ago. The answer is more nuanced than a simple “yes.” Harold brings a wide-angle lens to the conversation—one that connects the dots between broader societal and cultural trends and how they influence consumer and

player behavior. For example, the influence of spectator sports on lottery (and society in general) goes far beyond just sports betting. Harold looks beyond the surface with a view towards positioning our businesses for long-term success—not just for next quarter, but five to eight years down the road.

Remember when a standard question was, “Where do you see the industry twenty years from now?” How quaint, or maybe just optimistic. My conversation with **Tonya Beenders**, by contrast, focused on what's happening right now; on real-world strategies that are driving sales today. As the face of Lottery to the consumer, our network of retailers is a goldmine of untapped potential.

INTRALOT, Inc. has been on a tear lately, driving change, innovation, and progress over the last number of years. Under the leadership of CEO **Richard Bateson**, the company is executing a strategic vision centered on customer-focused operations and cutting-edge technology—delivering more value today while future-proofing IT investments to position us for tomorrow.

I asked **Lorne Weil**, Executive Chair of Inspired Entertainment, to turn his PGRI Smart-Tech presentation into an article as it puts hard numbers (based on research and surveys conducted by Simon Jaworski and Lotto Research) behind a concern many of us have shared: the growing impact on Lottery of easy consumer access to a wide range of gaming options. One takeaway: The influence of online casino-style eGaming is projected to far surpass that of sports betting.

We all know that player preferences and play-styles are evolving. For a closer look at what drives the digital-first generation, flip to page 30. ZEAL Network has been growing alongside its digitally native audience for more than twenty-five years. CEO **Helmut Becker** walks us through how consumer lifestyle expectations are shaping ZEAL's strategy to reimagine the player journey as well as lottery games to win new players while continuing to appeal to core players.

As iLottery growth in the U.S. flattens out, player acquisition and retention strategies are being updated. **Pollard Banknote** is leading the way with a focus on diversifying the portfolio of games to reach a broader audience of players and omni-channel interaction to drive engagement.

It's that time of year again! Since Holiday Scratchers can make up over 10% of total annual Instant sales, **Scientific Games** pours a lot of research, surveys, and analyses into the project of maximizing those sales. The Holiday season may be a few months away, but it's time to start planning your Holiday Instant Scratch-Card campaigns. Turn to page 22 for your SG primer!

IGT has two new ideas to share:

LotteryLink™ is its break-through award-winning solution to In-Lane lottery that lets retailers quickly and easily sell lottery games in-lane on their own point-of-sale devices. And the new **Digital Menu Board** showcases Instant Games to boost player engagement, instant ticket sales, and operational efficiency.

The **WLA/EL Marketing Seminar** is always a brilliant way to jump-start the new year. This year was special as it has moved (along with the ICE Totally Gaming trade-show) from London to Barcelona. Some of us miss London but do love the change of scenery (after more than twenty years of being in London). Next up for our European colleagues is the **EL Congress in Bern Switzerland** in September. That'll be right after the **NASPL conference in Niagara Falls**. And right before **PGRI Smart-Tech Conference in Nashville** the first week of November. See NASPL.org, European-Lotteries.org, and PublicGaming.com for updates, registration, and more information.

Paul Jason, Publisher
Public Gaming International Magazine



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Changing the Conversation:

Connecting with the modern consumer and the next gen' players

Harold Mays

Director, Illinois Lottery
President, North American Association
of State & Provincial Lotteries

PGRI INTRODUCTION: After being appointed to serve as Acting Director of the Illinois Lottery in Jan 2019 by the current Governor, Harold Mays was officially confirmed as Director in March 2022 by the Illinois Senate. His experience with the Lottery runs deep—before stepping into the role of Acting Director, he spent five years as Chief of Operations and Technology for the Department of the Lottery. Over the years, he has witnessed significant changes and positive impacts on the state. One clear indicator of that growth: lottery sales have surged from \$2.84 billion in FY 2020 to \$3.86 billion in FY 2024.

At the PGRI Smart-Tech Conference in Ft. Lauderdale in March, Harold delivered a keynote address on The Intersection of Sports Betting and Lottery in the U.S. Our conversation took that discussion further, exploring how lottery is increasingly intertwined with pop culture, recreation, entertainment, and other games-of-chance; and more specifically, how this evolving landscape is reshaping lottery's role in players' lives.

Paul Jason: Some state lotteries that introduced iLottery have seen exceptionally high growth rates. Is there an ideal target growth rate for iLottery?

Harold Mays: I can't speak for other states, but there are different ways to measure financial results. One is top-line sales revenue, which reflects total sales. Then there's Gross Gaming Revenue (GGR), which is what's left after prize money is paid out.

In the iLottery space, some states measure their iLottery growth using topline sales. If you have e-instants, those numbers can be astronomical compared to traditional

products. Others may only consider adding iLottery GGR to topline sales if they have e-instants. Everyone is different so everyone's growth target can be different. What may be an ideal target for one may be different for another.

So while iLottery GGR may show strong growth, it won't be as high as the growth in top-line iLottery revenue. Since most of us tend to think in terms of sales revenue, what percentage of your total sales comes from iLottery?

H. Mays: This year we are hovering around 19% of our total sales coming from iLottery, and we only sell draw games,



no eInstants. We really lean into making sure people are aware that our games are available online and that it's easy and convenient to play online.

Wow. That's higher than I thought it would be, considering it's only draw-games.

H. Mays: Let's look at our history. Illinois was the first state to sell single tickets online back in 2012. In the beginning, we were only allowed to sell three draw-games online - Mega Millions, Powerball and Lotto. Our other draw-games could only be sold via a subscription online. That changed in 2019. Over the past twelve years, Illinois' iLottery category has experienced double-digit growth in nearly every year since 2012.

The growth in other iLottery states is driven more by eInstants, isn't it?

H. Mays: I don't know if I would make that generalization because every state



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“We’re evolving from a traditional monopoly-based model with a core player base skewing older, to a landscape where players have more gaming options than ever before and is skewing younger.”

has a different mix of online games, but yes, there are a number of states where e-instants figure prominently in their growth. Illinois is a bit of an outlier given we only sell draw games, but I believe we do that more than any other lottery.

That's fantastic. It must be nice for the players to avoid the long lines when the jackpots get big.

H. Mays: Giving players the option to buy lottery tickets online has been a huge driver of sales, especially when jackpots get big. Jackpot runs aren't just important for the revenue they generate—they also expand our player base by attracting new and casual players. And when Mega Millions and Powerball jackpots roll up, iLottery revenues see a major spike.

I think of our iLottery program in two phases: pre-2019 and post-2019. In the first half of our history, our compound annual growth rate (CAGR) was well over 30%, and that was just from selling Mega Millions, Powerball, Lotto, and subscriptions for our other games.

Then, in 2019, we expanded iLottery to include all of our draw-based games—adding Pick 3, Pick 4, Lucky Day Lotto, and later Fast Play in 2022, alongside Mega Millions, Powerball, and Lotto. This expansion increased our sales by 50% the first year. Then came the pandemic which changed the world in countless ways, and for us, it helped significantly accelerate iLottery growth. The introduction of Fast Play online was a game changer as well. Our CAGR jumped from around 36% before 2019 to 64% in the five years since.

What are the plans and strategies for growing the lottery over the next three years?

H. Mays: That's the question we tackle every day. The marketplace is evolving, and so are the pathways to success. But some of the old rules still hold true. For

example, we're committed to growing our retail presence because we believe there's still headroom to grow our retail base. One of our key initiatives right now is to increase our number of retailers by 10% over the next year.

The key to continued growth—in both retail and digital—is executing concrete initiatives with measurable results. One way we're doing that is by expanding into new types of retail spaces we haven't tapped before, like social clubs, bars, and restaurants. To support that effort, we're launching a brand-new draw game that we believe will be a game-changer for these establishments.

It's such an interesting idea to try to make a game that would be tailored to the play styles and preferences of the patrons of a certain type of venue.

H. Mays: Exactly! These venues will bring a more social element to the playing experience. The game should be something players can enjoy while they're hanging out, whether they're interacting with friends or just relaxing.

Since people will want quick results, we designed this new game with a faster play style, featuring multiple drawings per hour. That way, players can experience the excitement together in real time—hopefully with some wins to celebrate. It also opens up a new kind of conversation with our players, one we haven't been able to have before.

It sounds like you feel that retail continues to be rich with opportunity to innovate?

H. Mays: Absolutely. We're always looking at every aspect of the business for opportunities to innovate. And while there's certainly room for more creativity in game design, the number of variables is limited—so there's only so much we can do to fundamentally change the lottery game itself.

We've been working with familiar game styles and mechanics that have been around for awhile — exploring ways to modernize them; updating classic concepts for today's consumers or tailoring them for different player groups. The question is: how can we refresh a product and use it as a platform to spark a new and different conversation with players?

Take Cash Pop, for example—you could argue that draw games like it have been around forever. Nothing new there, right? It was built on a concept players already knew, but IGT put a new spin on it, reintroducing it in a way that created a completely different player experience and conversation.

So innovation does not have to mean some cosmic reinvention of the lottery playing experience. It can be about creatively revisiting things that have worked in the past.

H. Mays: Figuring out what players want might seem challenging, but at its core, it's pretty simple—they want to be entertained, and they want a chance to win. The key is to engage them in ways that resonate with them today. Just like in every other aspect of life, what was once old can become new again. Some concepts that worked years ago can be refreshed and modernized with small tweaks to the look, feel, or mechanics to appeal to today's players.

“Lottery and sports are very different. We are not trying to sell sports to compete, we are trying to understand the consumer better to sell lottery products.”

continued on page 20



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Tonya Beenders

Chief Sales Officer, Arizona Lottery



PGRI Introduction: With over 30 years of lottery industry experience, Tonya now serves as the Chief Sales Officer for the Arizona Lottery.

Previously holding the same role at the Missouri Lottery, Tonya brings extensive expertise in sales, distribution, and retail engagement. Throughout her career, she has been instrumental in driving sales growth, strengthening retailer partnerships, and enhancing operational efficiencies. Tonya is passionate about empowering her sales team and leveraging innovative strategies to optimize the player and retailer experience. And since the vast majority of the “Player Journey” runs right through retail, there’s plenty of room to innovate and find new ways to drive sales performance.

Retail is evolving — adapting to shifts in consumer shopping behavior and an increasingly competitive landscape. Change and disruption aren’t just challenges but are also opportunities for those who anticipate trends, adapt strategically to stay ahead, and build mutually rewarding relationships with their retail partners.

And when it comes to seizing those opportunities, Tonya Beenders and the Arizona Lottery team are on it!

Paul Jason: Do you think of the Lottery Sales Representative (LSR) as more of a customer service role or a hard-driving sales person?

Tonya Beenders: Our culture best suits a solution-selling approach for our retailers. We see service and support as essential parts of an effective and strategic sales strategy. That said, we are absolutely sales-oriented.

For example, right now, we’re in discussions with a national chain about merchandising the \$50 ticket. Convincing retailers to take on new products isn’t

easy—especially when they’re unsure about consumer demand. Retailers are incredibly busy, so getting them to hear us out takes persistence. And let’s be honest—most retailers aren’t eager to change what’s already working for them.

I think your readers will relate to this challenge—the ongoing effort to persuade retailers to try something new, whether it’s a different Point of Sale (POS) strategy, product, or promotion. It all takes real selling to make that happen!

Relationships and customer service are the key to everything sales. But our Lottery

Sales Representatives are also highly focused on driving innovation, modernization, and selling new products and ideas for increasing lottery sales. And they know that even with engaged retailers there will be objections and that “no” does not mean forever. Sometimes, it means that you have to tell your story in a different way that will appeal to the retailer and in a way that they better understand the benefits of the proposal.

Are retailers more willing to innovate and modernize than they were a few years ago?

T. Beenders: Yes. A great example of this shift is retailers’ growing investment in their own loyalty apps and programs. They see these as key differentiators in a competitive market. Consumers who use loyalty programs from brands like Circle K, Walmart, and Target tend to become highly engaged and loyal customers. That represents a big opportunity for lotteries to cross-promote and add value for both retailers and players.

The Arizona Lottery has done an outstanding job of leading the way in retailer partnerships. Take Circle K, for example. They prioritize loyalty and want to drive more foot traffic. Vendors regularly approach them with partnership ideas, and they’re open to collaborative efforts that attract customers and add value. The lottery is a very low-cost way

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to get shoppers' attention. So, these cross-promotional strategies strengthen the lottery's position within the retail space. For instance, a promotion might offer 10 cents off per gallon of fuel when a customer purchases a \$10 lottery ticket. These kinds of cross-promotions create additional incentives for players while reinforcing the lottery as part of a retailer's broader sales strategy.

Another exciting aspect of Arizona Lottery's work with Circle K is how they've expanded collaboration beyond just their own stores. Because of the strong relationship they've built, Circle K now helps facilitate discussions with other vendors, enabling co-branded promotions. So, for example, a promotion could offer a discount on a Coca-Cola product with the purchase of a lottery ticket. Instead of having to navigate corporate channels and reach out to Coke headquarters in Atlanta directly, Circle K acts as a bridge, helping to get these partnerships off the ground faster and more effectively.

“So when the time comes to introduce new ideas, launch a pilot program, or place new vending machines that require additional floor space, those retailers are far more receptive. They remember that we were there to support them”

This kind of retailer-lottery synergy is a win-win. It enhances the perceived value of the lottery, drives sales, and strengthens partnerships that can lead to even more innovative collaborations in the future.

We still rely on traditional, boots-on-the-ground methods for on-site promotions, even though many vendors have moved away from them because they're labor-intensive. But we see it as a win on multiple fronts.

When we have someone in a store, or even out in the parking lot, selling lottery tickets, we're not just promoting lottery; we're also boosting visibility for the store and the retailer's products. We're adding value to the shopper's experience, making

their visit more engaging. And retailers appreciate it because they can see the impact firsthand.

The Arizona Lottery has embraced this strategy for years—whether standing outside a Safeway or being part of a Fry's grand opening for hours, engaging with customers and driving excitement. The best part? The effect can go viral. A successful promotion often spreads through social media and word-of-mouth, drawing even more attention to the Lottery brand.

Yes, it requires an investment of time—but when done right, it becomes the gift that keeps on giving.

It sounds like you foster a culture of openness to new ideas.

T. Beenders: For sure. It's always easy to be the one who points out why something won't work—maybe it's been tried before, or maybe it's hard to measure ROI on something completely new. But we intentionally create a big comfort zone for new ideas so that creativity isn't stifled.

Would the idea be that helping retailers succeed leads to more lottery sales?

T. Beenders: It's not just an idea — it's a reality. We understand that a grand opening is a big deal for a retailer. They want to stand out from the competition, and when we show up to help them do that, it strengthens our partnership.

So when the time comes to introduce new ideas, launch a pilot program, or place new vending machines that require additional floor space, those retailers are far more receptive. They remember that we were there to support them, whether it was helping with a launch, improving efficiency, or driving in-store engagement. That doesn't mean they'll say yes to everything we propose — we still have to demonstrate the value — but they'll listen, and that's a big part of the equation.

We always look for ways to add value, sometimes in ways that only the lottery can. Retailers are constantly seeking ways to increase foot traffic and boost basket size. Our advertising not only promotes the lottery, it drives foot traffic to the store. And if we can help drive higher purchases — especially through creative promotions that encourage sales of food products or other high-margin items — then it's not just a win for the lottery, but a more profitable partnership for everyone.

Tell us more about creative approaches to merchandising.

T. Beenders: Merchandising at retail is still king. It remains the gold standard because relevance at the point of purchase (POP) is critical. We recently conducted a player study focused on our holiday-themed games, asking players: What prompted you to buy lottery tickets? Was it a billboard, radio ad, or social media? What made you think about playing?

The #1 answer? Point of purchase.

Drawing attention and standing out at POP is still the most powerful touchpoint for lottery sales. Lottery is an impulse purchase, and effective merchandising is what triggers that impulse. That's where a player suddenly thinks, “Oh! I should grab a lottery ticket for so-and-so as a Christmas gift.”

That said, a diversified media mix is still essential—not just to reach a broader audience but also to pre-sell the idea of playing before they even get to the store. The more a consumer is exposed to the lottery ahead of time, the more likely they are to

You'll sometimes hear people ask, “How will this help us sell more lottery tickets?” And while, of course, selling more tickets is the ultimate goal, framing brainstorming sessions that way can smother creativity and thereby limit innovation. If every idea has to immediately justify itself in terms of sales, you're less likely to come up with fresh new concepts.

That's not to say that ROI and measurable results aren't important—they absolutely are. But if you focus too much on those questions too early, you risk shutting down creative thinking before it even has a chance to take shape. The key is giving new ideas the space to breathe first, and then refining them with a practical lens.

continued on page 40

ZEAL

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Innovating the Future of Lottery: Intralot's Path Forward

Richard Bateson

Chief Executive Officer, Intralot, Inc.



PGRI Introduction: Richard Bateson is a dynamic leader in the global lottery industry, serving as Chief Executive Officer of Intralot Inc., overseeing all North American operations. With a rare combination of operator and vendor experience, Richard brings a unique perspective to the role, blending strategic innovation with hands-on industry expertise.

His journey in the lottery sector began in 2001, following an early career in marketing at Unilever (Canada) and Fujitsu (UK), where he honed his ability to merge marketing with technology-driven solutions. Richard's first major lottery role was at Camelot UK, where he played a pivotal role in launching EuroMillions in collaboration with FDJ and SELAE in 2004. He later became a board member and eventually President of EuroMillions, shaping one of the most successful transnational lottery games in the world.

Richard led the UK National Lottery's Marketing, Digital, and Commercial Divisions, spearheading successful game development, retail sales, and digital transformation initiatives. His expertise extended beyond the UK, driving significant sales turnarounds in Ireland and North America.

Recognizing the power of technology in shaping the future of lotteries, Richard transitioned to the vendor side of the industry in 2012, establishing Camelot Global's commercial

division and providing strategic consulting across the US, Canada, and Europe.

Before joining

Intralot, he spent three years as a management consultant, working with companies like Jumbo Interactive, Gatherwell Ltd., Teneo, and Camelot UK Lotteries Ltd.

In March 2023, Richard joined Intralot as Chief Commercial Officer, leading a transformation of the company's commercial and customer engagement strategies. His impact was immediate, and in December 2024, he was appointed Chief Executive Officer, tasked with driving the continued evolution of Intralot's business, the rollout of LotosX Omni, and the expansion of new games and support services.

With a deep understanding of both lottery operations and technology innovation, Richard is well-positioned to redefine the industry's future, ensuring Intralot remains at the forefront of modernization and strategic growth. His leadership is marked by a commitment to customer success, digital transformation, and delivering cutting-edge lottery solutions for a rapidly changing market.

The Intralot logo, featuring the word "intralot" in a bold, lowercase, sans-serif font. The "i" is lowercase, while the rest of the letters are uppercase. A thick orange horizontal line is positioned below the text, starting from the left and extending under the "intralot" text.

Paul Jason: You've been part of the lottery industry for over two decades. What led you to Intralot, and what sets the company apart?

Richard Bateson: I've been fortunate to work in this industry since 2001, starting in marketing and expanding into various disciplines that support lottery operations. In 2020, after nearly 20 years, I stepped back to explore consulting so I could experience industry and non-industry projects. After three years, and working closely with lotteries and vendors, I decided I wanted to join one of the big vendors.

In 2023 I decided I wanted to join Intralot for three clear reasons: technology, finance (ability to invest), and people.

Technology: the company's modular, interoperable systems architecture was a major draw, as it allows for seamless integration of best-of-breed solutions – something important for me as a marketer, as I believed Intralot had the best system in the industry to enable lotteries' business and marketing plans. **Finance:** the company has significantly strengthened its financial position over the last several years, allowing for further investment into product, services and people – something the company has allowed me to focus on.

People: I was given the opportunity to leverage existing talent, while bringing in new voices to enhance our capabilities. This transformation started in 2023 and continues as we set our foundations for growth in 2025.

These three pillars—technology, financial strength, and people—guide our investments and ensure we deliver tailored solutions for our customers.

The Lottery Landscape: Today & The Future

The lottery industry has seen significant change. What's your perspective on its current state and future direction?

R. Bateson: I once quoted Lenin at a PGRI event: *"There are decades where nothing happens; and there are weeks where decades happen."* While we aren't seeing an industry revolution, change is accelerating. Historically, innovation has been slow, not because of a lack of vision, but due to restrictive and often inconsistent legislative and regulatory frameworks. Meanwhile,

competitors like sports betting, iGaming, and the grey market can act with agility and capture opportunities quickly as they don't have the same business models (beneficiaries), or they sit outside of regulation

At Intralot, we are tackling this innovation and increased competition challenge in two ways: reactively and proactively. Reactively, we have developed a future-proofed platform that is fully interoperable – *LotosX*, enabling lotteries to adopt new technologies as needed – helping them respond quicker and with more relevant solutions to their players. Proactively, we launched initiatives such as Intralot Labs, which fosters industry innovation, new game development, and enhanced customer experiences. By investing in research and experimentation, we help lotteries stay competitive and more relevant in an evolving industry landscape.

Operator vs. Technology Vendor: A Balanced Perspective

You've worked both as an operator and a vendor. How has that shaped your approach at Intralot?

R. Bateson: The challenges faced by operators and vendors are quite different. Having been on both sides, I don't just understand what needs to be done, but also how and why. Vendors may recognize these challenges in theory, but operators experience them daily.

At Intralot, we are redefining the vendor role. We aren't just technology providers; we are enablers of our customers' growth. This perspective has driven key initiatives that enhance the lottery experience and drive performance. We are introducing new games such as Jackpot USA® and Perfect Pick, alongside twenty new omnichannel games set to launch this year. Our iPOP program is designed to help lotteries optimize their product mix, ensuring they maximize impact and revenue potential. Additionally, our Retail Digital Program (RDP) seamlessly bridges in-person and digital lottery experiences, creating a more cohesive player journey. From day one, my message has been clear: **We succeed when our customers grow.** That's why we are committed to delivering solutions that drive real, measurable results.

100 Days In: Early Observations & Organizational Change

You're approaching your first 100 days as CEO. What are your key observations and priorities?

R. Bateson: Our greatest strengths are technology and people. Our *LotosX* Omni platform sets the standard, complemented by *CanvasX* for advanced content management, an upgraded PAM (Player Account Management) system for seamless player engagement, and enhanced security, monitoring, and reporting tools.

On the people side, we have a strong blend of industry veterans and new talent, fostering a culture of innovation and expertise. We've already seen tangible success—BCLC launched *LotosX*, setting a benchmark for future implementations, and we secured a 7-year extension with the New Hampshire Lottery, with a full platform rollout planned for 2025. Our challenge now is ensuring the industry recognizes that the future is already here.

Future-Proofing Lottery: Innovation & Technology

Technology is at the heart of lottery evolution. How is Intralot investing in future-proofing the industry with innovations like LotosX, interoperability, AI, and new game formats such as Fast Play Jackpot USA®? How do you see these developments shaping the lottery experience for players and operators?

R. Bateson: As I mentioned earlier, one of the most critical requirements lotteries should demand from their technology vendors is interoperability and openness. The era of monolithic systems – where a single vendor provides everything in a closed-loop ecosystem—is behind us. **The future is about modular, agile architectures that promote best-of-breed integration, enabling lotteries to customize their offerings and remain adaptable in an ever-changing environment.**

At Intralot, we are leading this shift with *LotosX*, the next-generation modular platform designed to future-proof lottery operations. *LotosX* accelerates innovation, enhances agility, and allows operators to

continued on page 29

That said, player, expectations, and the ways players interact with us have changed significantly over the past five to ten years. So, we need to evolve—not just in how we design games, but in how we engage and communicate with our audience. However, the fundamental desire to have fun and experience the thrill of a potential life-changing win hasn't changed.

While there may be limits to how much we can alter the structure of a lottery game, there's huge potential in reimagining the overall player journey. By modernizing successful past games and refreshing the way we connect with players, we open up a broad landscape of opportunities for innovation.

How does the idea that "what used to be old is now new" apply to retail?

H. Mays: We see retail as a space with enormous potential for innovation. Consumer lifestyles and shopping behaviors are evolving, which is driving changes in retail itself. Since retailers are the face of the Lottery to consumers, we need to think about how we can help them optimize efficiency and profitability. The more we understand their needs and meet their expectations, the more engaged they'll be with Lottery. There's always room for improvement in how we support our retail partners, and we see that as an ongoing opportunity. Evolving, modernizing, and innovating our retail strategies is a top priority.

As mentioned, we're highly focused on expanding into new non-traditional retail venues, in addition to strengthening our traditional retail footprint. Lottery has been around for 50 years, so we've likely had conversations with many of the obvious traditional lottery retailers. But the world has changed—society, the economy, and consumer habits have all evolved. New retailers have emerged, and we need to revisit familiar territory while also building bridges to new distribution channels. By helping our retail partners evolve successfully, we can carve out a bigger role for Lottery and attract new consumer groups. Just look at how much convenience stores have changed in the past few years—change brings opportunity, and it allows us to reshape our value proposition to align with retailers' new priorities.

The same principles apply to the digital space. While it has already been a strong driver of growth, we're pushing even harder to expand our digital presence. Of course, we'd love to go beyond draw games. The Fast Play category, for example, has taken off, prompting us to rethink our portfolio and optimize exposure for more forward-leaning games and play styles.

Our mobile app is already one of the highest-rated lottery apps on both the Apple App Store and Google Play. But there's always room to enhance and refresh the UX. Even though players love it now, we're constantly looking for ways to make it even better.

“While there may be limits to how much we can alter the structure of a lottery game, there's huge potential in reimagining the overall player journey.”

How do these concepts of continuous improvement apply to promotional strategies?

H. Mays: Like everything else, the way we connect with our audience is evolving fast. We have a strong digital promotions program and leverage our CRM (Customer Relationship Management) platform to better understand what players want. That insight helps us engage with them more effectively online.

It's an ongoing, iterative process—we're constantly testing what works, seeing how players respond to promotions, and analyzing whether that leads to better engagement and more registrations. Alongside that, we'll continue running email promotions to keep players informed and engaged.

We regularly update players on our latest activities and offerings. From sweepstakes to secondary prizes and cross-promotions, we're always looking for ways to add extra value. Whether it's a second-chance draw or another opportunity to win, we explore every option to try to make our games exciting and help ensure players see value.

Should we think of other game categories like sports betting and casino gambling as competition?

H. Mays: Not too long ago, like many others, I believed lottery players largely stayed in their own lane. Sure, they may go to a casino or horse racetrack occasionally, but lottery was their game of choice. But that's starting to change a little. With gaming, and especially sports betting, becoming so widely available, we're seeing more and more overlap.

We are working hard to responsibly grow our market share. A few years ago, we thought about competition in terms of the share of the discretionary entertainment dollar—competing with things like candy

and movie tickets. That's still relevant, but we're also focused on the share of the gaming dollar. The good news is that the overall gaming market has expanded significantly over the past five years. And it's not just existing players spending more—it's entirely new consumer groups entering the space.

When I think about competition, it pushes us to be the best lottery we can be because we are the only lottery that operates in IL. We need to keep doing what we've always done well while constantly improving. We have to refresh our game portfolio and introduce new products because today's consumers have more choices than ever and can easily shift their attention and loyalty. We know casinos and sports betting operators are actively working to attract lottery players to their offerings, and online casinos will be an even bigger challenge if they get approved in IL.

That's why we need to understand what our players want—how they like to engage with games. Take sports betting, for example. What's the appeal? Is it the fast pace? The timely results? The thrill of watching a game unfold in real-time? If

continued on page 39



89 of Top 100

Performing Instant Scratch Games

When it comes to performance, our data-driven scratch games continue to lead the global lottery industry.

Backed by 50+ years of science, we're driving success for 19 of the Top 20 performing instant game lotteries in the world. Our partnership means more profits for good cause programs.

*THIS IS THE
Science Inside*



ScientificGames.com

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MAP U.S. lottery data for games launched in CY2023, weekly per capita sales for first 12 weeks.
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Unwrap

the Magic of New Products



Bringing merriment to millions of players across the U.S., holiday game sales were a bright spot in 2024 for many lotteries. Portfolio strategy – with a sprinkle of magic through product enhancements – is essential to unwrapping strong sales in 2025.

Holiday scratchers can represent up to 10% of instant game sales annually. That's why, every year, teams of experts at Scientific Games bring the latest consumer and player trends to life through the company's annual holiday catalog. The 2025 catalog just dropped, glimmering with innovation and inspiration.

Showcasing options for lottery product managers to create just the right mix of products that pop at retail during the holidays, the games in the catalog are curated to appeal to core players, occasional and infrequent players, and gift-givers looking for something extra special.

New scratch games across all price points have been validated through Scientific Games' ONEVoice panel,

an online community of consumers who share opinions and participate in surveys, polls and discussions as part of the company's research. Its industry-leading CRM programs – which help lift lottery sales year-round – are perfect for enhancing holiday performance across eInstants and traditional product lines.

"Games that appeal to distinct player segments are carefully selected for our portfolio recommendations for our customers' upcoming holiday season," says Danielle Hodges, Senior Director of Instant Product Innovation for Scientific Games, who has been innovating instant products for 12 years. "With our 2025 holiday scratch games, we're adding more magic with *Strategic Product Enhancements* and connecting retail and digital play with new products like *Scratch Connect*. We're elevating top-shelf game designs and delivering the best holiday scratch experience to players."



Scratch Connect, one of the company's newest innovations, is a hybrid instant game with a QR code that takes the player online where they can select a *Scratch Connect* digital game from a library of entertaining titles chosen by the lottery. A predetermined prize is

revealed when the digital play ends. Alternatively, the player can choose NOT to play the digital game and simply turn their ticket in at retail to redeem their prize.

As for eInstants, SG Studios continues to deliver immersive eInstant holiday games that delight players' digital lottery experiences, capturing the essence of the season in festive, themed playstyles.

Here are the products that were tops on product managers' interest lists at the Scientific Games holiday suite during PGRI Smart-Tech.





✧ Ho Ho Who Dunnit

Embrace the festive cheer of the holidays in a holiday-themed whodunnit from SG Studios. This delightful tumbler-style game immerses players with boughs of holly, twinkling lights and the jolly spirit of Santa himself. With three ways to win *HO HO WHO DUNNIT*, anticipation builds as symbols and colors align. Checking off Santa's list with each match brings players closer to an instant win. When three unwrapped gifts are uncovered, the bonus game is activated. Players can dive deeper into solving the mystery while earning even more chances to win and hit the Happy Holidays jackpot.

✧ Gnome Sweet Gnome for the Holidays

Perfect for gifting with a to/from tag in the corner of the design, holiday gnomes-themed games are light-hearted, whimsical and on-trend. With *GNOME SWEET GNOME*, colorful, entry-level price points in several scenes are great for light players who may only play around the holiday season. These products are finished with a glossy *Dimension* stars pattern that unifies the festive graphics right into the scratch-off area.

✧ High Definition Merriment

Featuring *HD Games* technology, *MERRY \$500's* takes the holiday play experience to the next level with large, crystal clear numbers and prizes. Tying the game's merry theme to the prizes, bonus wins are wrapped in whimsical packaging to match the graphics. To stand out at retail and deliver a tangibly premium experience, two scenes glow on *Platinum* paper with a *Dimension* stars pattern to integrate the display graphics and scratch area seamlessly.



✧ Fusing Holiday Fun

These *FusionHolo* holiday games shimmer with fun for scratch players. The latest in Scientific Games' holographic innovation, *FusionHolo* melds multiple holograms into one game design. In these festive, seasonal versions, *HOLIDAY FUN X100* and 7, custom holiday holograms like ornaments, gingerbread men and stockings cascade down the edges of the tickets with a diamond pattern in the center play area.

✧ Wrapped Up Riches

The spirit of the season shines bright in *WRAPPED UP RICHES*, another engaging seasonal instant from SG Studios. This matching/connect game style celebrates the holidays with colorfully wrapped instant win presents, ornament multipliers and candy canes for more chances to win on a larger game board.

✧ Platinum Wonderland

This three-scene *HOLIDAY WONDERLAND* game is traditional at its best but features an aesthetically unique design. Classic holiday imagery meets modern lines, allowing the most reflective paper in the industry to fully shine through. These glowing *Platinum* games will shine for players in the 2025 holiday season.

✧ Holiday Frenzy Family

Meet the *HOLIDAY FRENZY* family of games at multiple price points, unified by a custom holographic of frenetic waves vertically reflecting light in the background of the game graphics. Each price point features loads of prizes and great odds of winning – from \$10 to \$20 on the \$2 game and \$250 to \$500 on the premium member of the family – all redeemable at retail. Best of all, the prize structure calls for smaller run quantities during the holiday launch season. This new money-themed family was a collab with Scientific Games Analytics, Creative and Innovation teams, resulting in a holistic holiday scratch experience.





* Holly Jolly Millions in Motion

Leading innovation in holographic scratch games, Scientific Games introduces *Micromotion* on holographic paper. Widely popular with players in recent years, these two unique enhancements come together in one premium product – perfect for higher price points. Following strategic product development and player testing, designs are available in several combinations just in time for 2025 holiday portfolios. *HOLLY JOLLY MILLIONS* features the classic *Micromotion* burst pattern layer on top of a holographic pillars pattern, creating the illusion of movement from the game name and left to right through the light refractions of the holographic pattern.

* Holiday LOTERIA™

Authentic *LOTERIA* featuring original Don Clemente imagery is now available on holographic paper in a festive holiday game. Classic Latin-American style bingo has never shone brighter, entertaining players with the warm, colorful “glow” of holiday lights.



* Cashing through the Snow

A holiday winter wonderland is the backdrop for SG Studios' *CASHING THROUGH THE SNOW*, a connect-style instant game designed to enchant players. With colorful Santa, ornament and reindeer play symbols, the game features wrapped gift instant wins and a wreath multiplier. The excitement glides through the snow in a sleigh bonus game.

* Holiday 100X with Scratch My Back

Celebrate the value of more play – and more chances to win. *HOLIDAY 100X* is a stunning holiday game featuring the *Scratch My Back* enhancement. Glimmering *Sparkle Select* in gold and dots infuses the glow of the holiday season in the scratch experience. *Scratch My Back* games also offer lotteries the opportunity to use four-color process printing to highlight holiday second-chance promotions or digital play extensions.



* Explore the Scientific Games 2025 HOLIDAY CATALOG



Contact your SG representative or email: info@scientificgames.com



DEMO
eInstant Games

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There's Never Been a Better Time to Get In-Lane

Shown: IGT LotteryLink™ (lit green, ready for use) with optional stand and scanner.

Attendees at the World Lottery Summit (WLS) in Paris got a first-hand look at how simple and seamless it is to use IGT LotteryLink™.

Introducing IGT LotteryLink™, the award-winning solution that lets retailers quickly and easily sell lottery games in-lane on their own point-of-sale devices.

IGT LotteryLink™ clinched the title of **Lottery Product of the Year** at the prestigious 2025 International Gaming Awards in January, where it was recognized by judges for revolutionizing the way lottery tickets can be sold in stores.

LotteryLink solves an enormous need for the industry by enabling **in-lane sales for both instant games and Quick Pick draw games without any point-of-sale programming.** This innovative plug-in device offers unmatched ease of use and

universal applicability for retailers and lotteries around the globe.

Here's everything you need to know about this in-lane game changer:

A Transformative Solution for Lottery Sales

The industry's secure and reliable system for selling lottery products at retail has earned longstanding trust around the world and enabled enormous category growth. Yet in multi-lane stores, **consumers** may still need to go out of their way—using a vending machine or separate counter—to purchase lottery tickets at retail, making the experience less convenient than purchasing other goods. **Retailers** still face challenges with the category, such as managing a separate reconciliation process, staying on top of instant-ticket inventory, and conducting lottery transactions on a separate terminal from other purchases. In retail locations around the world with limited counter space, there is also an acute need for a solution that does not require space for a separate lottery terminal.

Meanwhile, **lotteries** continually need to recruit new retailers. A solution that radically simplifies the work a retailer must do to support lottery sales can drive adoption of in-lane sales – and help lotteries realize the substantial benefits.

Enter **LotteryLink**, a revolutionary product designed to transform lottery sales by offering a simple, user-friendly solution that elevates the experience for retailers and consumers alike.

What is IGT LotteryLink™?

IGT LotteryLink™ is a small device that integrates seamlessly with a retailer's existing point-of-sale (POS) system. There's no need for software modifications. Retailers can simply plug it in and start selling lottery products directly at checkout lanes with minimal effort, the same way they sell other consumer goods.

This innovation is the first and only solution in the lottery industry to enable both instant and Quick Pick draw-game sales without requiring a dedicated lottery terminal or complicated setup.

IGT LotteryLink™ leverages pre-defined APIs (application program interfaces) to interact with the lottery central system, handling all necessary interactions to ensure smooth operation.

A retailer simply plugs this small device into their own point-of-sale terminal, and it's ready to go. An optional printer is available for printing draw-game tickets and instant-ticket receipts.

How Does IGT LotteryLink™ Work?

- This small device, measuring just **4.3 x 4.3 x 1.1 inches** (110 x 110 x 27.5 mm), connects to the retailer's POS terminal.

- IGT LotteryLink™ supports two deployment modes: Clerks can either use their own POS scanner – the same one they use for other products sold in the store – or use LotteryLink's optional, dedicated lottery product scanner. An optional printer is also available for draw-based tickets and/or instant ticket receipts.
- Retailers simply scan the barcode on a lottery product, and the device seamlessly communicates with the lottery's central system to process the transaction.

Once connected, retailers can scan lottery products, process sales, and print tickets with zero changes to their existing system.

Benefits of IGT LotteryLink™

Retailers enjoy a hassle-free setup while customers get a streamlined checkout experience.

For Retailers:

- **Ease of Adoption:** The plug-and-play nature eliminates the need for costly and complex software development.
- **Integrated Accounting:** Lottery sales are included in regular POS data and reporting, streamlining reconciliation.

Selling Draw Games



- Retailer uses scan sheet to scan a barcode associated with a specific draw game at a particular price point.
- Ticket is printed on lottery printer.
- IGT LotteryLink™ sends UPC to retailer POS; draw game purchase is included in shopping "basket" and printed on customer receipt along with their non-lottery purchases.

Selling Instant Tickets



- Retailer scans each instant ticket the consumer wishes to purchase (the inventory barcode).
- IGT LotteryLink™ sends instant ticket activation to host.
- IGT LotteryLink™ sends UPC to retailer POS; purchase is included in shopping "basket" and printed on customer receipt along with their non-lottery purchases.

Lottery players and potential players visit numerous chains and trade styles on a regular basis. These retailers are looking for growth opportunities and want to give consumers a reason to keep coming back.

Lottery can be that reason. And LotteryLink makes it easy for any retailer to add lottery points of sale.”

– Melissa Pursley, IGT Senior Vice President, Lottery Product Sales and Development

- **Operational Efficiency:** Allows activation of instant tickets at the point of sale, significantly reducing manual labor and theft risks.
- **Marketing Opportunities:** Enables integration of lottery promotions into loyalty programs and in-store campaigns.

For Consumers:

- **Convenience:** Purchase lottery tickets alongside other goods in a single transaction at the checkout counter.
- **Simplified Process:** Players receive a single receipt for both retail and lottery purchases.

LotteryLink offers a modern, frictionless way to sell and buy lottery tickets in-lane. It aligns with consumer demands for convenience while providing retailers with an innovative tool to drive sales and enhance customer satisfaction.

Why Choose IGT LotteryLink™?

Retailers play a crucial role in the growth of the lottery industry—chain retailers alone account for 25% of U.S. lottery sales, approximately \$21.4 billion annually. Yet adoption of in-lane lottery sales has been slow due to costs and system integration challenges. IGT’s innovative **LotteryLink™** product addresses these barriers head-on, making in-lane solutions more accessible and scalable.

LotteryLink™ does not replace all lottery terminals, which offer specific capabilities

needed by retailers above and beyond the scope of in-lane sales. However, what LotteryLink does offer is the never-before-possible means to easily and rapidly expand lottery sales in-lane across retailer locations. ■

Contact your IGT representative to simplify sales with IGT LotteryLink.



IGT LotteryLink™ in Action

Prior to the release of IGT LotteryLink™, a pilot program was conducted in partnership with the Texas Lottery at C Mart, a convenience store in Austin, Texas.

From March to July 2024, IGT tested the solution, integrating lottery sales directly into the retailer’s point-of-sale system.

The pilot began with Powerball and Mega Millions Quick Picks alongside six Texas Lottery scratch tickets priced between \$5 and \$50, later expanding

to include up to 10 scratch games using ticket-by-ticket activation. IGT collaborated with C Mart to refine processes, while the retailer’s staff tested workflows to find what suited them best.

The results were overwhelmingly positive: The staff at C Mart loved the simplicity of IGT LotteryLink™ sales and the ease of reconciling their sales reports. They were reluctant to part with the equipment at the conclusion of the pilot.



Shown in foreground: IGT LotteryLink™ with optional stand and scanner.

An industry-changing feature of LotteryLink™ is its integration with retailer’s point-of-sale equipment. Among other benefits, this allows retailers to maximize limited space on and behind the counter.

introduce new games like Jackpot USA more quickly. In fact, while Jackpot USA is still relatively early in its lifecycle with much of its potential still to be realized, the launch of this game, the first multi-state, progressive jackpot instant game anywhere in the world, has increased total Fast Play sales in participating states by an average of 5% which is expected to grow as game liquidity grows. One of LotosX's most powerful capabilities is its Codeless Game Configurator, which reduces game deployment time by up to 75%, enabling lotteries in markets like British Columbia, Croatia, and Greece to adapt and launch products with unprecedented speed. Additionally, LotosX seamlessly integrates with third-party systems and supports omnichannel strategies, ensuring real-time data synchronization. For example, DC iLottery leveraged this capability to achieve double-digit growth in digital sales.

Beyond system flexibility, we are leveraging advanced analytics and AI-driven personalization to optimize marketing, enhance security, and improve player engagement. These innovations ensure that lotteries remain competitive in an increasingly dynamic entertainment landscape, delivering superior player experiences and sustainable long-term growth.

The Power of Partnerships & People

Partnerships are a key part of Intralot's strategy. Can you elaborate on your approach?

R. Bateson: Innovation thrives on collaboration. Since joining Intralot, we have significantly expanded our partnerships, making us the most integrated vendor in the central gaming system space in North America and beyond. Our collaboration with **Instant Win Gaming (IWG)** has led to the development of multi-state progressive jackpot games, while our partnership with **Zeal Networks** has strengthened our online game portfolio. Additionally, we are leveraging **Capuchin's** expertise in behavioral science to enhance player engagement, ensuring that our offerings are not only technologically advanced but also deeply attuned to player preferences. We're also excited to partner with **Splashdot** to enhance our player engagement and

loyalty programs, delivering innovative solutions that drive customer retention and satisfaction. These strategic alliances enable us to bring best-in-class solutions to our customers, driving transformation and growth across the lottery industry.

Throughout my career, I have seen how win-win partnerships accelerate growth. At Camelot UK, I pioneered a partnership with Ticketmaster that transformed second-chance promotions. These experiences reinforce my belief that strategic collaboration is the fastest way to innovate and deliver real value to customers.

Internally, we follow the same principle. By empowering our team with the right tools, training, and mentorship, we create a foundation for better decision-making and long-term success. Building the right teams with the right leadership is my top priority.

Getting to Know Richard: The Lighter Side

Leadership isn't just about strategy—it's also about personality. What are some things people might not know about you?

R. Bateson: Outside of work, I have a few unexpected interests. I played rugby in Hong Kong and for the European Exiles, and still follow the game, however I now prefer to watch Football, albeit as a Titans fan it is a tough start to that adventure!

I practice Krav Maga, and I have a new passion for dogs – with two 18 week-old puppies. Another lesser-known fact: I'm an aviation enthusiast – I can name any commercial airliner by type and airline, though my fellow travelers don't always appreciate it!

What's next for Intralot?

R. Bateson: Our mission is clear: **Empower lotteries to grow through cutting-edge technology, strategic partnerships, and deep industry expertise.** We are not just a vendor – we want to be your trusted partner in driving growth and returns in your lottery.

The lottery industry is evolving, and **Intralot is ready.** ■



Modernizing Lottery Games to Meet Evolving Consumer Expectations



Helmut Becker *Chief Executive Officer, ZEAL*



The Lottery Industry is at a Turning Point

Lotteries have always been a source of excitement, aspiration, and social good. The dream of a better life is a powerful motivator, and lotteries provide a simple yet thrilling opportunity to turn that dream into reality. At the same time, they fund important societal causes. However, as consumer behaviors change, so too must our industry. As the competition from sports betting and iGaming is heating up, we must keep lotteries fresh, relevant, and engaging.

The modern lottery player demands more than just large jackpots. To be successful as an operator, we must address different user needs, appeal to new target groups, and create an experience that resonates with today's players. Younger generations, particularly digital natives and Gen Z players, have different expectations when it comes to entertainment. Our ability to adapt will determine the future success of the industry. Of course we don't claim to have all the answers at ZEAL. But what we do have is experience tackling these challenges. We have tested new approaches, learned from our players, and gained insights that have shaped our modernization efforts. From this we have derived insights into how we need to evolve our strategy to ensure that the lottery industry remains relevant and engaging for the next generation.

The Challenge: Lottery Must Modernize to Stay Relevant

The lottery business model is built on an incredibly strong foundation. The fundamental appeal of dreaming about a better future remains as powerful as ever. The lottery industry is also surprisingly crisis-resistant, as players dream of a better life even in times of crisis.

However, despite these advantages, we have faced serious challenges that made us rethink

the way we engage players and grow sustainably. One of the biggest challenges has been meeting the expectations of digital-first consumers. Today's players expect the same seamless, engaging experience from lottery platforms as they do from any other online service. We had to ask ourselves how we could improve our offerings to align with these modern expectations.

Another critical challenge was the need to expand our audience beyond traditional lottery players. The core lottery demographic is aging, and if we want to ensure the long-term sustainability of the industry, we must attract younger and more diverse players, including more women. At the same time, we need to do this without alienating our loyal, long-time players.

We also had to find ways to maintain engagement beyond jackpot peaks. High jackpots naturally drive excitement and participation, but what happens when there isn't a record-breaking prize on the line? How do we keep players interested and engaged even during quieter periods?

The E-Commerce Perspective

Rather than looking only at our industry for best practices, we turned to e-commerce for inspiration. In today's world, consumers expect seamless digital interactions. Whether they are shopping, booking vacation, or streaming content online,

they demand an intuitive, frictionless, and engaging experience. If we want to attract and retain modern lottery players, we need to adopt the same mindset.

One of the key areas we focused on was improving conversion rates. We examined every touchpoint of the player journey and refined the way users interact with our platform. By optimizing the user experience, we made the process of playing the lottery more seamless, intuitive, and engaging.

We also embraced personalization. The lottery experience is not one-size-fits-all, so we leveraged data to tailor content, promotions, and game recommendations based on each player's preferences and habits. This allowed us to create a more individualized experience, increasing both engagement and retention.

To support personalization at scale, we implemented automation. Highly efficient processes enable us to segment players dynamically, trigger campaigns at the right moment, and deliver targeted offers. By automating these elements, we ensure that players receive timely and relevant messages, keeping them engaged without overwhelming them. The combination of these strategies has resulted in a lottery experience that feels as dynamic and engaging as any modern digital service. As a result, we could more than double the lifetime value of our customers over the course of the last five years.

The Marketing Perspective

As we modernized our platform, we saw a fundamental shift in our player base. One of the most striking changes was the rapid growth of first-time lottery players. Many of the people engaging with our platform had never played the lottery before, demonstrating that our efforts to modernize were successfully attracting new audiences.

To continue this momentum, we had to evolve our marketing strategy. We adopted a full-funnel approach, meaning we no longer focused on converting immediate

demand. Instead, we built awareness at the top of the funnel, engaged potential players in the middle, and converted them when they were ready to play. This approach allowed us to nurture long-term relationships rather than focusing only on short-term transactions.

For first-time players, we introduced tailored messaging to make the lottery experience more accessible. Many new players are unfamiliar with lottery mechanics, so we created clear, engaging content that guided them through the process. This helped eliminate potential barriers to entry, making it easier for newcomers to participate.

By understanding and addressing the motivations of different player segments, we have been able to grow our audience sustainably while keeping our core players engaged.

Game Innovation: A New Approach to Prizes and Engagement

Modern players, particularly the next generation, are looking for more than just a big win. They want experiences that feel relevant, personal, and emotionally engaging. We needed to rethink how we structure our games to make them more aspirational and compelling.

We have innovated in a number of product categories. Some of these products are tailored to traditional lottery players, like our team player feature. It lets lottery customers play as a group and invite their friends, family or colleagues to play together. Our e-Instant game portfolio is also optimized for cross selling to lottery customers. Especially with games, it is important to look beyond the performance of a single game and understand its impact on the lifetime value of the customer. Because we have more than 8 million lottery customers whose behavior we can track, we have been able to build a broad portfolio of games and provide the right games to the right customer at the right moment. Other product innovations aim at new target audiences. Two examples are *freiheit+*, a charity lottery that is positioned as a lifestyle brand for a younger target group, and *daymade*, a UK start-up that offers smaller but more frequent prizes. Instead of cash, the customers can win experiences like travel or wellness products.

One of the most significant innovations we

introduced was our Dream House Lottery, which we launched last year. Instead of offering a standard cash prize, we created a game where players could win something deeply meaningful: a home. This shift transformed the way players perceived the lottery. Rather than just chasing a large sum of money, they were playing for a lifestyle – a dream they could visualize and connect with on an emotional level.

Beyond the prize itself, we modernized the lottery experience by integrating a charitable purpose and digital engagement. Each draw supports a different charitable organization, allowing players to see exactly how their participation is making a difference. We leverage social media to amplify this impact, turning players into active participants in something bigger than just a game.

The results are already striking. *The Dream House Lottery* has resonated emotionally, attracting many new players who had never considered playing before. It also created sustainable engagement, as players returned not just for the prize but for the meaningful experience it provided.

One of our most interesting findings during the launch of the Dream House Lottery was that classic lottery products with high jackpots are still very successful – not only with traditional players, but also with new target groups.

Conclusion: What's Next?

ZEAL's strategic approach combines e-commerce, marketing, and game innovation. This has not only expanded our player base but also unlocked new audiences and elevated engagement. By introducing fresh, dynamic ways to play, we have captured the attention of younger demographics and attracted more female players too. What is most encouraging is that the customers who first played a new game spend, eventually spend two-thirds of their budget on Traditional Lottery products, highlighting strong cross-play engagement and long-term player retention.

The future of the lottery industry is bright—but only if we continue to modernize. The world is changing rapidly, and player expectations are evolving alongside it. If we want to ensure that lotteries remain relevant and compelling, we must embrace digital transformation, personalized engagement, and purpose-driven gaming experiences.

The real question is not whether the lottery

industry needs to evolve, but how we ensure that it does so in a way that resonates with players while continuing to support good causes. At ZEAL, we are committed to that challenge. We believe that by continuously refining our approach, leveraging insights from e-commerce, and staying true to the core values of the lottery, we can create an experience that is engaging, sustainable, and impactful for generations to come.

Now, it's up to all of us in the industry to shape what comes next. By working together, embracing innovation, and keeping the player at the center of our decisions, we can build a lottery experience that meets the expectations of both today's and tomorrow's players.

About ZEAL

ZEAL is one of the most relevant players in the international lottery sector. With more than 25 years of experience in the industry, ZEAL's unique business model sets it apart from its competitors: The company's core business, for example, consists of brokering state lottery products. In addition, ZEAL also operates its own lottery products; among other things, ZEAL launched a Dream House Lottery, the first lottery of an existing property on the German market, just last year.

Through its ventures arm ZEAL Ventures, ZEAL also invests in up-and-coming founders and young companies in the online lottery sector, thereby making an important contribution to securing the future of our industry. With its Spanish subsidiary ZEAL Iberia, the company also manages the online presence of the Spanish public lottery ONCE. Another important pillar of the company is their online games business, which is not only offered to B2C customers on the German market but also a successful B2B business with renowned international partners.

About Helmut Becker

Dr. Helmut Becker has been CEO of ZEAL, the German online market leader for lotteries, since 2015. Before taking over as CEO, he had already worked as CMO (Chief Marketing Officer) for two years. Before joining ZEAL, he worked for the German career platform Xing and ebay Germany. He began his career as a consultant at McKinsey. Dr. Helmut Becker studied physics at the University of Hamburg and the University of Cambridge, where he earned his PhD. ■

eINSTANT SALES GETTING **SLUGGISH?** **DIVERSIFY!**




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THE CHALLENGE FACING iLOTTERY PROGRAMS IN NORTH AMERICA

As iLottery programs mature in the North American market, attracting first-time depositors has become increasingly difficult and the rapid sales growth realized early on eventually begins to taper off. Industry data shows that the number of iLottery first-time depositors dropped by approximately 25% from 2023 to 2024. Additionally, eInstant sales growth has begun to plateau with fewer first-time players being acquired and retention rates dropping. In a recent Eilers & Krejcik Gaming Report that looks at quarterly sales, comparing Q4 sales over the last three years shows that while eInstant sales grew by 30% in 2022, this growth dropped to 17% in 2023, and further declined to 11% in 2024, with less than 1.5% growth observed over the last two quarters.

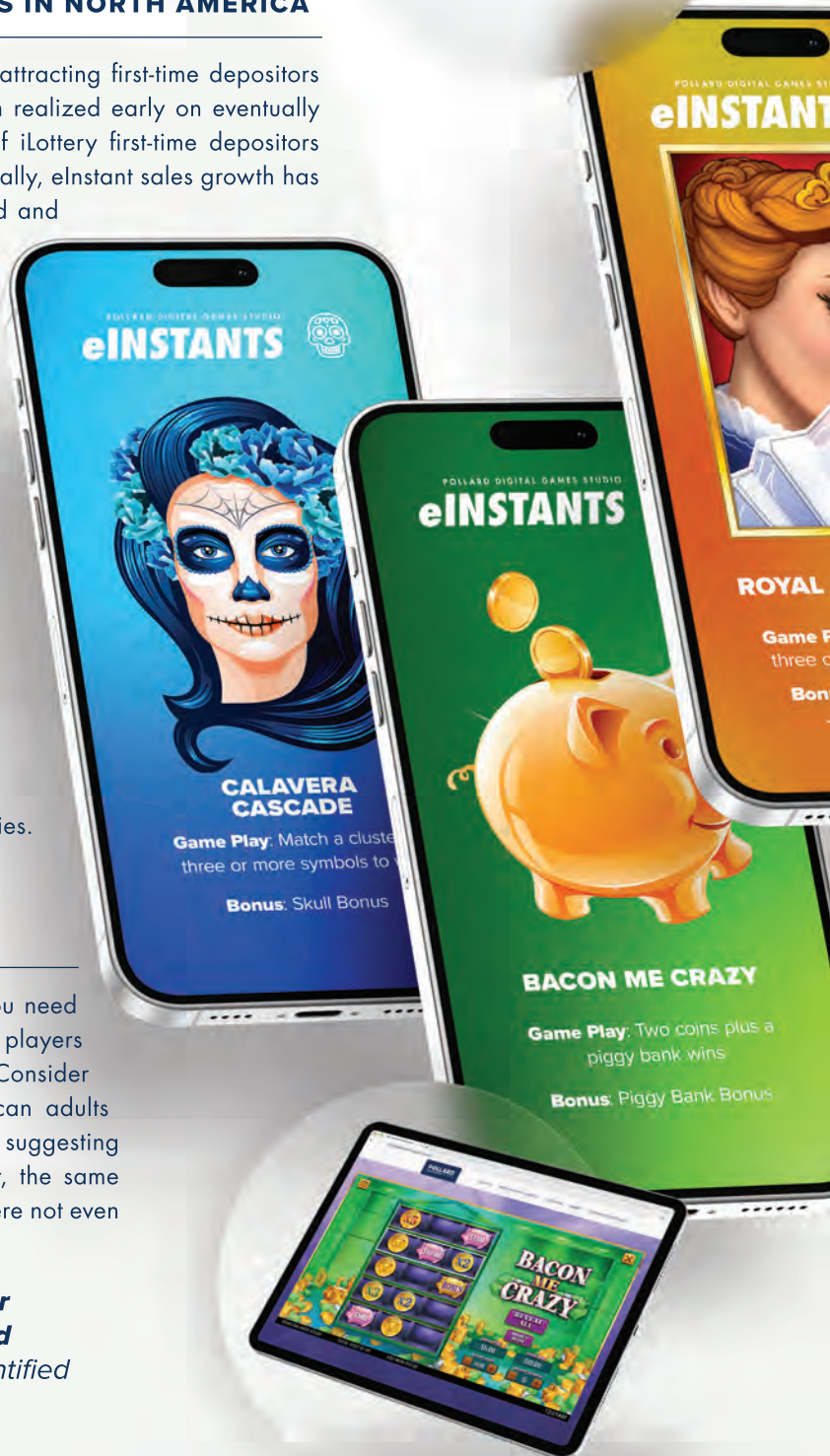
How can lotteries address the challenges of declining iLottery player acquisition and retention rates? Here is what industry data and experience reveal:

-  Large jackpot runs provide a temporary boost in iLottery player acquisition; however, they are ultimately unpredictable and unreliable for sustained growth.
-  Paid advertising is an expensive player acquisition source for lotteries.
-  Lotteries generally lack the iLottery budget needed to compete with the bonuses offered by iGaming companies.

UNLOCKING NEW PLAYERS THROUGH OMNI-CHANNEL STRATEGIES AND DIVERSIFICATION

As Nike co-founder Bill Bowerman once said, "Everything you need is already inside". For lotteries, the key to finding new iLottery players lies within their already engaged and loyal retail player base. Consider this: a 2022 Leger study found that 52% of North American adults purchased a lottery ticket at a retail location in the past year, suggesting a vast fertile ground for potential iLottery players. However, the same study also revealed that nearly 70% of retail lottery players were not even aware that iLottery exists!

How can lotteries better educate and engage their retail players while also promoting awareness and participation in iLottery? Pollard Banknote has identified two key strategies to address these challenges:



OMNICHANNEL OPPORTUNITIES

Lotteries can cost effectively promote online versions of the games that retail players like to play. By offering both an instant ticket and an elnstant version of a game, complemented by a robust loyalty campaign, lotteries can successfully market elnstant games to retail players. QR codes can also be added to instant tickets to help direct retail players to the iLottery program, providing an easy, affordable, and engaging call to action.

Pollard Banknote has built a portfolio of omnichannel games that players can access both at retail locations and on digital and charitable game platforms. We have developed a programmatic approach to encourage players to engage across channels, allowing them to enjoy their favorite games wherever they prefer.

DIVERSIFYING PLAY STYLES AND GAME DESIGNS

Just as it is at retail, play style diversification is essential to elnstant sales growth. Take Crossword games for example; they invariably perform poorly in focus tests because core players find them slow to play. Yet there is a dedicated segment of players who enjoy them. In fact, in 2024, the Ontario Lottery and Gaming Corporation (OLG) achieved 23.24% of its total instant sales from Crossword games alone!

The same concept can be applied to elnstant games. To attract and retain players—and boost sales—lotteries should offer a well-rounded mix of elnstant games and play styles, such as multi-ticket, pull-tab, Crossword, Keno, key number match, and symbol-based games. At the same time, it is essential to keep these games fresh and exciting to maintain long-term player engagement. As player preferences evolve, game designs must adapt accordingly to sustain interest and excitement.

To reignite sluggish elnstant growth, lotteries should tap into their loyal retail player base. By creating omnichannel opportunities to engage retail players and committing to diversifying play styles and game designs, lotteries can boost awareness and encourage repeat play of elnstant games, all while keeping the experience fresh and engaging.

POLLARD
banknote limited

PREPARE FOR THE PARADIGM SHIFT IN PLAYER BEHAVIOR

LOTTO
RESEARCH

INSPIRED

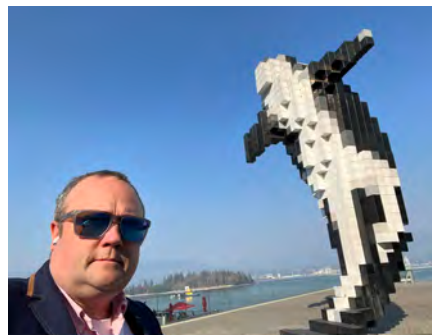
A combined article brought to you by Inspired Entertainment (Lorne Weil) and Lotto Research (Simon Jaworski) about the opportunities and threats currently encompassing the American Gambling and Lottery markets.

The research referenced in this survey was administered among past year gamblers in four key iGaming/iLottery states – Michigan, New Jersey, Pennsylvania and Virginia. The total sample was split evenly among the four states with almost 2,000 American gamblers interviewed.

20 key facts applicable to Americans who have gambled in the past year ...

Sports betting and young males still on a growth trajectory

1. More than half of male gamblers in the four states have bet on sports in the past year, and this reaches as high as 58% among 25-34 year olds men. Sports betting now has the second highest % of penetration for gambling and gaming activities among both 18-24 and 25-34 year olds, only behind Instant Scratch tickets (but ahead of National Lottery draw games).
2. Among the n=500+ iGaming (Online Casino Game) players across the four states, 66% have also bet on sports in the past year. However, this means that one third have not, **leaving a giant iLottery sized gap in the marketplace!**
3. Average monthly spend on sports betting is almost four times higher than average monthly spend on either Scratch games or National Draw games. Among 25-34 year olds it is five times higher.
4. 3.5% (net) of past year Gamblers in these four states say they will have a decline in spend in 2025. This 'net' is the % of gamblers who say they will spend more in 2025 (18%), subtracted from the % of gamblers who say they will spend less (21.5%). 60% claim their spend will be the same. There is expected to be a 'net' (-11%) decline in spend among female players.



Simon Jaworski
Founder & CEO, Lotto Research

5. However, in 2025, even though the average 'net' gain in terms of sports betting spend appears to be low (only 1%), there are two groups that say they will increase their spend, either significantly or slightly;
 - a. 17% of males say they will 'net' increase their spend on sports betting.
 - b. 24% 'net' of 25-34 year olds claim they will increase their spend on sports betting.

What does this mean for Lottery Draw games?

The introduction of a \$5 Mega Millions ticket on April 8th 2025 should hopefully help abate the slide of draw game sales for state lotteries in the short term. However, sports betting's hold on young men continues to grow, with no sign of slowing in terms of increased spend levels.

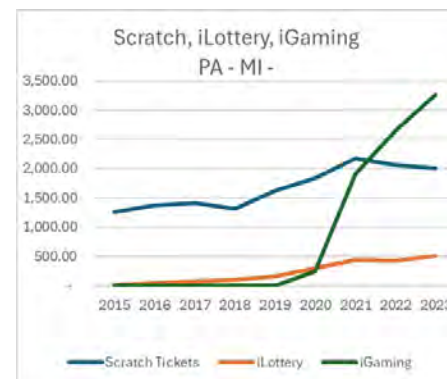
Lottery State Governors take note - Convenience is king!

6. Among those gamblers in the four states who say they'll increase their spend on Online Instant Win games in 2025, the top two reasons are related directly to convenience. 21% state that it is 'easy to play online or on their phone', while 19% state they can play 'whenever I feel like playing'. Convenience is paramount.
7. **Convenience** (the same two reasons, combined at 41%) is also the reason why gamblers say they'll increase their Online Casino spend in 2025. Among 25-34 year olds, the second highest reason (19%) is 'Casino Games Online are the most enjoyable form of



Lorne Weil
Executive Chairman, Inspired Entertainment

- gambling'.
8. When asked how do you prefer to gamble, 58% of gamblers said they preferred to gamble in person, compared to only 42% online. **Great, right!?!? Well...**
 - a. Among 25-34 year olds these numbers are flipped, with 58% preferring to gamble online. It's also 54% among 35-44 year olds, and also a majority of 18-24 year olds who prefer gambling online.
 - b. A higher % of African Americans and Asians both have a preference for gambling online as opposed to in person.
 - c. A majority of men (52%) prefer gambling online compared to in-person.
 - d. However, there is no difference whatsoever across income breaks...



9. In terms of overall spend on Lottery, sports betting and casino in-person, gamblers in these four states predict a net increase of +9%, while +13% claim they will increase their spend online.

- a. Men are driving all the stated increases. A net +17% claim they will increase in person play in 2025, while a net +26% claim they will increase their spend online/on their phone
- b. In terms of age, 18-24 year olds claim their net increase in spend will be similar on both gambling formats, around 26-27%.
- c. However, among 35-54 year olds, the gap continues to widen. Only net +4% of 45-54 year olds claim their in-person spend on gambling will increase in 2025, compared to +17% net for those online/on their phone.

Winning isn't everything, it's the only thing. Not quite true ... however ...

- 10. The primary reason players state they are going to spend either significantly or slightly less on Scratch Games in 2025 is 40% state 'I never seem to win'. It's almost the same proportion for those who state their Lottery Draw Games will decline. Almost half state 'I never seem to win'
- 11. A quarter of those who say their Lottery spend will decline in 2025 state that they have simply 'started gambling less in general'. 13% state it is because they don't go to the store as much anymore.
- 12. And in terms of winning, between Lottery Scratch, Sports bet and Online slots game,
 - a. 47% of gamblers state Lottery Scratch has the best chance of winning, with a bet on sports in 2nd at 39%
 - b. However, among 18-24 and 25-34 the winning preference is flipped, with sports betting seen as a better winning proposition at 50% (compared to 38% for Scratch) and 25-34 year olds at 55% for sports betting and only 27% for Scratch.
- 13. It is the same ratios for 'most likely to win on'. Among 18-24 year olds, 69% say they are more likely to win on Online Casino Games compared to Lottery Online games and among 25-34 year olds they have a similar ratio (66 % think winning is easier on Online Casino Games)

Lotteries are still #1 for Trust

- 14. State lotteries still lead the way in trust! **83% of Gamblers trust their state lottery, compared to only 40% who trust FanDuel and 38% who trust Draft Kings!**

- a. However, the gap narrows among males. 77% trust their lottery, while more than 50% trust the two largest sports betting companies.
- b. Among 18-24 year olds and 25-34 year olds, the gap narrows even further.
 - 69% of 18-24 year olds trust their state lottery, but 55% trust Fan Duel.
 - 71% of 25-34 year olds trust their state lottery, but 54% trust Draft Kings
- 15. We also asked which is more fun – Michigan or Pennsylvania Lottery Online Games or Online Casino Games
 - a. 46% say Lottery, 54% say Online Casino Games
 - i. The disparity gets stronger among 18-24 year olds (63% Online Casino) and 25-34 year olds (69% Online Casino Games)
- 16. When asked, would you like to be able to add lottery to your family's grocery store deliveries or store pick- ups, among past year gamblers in the four states:
 - a. 25% said they would like to add lottery tickets to their grocery store pickups, which skews higher among African Americans and Asians.
 - b. 13% said they would like to add lottery to their grocery stores deliveries

The role and importance of sports fans in Gambling is undeniable.

- 17. Among the 1,974 past year gamblers, 17% are Super Fans (who go to games and watch sports a lot), whilst 26% are Passionate fans (who watch professional sports multiple times a week)
 - a. These two groups heavily over-index male (27% and 35% respectively) and 25-44 year olds (26% and 32%)
 - b. Only 26% are 'casual/social sports fans (and they over-index female at 35%)
 - c. Super Fans heavily over-index on a large majority of gambling types, including
 - i. 37% playing Lottery online (23% overall average)
 - ii. 73% bet on sports (37% overall average)
 - iii. 44% bet/gambled online (Casino style games), versus 27% average

- iv. They average 5 types of gambling in the past year compared to the average of 3.4
- 18. 2025 'net' increase of spenders (so those stating they will increase spend subtracted from those who will decrease spend) and among Sports Super Fans for the key gambling types are
 - a. Lottery draw games +17% net
 - b. Lottery Scratch +26% net
 - c. Sports betting +38% net
 - d. Casino Game Online +16% net
- 19. Thinking about gambling and gaming on your phone/online, how do you think your spend will change in 2025, for
 - a. **Super Fans...net +43% increase**
 - b. **Passionate Fans...net +26% increase**
- 20. However, those 'Not Interested in Watching Sports' have the highest average spend on Casino Games online at \$234 per month.

In Conclusion ... Ultimately, lotteries have to understand that older Americans have started to travel more, and so underlying trends of decreases in spend in gambling may well be accurate. However, in the online realm, low hanging fruit remains available. For instance, the third of the online gambler community currently uninterested in betting on sports represents a tremendous opportunity for iLottery to acquire new players. Of course, the online casino operators are already targeting the same player profile, so it's better for lotteries to start sooner than later.

Alternatively, the Sports fan (and especially the Super Fan and Passionate Fan groups) remains a prominent focal point in gaming. One take-away from these data points is that a window of opportunity is there for the lottery industry to act now to attract this important consumer group, and to embark on this mission well before the NFL Powerball game arrives in September 2026.

If any state lottery would like free access to the full report and data tabulations, please don't hesitate to contact Lorne at lorne.weil@inseinc.com.

Trust me, I'm a researcher (and this information is gold, Jerry gold!) ■

Simon Jaworski, Founder & CEO, Lotto Research
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Now on the Menu: A Smarter Way to Showcase Instant Games

Boost player engagement, instant ticket sales, and operational efficiency with the new Digital Menu Board solution from IGT.

This unique software solution is integrated with the lottery terminal application, making it easy for retailers to showcase their in-stock instant games and update their digital menu displays in real time.

IGT's solution to drive lottery point-of-sale digital displays marks a huge step forward for retailers. What sets it apart?

For one, it uniquely provides **cutting-edge integration with IGT's lottery terminal application — ensuring that a retailer's digital menu display reflects a store's current instant ticket inventory.**

For another, it's not hardware. The Digital Menu Board solution from IGT is software that works with just about any digital signage monitor on the market.

Simplicity for Retailers

Another feature that sets IGT's Digital Menu Board solution apart is **ease of use.**

Retailers control the player-facing digital menu via a **simple and intuitive** user interface on their lottery terminal.

"When a retailer activates a new pack of tickets, IGT's Open Retail functionality brings them directly to the terminal screen where the new game is shown as available," explains Marcelo Assis, IGT Director Marketing Retail Applications and Digital Signage. "The retailer simply **drags and drops** the game from the 'unassigned' area on the terminal screen to the 'assigned' area, positioning it based on the arrangement of the ticket bins behind the counter."

With the push of a button, the digital menu on the player-facing monitor is

instantly updated with the new game's ticket art, price point, bin number, and other information as desired.

"It's just as easy to unassign games," notes Assis. "The display is fully responsive and will instantly rearrange the remaining games accordingly."

Players approaching the digital menu display are greeted with an appealing, modern interface showcasing only games currently in stock — making it easy for them to view and order what they want to play, be aware of new games as they launch, and avoid the disappointment of selecting a game only to be told that tickets are not available.

Lottery was among the first to roll out IGT's Digital Menu Board solution.

IGT was flexible in accommodating each retailer with placements. Retailers participating in the pilot were given a choice of two screen sizes, horizontal or vertical orientation, and the option to place the hardware on the counter or mount it above or next to the register.

"An essential aspect of the pilot was collecting feedback while it was in the field," says Kathy Meunks, IGT Account Development Manager, Missouri. "IGT's market research team created and issued a survey during the program to gather comments and impressions from retailers who were using the solution. Lottery sales representatives who visited the stores during the pilot also reported back with their observations."

The input enabled IGT's product team to identify areas for enhancement, resulting in improvements such as the capacity for larger ticket images and a reduction in the space between ticket images. "The gradual rollout of the pilot allowed IGT to make improvements at the stores as they went along. This led to better placement and optimization of the graphics," said Higgins. "The overwhelming feedback from retailers reinforced how easy this solution is to use – especially to position the games. Our retailers love it."

Corporate Retailers on Board

The pilot with IGT's Digital Menu Board was also a boon for national retailers, including Circle K.

"Since the pilot began in Missouri, feedback from our associates has been incredibly positive," says Circle K Director of Operations, Jason Koenig. "The solution simplifies use for our associates and **helps to minimize transaction time**. Shoppers also love the **ease of visibility** for the instant lottery products sold in the store."

+Optimized for In-Lane

Lotteries and retailers have an ongoing need to expand points of sale. Among IGT's innovations is its award-winning IGT

LotteryLink™ product to easily add in-lane sales. This small, plug-and-play device allows retailers to sell instant games and Quick Pick draw games directly from their existing point-of-sale systems the same way they sell other consumer products —no software modification needed. (See article about IGT LotteryLink™ in this issue of PGRI.)

With the means to easily expand lottery sales in-lane comes the need for a way to showcase the games available.

To solve this need, IGT recommends using the Digital Menu Board solution to drive a mini-display, showcasing a smaller selection of lottery tickets in limited in-lane spaces. Retailers can highlight all the tickets sold in-lane or focus on specific games, such as seasonal options or a family of games. It's a smart way to raise awareness among consumers and help retailers make the most of the available space as they add more lanes.



The Menu is Always Fresh

Lotteries and retailers see the value of replacing plastic displays and other crowded, difficult-to-see displays of instant tickets with bright and attractive digital menus.

IGT's Digital Menu Board solution represents a fresh approach to managing

Response Data from IGT's Survey of 100 Pilot Retailers in Missouri

72%

of retailers surveyed reported being **"very satisfied"** with IGT's Digital Menu Board solution

91%

rated it **"very easy"** to manage from the terminal

82%

liked the jackpot **information displayed** on the Digital Menu Board

69%

say their players will be **very interested** in the Digital Menu Board solution

and updating digital displays, setting a new standard for adaptability in modern retail environments.

IGT's Digital Menu Board is the only solution of its kind. To learn more, visit IGT.com or contact your IGT representative.



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that's what drives engagement, then we need to think about what we offer that delivers a similar kind of excitement; and how we might integrate the appeal of spectator sports into the lottery-playing experience.

I think we all need to look at the sports betting phenomenon that way. What is this telling us? What are players signaling with their choices? What are some of the warning signs to heed as we continue to focus on responsible play? It's clear they're expressing what they want and where they're willing to spend their money. What can we do to be part of that conversation in a responsible way? Lottery and sports are very different. We are not trying to sell sports to compete, we are trying to understand the consumer better to sell lottery products.

What are your priorities as president of NASPL?

H. Mays: I always smile when I think about everything NASPL has accomplished over the past 20 years, and I'm truly honored to contribute to its mission in the role of President this year. One of my main goals is simple—don't mess anything up! NASPL has a strong foundation, and my priority is to preserve that continuity and ensure we keep delivering value to our members.

Cindy Polzin did a fantastic job as NASPL president, and one of her key initiatives was launching a mentorship program for new lottery directors. This program provides new directors with a network of experienced mentors to share insights and guidance, and it has received tremendous support. Many directors come from outside the lottery industry, so having access to mentorship is incredibly valuable. I want to make sure NASPL continues to grow and strengthen this program.

NASPL has always been in a unique position to support the collective interests of state lotteries, and my goal is to help David Gale and the NASPL team continue the great work they've been doing for years in that area.

One of the biggest lessons we learned during COVID was that there are multiple ways to engage with our members and stakeholders. When in-person meetings weren't possible, we adapted by shifting to virtual conferences and information-sharing. Now that we've resumed in-person meetings, seminars, and trade shows, I still see great value in continuing virtual engagement. Video meetings

and online seminars allow us to reach more people, making it easier for members to stay connected without having to travel across the country.

For example, we're working on new ways to package and present important topics—like responsible gaming or Request for Proposal (RFP) processes—in virtual seminar formats. That way, members can access valuable information without the time and expense of in-person travel.

Another priority for me is strengthening NASPL's engagement with the World Lottery Association (WLA) and other regional lottery associations around the world. There's so much we can learn from both our differences and the common challenges we all face. A great example of this collaboration was the recent Responsible Gaming Conference in Atlanta, which NASPL co-hosted with WLA and the Georgia Lottery. Attendees came from all over the world, and the insights shared were incredibly valuable. Seeing how Responsible Gaming is approached in different countries broadens our understanding and gives us fresh perspectives on how to address these universal issues. Strengthening these global connections is something I'm passionate about and will continue to prioritize.

Finally, we recently launched a new NASPL website last year with a more user-friendly interface to enhance member engagement. We're also expanding our resource bank, conducting more industry surveys, and tackling key challenges to better support our members. Improving communication about and access to these resources and continuing to build on NASPL's infrastructure will be essential moving forward.

I know the regional associations around the world want very much to engage more with NASPL. It is great that you are encouraging that.

H. Mays: Rebecca Paul's impact on this industry—especially in helping to shape the role of regional associations—has been a game changer. Among many things, she has been instrumental in fostering stronger engagement with our colleagues around the world. Thanks to her leadership, we're in a much better place when it comes to global collaboration.

I hope we continue to build on that progress and push even harder to strengthen the rela-

tionship between North American lotteries and our sister organizations around the world. There's so much we can learn from each other, and deepening those connections will only make our industry stronger.

Lastly, congratulations for the 50th anniversary of the Illinois Lottery. It was amazing to see how you leveraged that into a wildly successful 360 degree marketing event.

H. Mays: Last year's 50th anniversary was a 6-month long celebration that involved a cross-functional team from every part of the organization. It was definitely a team effort. We had events and promotions across the state involving players and retailers. We wanted it to be the talk of the town everywhere we went, and we succeeded. It was incredible to see so much enthusiasm. Now, we're focused on carrying forward as much of that momentum and excitement about the lottery as possible as we begin another 50 years of success.

Looking ahead into the future, I believe we're at a critical inflection point in the industry. We're evolving from a traditional monopoly-based model with a core player base skewing older, to a landscape where players have more gaming options than ever before and is skewing younger. That shift makes it essential for us to understand lottery's role within the broader games-of-chance ecosystem.

Consumer expectations are changing rapidly, shaped by pop culture and new forms of entertainment. The rise of sports betting is just one example of how gaming is intersecting with mainstream culture in ways we've never seen before. I believe this will be an ongoing trend—one that will continue to connect lottery, entertainment, and the larger gaming industry in ways we need to pay attention to.

The challenge now is twofold: we must acknowledge and embrace the disruption we are seeing in order to understand it enough to position state lotteries for long-term, sustainable growth. The next few years will be pivotal in shaping the future of lotteries. If we're proactive, innovative, and willing to adapt, I have no doubt that we'll continue to thrive in this evolving landscape.

It's an exciting time for our industry, and I can't wait to see what's next. ■

respond when they see it at the POS.

A great example is what the Arizona Lottery has done on Instagram. They resurrected an iconic character, Willie, who looks like an old-school coal miner and was once considered the Arizona Lottery mascot. Bringing back vintage Willie sweatshirts and T-shirts has generated tons of buzz, attracting a different demographic and making the Lottery stand out in the cluttered space of traditional advertising.

So, while POS remains the top down-funnel driver, a well-rounded mix of paid media, creative promotions, social media, earned media, and merchandising helps reinforce brand awareness and maximize engagement across all platforms.

Are we competing with other consumer brands for prime POS placement and visibility?

T. Beenders: Absolutely. It all comes down to how we package the value proposition for our retailers. The message needs to be clear, concise, and focused on the WIFM—What's in it for me? And Why should I care? Every conversation—whether it's with a clerk, store owner, or category manager—should be framed around that question. If that's your guidepost, your message will be focused, effective, and actionable.

For example: "We've got this new \$50 ticket, and you're going to earn \$3.25 for every ticket sold. Plus, 80% of those tickets are winners, which means you'll be putting money back in your customers' hands—money they'll likely reinvest in more lottery tickets, snacks, sodas, and other in-store products." Period. That's the kind of concise, high-impact pitch that retailers can quickly understand, process, and act on.

How relevant or impactful is signage?

T. Beenders: The Arizona Lottery invested in 250 digital ticket menu boards about 10 months ago, and they've been a game-changer. These boards can be updated instantly, either manually or automatically, through a remote server we control.

This brings tremendous value to retailers because we're handling their merchandising while also enhancing the look and feel of their store environment. It's a win for us, too, since we're negotiating prime placement at the counter, ensuring high visibility for the lottery.

Circle K loves these boards—they want them in as many stores as possible. And it's

easy to see why. Not only do they look great and deliver timely, engaging promotional messaging, but they also save retailers time and effort. With traditional ticket menu boards, every time a new game launches, someone—either the clerk or a lottery sales rep—has to manually update display cards and rearrange the merchandising setup. That process takes time, and it's prone to human error.

Digital menu boards help relieve some of the retailer's labor. The store clerk doesn't have to figure out which games go where or worry about keeping things updated because we handle it all remotely.

And with labor costs rising and clerk turnover at an all-time high, automation like this is more valuable than ever. Just yesterday, a high-volume convenience store chain shared their employee turnover rate is over 1,014%, which makes training new employees an ongoing challenge.

As staffing issues continue, automating merchandising functions will only become more critical — helping stores run smoothly while keeping the lottery front and center.

You talked about how retailers are focused on their own apps and loyalty programs. Lottery apps are among the most visited. Why can't we do more to collaborate with retailers in the online world?

T. Beenders: I think lotteries can do more. Advertising winners on social media is a no-brainer. For example, let's say a 7-Eleven sells a million-dollar winning ticket. Lotteries can tag 7-Eleven, repost it, and say "Another lucky 7-Eleven Customer Wins \$1,000" and tag us. This kind of post catches the attention of other retailers, who recognize the value in these posts—they draw attention to the lucky store and generate buzz.

This kind of engagement does more than just celebrate a winner. Other retailers see these posts, recognize the value, and understand how highlighting big wins brings attention to their stores. And because social media thrives on sharing, these posts spread organically, reaching new audiences—many of whom might not even be engaged with the lottery yet.

It's truly a win-win for both the retailer and the lottery. Social media is built for this kind of cascading, co-branding effect: we tag them, they tag us, and others join in. It all snowballs and increases visibility for both parties.

Retailers could also incorporate lottery into their loyalty apps. We already have coupons and promotional messaging that highlight the value of the lottery while also driving foot traffic to the store. For example, a retailer could offer a reward, like spending \$10 in-store and getting a credit toward your next lottery ticket purchase.

There are endless ways to integrate lottery into retail loyalty programs, creating mutual value while engaging more players. We just need to connect the dots.

In closing — any more examples of how supporting retailers leads to them supporting lottery?

T. Beenders: A great example is the category manager of one of our valued corporate partners, reached out and asked if we could provide lottery winner testimonials that could be shared with other managers and with corporate. The goal? Sharing real customer stories/experiences could be a way to drive home the relevance and importance of the lottery category to the business. The more valuable the category, the more justification there is to allocate more hours to the lottery category.

Another great example: We recently launched a pilot for a 40-bin vending machine. Thanks to our strong relationship with Fry's/Kroger, they agreed to test these machines right before Thanksgiving, one of the busiest times of the year. Even with the holiday rush, they committed to the pilot. We are working through the challenges together, and in the near future, we plan to roll these out statewide.

Fry's reached out and asked if they could incorporate lottery into their in-house ads heard by shoppers in-store. When jackpots are high, they promote and remind shoppers not to forget to play or reminders that lottery is a great idea for last minute gift giving during the holidays, and other special occasions.

Think about that—free in-store advertising, reaching customers while they shop. That kind of collaboration happens when a retailer sees the value lottery brings and lotteries see the value of a strong relationship with retailers.

The key takeaway? Building a true partnership—one where both sides see the value and are excited about the opportunities—opens the door to new ideas, deeper collaboration, and shared success. ■



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Breaking Boundaries: Innovative Approaches to Traditional Marketing Challenges: Highlights from Barcelona 2025



With an exciting move to Spain, the **EL/WLA Marketing Seminar 2025** welcomed a record number of participants to explore emerging trends, share best practices and discuss innovative solutions to timeless marketing dilemmas. From managing sales growth while ensuring responsible gaming practices to navigating the complexities of both retail and digital channels, this was an opportunity to discover how to leverage new technologies and turn classic marketing challenges into opportunities for innovation and growth.

The event commenced with welcome addresses from **WLA President Andreas Kötter** and **EL President Romana Girandon**.

Girandon emphasized the lottery sector's core mission of raising funds for public good, stating, "For the benefit of society isn't a slogan or a marketing tool—it is EL's guiding star, and also our limitation. But also, our most powerful differentiator."

Kötter highlighted the importance of maintaining WLA values, positive social impact, and remaining relevant to customers in an increasingly digitalized world.

Keynote speaker Peter Corijn, CEO of Vucastar Consulting, discussed the evolution of marketing, emphasizing the balance between timeless principles and innovation. He noted, "The times, media, tools, the audience change, but the core marketing does not—consumer understanding is still at

the heart of everything." During her **Keynote Kate Ancketill, CEO and founder of business futurist consultancy GDR** focused on how the diverse realities of Gen Z make them a complex proposition for marketers, and what lotteries can do to navigate the rapidly evolving AI landscape.

Two panel discussions with lottery CEOs addressed adapting to shifting landscapes and evolving consumer preferences. **Rebecca Paul, President and CEO of the Tennessee Education Lottery Corporation**, underscored the need to protect the integrity of games while embracing new advertising methods. **Jean-Luc Moner-Banet, CEO of Loterie Romande**, highlighted the importance

of considering the evolving legal context, corporate social responsibility, responsible gaming, and innovation when marketing products. Romana Girandon shared insights into digitalizing points of sale to enhance convenience, while **Samuel Awuku, former Director-**

General of Ghana's National Lottery Authority, emphasized aligning lottery offerings with public expectations and ensuring societal benefits.

Rebecca Paul, former WLA President also underscored one

of the important parts of the regulated lottery and sports betting industry, noting: "it's organizations like WLA and EL, where we get the opportunity to share what we do on a global level and the impact on society and each jurisdiction reaches differently to their public about their good causes. Some places it goes to a general revenue fund, other times it goes to a specific cause, such as Education. But what's important is to learn from one another and look at the global impact like the USD 90 billion that has made a difference in every part of the world."

Professor Robin Teigland from Chalmers University of Technology delivered a keynote on digitalization and societal transformation, encouraging a rethinking of value creation and the circular economy. She presented the Peniche Ocean Watch initiative, funded by Santa Casa in Portugal, as an example of lotteries' positive impact on local communities.

In addition to lottery presentations on innovative marketing strategies and inspiring campaigns, **EL and WLA Partners** also focused on the dynamic balance of player engagement and responsible gaming as well showcasing how to implement to capture new audiences and align entertainment with sustainability goals.

In summary, the Seminar served as a platform for lottery professionals to address traditional marketing challenges with innovative approaches, ensuring the sector's continued relevance and positive societal impact. ■



Luca Esposito and Lucy Lenders-Mathieson



"Building a better world"

12th EL Congress and Trade Show 2025

Join us in historical city of Bern, Switzerland, from 14 to 17 September 2025 for the lottery event of the year – **the 12th EL Congress and Trade Show!**

Hosted by Loterie Romande and Swisslos with the support of EL Partners, this year's edition will bring together industry leaders and experts in the field. Under the theme **"Building a Better World"**, the Congress will explore the future of lotteries in an evolving world.

Through navigating new challenges and opportunities, EL and its members remain committed to their core values of forward thinking, sustainability and integrity which will be reflected in the official business programme alongside

key topics such as responsible innovation and addressing regulatory affairs. The 2025 EL Advertising Awards will celebrate excellence in lottery advertising, while the Trade Show will showcase cutting-edge products and services.

Set in the heart of Switzerland, Bern provides the perfect backdrop for the Congress. As a UNESCO World Heritage Site with a strong commitment to sustainability, the city reflects EL's dedication to shaping a responsible and forward-looking future.

Join us as we unite to build a better world – for society and for future generations. Register today to secure your place!

Visit the EL website for all information about the Congress, updates and how to register:
<https://www.european-lotteries.org/events/12th-el-congress-2025>

The Congress and Trade Show takes place at the Kursaal Bern. Participants are encouraged to go green and use Switzerland's excellent public transport network to get around. On the occasion of the Congress, the EL General Assembly will take place on 17 September 2025 with elections for the new EL Executive Committee.

PGRI LOTTERY EXPO NASHVILLE 2025

NOVEMBER 4, 5, AND 6 | NASHVILLE, TENNESSEE

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STATE-LOTTERIES BUILDING A BETTER WORLD

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November 5, Wednesday: Conference Sessions all day, followed by Reception

November 6, Thursday: PGRI Conference Sessions conclude at 12:30 pm.

Lotteries Reshaping the Games-of-Chance Industry

PGRI Conferences are about pushing fearlessly into a future that is rich with opportunity. Team Lottery is keeping up with a consumer that expects more than ever and a competitive environment that is changing rapidly to meet those expectations.

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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.

Arizona Senate confirms Alec Thomson as Executive Director of the Arizona Lottery

Scientific Games Advances Responsible Gaming Global Leadership with World Lottery Association Re-Certification

Scientific Games' SCiQ Technology Driving Sales at Participating Kansas Lottery Retailers



Scientific Games' SCiQ retail technology is driving instant scratch game sales and simplifying operations at Kansas Lottery retailers. The newly deployed SCiQ system improves operational and inventory efficiencies for lottery retailers and features optimized digital displays for players to order games easily. The rollout of the tech ecosystem is already making a positive impact at participating chain retailers and independently owned stores in greater Topeka, Wichita and other regions in the state.

Scientific Games Rolls Out Advanced Self-service Terminals at Iowa Lottery Retailers

The Company's PlayCentral Powered by SCiQ Technology Offers Modern Self-Service and Streamlines Lottery Product Management. Scientific Games has completed the rollout of PlayCentral Powered by SCiQ self-service terminals at select Iowa Lottery retailers. With more than 79% of U.S. consumers regularly using self-service in stores last year, the global lottery company has advanced the award-winning PlayCentral terminals with its SCiQ retail ecosystem to streamline instant game inventory management and sales reports and provide real-time data analytics to retailers and the

Lottery. PlayCentral Powered by SCiQ is helping enhance Iowa Lottery sales as part of an overall plan to modernize the lottery product category in stores for players and retailers. More than 14,000 PlayCentral terminals are currently deployed in 13 North American jurisdictions, and 8,000+ of those terminals feature SCiQ technology. Additional rollouts are planned domestically and internationally in 2025.

In addition to providing a convenient, engaging in-store experience for players, the advanced self-service terminals simplify retailers' management of Iowa Lottery products and provide critical data that helps the Lottery serve its players more effectively and meet revenue goals.

The SCiQ system inside PlayCentral self-service terminals gives the Iowa Lottery and retailers real-time data for more precise sales tracking and inventory management. This allows retailers to manage inventory confidently, reduce inefficiencies and ensure optimal product availability. The Lottery can use the data to refine game portfolio management, develop targeted promotions and enhance retail distribution strategies for Iowa Lottery Scratch Games.

Scientific Games Named the New Mexico Lottery's SGEP and New Gaming Systems Technology Partner

Scientific Games has been selected as the New Mexico Lottery's full-line provider, winning a new, 10-year contract for gaming systems technology and expanding the global lottery company's previous contract for New Mexico Lottery Scratchers to the Scientific Games Enhanced Partnership program. The company is the fastest-growing government-regulated lottery gaming systems provider in the world, highlighted by recent systems contract wins in the U.S. and Europe.

David Barden, CEO of the New Mexico Lottery, said, "Following a rigorous competitive procurement process, we are delighted to announce Scientific Games as the New Mexico Lottery's new full-line provider. This strategic partnership will see Scientific Games become our exclusive lottery systems technology partner and expand our existing Scratchers relationship to a full SGEP arrangement. By implementing a single, holistic solution across our entire lottery operations,

we aim to optimize performance and generate increased scholarship funding for New Mexico students."

With a focus on strategic planning across all product lines, Scientific Games will provide the New Mexico Lottery with the company's Momentum ecosystem, featuring the advanced AEGIS central gaming system, SciTrak instant game system and Infuse business intelligence platform. Scientific Games' WAVE X point-of-sale retailer terminals and PlayCentral suite of self-service machines across its network of 1,000+ retailers will help engage New Mexico Lottery players with expanded game content.

IGT Delivers Upgraded Lottery Solutions to Tennessee Education Lottery with Nine-Year Contract Extension



The contract extension begins June 2027 and runs through June 2036. The TEL has been a valued IGT customer since 2004.

Under the terms of the agreement, IGT will deploy its high-performing Aurora™ central system, a feature component of IGT's integrated lottery solution, OMNIA™. Additionally, IGT will provide upgraded Wizard back-office business applications, replace existing terminals with newly launched Retailer Pro S2 terminals with WinCheck S2 peripherals, provide new Keno Show Controllers with WiFi capabilities and deliver communication network upgrades.

"For more than 20 years, IGT has been a trusted partner to the Tennessee Education Lottery, providing innovative solutions that have supported our consistent growth," said **Rebecca Paul, Tennessee Education Lottery Corporation President and Chief Executive Officer**. "One of our core missions is supporting educational programs in Tennessee, and since our inception, we have raised more than \$7.5 billion for our state. We look forward to continuing our strong relationship with IGT, whose advanced technology will assist in responsibly increasing both sales and our contributions to Tennessee education."

"IGT has been committed to bringing best-in-class lottery solutions to the Tennessee Education Lottery since its inception," said **Jay Gendron, IGT Chief Operation Officer, Global Lottery**. "Through this nine-year contract extension, we are excited to bring new technological upgrades to the Lottery, providing them the systems and equipment needed to drive performance for its players and the good causes it serves in the state."

The upgraded technology will provide the TEL with intuitive, user-friendly applications, tools, and reporting capabilities. Components of the central system, including Performance Wizard, Sales Wizard, Learning Wizard, and Retailer Wizard will streamline operations for optimal functionality. The introduction of IGT's high-performance, high-volume Retailer Pro S2 terminals with WinCheck S2 peripherals will enable the TEL to easily add new features across multiple point-of-sale terminals simultaneously and allow players to quickly and reliably see if they are draw game or instant ticket winners.

IGT Achieves Improved ESG Score from FTSE Russell

IGT Reaffirms Responsible Gaming Leadership in Italy with Sixth Consecutive European Lottery Recertification

Lottery-Ticket Purchases at Checkout Make Iowa Debut at Fareway Stores

Powerball® and Mega Millions® tickets can now be purchased in checkout lanes at select Fareway® Stores in Iowa, marking the state debut of this new convenience in lottery purchases. The new purchase process allows the printing of easy-pick tickets in Powerball and Mega Millions at the cash register. The tickets involved are produced on the same paper as store receipts, but printed separately. Called Easy Play, this new purchase option from the Iowa Lottery debuted Feb. 24 in select Fareway stores and is planned to roll out by the end of March to all Fareway locations in Iowa that sell lottery tickets. Customers at those stores will be able to buy easy-pick tickets (meaning the numbers in the play are randomly assigned) in Powerball and Mega Millions in any checkout lane staffed by a cashier.

Prior to this month's debut of Easy Play, Iowa Lottery tickets could only be purchased at a lottery terminal or self-service kiosk in a retail location. "Think of Easy Play as an express lane while the lottery terminal provides a full-service approach for all lottery products," said Iowa Lottery CEO Matt Strawn. "We recognize consumer expectations for convenience and are thrilled to work with a partner like Fareway to deliver that experience."

Mike McCormick, Chief Retail Officer with Fareway Stores, Inc., said his company welcomes the new option. "We are excited to partner with the Iowa Lottery to be the first retailer in the state to provide customers with the convenience of Easy Play," McCormick said. "At Fareway, the

customer experience is a top priority and adding Easy Play will elevate that experience for our lottery playing customers."

The Easy Play process allows customers at the cash register to buy easy-pick tickets with 1, 2, 3, 5 or 10 plays for the next drawing in Powerball and Mega Millions. Easy Play tickets do not allow the Power Play®, Double Play® or Megaplier® options to be added and are not available at self-service checkouts.

Strawn said that development and implementation of the Easy Play technology has been a years-long endeavor for the Iowa Lottery. He emphasized that Easy Play tickets adhere to the same exacting security standards as those from a lottery terminal or self-service kiosk. And, any Fareway cash registers utilized for Easy Play transactions ensure that lottery purchases are made with cash or the equivalent, not credit.

Easy Play tickets can be checked or cashed at any retail location in Iowa. Tickets printed from a store's cash register look similar to those from a lottery terminal, but feature the Easy Play logo to help identify them. And as with tickets from a lottery terminal or self-service kiosk, excessive heat or light can damage Easy Play tickets.

The technology that allows Iowa Lottery tickets to be printed from cash registers in Fareway stores involves technology from three distinct platforms: the statewide central gaming system that provides and tracks Iowa Lottery sales transactions in real-time; the point-of-sale system utilized at Fareway store cash registers; and a systems communications bridge that securely links the two.

The systems bridge is provided through a technical partnership with **ABACUS**. Using the North American State and Provincial Lotteries (NASPL) API, the **ABACUS Fusion Platform** has been integrated with the lottery's central gaming system provided by Scientific Games to enable in-lane sales of the two major national lottery games.



ABACUS, in conjunction with its retail vendor partners, has built the connectivity that facilitates the sale of lottery tickets on the retailers' point-of-sale systems. This solution enables the quick and seamless deployment of lottery products into retail.

Simon Butler, the CEO of ABACUS said, "We are pleased to be working with the Iowa Lottery and Fareway Stores who will be the first U.S. lottery and grocer, and among the first in North America, to adopt this print-on-receipt lottery solution. ABACUS are innovators in the lottery industry and help lead the U.S. lottery market in improving retail lottery operations."

Scientific Games, the Iowa Lottery's systems and retail point-of-sale technology provider, worked with the Lottery and Abacus to connect the solution to its central gaming system.

Pollard Banknote maintains efficiency to break FY24 targets

Pollard Banknote Limited (TSX: PBL) ("Pollard") released its financial results for the three months and year ended December 31, 2024. Full Year 2024 Results and Highlights

- Established a new record for revenue at \$557.1 million, up 7.1% from last year.
 - Combined sales(1) in the year, including our share of NPi's joint venture sales, attained \$665.9 million, up 10.9% from \$600.6 million in 2023.
 - Net income was \$35.2 million, an increase of \$3.8 million or 12.1% over \$31.4 million earned in 2023.
 - Adjusted EBITDA(1) achieved a record annual amount of \$114.5 million, \$23.2 million or 25.4% higher than the previous year.
 - Income from operations reached \$69.8 million, up \$23.8 million or 51.7% from the previous year.
 - Instant ticket margins increased throughout 2024 due to the ongoing impact of increased selling prices due to the success in repricing our contracts as they came up for rebid. The effect of repriced contracts had increasing impact during 2024 and the full effect will be reflected in 2025.
 - During 2024 we were awarded our first U.S. contract for our Catalyst™ iLottery solution with the Kansas Lottery and subsequent to year end, on February 13, 2025 the solution successfully went live.
 - Our joint venture iLottery operations generated very strong results in comparison to last year, contributing \$59.3 million in combined income before income taxes in 2024, 20.8% higher than the \$49.1 million earned in 2023.
 - Expanded our product offerings with the acquisition of Clarence J. Venne, LLC during the year, a leading manufacturer of bingo daubers primarily used in the charitable gaming market. (1) See Non-GAAP measures for explanation Fourth Quarter Results and Highlights
 - Revenue reached \$140.3 million, up 3.5% from the fourth quarter of last year.
 - Combined sales(1) in the quarter, including our share of our NeoPollard Interactive LLC ("NPi") joint venture sales, reached \$168.2 million, up 6.9% from \$157.3 million in 2023. - 2 -
 - Adjusted EBITDA(1) attained \$25.2 million, similar to the \$25.7 million earned in the fourth quarter of 2023.
 - Adjusted EBITDA was negatively impacted during the quarter due to manufacturing issues related to our instant ticket production causing higher spoilage on certain large games.
 - Production volume of instant tickets during the fourth quarter was lower than the previous quarters in 2024 based on a lower order pattern typically experienced in the fourth quarter.
- "2024 was a very successful year for Pollard Banknote, not only through reaching a number of record financial results, but also with the achievement of a number of critical business milestones," remarked John Pollard, Co-Chief Executive Officer. "Our core instant ticket business increased its margin significantly compared to 2023 as the success of our instant ticket repricing strategy continued to be reflected in our financial

results. Strong demand in our charitable gaming operations led to increased profit contributions in 2024.”

“Significant investment in our Catalyst™ iLottery Gaming Platform and eInstant game content continued throughout 2024, culminating in August with the official awarding of a contract to provide the iLottery solution for the Kansas Lottery. The Kansas Lottery has been a very important, long-time customer of Pollard Banknote and we have worked together providing technology services including our loyalty solution and other products successfully during that time. After a thorough and ambitious implementation period, the iLottery platform successfully went live on February 13, 2025, becoming the fastest implementation of a full iLottery program in U.S. history.”

Kansas Lottery launches Pollard Banknote-powered iLottery

POLLARD
banknote limited

The Kansas Lottery has successfully launched its iLottery program, powered by the Pollard Catalyst™ Gaming Platform, Pollard Banknote's cloudnative, modular, and API-first iLottery solution. The leadership and strong partnership of the Kansas Lottery, combined with Pollard Banknote's deep iLottery expertise, enabled today's launch to come only ten months after initial scoping, making this the fastest implementation of a full iLottery program in U.S. history.

The iLottery solution builds on the Lottery's existing PlayOn® Loyalty Program, Pollard Banknote's proprietary loyalty solution. Existing PlayOn® members can easily join in the fun by upgrading their existing loyalty accounts. The Lottery launched PlayOn® in 2017, enabling players to earn points by submitting their retail tickets and completing other activities. Points can be redeemed for chances to win cash, experiential prizes, or free plays.

In addition to the features mentioned above, the turnkey iLottery solution includes a complete Player Account Management system that provides the functionality required for registration, age and identity verification, wallet transactions, and responsible gaming features. Geolocation services are provided through Pollard Banknote's proprietary GeoLocs™ technology. Pollard Banknote is additionally providing a suite of business services including marketing, draw operations, risk management, and a player support center.

There are an estimated 85,000 unregulated skill games in Pennsylvania - legislators think they should be regulated and taxed

Mississippi Sweeps Away Sweepstakes, Mobile Betting Delays Enactment

Mississippi is likely to ban online sweeps

Mississippi has become the first state in the country to pass legislation to prohibit sweepstakes platforms that critics say are nothing more than cleverly designed online casinos tailored to sidestep gaming laws. The bill, however, has a final hurdle to clear before reaching Gov. Tate Reeves' (R) desk. A person found guilty of running an illegal internet betting business would face a fine of up to \$100K and 10 years in prison. SB2510 says “any online, interactive, or computerized version” of “race books, online sports pools, and online sweepstakes casino-style games” would qualify as an unregulated, illegal gambling enterprise. The SB2510 provisions go on to say that “internet sweepstakes cafes” and “online sweepstakes casinos” constitute illegal gambling.

Perhaps no issue is more detrimental to the highly regulated gaming industry than the emergence of online sweeps. The unregulated websites have popped up across the country and target players by billing their businesses as social, free-to-play sites. Once a player's free allotment of coins runs dry, customers can purchase a secondary currency, commonly called “sweeps tokens,” that can be gambled with to win real money. Along with Mississippi, legislation to outlaw online sweepstakes that offer slots, table games, and other forms of traditional gambling is active in numerous states, including Florida, Maryland, Michigan, New Jersey, Nevada, and New York.

New York Senate committee advances bill to ban sweepstakes gaming

California Lawsuit sues Online Sweepstakes Site of Operating Illegally Based on Internet Cafe Law

Mississippi, Maryland move forward with sweepstakes casino bans

Nevada bill would increase penalties for sweepstakes, illegal online gambling providers

Connecticut and Maryland file bills to prohibit sweepstake casinos

Online Gambling Sites Linked to Fentanyl Money Laundering

Michigan Gaming Control Board issues cease-and-desist letters to nine unlicensed online casinos

The Michigan Gaming Control Board (MGCB) has taken swift action against nine online casinos, issuing cease-and-desist letters for violations of state gaming laws. The affected websites offer a

range of casino-style games, such as slots, poker, blackjack, roulette, and craps, as well as betting services for sporting events and horse races.

Unregulated Online Gambling on the Rise

The growth of unlicensed online casinos has been a growing concern nationwide. A 2022 report from the American Gaming Association (AGA) estimated that Americans wagered over \$510 billion annually with illegal and unregulated operators, including online casinos and sportsbooks. This unregulated market not only undermines consumer protections but also results in substantial tax revenue losses for state and local governments. The AGA's report highlights that illegal gambling operators contribute to an estimated \$13.3 billion in lost tax revenue annually.

One method these platforms use to evade regulatory scrutiny is by operating under the guise of sweepstakes, which allows them to circumvent traditional gaming laws. However, many of these sites lack proper consumer protections, oversight, and responsible gambling measures, making them a risky choice for players and underscoring the importance of state-regulated gambling to ensure consumer safety.

Loto-Québec maintains its momentum and posts strong results

From April 1 to December 30, 2024, the figures show total revenues of \$2.238B (+\$127.0M or 6.0%) and a net income of \$1.132B (+\$55.8M or 5.2%).

Quebec Online Gaming Coalition (QOGC), an organization of private operators comprised of Betway, Bet99, DraftKings, Entain, Flutter, Games Global and Rush Street Interactive pushes hard to Cut Back Loto-Québec Monopoly

Bill to bring online gaming to Arkansas filed in legislature

Two of the largest Canadian lotteries are looking to hire a technology firm to develop a shared online sports betting platform.

The Atlantic Lottery Corporation (ALC) and the British Columbia Lottery Corporation (BCLC) will have separate contracts for the supplier, which will produce a multi-purpose betting platform for both. The crown corporations – which are the only licensed gambling providers in their respective provinces – envision a platform which will cover trading and liability management services.

Maryland, Virginia, Indiana, Wyoming, Massachusetts and New York introduce online gaming bills

Legal iGaming in New York: 'Not If But When,'

While Sen. Joseph Addabbo Jr. has proposed several gaming-related bills this session, he says it is Gov. Kathy Hochul who 'drives the bus' on legislation.

New York is already the largest competitive market for online sports betting in the U.S. From the week that ended March 31, 2024, to the week that ended March 2, 2025, mobile sports betting in New York generated more than \$1 billion in tax revenue for the state.

RFP: Wisconsin Lottery 'Lottery Gaming System and Supporting Products and Services'

RFP: Idaho Lottery Advertising Services

RFP: Idaho Lottery Financial Auditing Services

RFP: Iowa Lottery Print and Loyalty Services

RFP: Minnesota Lottery for a new Central Gaming System.

RFP: Research, MUSL - National For Life Lottery Game

JOB: NORTH DAKOTA LOTTERY DIRECTOR

WORLD NEWS

Piet Van Baeveghem appointed new Secretary General of The European Lotteries (EL), effective 1 July 2025

The appointment of Piet Van Baeveghem by the EL Executive Committee is a key step for the Association's future, ensuring that both the EL team and the membership continue to grow and strengthen our unique societal mission.

As a long-time colleague from The National Lottery in Belgium, Piet has been deeply engaged with EL for many years - most notably as Executive Chair of the EL Legal & Regulatory Working Group, but also in various other capacities. His extensive experience and deep understanding of the lottery sector make him well-prepared for this role.

Piet holds a Master's degree in Law from Ghent University and is a recognised leader in strategy, governance, and regulatory affairs. An experienced team leader, he brings over 25 years of expertise in policy-making and stakeholder engagement, making him a valuable addition to the EL team.

We look forward to welcoming Piet in his new role from 1 July 2025.

EL Report reveals sector's long-standing commitment to society

The latest "Report on the lottery sector in Europe" highlights the sector's continued dedication to public good

The latest "Report on the lottery sector in Europe" highlights the sector's continued dedication to public good.

In 2023, EL members contributed €22 billion to good causes and societal initiatives, reinforcing their core mission: generating funds for public benefit through safe and responsible games of chance.

"With over 50 percent of Gross Gaming Revenue (GGR) reinvested into society, European lotteries remain steadfast in their mission: creating a positive societal impact while ensuring responsible gaming practices. Once again, EL and its Members have put public benefit first, upholding their long-standing commitment to society."

Romana Girandon, EL President

The 18th edition of the report confirms the lottery sector's robust health, with EL members making a significant contribution to local communities across Europe. In 2023, funds were channeled towards various social projects including for cultural heritage, sport, health, education and taxes for treasuries. Lotteries are not just about entertainment; they are about making a real difference.

Another important societal contribution is to employment in Europe. In 2023, EL Members reported a total of nearly 54,000 full time employees, an increase of five percent compared to 2022.

The report also highlights steady sector growth. Draw-Based Games (DBGs) remain the largest game segment, growing by 2,1 percent compared to 2022, followed by instant games, with a 6,5 percent increase. These categories were complemented by a rapidly expanding Sports Betting and Other Games segment, driven by evolving market regulations and product diversification. Retail remains the dominant sales channel, while online sales grew by 14 percent in 2023, driven by continued digitalization, mobile device penetration and increasing demand from younger players.

With a commitment to responsible gaming and sustainable funding models, lotteries in Europe continue to make meaningful social contributions while adapting to a rapidly evolving market landscape.

EL Report on the Lottery Sector in Europe 2023 (public version)

The EL Data & Research WG (D&R WG) is responsible for collecting and sharing data among the EL membership. The data is collected online and aggregated by an independent third party, based on which D&R WG publishes the yearly report.

Work begins on World Lottery Summit 2026 in Sydney

Work has already begun on the next World Lottery Summit in 2026, which will take place in Sydney, Australia from 9-12 November, 2026.

Host lottery and co-organizer – The Lottery Corporation – welcomed the WLA team to Sydney for a week-long, and highly successful first site visit. The proposed main venue for the business program and tradeshow, is the International Convention and Exhibition Centre (ICC), located in Darling Harbour, at the heart of the city, in close proximity to the iconic Harbour Bridge and Opera House.

Sidney is home to historic and modern venues in spectacular locations which would be suitable for the WLS social program of opening and closing dinners, Contributor dinners and tour options.

WLS – our landmark biennial event

The World Lottery Summit is the lottery and sports betting industry's most important event. It gathers together our global community and provides a platform for participants to keep up with latest industry developments, exchange experiences, learn from peers and experts, and broaden connections.

It offers our suppliers the chance to demonstrate their products, services and innovation to our members, allowing everyone the time to discuss and try products on display.

Audiences gain a deeper understanding of our industry, through the business agenda, which covers key topics and trends and underscores the important work done by our lottery and sports betting members, to raise funds for good causes and make a positive impact on many communities around the world.

Every WLS is unique! Each venue highlights a host lottery and its region, and each is as successful in its own right. Put WLS 2026 Sydney, on your agendas and stay tuned for more.

Scientific Games' Omnichannel Gaming System Selected to Power Deutsche Klassenlotterie Berlin

Scientific Games' omnichannel SYMPHONY gaming system will power **Deutsche Klassenlotterie Berlin's** retail and digital lottery sales, enhancing the consumer lottery experience across Berlin, Germany through a new, seven-year contract. Selected by DKLB through a competitive tender, SYMPHONY's advanced, open architecture supports retail, digital and mobile play and future game entertainment channels, including third-party content and platforms. Scientific Games has served as a technology provider to DKLB for more than 20 years. The company's teams and partners will coordinate the conversion to the new SYMPHONY system.

Hansjörg Höltekemeier, CEO of Lotto-Berlin, said, "With our selection of Scientific Games and SYMPHONY, we are not only responding to the ever-increasing requirements in the areas of operational safety and cyber security but also focusing on continuity. Above all, we are investing in a new system architecture that will lead to an excellent, system-supported customer experience across all our sales channels."

IGT Modernizes Central Lottery System for LOTTO Thüringen in Germany via Seven-Year Contract Extension

International Game Technology (IGT) has signed a seven-year contract with the Thuringian State Lottery in Germany to deploy its retail central system technology, Aurora™, and related software upgrades. An integral part of OMNIA™, IGT's player-centric, omnichannel solution for lotteries, Aurora helps drive lottery innovation and profitability. The platform will provide intuitive, user-friendly applications, tools and reporting capabilities which will handle all of LOTTO Thüringen's transaction processing, game management and back-office operations.

"LOTTO Thüringen has relied on IGT's versatile and strong-performing central system technology throughout the course of our decades-long relationship," said Jochen Staschewski, LOTTO Thüringen Chief Executive Officer. "Upgrading our central retail system to IGT's advanced platform and back-end software will enable us to streamline our business processes and continue operating with the highest levels of efficiency."

FY 2024: Allwyn digital segment drives double-digit revenue growth

Digital channel revenue surged 20% year-on-year, now representing 39% of the group's gaming revenue as the company continues its strategic shift toward online offerings. The Switzerland-based lottery operator reported total revenue of €8.79bn for the year ended 31 December, a 12% increase from the previous year. Gaming revenue also grew by 12%, with strong performance across most markets on a constant currency basis.

OPAP FY24 accounts reveal Greek lottery dominance

Allwyn-majority-owned Greek market player OPAP saw an uptick of 6.1% YoY in revenues generated by its lottery segment for the full 2024.

The Finnish government is overhauling the gambling monopoly held by Veikkaus, as it aims to increase competition in the sector

The draft law which will convert Finland's gambling regulation into a multi-licensing model has been sent to parliament.

German court curtails gambling regulator's IP blocking powers

The news represents a blow for the country's gambling regulator GGL, which has seen its attempts at IP blocking offshore gambling sites frustrated by the court's almost since its establishment four years ago. The judgement confirmed one made by a lower court in February 2023 that said the GGL's attempt to IP block Lottoland lacked legal basis.

Italian government to consider lifting the Gambling Advertising Ban

Sweden told to close Gambling Act loopholes exposed by black market

Poland Proposes EU Group to Tackle Illegal Gambling Revenue

Poland has proposed the EU form a working group to combat unregulated gambling as part of a bid to recover lost tax revenue.

Spanish regulator warns of identity theft via online gambling platforms

A report identified nearly 8,000 cases of identity theft in online gambling in 2024.

Gambling Commission mistakenly hands Northern & Shell's lawyers over 4,000 sensitive documents

Regulator makes 'unprecedented' blunder in legal battle over UK lottery

The documents covered the process of awarding the lottery licence to Allwyn, rather than Camelot or Northern & Shell. Thousands of sensitive documents have been accidentally given to N&S lawyers and the Gambling Commission seems unsure of which documents have been handed over. According to those who attended the procedural hearing on Wednesday, the Gambling Commission handed more than 4,000 sensitive documents to Northern & Shell (N&S) lawyers in what is being described as an 'unprecedented blunder'. Northern & Shell operates The Health Lottery, which returns 20% of ticket sale proceeds to local health-related charity and community support groups.

Former Director-General of the Ghana National Lottery Authority (NLA), and current member of Ghanaian Parliament, Samuel Awuku, has called for a comprehensive reform in the management of lottery proceeds.

BRAZIL: The Treasury Ministry's Prize and Betting Secretariat published rules that prevent bank accounts for illegal betting operators

Foreign companies are set to dominate New Zealand's internet gambling market as the government auctions online casino licences for the first time.

New Zealand government is pushing back against TAB's efforts to secure online gaming license

SPORTS BETTING AND CASINO GAMBLING

AGA: Americans to wager estimated \$3.1 billion on March Madness

Class action lawsuits filed against DraftKings over ad practices

Texas sports betting bill now has Senate companion

Texas Governor Now Supportive of Online Sports Betting

SAFE Bet Act is reintroduced to address Sports Gambling

With March Madness set to kick off this weekend, U.S. Senator Richard Blumenthal and U.S. Representative Paul D. Tonko (NY-20) reintroduced their Supporting Affordability and Fairness with Every Bet (SAFE Bet) Act, legislation that would create nationwide consumer protections and standards for the mobile sports gambling industry.

IL AG warns bettors to avoid Bovada, PrizePicks Friday before Super Bowl

Canada: Manitoba seeks court order to block offshore gambling site Bodog

Colombia's gambling regulator blocks 10,000 websites, social media profiles offering illegal betting

Sportsbet Sued by Aussie Gamblers For 'Illegal' In-Play Betting



Abacus: The Future of Lottery Retail

With **self-checkout** and shifting **shopping habits**, lottery needs are changing at service counters. **Abacus makes lottery easy**, ensuring every customer has the opportunity to play, even at self-checkout.



Recapture lost revenue from self-checkout users



Increase lottery sales & enhance consumer experience



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