

# PGRI PUBLIC GAMING

MAY/JUNE 2024

I N T E R N A T I O N A L

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## MULTI-PRONG APPROACH TO THE MOST TIME-EFFICIENT IMPLEMENTATION OF AN ONLINE SELLING CHANNEL

**Ionut-Valeriu Andrei**

General Manager,  
Loteria Română



## Data-driven Customer Management

**Zsófia Bánhegyi**, Chief  
Commercial Officer,  
Szerencsejáték Zrt.



Lotteries in Europe: A Seminal Colloquium

## Leveraging the Power of Brand Lottery

L to R: Bret Toyne,  
Jay Finks, Norm Lingle,  
Stephen Durrell, David Barden





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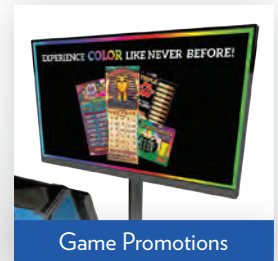
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## From the Publisher

So, tell me what you really think ...

Legislators were elected to represent the interests of the people, not the sports betting and casinos who contribute to their campaigns. Selling their legislative votes to the highest bidder is not what they were elected to do. Which brings us to observe an interesting confluence of events.

First, it has gotten to the point where sports betting operators no longer need to even pretend to respect the normal protocols and operations of the state governments tasked with regulating their activities. See page 50 for the short story of how none of the operators even showed up for a meeting called by the Massachusetts Gaming Commission (MGC). This roundtable was called for the purpose of talking about “how, when and why they set betting limits on some patrons”. The sports betting operators literally refused to attend. Why should they bother when they (i.e. sports betting operators) know that legislators will protect their interests no matter how flagrantly they disrespect the state agencies responsible for regulating sports betting?

Accordingly, and as a direct result of the rampant corruption during the process of legalizing casino gambling, Louisiana did the sensible thing of making it illegal for state legislators to accept campaign contributions from gambling interests. But that was 30 years ago. Now, at the behest of an attorney for Penn Entertainment (a major gambling company with five riverboat casinos in Louisiana), a bill was just approved by the state senate finance committee to reverse that prohibition and allow campaign donations from commercial gambling interests. Further evidence (along with the dearth of new states approving iLottery) that we are going in the wrong direction.

I do not understand how a legislature can approve sports betting, online sports betting, casino gambling, or online casino-style gambling, and not approve

iLottery, which is what has happened in many states. This is so clearly contrary to common-sense and to the interests of the people that legislators are elected to serve, and so blatantly aligned with campaign contributions that are buying legislative support. Is there really nothing that can be done about this?

Much of the content of this issue comes directly from the fabulous **EL/WLA Marketing Seminar** held every year in London in the first week of February. That date has been moved to the week of Jan. 21 to 24 in 2025 to coincide with the ICE Gaming Show. And both are moving to Barcelona. It is a wonderful week as so many industry leaders come together for these events. See photo collages pages 42-44.

Our feature interview is with **Ionut-Valeriu Andrei** whose presentation at the Marketing Seminar galvanized the audience to raise their expectations for how much can be accomplished in a short window of time to launch and build out an online lottery program. As Ionut explains, it involves launching multiple initiatives simultaneously, and taking on a small extra measure of risk to achieve outsized results in record time.

All the presentations at the Seminar were fabulous. Featured also in this issue are articles based on two more of the best. We know that success at applying the tools and skill-sets of data-driven management is already separating the winners from the also-rans. Some of us just aren't clear on the concrete steps involved in taking data analytics and execution to the next level. **Zsófia Bánhegyi's** Seminar presentation and article on page 24 connects the dots, showing how data-science has become mission-critical to the goals of enhancing customer experience, enterprise profitability, and effective customer retention.

**Ross Sergeant** tackles the confounding question of how marketing communications is being turned upside

down by the changing media landscape. TV in particular, with impact declining and costs increasing in dramatic fashion. The solutions involve creative new approaches to drive multi-media synergies and elevating digital as the tail that wags the dog in the overall media mix.

**Lotteries in Europe: A Cultural Cornerstone, Social Contributor, and Economic Entity** describes another very special EL event, a colloquium held in Brussels that helps us appreciate the serious societal role performed by government lottery.

I ask our media partners **IGT, Scientific Games**, and **NeoGames** for genuinely insightful, research and evidence-based articles and they deliver. Thank you for sharing the benefit of the resources applied to analyze big-picture consumer-behaviour, retailing, and market-place trends and how they impact our own lottery-specific interests. We depend on you and appreciate your service to support lottery and good causes.

We also include articles on the cutting-edge issues affecting the U.S. market. Keeping Brand-Lottery top-of-mind, for the consumer in general but the games-of-chance player who is faced with more and more options in particular, is the topic of **Simon Jaworski** (our resident research genius) and the **MUSL panel discussion** held at our own PGRI Smart-Tech conference in March. **Leading with Gratitude** is another article based on a very special session also held at Smart-Tech.

Susan and I are looking forward to seeing you all soon!!!

Paul Jason, Publisher  
Public Gaming International Magazine





# \$200 Million

## In Revenue Opportunity

Out-of-stock conditions result in significant lost revenue for lotteries. Through our SCiQ retail ecosystem, we were able to identify nearly \$200M in additional revenue that could be captured by proactive sales representatives and retailers over a one-year period. Just one example of how the science inside our retail technology is making a difference.

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## Multi-Prong Approach to the Most Time-Efficient Implementation of an Online Selling Channel

**Ionut-Valeriu Andrei**

*General Manager and member of the board of the Loteria Română (Romanian Lottery)*



**PGRI Introduction:** Loteria Română wanted to implement the online selling channel quickly and cost-effectively, and then nurture its growth over time. The initial goal was to reach 5% of total sales by the end of the first year of implementation. Ambitious but do-able. Then grow online sales steadily. As the process unfolded, though, Ionut-Valeriu Andrei discovered creative ways to drive sales at an increased rate. The result is that the initial target of 5% of total sales was reached in just three weeks. But that is not the interesting part of this story. Projections were adjusted accordingly, increased to 10% of sales over the next ten weeks. They blew past that goal in seven weeks. Projections increased again and again. Online sales continued to increase at a breakneck pace to the point of exceeding 20% in a grand total of thirty weeks time. Last time we checked, they were at 26% of total sales.

This interview is based on a presentation made by Ionut-Valeriu Andrei at the EL/WLA Marketing Seminar in London in February. Mr. Andrei was recently appointed to the Executive Committee of EL (European Lotteries Association).

**Paul Jason:** The Romanian Lottery dove into the process of digitalizing its lottery products and channel mix with a bold 2-way approach, which included both developing its own in-house platform, as well as engaging in partnerships with 3rd-party apps. Describe the process of deciding how to approach the goal of building an online sales presence from scratch?

**Ionuț Valeriu Andrei:** It is true, we made a

bold decision regarding the method of going online. What we might point out is that right from the beginning we took it from scratch which provided a lot of latitude and flexibility for developing our own unique strategy. Two years ago when I took the challenge of running the Romanian Lottery, the company was stuck in an old paradigm in which consumer access to classical lottery games was mainly the same for as long as the history remembers. And the Romanian Lottery



has, indeed, a great history behind, a legacy of which we are very proud.

For more than 117 years, the company has been present in the lives of Romanians as one of the most trusted public-owned companies.

But, in terms of approaching the latest trends of the market, the company had very little experience. And here is where our team decided to tackle hard. We chose a pathway of switching the entire paradigm. We worked for several months on developing a comprehensive marketing and sales strategy, which took into account all the aspects involved in creating a new image of the Romanian Lottery on the market. We decided to use our objective of building an online platform as a catalyst to transform our whole approach to the business.

In 2023 we went through a comprehensive rebranding process, in which we combined our tradition with modern and minimalistic elements, aiming to address, in terms of visual identity, a wider range

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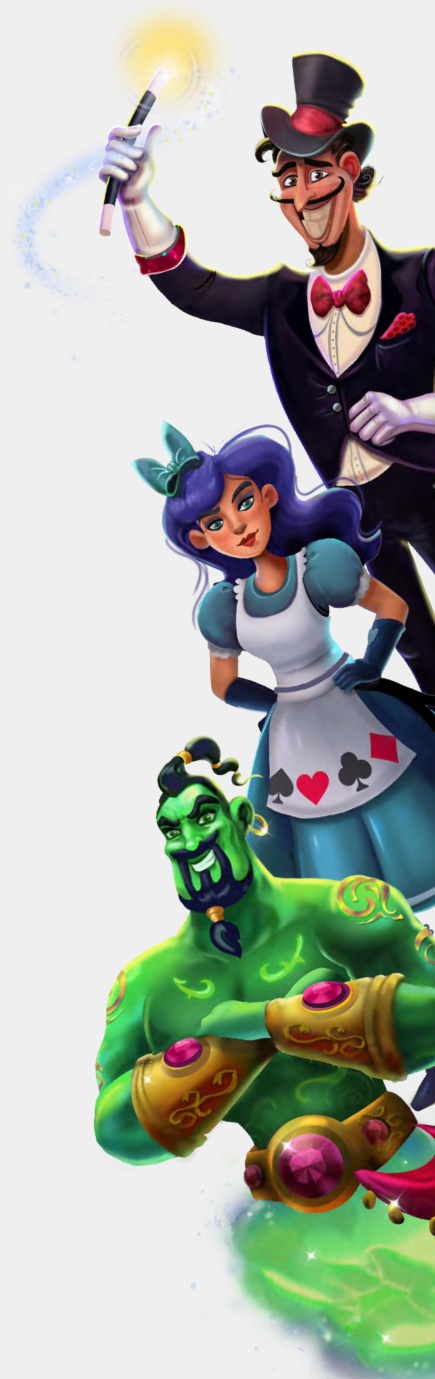
Michigan Lottery



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Based on the top 10 revenue generating games in 2023

of consumers, play-styles, and demographic profiles.

We launched several projects, some of them already being successfully implemented, for the digitalization of internal processes, and to be able to manage ourselves more efficiently. We now have nearly 1,000 of

comprehensive and competitive gaming experience. The possibility of selling lotto tickets through multiple channels gave us a huge boost and connected us with consumer groups which we may not have otherwise reached. We were able to create and implement additional promotions for

## Online sales continued to increase at a breakneck pace to the point of exceeding 20% in a grand total of thirty weeks time. Last time we checked, they were at 26% of total sales.

our own points of sales, spread all over the country. We also expanded our network of partners, going also towards the providers of self-service terminals. The products of the Romanian Lottery are now accessible in more than 38,000 points of sales.

And now reaching to the essence of your question, it came time for us to identify the most time-efficient way of implementing the Online Selling Channel. Time was essential, as the pressure from the market was growing. So, from the comprehensive analyses we had already performed, three approaches emerged – one in which we could have launched a public tender to contract a software provider to develop an online platform; another one in which we develop in-house our own platform; and another one which involved partnerships with app owners that already had a big pool of clients, to integrate our products. We went forward to analyse the last two options because the first one was less time efficient to implement. Seeing the strong points and weak points of each project we concluded that the benefits of the projects can be overlapped, so we made the decision to give the green light to both of the projects. We would build our own app and also partner with already-existing app owners.

In terms of business, going towards already established apps to integrate our games has proven to have some extremely strong points. We identified apps on the market which already had a large pool of clients, which allowed us to have a quick entry into the market – around 6 months. That enabled us to capitalize on the already existing app features, which enabled us to offer a

the products and in less than one year we managed to exceed our target benchmark of 26% of our sales coming from the online channels exclusively.

Additionally, we gathered data from the market through our app partners and we were able to work on developing our own in-house online selling platform, that we just launched in March. We see it as a new step towards digitization, transparency, and accessibility, which were our main objectives right from the beginning. It is a promise respected by our players and retailers alike, to be as close as possible to the Romanian consumer and to further strengthen the trust with which we have been invested by the players, in the tradition of over 117 years of history of the Romanian Lottery.

### What is an example of a 3rd party app partner?

**Ionuț Valeriu Andrei:** AmParcat.ro is a parking payment solution that provides the ability to pay the parking fee on your smartphone. Through the AmParcat app, users are now able to purchase lotto tickets and participate in the draws organized by the Romanian Lottery. AmParcat has over 1 million users, a huge customer base that is now being presented with the option of playing the Romanian Lottery.

**Some lotteries may suffer from "paralysis from analysis" and the pressure to spend more and more time and money testing and researching in order to further reduce risk. You describe coming to a point where you had not eliminated risk, you were not sure what the outcome would be, but you met a threshold of confidence**

**in the outcome, and had gamed out the war-room scenarios so that you had an action plan and contingency plans for the different ways that things might unfold. In hindsight, how do you look upon this approach now?**

**Ionuț Valeriu Andrei:** It is true, we had to dive in! Of course we had a strong analysis behind every step we took, but I chose to take decisions as a manager, not as a technician. Technicians tend to wait for a project to be 100% failproof in order to take it to GO LIVE. As a manager, I see the things quite a bit differently. Rather than wait twelve months for a project to be 100% failproof, I prefer to launch it after three months when it is at 98% and do another two months of live fine tuning. In the end you have the same project implemented in half the time. Testing and implementing the preliminary results of each stage put us in the position of being flexible and able to modify or even pivot based on the real-time feedback. Time is sensitive in a dynamic market like gaming and we decided to keep up the pace with our engines at maximum speed. But we did not go blindly ahead as we are constantly monitoring results and bringing new features, new opportunities, and new games on the table.

We've observed healthy competition among partners who are driving increased sales, and we continuously assess how the diversity in user experiences benefits our strategic objectives.

**Did you say that part of your approach included plans for pivoting if you fell short of the target, or if some part of the plan did not perform as well? Like dropping either the in-house app or the third-party app partnerships if one out-performed the other by a big enough margin?**

**Ionuț Valeriu Andrei:** We are always analysing and adjusting, as mentioned before. Of course every approach has its own risks, and we are well prepared for multiple scenarios. The partnerships with the 3rd party app providers are going well and the results have been much higher than our initial expectations. Also, with our own platform we are looking towards building on the momentum and we want to gain as much visibility as possible. So that foundational aspect of our strategy is not likely to change.

However, we are not looking solely at these steps and processes from a sales

*Continued on page 41*



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# Data-driven customer management is the future of national lottery companies

**Zsófia Bánhegyi**, *Chief Commercial Officer Szerencsejáték Zrt., Hungary*  
[www.szerencsejatek.hu](http://www.szerencsejatek.hu)



SZERENCSEJÁTÉK ZRT.



**N**ational lottery companies face numerous challenges due to rapid changes in industry trends and shifts in the market environment.

The acceleration of digitization has led to altered player pathways, also endangering the sustainable growth of retail networks with a shift towards digital sales. The gaming preferences of the young adult generation are changing, favoring fast and exclusive gaming experiences. Similar to other industries, customer experience and personalized service take precedence, requiring significant development for lottery companies with millions of players. With the rapid spread of artificial intelligence and predictive marketing, the sector also needs to keep pace by formulating an appropriate corporate strategy.

**According to Accenture's Personalization Pulse Check, 91% of consumers are more likely to shop with brands who recognize, remember, and provide relevant offers and recommendations.**

Similar global processes influence the future of the Hungarian National Lottery company as well. The 34-year-old Szerencsejáték Zrt. has achieved an average compound annual turnover growth rate (CAGR) of 15% over the past 12 years and currently demonstrates over 30% YoY growth due to robust digital expansion. The company boasts Hungary's largest sales network, comprising 7,500 points of sale, visited by 5 million unique players annually, with 1.3 million digital players on its online platforms. Besides draw-based and instant games, its broad portfolio includes significant segments of sports betting and virtual betting.

**However, sustainable growth is influenced by numerous factors that the Hungarian National Lottery must address in the long term within its commercial operations:**

- The Hungarian online sports betting market opened on January 1, 2023, ending the company's monopoly position in this segment and intensifying competition.
- A retail renaissance is observed post-Covid, with players returning to land-based networks.
- Despite millions visiting lottery shops annually, the company lacked data on these players, rendering them an anonymous mass for decades.
- A significant amount of Hungarian players now engage in omnichannel play, switching channels throughout their gaming journey, expecting a seamless

customer experience at every touchpoint.

**Market dynamics and technological trends necessitate significant changes in Szerencsejáték Zrt.'s operations, requiring a substantial transformation of its commercial and marketing approaches and toolsets to maintain competitiveness.**

One of the most significant steps in this transformation was the launch of a four-year program in 2023, named the Optimus Program. **Its primary goal is to enhance customer experience, profitability, and customer retention among identified players, utilizing data-driven tools in a partially competitive market.** The name Optimus Program was chosen to signify the development of a robust, AI-driven system that reformulates the company's approach and develops the tools of modern integrated customer management.



*Continued on page 24*



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# Transitioning from TV advertising to the new world of more effective and more responsible Digital Connection

**Ross Sergeant**

Global Head of Media, Allwyn Entertainment  
allwynentertainment.com

Advertising has undergone a transformation over the past few decades, shifting from the heyday of newspaper and "Mad Men"-style TV advertising to today's digital-led landscape. This new world, dominated by streaming platforms and other digital outlets, has eroded the position of traditional television. According to BARB data from the UK, **traditional**

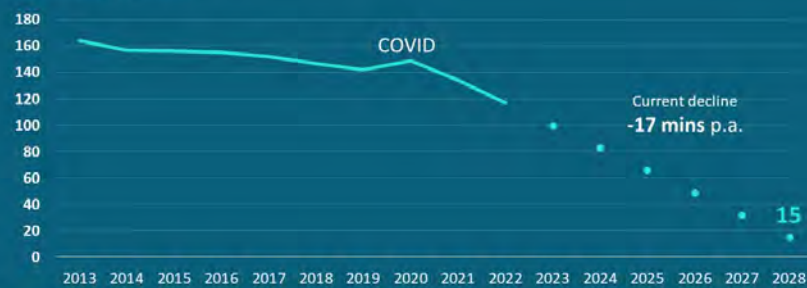
**TV minutes among all adults are falling at a rate of 17 minutes per year.** While the COVID-19 pandemic temporarily increased traditional TV viewership, the long-term downward trend resumed once restrictions lifted.

This decline is not the only challenge traditional television faces. The costs of advertising through traditional TV channels have increased significantly. Network cost-per-thousand (CPT)



## The number of minutes of traditional TV viewership is declining rapidly

All Adults total TV minutes



Source: BARB, DemographyUK 2023

## Traditional TV costs have risen dramatically

Network cost-per-thousand (CPT)



has risen by 107% over the last eight years, causing advertisers to rethink the value proposition of traditional TV advertising as returns diminish and costs climb. Against this backdrop, streaming platforms and other digital channels have emerged, capturing viewers, and challenging the status quo.

The digital age has brought new opportunities as well as fresh challenges. **With streaming platforms, social media, and mobile devices at their fingertips, advertisers can reach more consumers in more personalized ways.** However, these benefits come with a caveat. The increased precision in targeting has also made over-targeting and under-representing certain demographics a risk. The fragmentation of media has made

*Continued on page 38*





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# Lotteries in Europe: A Cultural Cornerstone, Social Contributor, and Economic Entity



**D**uring a two days colloquium in Brussels under the six months Belgian Presidency of the European Council (January until end of June 2024) the rich cultural heritage and important societal role of Lotteries in Europe was highlighted by a wide variety of speakers talking about the contributions of Lotteries to society, the cultural and economic dimension and the EU legal aspects. In the presence of her Royal Highness, Princess Claire of Belgium, speakers from different lotteries in Europe and experts did address the audience.

Lotteries, with their tantalizing promise of life-changing wins, have long held a captivating presence in European society. From their humble beginnings in 15th century Bruges to their widespread adoption across the world, lotteries have evolved into more than just of chance; they have become deeply embedded in the cultural fabric, acting as significant contributors to social causes and economic activities.

## A Cultural Legacy

The history of lotteries in Europe is a

testament to their enduring appeal and cultural significance. The first modern lottery, held in Bruges in 1441, marked a turning point in the evolution of these games. This groundbreaking event sparked a lottery boom that swept across Europe, with the word "lottery" itself deriving from Flemish languages, reflecting the region's pivotal role in shaping this cultural phenomenon.

Lotteries have long been associated with a sense of fairness and equal opportunity, embodying the belief that chance can provide a level playing field for individuals seeking fortune. This notion, deeply rooted in European history, has contributed to the enduring popularity of lotteries and their cultural significance.

## Social Contributions: A Cornerstone of Community

Beyond their entertainment value, lotteries have played a crucial role in shaping over centuries European societies and require

*Continued on page 36*

## Why Lotteries deserve EU Protection?

Arguing in favour of EU-level protection for lotteries may seem a little odd at first sight, but in reality it is not. Lotteries are an emanation of the sovereign power of Member States, which are the guarantors of their continuity. Made up of these, the European Union is the most appropriate level for confirming this national prerogative. This is why a Protocol in future treaties of the Union will establish a solid legal basis for the protection of the traditional Lotteries model.

# BOLDNESS EXPANDS HORIZONS

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MAKE SPORTS WIN

# Leveraging the power of Brand Lottery

L to R: Bret Toyne, Jay Finks, Norm Lingle, Stephen Durrell, David Barden



Lottery and other major consumer brand managers have long understood the value of collaboration to reinforce the value of the brands and connect with new consumer groups. In recent years, though, Team Lottery has come to appreciate, and learn how to leverage, the relative value of Brand Lottery to increase the ROI and effectiveness of these collaborations.

Moderated by **David Barden**, CEO of the New Mexico Lottery and President of MUSL, the panel discussed a broad range of new gaming, branding, and promotional initiatives. They focused on how state lotteries working together nationally has enabled collaborations with brands like Dick Clark’s New Year’s Rockin’ Eve, NASCAR, and others.

The panel also shared details of an exciting partnership that’s coming soon with another world-leading brand—the NFL—and highlighted a potential new national game.

In addition to David, the panel consisted of:

**Stephen Durrell**, Executive Director, Kansas Lottery

**Jay Finks**, Executive Director, Oklahoma Lottery

**Norm Lingle**, Executive Director, South Dakota Lottery

**Bret Toyne**, Executive Director, MUSL  
Introducing the panel, David thanked each member for their contributions to MUSL and for helping to develop the Lottery’s collaborations with big brands nationally.

mega-brands should be assessed. “When the Lottery collaborates with a mega-brand is return on investment the sole, or even the primary, priority? Or is it just as much about brand development and connecting with new consumer groups as part of a long-term growth strategy?” Illustrating how nation-wide promotional collaborations can build the lottery

**“Let’s work with other leading brands to really leverage our power to connect with other consumer groups and bring in new players.”**

Responding, **Stephen Durrell** praised MUSL’s work and David specifically. “Leading MUSL is a very important position,” he said, “and David has done a really great job. He’s relentlessly focused on expanding the brand and exploring new opportunities. And the successes we’ve enjoyed building the brand are a credit to David and his leadership.”

David opened the discussion by asking how the impact of partnerships with

brand, David mentioned the research showing how they had contributed to the strength of Powerball.

**Bret Toyne** explained how New Year’s Rockin’ Eve’s “First Millionaire of the Year,” which started five years ago, was one of the earliest examples of a national Powerball promotion. MUSL’s multi-state marketing budget enables that promotion, and David made clear that it

is beneficial for both parties. “Every time the draw takes place, the show’s ratings spike. So, Powerball brings value to our brand collaborators like Dick Clark Productions and ABC; and featuring on literally the highest-rated nationally syndicated show also delivers tremendous promotional value for Powerball.”

Bret observed that the promotion’s power is that viewers see the winner’s live reaction. “We have Powerball winners all the time, but they’re at home, so we don’t see the reaction. But on the New Year’s Eve show you get a reaction from a real person who has just won millions, and that’s a really priceless example for all of our players.”

## “By pooling some of our resources, we can amplify the impact we each have in our own markets. This benefits all states.”

Agreeing with that, **Jay Finks** emphasized that more pooling of resources would enable the Lottery to fulfill its potential as a powerful brand. “We are a big national brand, but do we always act like one? Partnering with Dick Clark Productions is great, but that’s just the start of a process. We now need to keep pushing to make it even bigger and better. Let’s work with other leading brands to really leverage our power to connect with other consumer groups and bring in new players.”

Stephen reflected on another partnership with a major national brand. “When the NASCAR promotion came up on a national level for Powerball, some states were concerned about how it might affect the strong relationships we had with NASCAR locally. But it’s actually been very beneficial. It’s lifted us all up and put the icing on the NASCAR cake. Our players can still enjoy playing a Kansas NASCAR game, but they can also participate nationally, go to events in Arizona, and have the chance to win even bigger prizes.”

Highlighting the learning from that, Stephen explained, “We all have to apply that open-minded thinking to other partnership opportunities. Obviously, all states have different regulatory require-

ments, philosophies, agendas, priorities, marketing plans, brand relationships, etc. But NASCAR shows how a national promotion can work even for states that have existing strong relationships with a big brand at a local level. And the folks who made that deal very diligently ensured that it’s beneficial for everyone.”

Adding to that, Norm Lingle commented. “We couldn’t do these big promotions with NASCAR on our own in a small state like South Dakota. Our advertising budget just wouldn’t allow it. So, it’s great for us to be able to participate in these promotions, which have been lots of fun for our players and provided a huge promotional boost for the South Dakota Lottery.”

Jay explained further how MUSL’s marketing fund has enabled these big-brand promotions to happen. “By pooling some of our resources, we can amplify the impact we each have in our own markets. This benefits all states, especially some of the smaller ones with limited budgets or those constrained by legislative restrictions. The fund enables us all to ask, ‘How can we get creative and unlock new promotional pathways?’”

Building on that, Jay argued for an “aggressive” further push on national partnerships with big brands. “We have already seen how productive these collaborations can be on a return-on-investment basis, a brand messaging basis, a short-term promotional basis, and a long-term brand development basis. So, let’s increase the scale and push these collaborations much further.”

Jay outlined his vision for doing that. “I think we should be pooling ten times the amount of dollars that we’re spending right now and looking at not only national promotions but also national media and advertising. It would still be a very small portion of our revenues, and the record shows that every increase in investment delivers a huge return. So, let’s grow our brand to be big enough to be talking to

the ESPNs and the NFLs, and let’s show them the value that collaborating with lottery brands will bring.”

Echoing that, Stephen said, “We must be more aggressive with the Powerball brand and stress its value. Traditionally, the lottery business has presumed that we should pay for the privilege of licensing other brands’ intellectual property. But we now have a much better grasp of how to leverage or monetize our own brands’ value. Consumer brands like NASCAR, Dick Clark Productions, and even the NFL now appreciate the value that a partnership with Powerball confers.”

“These are not one-sided relationships,” Stephen added, “with us just paying to access their audience. We are increasing their viewing figures and giving their brands greater visibility in tens of thousands of retailers nationwide. So, let’s continue being more assertive and pushing the power of our brand. Let’s build that value into our partnership agreements. And instead of just licensing a brand for a fee, let’s share the value of Powerball to offset that cost. And if Powerball’s value exceeds our partner’s value, they can absorb some of the costs of promotion or deliver compensatory value to us in another way.”

Next, the panel discussed MUSL’s forthcoming collaboration with one of the world’s biggest brands: the NFL. Jay explained that MUSL and the NFL are “building a national game for all states, which will complement our current national games and tie our two brands together. We’re still in the early research stage, but the goal is to launch the game in September 2025. And this is a true partnership, we’re not paying any fee because they want to work with us. This is a massive and very exciting opportunity. So, watch this space because there’ll be a lot more news soon.”

Reflecting again on how national partnerships impact states, Stephen praised the team working on the NFL agreement. “We already have a good relationship with our local NFL team, and we wanted to ensure that wouldn’t be affected by the national agreement. But it’s vital that everyone working on it understands and respects the existing local agreements. The new partnership is clearly going to be a benefit to those states that don’t have a local team and an additional benefit to those states that do.”

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# IS LOTTERY'S BATTLE TO REMAIN TOP-OF-MIND AMONG AMERICANS ONLY JUST BEGINNING?

**Simon Jaworski,**  
Founder & CEO, Lotto Research

**LOTT**  
RESEARCH



## Is Lottery still top-of-mind among Americans?

An American car buyer's path to purchase a new vehicle combines advertising, demographics, and brand market share, which all impact buying behavior. Insight and understanding into the factors that drive consumer decisions helps auto brands and their agencies develop more informed strategies that improve marketing effectiveness. However, one factor is hands down the most important in the purchase process.

90% of all automobile purchase intent is due to unaided, or unprompted brand recall, awareness of a brand.

This was a staggering finding from an AC Nielsen study in 2018\*.

## Why is awareness so important for a brand?

During a Q1 2024 research project, one of the first questions Lotto Research asked was 'When you think of gambling, gaming and lottery sectors, which brand or brands do you immediately think of?'

This open-ended, unaided question has been asked since the dawn of time, by brands all over the world,

to see if their particular brand is at the forefront of the consumer's mind because this metric provides an excellent yard stick of awareness. However, this one was answered by 30,000 Americans.

Usually, when we're talking about top-of-mind awareness, we're thinking about unprompted brand recall – that's where the brand can be named without needing any help.

## First mention, the peak of consumers' unaided awareness

So, let's start with the good news. Powerball is the #1 brand for being 'first mention, top of mind' among 9% of the population, significantly higher than DraftKings (7%), FanDuel (5%) and MGM Grand (5%), with Mega Millions at 3%. This 'first mention' is the first brand that 'comes to mind'.

However, there are some notable differences by demographics. For

males, DraftKings is #1 over Powerball. For higher income households (\$100k+), Powerball edges out DraftKings with MGM Grand seeing a significant boost to 8% and into third place.

When we examine the 'combined' scores (top-of-mind) of the various industries, the picture becomes a little murkier.

Casinos have the highest 'first mention' at 19%, driven by males (21%), with Lottery Games second (18%), driven by females (20%). Sports Betting and State Lottery mentions are tied for 3rd at just under 15%. Unsurprisingly, Sports Betting has twice the 'top-of-mind' level among men compared to women. Lottery Games are particularly top of mind among Asian Americans, at a demographic high of 24%.

## All top-of-mind, all the time

The beauty of the unaided question also allows the respondents to answer multiple times, to give us a 'net' % of

*Continued on page 39*



# THE FUTURE OF ILOTTERY: PREDICTIONS FOR 2030



Moti Malul, CEO, NeoGames

**A**s we approach 2030, the iLottery industry stands at a crossroads. Once viewed as a niche market, U.S. iLottery has reached a 2023 turnover of \$8 billion and a projected \$10.8 billion in 2024 (according to US State Lotteries & Eilers and Krejcik Gaming LLC), presenting both new opportunities and challenges for the industry. According to NeoGames CEO and iLottery, iGaming and Sports Betting expert, Moti Malul, we must ask ourselves “How will trends in the market affect the size of the industry ten years from now, based on the collective actions we take today?”

Ten years from now, lottery turnover could increase by 20-50%, depending on how slowly or urgently we act, but could also lose as much as \$30 billion to competing industries such as sports betting, retail, and iGaming, (all with significantly larger marketing budgets). To capitalize on iLottery’s impressive growth potential, the industry must act with urgency, focusing on GGR (Gross game Revenue) and owning the end-to-end player journey for both retail and online channels.

Today, American iLottery is authorized in 14 U.S. states (plus Washington D.C., for a total of 15 jurisdictions), with 85% of the revenue coming from eInstants, and 15% coming from DBGs (draw based games). Virginia, New Hampshire and Michigan are currently leading the U.S. iLottery industry in terms of per capita sales, with

North Carolina expected to join the list of top performers by 2025, if not sooner.

While the U.S. iLottery industry and its player base is certainly unique, we have much in common with these competing industries, who are all marketing to our player base via their own social and marketing channels. Our iLottery market share is further threatened by potential competitors who wish to cross sell iLottery to our own players. Potential competitors will include iGaming operators who offer instant games via their portal or courier services for lottery scratch-off tickets, and sports betting platforms who also sell (i)

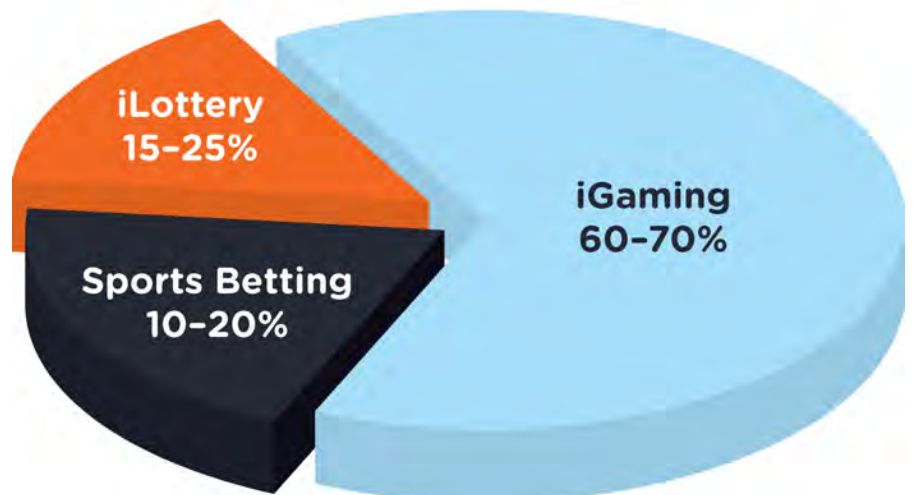
lottery products. The appetite for iLottery is evident, with the Virginia lottery—the leading per capita U.S. iLottery per capita jurisdiction—currently seeing more than 55% of sales from online, with GGR expected to approach \$400 million in 2024.

Where there's a will, there's a way, and so, if we don't meet our players' desire for online lottery play, our competitors certainly will. A prime example of this is DraftKings' recent acquisition of Jackpocket, who are now seamlessly embedding Powerball and Mega Million sales into their website (without cutting a

*Continued on page 41*

## Market Projections for 2030

The Difference is \$30 Billion Dollars



The changing competitive landscape necessitates reforms in services, offerings, data analysis, and responsible gaming capabilities. The Optimus Program is a strategic initiative aimed at revitalizing the company's customer service capabilities and establishing a loyalty program with related technological infrastructure (e.g., developing a super application) to increase player loyalty and commitment to the company.

The Optimus Program relies on numerous international trends and best practices in its objectives and tools, while also taking into account the company's starting position and capabilities. In its development, we examined the global trends currently influencing customer service operations:

• **Integrated data processing:**

Consolidating information gathered across various channels and integrating disparate systems can reveal previously hidden correlations and customer needs, increasing transparency.

• **Analysis of customer feedback:**

Beyond dedicated customer service channels, players often share their experiences with services online. Customer comments, direct likes, shares, and interactions provide additional insights into consumer behavior, which can enhance the effectiveness of personalized customer experiences.

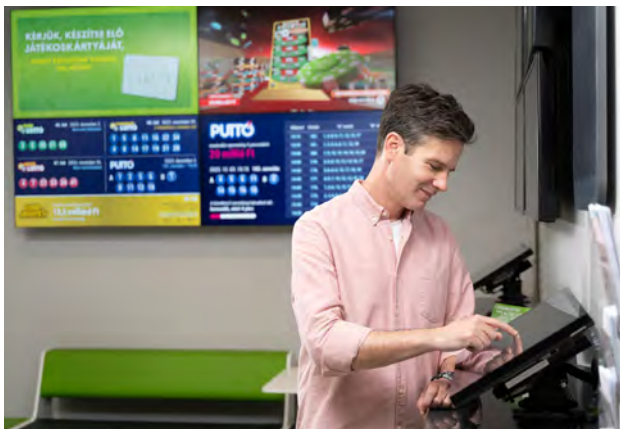
• **Personalized customer experience:**

Tailored experiences, such as personalized offers, enhance customer satisfaction by simplifying processes and making customers feel valued and important. This trend is based on the understanding that in today's world, customers want to feel more than just a number or data point. Personal interactions or unique opportunities/messages create a sense of importance, potentially increasing brand loyalty.

• **Artificial intelligence and automation:**

The use of artificial intelligence and automation facilitates process optimization. For example, AI can prepare unique offers and creatives within seconds using predictive analytics and tools.

• **Self-service options:** Forums, knowledge bases, interactive chatbots, and certain sales solutions are among the most commonly used self-service options. These accelerate and streamline customer



Headquarters Szerencsejáték Zrt. Lottery

processes, such as complaint handling, thereby increasing customer satisfaction levels.

These five trends reinforce each other, amplifying their impact on the market. For instance, integrated data processing enables the creation of personalized offers for players by observing more accurate correlations, thereby enhancing the overall customer experience.

Planned until 2026, the Optimus Program aims to achieve its objectives through various projects and nearly 100 different degrees of development within Szerencsejáték Zrt. along the following four pillars:

**1. Expansion of player base and data assets:**

Increasing the quantity of available and usable player data and further developing the company's data asset strategy.

**2. Development of analysis and modeling, knowledge sharing:**

Generating analyses and accurate traffic forecasts based on available player data, drawing conclusions, and sharing them within the organization.

**3. In-house offering capability:** Alongside the development of relevant processes, expanding and modernizing the offering

capabilities of online and physical networks. Establishing an appropriate toolset.

**4. Integrated loyalty program:**

Creating a unified loyalty program within the Super application that spans across different gaming segments.

The Program brings tangible benefits to players, retailers, and back office colleagues alike. It achieves mass exclusivity and hyper-personalized service. Overall, players will experience a higher level of customer experience and gain access to numerous convenience features. Such features include loyalty programs, partner discounts, or payment options with player card balances. Retailers have the opportunity for customized service provision through terminal messages or OCRM systems, while central employees are able to send data-driven automated campaigns using easily accessible and expanded data.

During the period since Optimus Program's launch, we have achieved several significant results:

- By the end of 2024, we will reach nearly 2 million identified players in the land-based network, compared to just 15,000 in 2022. The growth of identified players supports our efforts in responsible gaming organization as well.
- The number of annual engagements has increased to 18 million.
- 20% of customers are omnichannel, providing opportunities for integrated offers.
- The marketing consent rate stands at 82%, which is 15 percentage points higher than the Hungarian retail sector average.

Over the next three years, the Optimus Program will build business capabilities and implement technological solutions that significantly enhance the company's data assets, enabling a deeper understanding of our players' habits and needs, and reforming the process of personalized offer delivery.

**Through these developments, customer service is placed on new foundations that will shape Szerencsejáték Zrt.'s operations for the next decade strengthening its competitiveness in the growing competition. ■**



# Leading with Gratitude

L to R: Matt Strawn, Jay Finks, Ryan Mindell, Doug Pollard and Joshua Johnston



**W**hat is “leading with gratitude” and how could it help your staff to thrive and forge authentic, win-win relationships with partners? Moderated by Matt Strawn, CEO of the Iowa Lottery, the panel considered subjects ranging from Simon Sinek’s “start with why” principle to the challenges of connecting with staff in the digital age. Panelists shared practical advice about how to turn buzzwords like authenticity, connection, and purpose into tangible actions that will help lotteries deliver their missions.

Alongside Matt, the other panelists were:

- **Jay Finks**, Executive Director, Oklahoma Lottery
- **Joshua Johnston**, Executive Director, Washington Lottery
- **Ryan Mindell**, Deputy Executive Director, Texas Lottery
- **Doug Pollard**, Co-Chief Executive Officer, Pollard Banknote

Matt began the discussion by describing his unorthodox introduction to a recent Iowa Lottery’s Board of Directors meeting. He shared a message of gratitude received from the winner of an Iowa Lottery experiential prize: “Thanks again for an amazing time at the concert. My husband and I never

get to do something like that for ourselves. We have six kids and our youngest has a terminal disorder. So, everything we do is to make his time left the best it can possibly be. So, for us to do something just for ourselves, well, it was awesome. It meant more than you would ever know.”

Everyone in the lottery industry knows how thankful winners are for their good fortune. The winner in Matt’s example did not win a life-changing jackpot. But their expression of gratitude captures the personal impact that lottery has on winners and captures the impulse to appreciate our blessings, an impulse that brings out the best in all of us.

**We have to connect personally and meaningfully and make that integral to our communication style and corporate culture.**

The billions of dollars that are generated for the benefit of good causes and society also evoke heartfelt expressions of gratitude.

The theme of this discussion was how all of us, even though we haven’t won the lottery or been a direct recipient of lottery funds, nurture that impulse to be grateful for all that we do have and are blessed with. How

can we make the meaning and purpose of gratefulness come alive on a more personal level for everyone around us and how does it apply to business and leadership? Or, as Matt put it, “How can the concept of gratitude be infused throughout the entire organization to create a sense of connection and appreciation?”

Referencing Webster’s definition of gratitude as “awakened thankfulness,” he asked, “How do we as leaders awaken that thankfulness in ourselves so that we lead with gratitude? And, more importantly, how do we awaken that thankfulness in those that we’ve been entrusted to lead so

that they not only fulfill their work objectives but also feel fulfilled at work?”

Concluding his opening remarks, Matt expressed gratitude to the “amazing lottery community for the love and support” he received during his recent health struggles. He also thanked “the team at the Iowa Lottery who not only had my back as I

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# Revolutionizing Lottery with **Science**

An inside look at the tools that power profits

*The most successful companies* in the world rely on scientific tools to drive intelligent business decisions. In the unique lottery sector, Scientific Games arrived on the scene 50+ years ago with a science-based tool—technology developed by its founders (an engineer and a mathematician)—that produced the world's first secure instant game. And for the first time, no one would ever know if a ticket was a winner until they scratched.

Since then, the company pioneered digital lottery and its experts across dozens of sciences haven't stopped developing new tools and solutions that help power profits for lottery good cause programs. The tools have been refined and, in some instances, replaced over the decades. All innovated with one goal in mind. Giving lotteries a science-based foundation to continually adapt, protect and grow their business.

## Instant Game Development



Producing an instant game is an absolutely amazing process. From the original concept for the game to the artwork and final shipping, multiple sophisticated and custom-built tools are in use every minute of every day ensuring that each and every game is secure and accurate.

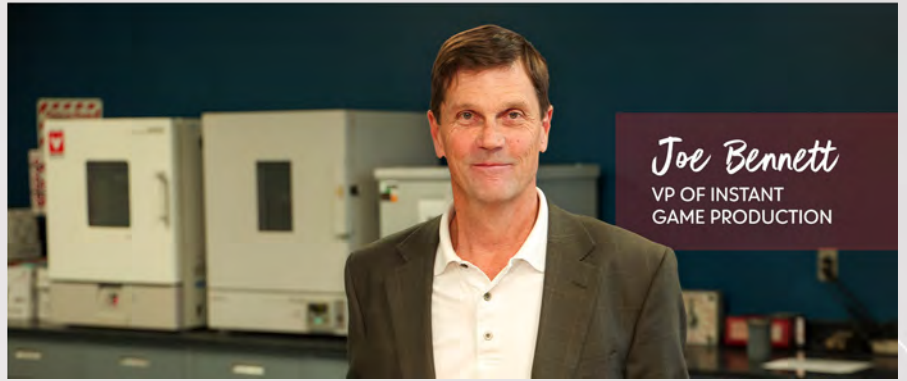
Each instant game begins to come together in Scientific Games' *Composer* system, which

lays out every detail needed to produce the game. *Composer* automatically feeds relevant game specifications into the company's critical production systems, including the *GamePlan* production control system.

*GamePlan* schedules and manages the hundreds of individual steps needed to produce a game starting with game programming, pre-press and moving through

all printing, packaging, prize balancing and shipping operations. *Composer* and *GamePlan* are custom-built applications that form the foundation of Scientific Games' internal communications processes, ensuring accuracy, security and products that lotteries can trust.

## Game Security



Joe Bennett  
VP OF INSTANT  
GAME PRODUCTION

If *Composer* and *GamePlan* are the eyes and ears of the game development process, the beating heart of instant products comes from the game data imaged under the scratch-off coatings. The game data is created within Scientific Games' secure production environment which ensures the data remains encrypted from the point of creation throughout the imaging process. Multiple and overlapping custom systems ensure that all game data is confidential and represents the exact logical specifications as described by *Composer*.

Moments after tickets are imaged onto paper, the company's systems automatically delete encrypted lottery game data, and a host of

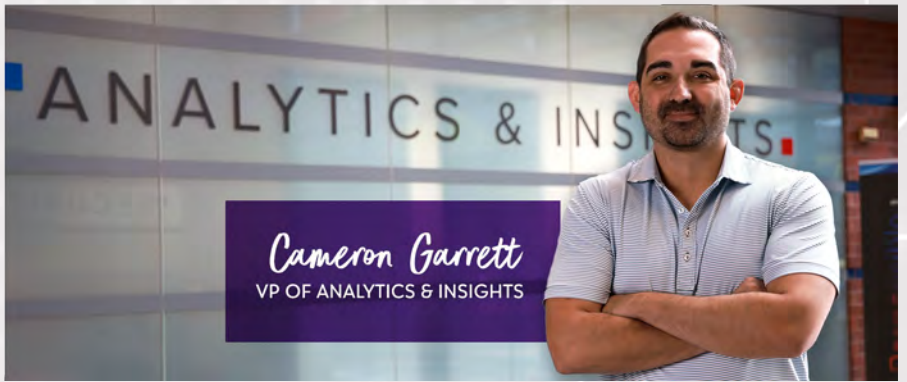
custom tools including *Seed Server* ensure complete security throughout the life of the game. The company's patented *Keyed Dual Security* system gives lotteries additional control and additional confidence that the production and management of every ticket is as secure as possible.

Finally, Scientific Games' *Real Time Marking System* is the brain that analyzes the quality metrics of every ticket. Defective tickets are identified by vision systems, sensors and scanners—as well as by experienced press operators—and fed into the *Quality Tracking System*. These systems work together with high-speed cameras and specialized scanners located on the finishing lines and ensure that

all tickets meet the game's required physical specifications. Any defective product is removed from the workstream automatically based on data from the *Real Time Marking* system. These systems form the basis of the company's continuous improvement programs and ensure that only high-quality tickets reach the lottery and its retailers – and ultimately, the player.

Since developing the world's first secure instant game, Scientific Games innovated these many complex scientific systems in a continuous effort to deliver advanced instant products to lotteries worldwide.

## Advanced Analytics



Cameron Garrett  
VP OF ANALYTICS & INSIGHTS

Lotteries have credible opportunities to refine their product portfolios for performance. There isn't one "right" approach. Scientific Games Analytics & Insights experts use as many relevant data points, methodologies and tools as possible to help lotteries make decisions and reveal new growth opportunities. It isn't just about making one best game, but arriving at a bigger picture to support the best portfolios of games that maximize reach to different player segments.

In this pursuit, the company's advanced analytics come into play, including descriptive and predictive analytics applied to product portfolios and their attributes. The goal is to produce outputs that have tangible real-

world applications that will positively impact the market.

As an example, Scientific Games' *Infuse* business intelligence platform includes a suite of prize structure analysis tools developed by the company's own data scientists. *Infuse* enables functionality such as measuring the degree of prize structure variety or staleness—to ensure that products are never "rinse and repeat." It also allows Scientific Games to create the best possible value proposition for any game, including specific win themes and callouts.

Analysts can even classify different types of prize structure experiences and compare how

a prize structure concept stacks up to others in a portfolio. Of course, prize structures are just one of 15 core determinants that impact consumer demand for instant products. Day in and out, the company's experts are building tools, analyzing lottery customers and their markets, and making recommendations to move the performance needle.

During a time when industry sales are slowing, it's imperative to pay attention to the data these tools provide, keep an open mind by listening to what the data has to say, and most importantly, begin to pull the levers that the lottery industry can control.

# Customer Relationship Management



The use of scientific tools has often involved learning from other industries and adapting solutions for lotteries. In the instance of player acquisition and retention, customer service management tools are making a difference for 12 U.S. lotteries. Developing a successful CRM program for lotteries took Scientific Games' vision – and a strategic partnership with Optimove, the first customer-led marketing platform used across a variety of industries.

The results-driven CRM solution is customized and managed by Scientific Games' CRM experts.

It's delivered on the Optimove platform and powered by the combination of rich historical, real-time, and predictive customer data, AI-led multichannel journey orchestration and statistically credible multitouch attribution of every marketing action.

The solution is adapted to fit wherever the lottery is with its digital journey. It focuses on driving player engagement and retention across both traditional retail and digital lottery programs, including second-chance play and iLottery (if applicable). Individualized insights

and a data-driven model of the player lifecycle allow the lottery to personalize and optimize marketing messages to its players just like any other consumer product company.

In fiscal year 2023, participating lotteries increased the total retail value of tickets entered into their second-chance programs by 66% year-over-year, with a 40% YOY increase in the total number of tickets entered. The program drove an incremental uplift in total deposits of more than \$32 million for three participating lotteries that offer iLottery.

# Retail Ecosystem



Scientific Games engineers and data scientists have collaborated with marketing experts since the company began. All to make foot-traffic generating lottery products easier for retailers to sell.

Given the volume of many products retailers need to manage in stores, most rely on category management data from their suppliers for real-time and strategic planning decisions. To scale the lottery category within retail, the industry needed a solution to empower the retailer in a simple and reliable way.

In 2016, SCiQ, the lottery industry's first technology ecosystem for the retail environment wrapped data science around

lottery retail for the first time. The ecosystem offered easy, streamlined inventory control and reporting, modern digital menu boards for instant scratch game dynamic display, product security and real-time data analytics to let the lottery and the retailer know what games were selling when and where and perform operational and strategic actions.

The system is now integrated into the company's award-winning self-service *PlayCentral* Powered by SCiQ vending machines. *PlayCentral* machines also feature *GameChoice*, a smart recommendation engine created by Scientific Games that gives players a modern purchasing experience similar to shopping at their favorite retailer online.

Using a rich data set, *GameChoice* delivers specific product suggestions during the player's purchasing journey featuring other exciting lottery games and promotions that players like them enjoy. The recommendations are driven by a logical analysis of the player's lottery "shopping bag or basket" before checkout at the vending machine, along with the history of what lottery products other players purchased together. The engine uses data generated by *Infuse*, Scientific Games' automated, enterprise business intelligence providing end-users with data-driven insights. Together, a perfect illustration of how Scientific Games tools all work together to achieve results.





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## Systems Conversions Since 2017

No other lottery technology partner has more worldwide conversion experience or success. Since 2017, lotteries have trusted Scientific Games to complete 24 systems conversions – including 10 from legacy suppliers – with two more underway. Our expertise and collaborative approach ensure a seamless transition for lotteries, retailers and players. It's what makes Scientific Games the industry's trusted choice for lottery systems.

*THIS IS THE  
Science Inside*



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# Turning LVMs

# Into MVPs



With more data — and a new, advanced analytics technology platform to analyze lottery vending machine metrics — come new insights to maximize performance.

**T**he National Retail Federation’s predictions for 2024 foresee ongoing changes to the in-store environment, whether retailers will be investing in technologies to provide shoppers with more personalization, or revamping stores to align with the experiences consumers want.

Yet even as the retail landscape shifts, when it comes to lottery sales, one of the reliable constants is still self-service vending.

“Self-service remains important to lottery retailers, relevant to players, and holds significant untapped opportunity for lotteries,” says IGT’s Paul Riley, VP Retail Innovation and Partnerships.

“Retailers’ hierarchy of needs starts with data, data, data – it’s the lifeblood of retail. Lottery vending machines (LVMs) are just one of the areas where we can offer lotteries access to more performance data than ever, and dimensionalize it with new analytics capabilities,” he explains. “We’re working collaboratively with lotteries and their retailer partners to apply the data and

insights to scope the opportunities and help determine how to deploy optimally.” Optimizing LVMs can **improve player convenience**, help lotteries **connect with new players**, and **ensure that the lottery products consumers find most appealing** are available to them, all of which drive sustainable growth.

In 2023, when Steve Desautels, IGT Director Sales & Marketing Execution, analyzed the LVM data for the top 20 retailer chains for lottery in the U.S., he found that stores with one LVM tended to outsell those with no LVMs by a significant percentage: “It’s not isolated cases here and there. The data consistently show



a difference of 30-40+% increase in net total sales when there is an LVM,” he says.

The data also revealed that while the #1 lottery retailer in the U.S. had the most sales, it also had the lowest percentage of LVM penetration. When Desautels compared the average weekly lottery sales in the retailer’s stores with an LVM versus those without one, “again, it was a night-and-day difference. In many cases there are almost double the sales when the retailer has an LVM in that store to complement the sales-counter offering.”

The analysis catalyzed the retailer’s interest in exploring the opportunities in various jurisdictions. Desautels facilitated a conversation between the retailer’s National Lottery Category Manager and Washington’s Lottery team, which had some LVMs in inventory as well as a number of new IGT GameTouch™ 28 units to deploy.

As a result of the discussions, the Lottery initiated a small pilot beginning in July of 2023, adding an LVM to six of the retailer’s locations. “Very soon, we started seeing the types of results in those locations that had been projected by IGT’s analysis,” notes Ron Smerer, Director of Sales & Marketing for Washington’s Lottery. This successful pilot is now being expanded to another 20+ locations in the state.

**Steve Desautels**  
IGT Director Sales & Marketing Execution

**Gina Easley**  
IGT Senior Manager National Retail Accounts

**Ira Lough**  
IGT Senior Director Research Science and Data Strategy

**Craig Hall**  
IGT Senior Manager Software Engineering and Data Strategy



Data and the analysis to aid in LVM optimization is available to any lottery participating in IGT’s Retail Market Insights (RMI) database.

With data on 29 states – both IGT and non-IGT – and more than 176,000 U.S. retailers, RMI gives lottery and retailer decision makers the tools to analyze lottery performance trends within and across jurisdictions, including comparing retailer and geographic attributes that impact performance to identify consumer trends and optimize existing lottery locations.

In another jurisdiction that is now engaged in a similar pilot, Desautels found that the difference in lottery sales between the retailer’s locations with no LVM units versus one unit was about \$17,000 per week. “This retailer has nearly two thousand locations in the state and less than a dozen of them have LVMs,” he observes. “If they were to deploy in just 10% of them – multiply the differential per week, per store – the case is very clear.”

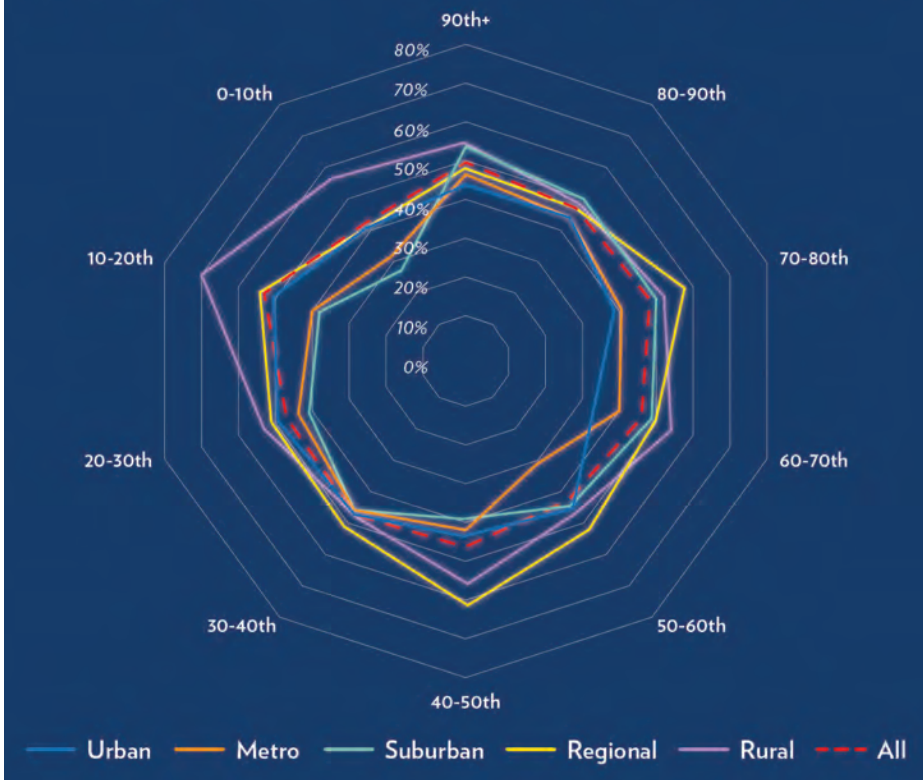
## Bringing More Dimension to the Data

It’s not uncommon for lotteries to have some number of LVMs in inventory going unused for various reasons. One of the tools that can support lotteries in assessing the opportunities and determining how best to deploy them is IGT’s **Retail Market Insights (RMI)** database, available at no cost to all U.S. lotteries that choose to participate. RMI currently covers 29 U.S. jurisdictions and more than 85% of U.S. traditional lottery sales.

RMI-partner lotteries have access to state-specific and multi-jurisdictional data, as well as a set of monthly consolidated reports and a dedicated staff of analysts and other specialists who support users with a range of tactical and strategic applications, including LVM optimization. Any lottery that is an RMI partner and provides LVM data can work with IGT to access the relevant data, insights, and other support.

What now makes the RMI data even more actionable is IGT’s

## C-Store expected sales growth from adding a vending machine — by urbanicity and sales decile



A sample dashboard illustrates one type of analysis that IGT's Lottery Data Cloud can produce, enabling IGT analysts to readily find commonalities or differences in LVM performance and assess how various factors impact expected sales growth.

**Lottery Data Cloud (LDC).** LDC is IGT's internal, cloud-based, advanced analytics platform that brings together cross-jurisdictional, cross-functional data sources to help IGT analysts find correlations and insights to drive enhancements and efficiencies, both for IGT and its customer lotteries.

"A driving goal of LDC was to bring together seemingly disparate sets of data, combined with machine-learning technologies, to discover insights and derive business value from them," says Ira Lough, IGT Senior Director Research Science and Data Strategy, who directed the development team. "Within this platform, we're building applications and toolsets that help automate analytic tasks. They provide IGT analysts with a powerful, governed, data platform that will allow them and the lotteries they serve to make quicker,

more informed business decisions — and further enable IGT to continuously improve the products and services we provide."

Applied to self-service optimization, for instance, the LDC brings more dimension to the data and allows analysts to interrogate it readily in various ways.

Craig Hall, IGT Senior Manager Software Engineering and Data Strategy, who was instrumental in developing the platform, provides some examples: "Once we identify all the locations that might be candidates for an LVM, we can assess the various attributes of these locations, such as **trade style, urbanicity, sales volume, and more.** We can then run these attributes against the 150,000+ existing locations for which we obtain data through RMI, and **identify a prioritized list of locations that would benefit most from the placement of an incremental vending machine.**

"Several lotteries are doing a similar analysis on their own, but one of the advantages we can provide is a **much larger sample size** to find commonalities," he adds. "And, because the retail chains cross jurisdictions, we are able to leverage cross-jurisdictional RMI data to **provide a more holistic assessment of a chain's performance.** This in turn increases a lottery's confidence about what they're seeing or plan to do in their own state."

The analysis derived from RMI and IGT's LDC platform also enables national retailers to have more meaningful conversations with their partner lotteries, armed with **the tools, data, and logic to support specific recommendations.**

"Due to the enormous amount of vending machine data, it's typically laborious to do LVM analysis with traditional technologies," notes Lough. "With this scalable, cloud-based platform, it becomes a lot easier. IGT analysts are now able to process these data sets more efficiently."

"What we try to do is bring information to light for lotteries to act on," says Desautels. "We can query the data and refine recommendations using the factors that the LDC takes into account, helping lotteries focus on the best opportunities. If a retailer is willing to have the conversation with their lottery jurisdictions, and a lottery is open to adding LVMs or has inventory available, we can support them in selecting the stores and surveying the locations to make sure they're a good fit for that store's layout and for the store manager — all the way through to in-store placement and post-execution measuring and monitoring."

IGT's specialized teams support lotteries with all key drivers of optimization, including **minimizing out of stocks and space to sales analysis.**

Gina Easley, IGT Senior Manager National Retail Accounts, notes, "It's important not only to connect with our customers where they are, but also to connect with lottery retailers by offering multiple support



# How Walmart Optimizes

Walmart continually evaluates the placement of LVMs to maximize consumer visibility and accessibility as its retail space constantly evolves with new front-end transformation projects.

*Gina Easley, IGT Senior Manager National Retail Accounts*



The Walmart team will consider placing full-size LVMs on the front wall of the stores, in addition to the low-profile machines at self-checkout kiosks, depending on store layout and space availability. Walmart will now also allow full-size vending at self-checkout if there is a grab-and-go cooler section installed, in addition to front-wall placement.

New York, for example, has deployed 80% of the Supercenters with two or more LVMs, with some stores having three machines, and has been able to drive material increases in sales in these locations. In Walmart's new fiscal year, beginning February 2024, the retailer's stores in New York continue to trend higher, with same store sales increasing at 30% compared to the same time period last year.

options that work seamlessly across all channels to better serve them.”

To meet this need, IGT is now rolling out a new **Retailer Self-Service Portal**, which provides participating retailers with helpful troubleshooting tips for their lottery terminals and vending machines simply by scanning a QR Code. In addition, retailers can chat with an AI-powered chat bot to ask for help, walk through troubleshooting steps, and even connect with a live agent for more assistance or to open a service ticket. The new portal also gives the retailer the option to order supplies.

“The tools, services, and level of analysis we offer are designed to help retailers sell lottery, help players access games they enjoy, and help lotteries make more of their LVM investment,” says Riley. “We invite lotteries to let us show you what we can do.”



Watch Paul Riley's related PGRI SMART-Tech presentation, “Retail: Whatever You're Thinking, Think Bigger,” at [PGRITalks.com/RILEY.mp4](https://PGRITalks.com/RILEY.mp4)

To learn more about how IGT approaches LVM optimization, contact your IGT representative. For more on RMI, check out “**Spotlight on RMI**” in **PGRI July/August 2023** or contact [RMInsights@IGT.com](mailto:RMInsights@IGT.com) for information on joining the program.



Norm also praised the work of Jay, Bret, and Pat Lance on negotiating the NFL partnership. David similarly complimented the NFL as a partner and highlighted the quality of the experiential prizes that they can offer, from going to the draft to attending the Superbowl. He also mentioned the forthcoming research showing that the Lottery's brand recognition level is as high as lots of the top brands in the country, including Pepsi and Coca-Cola, meaning that in the future "we might be the brand that others want to come to and pay for a partnership."

Moving on to recent game changes, Bret provided an update about Powerball's Double Play add-on feature, which was launched in 2022 and is currently being offered by 22 states. Evidence shows that Double Play provides a lift for Powerball sales of just under 10%.

In terms of new games, Bret discussed the possibility of creating a national 4Life game based on the Cash4Life and Lucky for Life games. A recent meeting had considered how such a game, potentially offering \$1 million per year for life, could fit into the national portfolio with Powerball and Mega Millions. According to Bret, that game is "very likely" to happen, but lots of work must still be done to develop it. Another new game launching this year is Jackpot USA, a fast play \$20 game with a \$1 million prize that will be managed by MUSL and initially offered in four states.

Considering new games, Jay discussed the importance of the national portfolio in the context of sports betting's rise. "Sports betting is coming, and it's growing, and it's a threat. So, it's crucial that we have a strong national Lottery portfolio to fight back against that. We need to design a better Mega Millions game, a better Powerball game, add the NFL into the mix, and create a new Million Dollars for Life game to make sure we stay relevant and compete." In that context, David outlined how the following two years are likely to be full of new games, with the next MUSL board meeting hopefully voting on a new product to be launched.

Also in the context of sports betting, the panel considered responsible gaming. Stephen highlighted "the evidence that sports wagering offers a completely

different level of risk even compared to casino gaming, especially for younger people who are increasingly likely to bet on sports regularly regardless of whether it's legal in their state or not. We need to be conscious of that demographic and the risk factors and aggressively target problem gaming through advertising and programs. And we need to make sure that these Responsible Gaming resources are prominently available as part of our genuine commitment to helping people."

On that theme, David mentioned NASPL's forthcoming responsible gaming seminar in Atlanta and the increasing number of states getting World Lottery Association certification for responsible gaming initiatives. Norm also emphasized the importance of generating "high-quality research data so that we can debunk some of the myths around problem gambling and make sure that our efforts to address the issue are as powerful as possible."

Jay approached the same issue from another angle, pointing out "the responsible gaming opportunities that come with iLottery" and arguing that Lottery's proven dedication to responsible gaming "is a really good selling point when you're talking to state legislators about introducing iLottery." Similarly, Bret added, "Promoting responsible gaming gives lotteries a chance to differentiate ourselves from the sports betting companies, so it's a big opportunity for us."

Closing the discussion, David reemphasized MUSL's focus on building brand recognition and value and paid tribute to how the research led by Simon Jaworski had built an understanding of the Lottery brand's worth. He also praised the vision of state directors who are helping to lead the brand in new directions.

Similarly, Stephen reiterated how David's leadership of MUSL had helped change the mindsets of state lottery directors. "Previously, most directors may have thought, 'We're a state agency, and we do what we're told within a very narrow set of parameters.' Whereas now, directors recognize that the Lottery is both a state agency and a market-driven business. And it's our job to create revenue for the state, and one way to do that is by working together on national branding initiatives."

Norm emphasized the importance of MUSL's membership collectively agreeing on the path forward while still giving states the opportunity to opt out. "We'll be pushing really, really hard to get the NFL product offered in every state because that will guarantee success," he said, "but this isn't a franchisee-franchisor relationship; it never has been, and it never will be. There's no way for MUSL to force a lottery to do something. But hopefully, the more successful we are, the more everyone will want to join in."

Bret explained how MUSL's marketing and promotions committee is always keen to hear anyone's great ideas and is actively seeking partners for promotional opportunities, especially those that tie in with the timeline for introducing or changing games.

Similarly, Jay reemphasized the benefits of coordinating promotional efforts nationally. "If we bought a TV spot in every one of our states or bought one spot nationally, the national spot is more cost-effective, and it comes with greater promotional reach."

"So, let's make our dollars go further," he added, "by exploring more opportunities to pool funding and collaborative initiatives. Of course, there are challenges because different states have different advertising and budgeting rules. But I believe there's a path through that complexity toward a simpler solution, where it's built-in as part of your membership to sell Powerball, so a little bit of money goes over to national marketing, and the group votes on how to use those funds."

Reflecting on MUSL's recent journey, Stephen concluded, "The topic of discussion has changed from 'Should we be doing national advertising and branding?' to 'How can we do it best?'"

Finally, David shared that he is "very happy about where MUSL is and all that we've done over the past five years, but we will keep trying to move it forward so that everyone can advance together. We're doing a lot, we're very excited about what we'll be doing in the future, and we're having a lot of fun. Let's keep the pedal to the metal." ■

focused on the most important objective in my literal life but also kept delivering the promise of the Iowa Lottery to the people of our great state.”

Matt attributed the team’s successes to “the culture of gratitude we have created at the Iowa Lottery. A culture that looks out for each other. A culture that is productive and continues to deliver amazing results for Iowa.”

Similarly, a 2023 American Enterprise Institute study showed that most workers considered “a welcoming workplace” the most or one of the most important factors when choosing employment. “While money gives people what they need to live,” Matt explained, “a sense of belonging and connection on the job is what helps them thrive. And what gives people that sense? Gratitude.”

sure they’re motivated to perform even during tough times, we need to ask ourselves how we can connect all employees to what we’re doing strategically.”

Joshua Johnston also explored the sense of fulfillment that comes from understanding each staff member’s individual why and using it to connect them to the organizational why. “We have to really try to understand the staff and their own personal motivations and whys. That engagement creates a culture of belonging, which is a critical underpinning of any organization.”

“We can’t succeed without a really diverse set of folks around the table,” Joshua added, “but if they don’t feel comfortable at work, they’ll leave. So, my why is making sure staff feels safe, comfortable, and deeply connected to the organization.”

Building on that, Matt described how his own “leading with gratitude principles have twin pillars. The first is knowing and communicating your why so that it permeates your entire organization’s DNA. The second was best expressed by Theodore Roosevelt: ‘People don’t care what you know until they know you care.’”

Addressing the question of how you show that you care, Matt suggested, “A major part is listening to partner organizations to understand their perspectives. We no longer see them as just a ‘vendor’ who provides a commodity to us; instead, we express gratitude and respect to foster a sense of belonging and common ownership of shared success.”

Similarly, Joshua explained that the Washington Lottery “has shifted from saying ‘vendor’ to ‘business partner.’ And that’s really critical because words matter. Our success is intrinsically linked with that of our business partners, and that terminology emphasizes the strength of that connection.”

Doug recalled management guru Tom Peters’ recommendation to “manage by walking around” to get to know colleagues personally and directly express gratitude. Applying that philosophy in modern virtual organizations requires a deliberate plan and execution. “We have to connect technology with these soft skills,” Josh added. “Videoconferencing is a very useful tool, but we also need to get out on the road, talk to people directly, understand what they do, look them in the eye, and say thank you.”

*Continued on page 40*

## Everyone is a leader, whether they’re leading an organization, a team, a project, or an assignment.

Bringing in the panel, Matt mentioned Simon Sinek’s book *Start with Why*, which emphasizes the importance of leaders understanding the purpose that motivates them and thinking hard about what really motivates the people around them.

On “finding your why,” Ryan Mindell commented, “I think the Lottery has it easy. We have a built-in ‘why’ in the service we provide to our beneficiaries, society, and good causes. We are all blessed to be in a genuinely noble occupation, and hopefully, our mission already motivates everyone in our industry. But we can’t assume everyone gets it and feels it on an ongoing basis. We all need to be reminded of our mission. We all need encouragement to feel appreciated and inspired. So, we have to connect personally and meaningfully and make that integral to our communication style and corporate culture.”

Ryan continued by emphasizing the importance of everyone’s contributions. “Everyone is a leader, whether they’re leading an organization, a team, a project, or an assignment. So we all need to understand how our actions matter and how the people we impact daily respond to our communication and management styles.”

Matt discussed the science behind this topic of gratitude. “Data from a 2019 study in *Positive Psychology* shows that grateful workers are more efficient, productive, responsible, willing to volunteer, connected to their teammates, happier, and more effective leaders.”

The data supporting this thesis resonated with Ryan who stressed that “the science on leadership by connecting on a personal, meaningful level is really persuasive. And that’s important,” he added, “because there are still people who think that business is only about metrics, operations, and execution. They need to see this data to understand that soft skills really do affect results.”

Ryan also raised the issue of employees who feel disconnected from the Lottery’s mission because they can’t see how their own role contributes. In response, Matt recommended “setting up processes that democratize information and enable people to input into organizational decision-making so that they are invested in the process and understand where their piece of the puzzle fits.”

Reflecting on “finding your why,” Doug Pollard cited a Chinese proverb that advises, “If you want to be happy for life, help others.” He also emphasized the importance of showing all staff the difference their work makes. “It’s important for people to feel part of something that they can take pride in. And that’s exactly what the Lottery is. But we still need to build that sense of community within our organizations, and we need to give staff opportunities to see the direct and powerful difference that our collective work is making to the people we serve.”

Similarly, Jay Finks spoke of the importance of employee involvement and empowerment. “If we want to empower our staff and make

protection within the EU Cultural heritage dimension. Their ability to generate substantial revenue has enabled them to contribute generously to a wide range of social causes, fostering a sense of community and solidarity. Philippe Vlaemminck, the European Lotteries legal advisor, referred in that regard to the double dimension of the EU as expressed by former EU Council President Herman Van Rompuy, to create an economic space (a 'raum' in German) and a citizen's living environment ('ein ort' in German). Recognizing this specific role of lotteries does by no means undermine the application of the EU Treaties and case law to other gambling activities, but it adds an essential non-economic dimension to the lottery activity. The Court of Justice of the EU has in other areas endorsed that there are fundamental human and societal principles and democratic values that stand on their own and are not subordinated to the economic freedoms.

Lotteries serve as a vital source of funding for public projects, from constructing bridges and roads to erecting monuments that adorn European cities. They have also played a pivotal role in supporting sports, charitable organizations, and cultural institutions, ensuring the preservation and promotion of Europe's rich heritage.

The impact of lotteries on European society extends beyond financial contributions. They foster a sense of unity and shared purpose, bringing people together in anticipation of a potential windfall. The excitement of purchasing a ticket, the thrill of checking the results, and the shared joy of celebrating a winner all contribute to a sense of camaraderie that transcends social and economic divides.

## Economic Activity and Regulation:

***“Lotteries have thus helped EU law to shape around games of chance.”***

President of the Court of Justice, Prof. Koen Lenaerts

***“We are jealous the way EU protects the French Camembert cheese. We would love Lotteries be protected in the same way”***

Jannie Haek, CEO, Belgian National Lottery

## Striking a Balance

While lotteries are deeply embedded in European culture and society, they also operate within the realm of economic activity. The EU Court of Justice (CJEU) has recognized lotteries as an "economic activity" subject to internal market rules. However, the unique social and cultural aspects of lotteries have necessitated a nuanced approach to regulation. This was emphasized by the President of the Court of Justice, Prof. Koen Lenaerts, in his speech. He emphasized the need not only to protect and recognize the societal contribution by Lotteries, but also their need to protect consumers and the social dimension of it in the EU Treaties.

Member states retain the discretion to regulate lotteries and gambling activities, striking a balance between economic freedoms and cultural and social considerations. This approach acknowledges the importance of protecting consumers from potential harms associated with gambling while preserving the cultural significance and societal contributions of lotteries.

## Protecting Lotteries: A Call for Recognition

Proponents of lotteries argue for their continued protection and recognition within the European Union. They highlight the unique role that lotteries play in European culture, emphasizing their contributions to social causes and their embodiment of a sense of fairness and equal opportunity.

Jannie Haek, the CEO of the Belgian National Lottery said it with the following words: Drawing parallels with the protection of certain European products, such as Camembert cheese, advocates call for a similar level of recognition for lotteries. He argues that this recognition would safeguard the cultural and societal value of lotteries while ensuring their sustainable operation within the EU's economic framework. We need to have the ambition to work towards such recognition in the EU Legal framework as set up by the Treaties.

## Conclusion: A Multifaceted Role

Lotteries in Europe are not merely games of chance; they are a multifaceted phenomenon that intertwines cultural traditions, social contributions, and economic activities. Their deep-rooted history, significant societal impact, and economic relevance underscore their importance within the European landscape.

As the EU continues to navigate the complexities of balancing economic freedoms with cultural and social considerations, the role of lotteries remains a subject of ongoing discussion. Recognizing the unique position of lotteries and striking a delicate balance between regulation and protection will be crucial in safeguarding their cultural significance and ensuring their continued contributions to European society. ■

# THE MASSACHUSETTS LOTTERY'S BEST SELLING INSTANT GAME WAS PRODUCED ON HAZEN'S 3D HOLOGRAPHIC BOARD

The Massachusetts Lottery launched its first \$50 game which was produced by Scientific Games using Hazen's 3D holographic technology. Following 16 weeks of sales, this game has proven to be the best-selling instant game in the history of the Massachusetts Lottery!

The favorable economics of using holography on high value games such as this \$50 game are indisputable, where only about a 1% sales increase is needed to fully pay for the holographic material. This can be compared with data that Scientific Games has compiled which shows that holographic games outperform non-holographic games by 13.1%\*

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# HIGH VALUE GAMES ARE A PERFECT USE FOR HOLOGRAPHY

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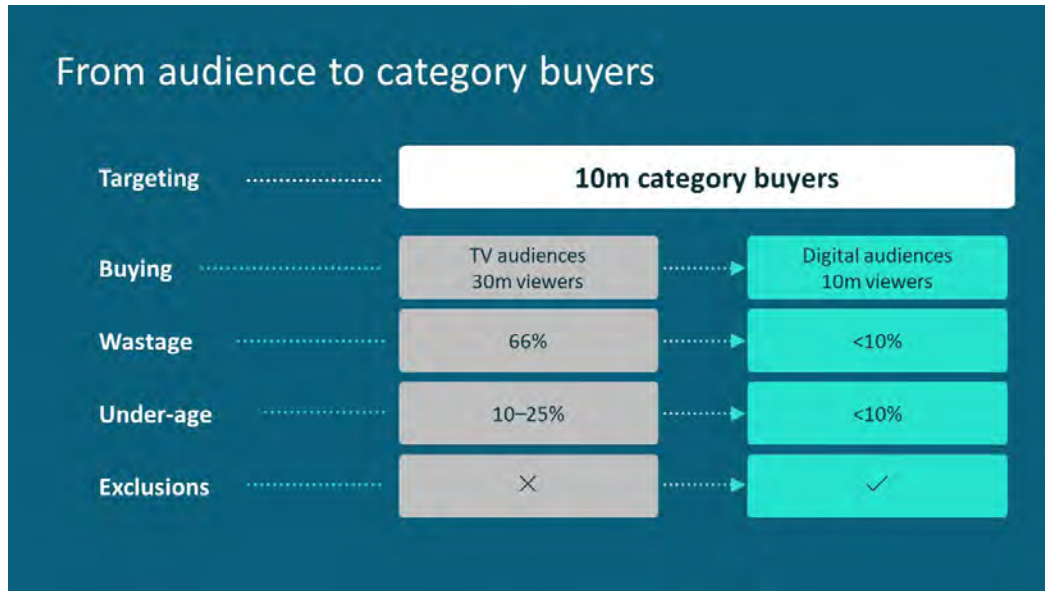
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## Scenes from the Lotteries in Europe Colloquium in Brussels



1. Ana Silva Coelho 2. Koen Lenaerts 3. Romana Girandon 4. Jannie Haek 5. Malcom Flemming 6. Beata Guzik and Ray Bates 7. Jannie Haek, Koen Lennaerts, Philippe Vlaemminck  
 8. Javier GÜEMES PEDRAZA 9. Philippe Vlaemminck 10. Arjan van 'T Veer, Sara Lammens, Romana Girandon, Her Royal Highness Princess Claire, Jannie Haek, Géraldine Demaret  
 11. Nils Petersen, Oscar Castro Villar, Ana Silva Coelho, Valerie Peano, Petri Lahesmaa, Giuseppe Pelle, Roland Louski, Allegra Crahay 12. Jannie Haek, Sara Massini, Theo Neyenhuis,  
 Comte Thierry Le Grelle 13. Professor Oonagh B. Breen 14. Jean-Luc Moner-Banet 15. Petri Lahesmaa 16. Adina Claiçi



reaching a wide audience difficult, even as regulation tightens on how data can be collected and used.

Legislation like the EU's General Data Protection Regulation (GDPR) and California's Consumer Privacy Act (CCPA) have introduced strict guidelines on how advertisers can collect and leverage consumer data. They also reinforce the ethical considerations surrounding privacy, leaving advertisers with a complex balancing act: harnessing the power of data for targeted campaigns while respecting consumers' rights to privacy.

To meet these challenges, **advertisers are shifting from the old model of broad, mass-audience targeting to a more refined strategy.** In the traditional TV model, a network audience of 30 million viewers might contain around 10% to 25% category buyers, depending on the product. In contrast, digital audiences are more focused, with a potential 10 million viewers containing less than 10% of the same category buyers. The result? More precise and effective targeting is needed, focusing on consumers actively considering or purchasing in the advertiser's category.

The new approach involves gently nudging these category buyers whenever they engage in relevant product exploration. **The digital landscape provides unparalleled access to these potential customers, enabling advertisers to personalize their messaging and increase conversion rates by making their products more appealing.**

Inflation in advertising requires innovative solutions. This is where the long-tail strategy comes into play, emphasizing the value of reaching niche audiences often overlooked by traditional media. **Niche marketing leads to higher engagement and often delivers a more cost-efficient way to connect with consumers, particularly those who are more likely to convert into loyal customers.**

In this environment, first-party data plays a pivotal role. Advertisers can harness first-party data to better understand their audience, refine their messaging, and reach category buyers with more precision. However, **these efforts require seamless cross-channel integration between traditional and digital media.**

Combining traditional media's broad reach with digital's granular targeting is critical to success. Traditional TV still has value when it comes to reaching large audiences, particularly during live sports or popular events. These moments draw millions of viewers simultaneously, providing significant advertising impact. However, **integrating digital data and analytics can refine this reach, ensuring advertisers deliver personalized messaging to the right consumer at the right moment.**

First-party data usage must navigate varying regulations across different regions. From the UK to Austria and the U.S., each market presents unique challenges. Advertisers must maintain compliance while leveraging first-party data to personalize campaigns and maximize

reach. Such data allows for real-time campaign impact measurement, enabling swift adjustments to maximize return on investment. Moreover, first-party data ensures campaigns remain relevant to category buyers while preventing inadvertent exposure to sensitive demographics, such as under-age audiences.

To succeed in this complex environment, advertisers must shift to a model of media mastery that blends traditional TV with digital targeting. This requires a data culture capable of not only leveraging first-party information but

also managing it responsibly within each market's regulatory framework. Although regulations like GDPR and CCPA create challenges, a compliant, innovative data approach can give brands an edge over their competition.

Ultimately, advertisers face a media landscape where consumer behaviour shifts quickly and unpredictably. The old TV-first models are insufficient to meet modern challenges. As viewership falls and advertising costs rise, advertisers must rethink how they reach category buyers. **Moving away from broad targeting and toward strategic, data-backed messaging offers the best chance of success.**

**In this fragmented media environment, the solution lies in blending the strengths of traditional and digital media.** By integrating data effectively across these channels, advertisers can reach category buyers with personalized campaigns. In doing so, they can avoid the pitfalls of either approach when used in isolation.

**With a robust data culture and a creative mindset, advertisers can remain relevant in a rapidly changing media world.** Traditional TV's large audiences combined with digital media's precision targeting provide the foundation for campaigns that resonate globally while meeting local compliance needs. As the advertising landscape evolves, staying agile and willing to experiment will be the keys to success. ■



all those brands that are top of mind to Yanks (Use of my British slang permitted!).

For male Americans, Draft Kings (20%), MGM Grand (17%) and FanDuel (17%) are all higher than Powerball (16%), and Mega Millions (11%) in terms of gambling brands that are top of mind.

When we examine the combined totals of the branded Lottery games we get to 28%, which is currently higher than the 'State Lottery' net (21%) and Sports Betting net (24%), but significantly lower than the combined power of the Casino brands which are at a very strong 35%.

Among \$100k+ households, Casino brands hit an incredible 42% unaided awareness, which is currently the gold standard in the gaming and gambling industry.

## **iLottery states have a distinct competitive advantage**

However, one large significant difference is perhaps more key than any other when thinking about the future of the Lottery industry and whether 'our' products, games and marketing are top-of-mind for the consumer. Among states with iLottery, 'State Lottery' unaided awareness (24.1%) is 3.5% higher than states with no iLottery (20.6%). It's currently the difference between being ahead of sports betting 'top of mind', and being behind. We also see the same trend with Lottery games (Nets of Powerball, Mega Millions, etc.), which are at 30% unaided awareness in iLottery states, and only 27.2% in non-iLottery states. These are strong and significant differences, and perhaps a good way to start a conversation with those who have yet to see the true benefits of selling Lottery online.

## **Is there a competitive advantage to having higher prompted (aided) awareness compared to being 'top-of-mind'?**

"Always remember: a brand is the

most valuable piece of real estate in the world; a corner of someone's mind." — John Hegarty, *Hegarty on Advertising*.

In April 2016 fantasy sports was seen as a game of skill, and then came DraftKings and FanDuel.

DraftKings launched its first legal sportsbook in New Jersey in August 2018, less than 6 years ago. and it is now, based on the information above, a household name. And now, DraftKing's recent acquisition of Jackpocket gives them an entry into the Lottery realm.

The MGM Casino group now has 17 Casino hotels in the United States, while Caesars entertainment has 50 properties across the U.S. and both are two of the leading sports book apps in America.

Based on the 'aided awareness' data from the same study, Powerball and Mega Millions have a 20%+ lead over DraftKings, with Powerball having a 32% aided awareness advantage over FanDuel and Caesars. The question here is, does that aided awareness advantage really matter when the 'top-of-mind' gap is so much closer, and far more dangerous from a competitive standpoint.

The honest answer is no.

## **An offer a day keeps the lotteries away!**

"An apple a day keeps the doctor away" is a common English-language proverb advocating for the consumption of apples, and by extension, "if one eats healthful foods, one will remain in good health and will not need to see the doctor often."

The major sports betting and casino brands have taken this aphorism and massaged it to their product. Every day, without fail, I get a 'No Sweat Bet' offer, to place up to a \$10 bet, and if it loses, I get a free bet to use within a few days. Genius. I never knew that's what I wanted to do with my hard-earned cash, but to qualify it for all those lotteries out there who don't believe in winning as the key factor for play, I win pretty regularly, or at least feel like I have a good chance to win,

when they contact me every day with a 'new offer'.

Second-chance drawings and Lottery Player's Clubs have been a very positive element in the Lottery industry over the past decade, but have they reached this level yet? If I place a bet with DraftKings, and I lose, I get another chance. Immediately. In the palm of my hand.

A year ago I wouldn't have even cared who DraftKings and FanDuel were. However, in my day-to-day life they are now 'top-of-mind', due to a perfect blend of critical mass advertising, key sponsorships, smart acquisitions and the customer centric approach of 'we want to give you the best chance to win'. Even though, and this is hopefully not just a secret between you and I, it is incredibly difficult to win in the long run on any gambling proposition.

Ultimately this leads us to one simple question. How can the Lottery industry's key brands like Powerball and Mega Millions, and especially individual state lotteries, fight back in the battle for American's subconscious and remain top-of-mind?

Jim Jarmusch, one of Ohio's most famous filmmakers (some bloke named Spielberg and the Russo Brothers probably take the top spots), floated the following idea. "Nothing is original. Steal from anywhere that resonates with inspiration or fuels your imagination... Authenticity is invaluable; originality is non-existent ... In any case, always remember what Jean-Luc Godard said: "It's not where you take things *from* - it's where you take them to."

You'll all be top of mind to me this coming year.

Trust me, I'm a researcher. ■

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Simon Jaworski, Founder & CEO,  
Lotto Research

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C: 609-558-1019

Reference\*: <https://www.nielsen.com/news-center/2018/car-buyers-consider-twice-as-many-brands-when-shopping/>

Ryan agreed with Joshua about the importance of words and intentionally planning how to demonstrate gratitude to remote workers. He also emphasized that “it’s easy to forget that communication is as much about listening as it is about talking. Everyone needs to be confident that when they’re talking to you, they have your full attention.”

On the theme of two-way communication, Matt explained how sharing information about future plans and industry trends helps staff at all levels to both contribute to management decisions and understand the final decisions taken.

Building on that, Jay discussed a recent tough decision and admitted, “In meeting with the staff, I shared more than I ever had about my thought process. And the response was ‘Thank you, we appreciate that because we wanted to know why this is happening.’” He also discussed staff who might not engage proactively. “As leaders we always say, ‘My door is always open.’ But some people might not come through it. So, we have to go through their doors.”

“We enrolled our young leaders in the same training and development program as the emerging retail leaders in our state.”

Expanding on that theme, Joshua detailed how the Washington Lottery is “working with our business partners to understand our market and design products and promotions to appeal to the specific interests of our players. To develop that understanding, our sales staff do more consulting than selling, digging deep into the numbers to help us understand what is moving, what isn’t, and why. And our retail partners really like that customized, individualized approach, which focuses on why the Lottery is important to their overall business strategy and how they can increase sales in their own stores.”

Joshua also illustrated how to create genuine partnerships with an example. “The pandemic was rough, and we saw a rise in thefts. But we let our partners know that we’ve got their backs, and we adjusted some of our rules to reduce the impact if they did get robbed. So, there are two sides to this. Of course, we need to make sure they have products they can sell. But we also need to

what motivates them in order to effectively address their concerns.”

On the importance of partnerships, Jay shared how the Oklahoma Lottery had gone from having one key account manager to a team of seven. “And their whole purpose is building mutually beneficial partner relationships that last.”

Matt asked the panel for actionable advice by sharing what they wished they would have known when they started as managers. In response, Jay described how the first staff member he managed was fired for not matching his attitude in terms of demanding more work for herself and her direct reports. Reflecting on that, he said, “I failed her because I said, ‘She’s not like me, which means she doesn’t measure up.’ I failed her because I didn’t adapt my management and communication style to connect with her why.”

Ryan shared how he used to worry too much about how he appeared to his staff and not enough about what impact he would have on them. “We need to worry less about sounding smart and focus more on understanding and being understood.”

Similarly, Doug advised, “Worry less about what people will think about what you say and focus more on listening to what they have to say and how they feel when the interaction is over. Let’s not talk so much and instead start with good questions. Figure out what we can learn from people and how to use that to help them succeed.”

Continuing that theme, Joshua advised ensuring you understand and appreciate your impact on others. Addressing organizational change management specifically, he said, “Understand the impact that changes will have on others and make sure you give them the time and the support required to process that.”

Sharing advice based on his early career in politics, Matt emphasized the importance of moral authority in leadership. “I didn’t understand the difference between having a title and actually having moral authority as a leader. And that relates to everything we’ve discussed because leading with gratitude builds your moral authority in your organization and your community.”

Finally, Matt invited the panelists to share actionable advice about implementing a gratitude-infused approach to leadership.

## Our success is intrinsically linked with that of our business partners, and that terminology emphasizes the strength of that connection.”

From a lottery business partner perspective, we depend on each other for our success. To that end, Doug highlighted the importance of creating win/win partnerships based on mutual trust. He argued that if a lottery solely focuses on cost reduction, that approach “flies in the face of this industry’s collaborative ethos. Driving down costs doesn’t leave money for innovation. Instead, we need to invest in driving progress and innovation to fight against the competition we’re facing from casinos and others. Thankfully, this industry has a proven record of delivering a predictable and very high ROI.”

Matt described how positive partnerships can be created by showing gratitude and understanding partners’ perspectives. Giving a practical example of the latter, he explained,

connect with them on a personal why level by letting them know we won’t abandon them when times get tough.”

Ryan agreed that it is essential to understand our retail partners’ goals and how lottery products fit into their overall ecosystem. “It’s not just telling them how well our tickets are going to sell; it’s about how our products compare to energy drinks or what Coke is doing to support the retailer or secure its premium shelf space. And understanding the various ecosystems of different retailers, from grocery stores to gas stations, helps us have better conversations, make better decisions, and align our efforts to overcome their challenges, which will ultimately accrue to our benefit. We need to understand our retailers’ whys and think about

Ryan said, “Take time to really understand people and their why. Spend more time listening than speaking and make sure you appreciate and respect where people are, what they’re thinking and feeling.”

Jay agreed, “Get out of your office and communicate, call some teams up out of the blue, be present when you talk to people. Ask people what’s motivating them and what’s discouraging them right now. I’m usually surprised by the answers. Even if you don’t have the remedy for their concerns, you will find that they appreciate

your willingness to listen, acknowledge their concerns, and think about how to work on improving things.

Doug offered a practical example of enabling authentic conversations. “After our annual staff survey, I meet with staff in groups but without their supervisors. You would be amazed at what people will say when their supervisor isn’t there. Amazing value comes from them feeling heard and being able to talk to me directly, and we use what they say to create actions.”

Concluding the discussion, Matt shared his commitment to “spending five good minutes each day thinking, ‘How can I engage with and thank a team member.’ Just five good minutes, and always let them know that you were thinking about them. I can personally attest to the power of that, and I’ve seen the impact it has on a team when you really understand their why and awaken that thankfulness. You’re going to be a better leader, and your team’s going to be more productive because that sense of belonging and connection will help them thrive.” ■

*Multi-Prong Approach to the Most Time-Efficient Implementation of an Online Selling Channel — continued from page 12*

and marketing perspective. We see these digital assets that we have included and developed also as tools of increasing our presence and footprint in the Romanian society. We are staying focused on one of our most important missions – that of being an actively involved actor in society. For instance, our in-house-developed platform and the partner apps include educational resources about responsible gaming practices, ensuring that players are informed and promoting a healthy approach to lottery participation. And we are constantly learning from our 3rd party app partners in ways that enhance our in-house capabilities.

We are also keeping our level of involvement in CSR actions at a peak performance as we are committed to creating a positive impact in society.

**What is the next frontier you are working on now?**

**Ionuț Valeriu Andrei:** The next step is to launch the native in-house developed App. This year I want to finish our analysis of the online casino and sports betting platform and if possible by the end of Q3 to be able to launch an RFP. We have an important duty to continuously enhance our clients’ user experience and to improve our RG policies.

Our extraordinary interaction within the EL and WLA team is as well a top priority for us and we want to contribute as much as possible to the benefit of our associations. This year we are proud to host in Bucharest EL Corporate University (ELCU) INDUCTION seminar, and we are thrilled to welcome all professionals from EL Lottery and Associate Members. ■

*The Future of iLottery: Predictions for 2030 — continued from page 23*

deal with the lottery). We can expect that more of our competitors will follow suit, further encroaching on our own market share.

The need to address online lottery play becomes even more apparent in Les Brown’s “attention economy,” when player time and attention are considered the scarcest resources of all. This means that unless U.S. Lotteries learn to effectively capture, manage, and maintain their player’s attention by providing them with online play – they’ll fall hopelessly behind competitors who are providing these online experiences.

This includes developing innovative marketing and sales strategies to attract

and retain iLottery players and create opportunities to cross sell iGaming, sports betting, and competing products, or risk losing our player base to our competitors. Moti also believes that lotteries should not just assume that if they build it, players will come to play iLottery. If players have already churned to our competitors to buy iLottery products, it will be significantly more challenging to lure them back. Additionally, costs will exponentially increase to remarket to churned players, highlighting the need to own our players now, and cater to our U.S. customer’s desire for online Lottery play.

As we walk towards our shared future, proactive creativity and collaboration will

be key to the (i)Lottery industry’s success in 2030. By pooling our resources and sharing best practices, lotteries can effectively educate legislators and underscore iLottery’s contributions to worthy causes, to successfully combat our competitor’s growing legislative opposition. This collective approach will be essential, and we must own our players end-to-end and win their loyalty in the wake of this new competition, or ultimately risk losing our market share and our player base. ■

# Scenes from the WLA/EL Marketing Seminar held in London on February 5 & 6

The Marketing Seminar is an annual event attended by everyone interested in the European lottery sector. Held in London for the last twenty years, it is moving to Barcelona end of January 2025. ICE Totally Gaming trade-show is also moving to Barcelona and being held the same week as WLA/EL Marketing Seminar.

In terms of content and the industry leaders who participate, the WLA/EL Marketing Seminar has evolved into a hugely important event. Check out articles on pages 10, 14, 16. Based on presentations made at the Seminar, they give us a feeling for the high level of insights and focus of this event. Visit [European-Lotteries.org](http://European-Lotteries.org) to learn more about the educational seminars, trade shows, and services provided by the European Lottery Association.



1. Muriel Grube 2. Johanna Kozul 3. Ionut-Valeriu Andrei 4. Arjan Van 'T Veer 5. Gretchen Corbin, David Barden, Sarah Taylor, Rebecca Paul 6. Allister Frost  
7. Rebecca Avrahami 8. Elizabeth Button 9. Richard Bateson 10. Ross Sergeant

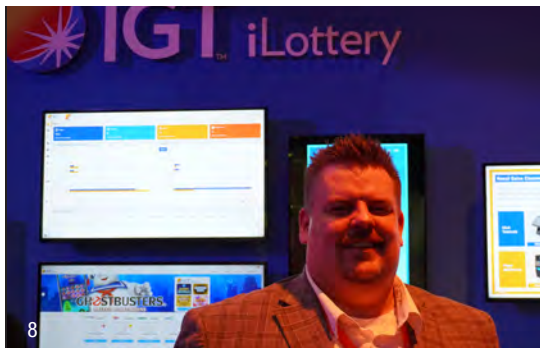


11. Zsófia BÁNHEGYI 12. Romana Girandon 13. Rebecca Paul 14. Lauri Halkola 15. Agnieszka Rygula 16. Antonio Travaglini 17. Julia Cloutier 18. Ewa Ulicz  
 19. Thomas Sporing 20. Luca Esposito and Arjan van 't Veer 21. Sebastian Meitz 22. Gretchen Corbin 23. Sarah Taylor 24. Bénédicte LOBELLE  
 25. Genevieve Pageau 26. David Barden 27. Jennifer Quigley-Jones 28. Ruth Zohrer 29. Luca Esposito

# Scenes from ICE Totally Gaming held in London on February 6- 8



**ICE Totally Gaming** is by far the largest trade-show in the games of chance industry. It has been held annually the first week of February in London for the last fifteen years. Like the WLA/EL Seminar, ICE Totally Gaming is moving to Barcelona next year, being held January 20-22, 2025.



1. Jovana Popovic Canaki, Chris Shaban and Shlomit Kedem 2. Salim Adatia 3. Christie Eickelman and Angela Wong  
4. Brad Cummings 5. Nick Weil 6. Paul Kallis, Jesse Saccoccio and Dalesh Patel 7. James Maida 8. Sebastian Meitz 9. Martin Blach  
10. Rinat Belfer, Rob Wesley, Chris Shaban, and Steve Beason 11. Lorne Weil and Steve Frater



12. Team Neogames 13. Darrell Smith, Mariana Mokritski and Tom Markert 14. Chariton Charitoglou and Helena Szrek Pereira 15. Johanna Kozul, Joni Hovi, Stephanie Weyant 16. IGT Booth 17. Joni Hovi and Timo Kiiskinen 18. Moti Malul 19. Carys Damon, Brooks Pierce, and Simona Camilleri 20. Doug Pollard



# 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](https://PublicGaming.com). Too, these stories are the highly edited short versions. You can visit our news website [PublicGaming.com](https://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](mailto:sjason@publicgaming.com).

## NORTH AMERICAN NEWS

### Ryan Mindell has been promoted to Executive Director of the Texas Lottery Commission effective immediately

The five-member Texas Lottery Commission today announced that Ryan Mindell, the agency's Deputy Executive Director since September 2022, has been promoted to Executive Director, effective immediately on April 18, 2024. As Executive Director, he will oversee the agency's mission of responsibly generating revenue to support public education and veterans' services in Texas.

"With a unanimous decision, we are proud to appoint Ryan Mindell as the Texas Lottery Commission's newest Executive Director," said Robert G. Rivera, Chairman of the Texas Lottery Commission, on behalf of the Commission. "In his time with the agency, Ryan has demonstrated strong leadership while putting together an impressive track record in the lottery industry. He brings a breadth of experience, knowledge, and innovative ideas to this role. We are confident that his appointment to Executive Director will sustain the integrity, strategic leadership, and growth of the agency, which is critical for its mission."

"I'm honored and thrilled for the opportunity to take on the role of Executive Director of the Texas Lottery Commission," Mindell said. "Having been part of the agency in many capacities, I know first-hand the strength of our dedicated staff. I am eager to build on the success we've had through continued collaboration with the Commissioners, our vendor partners, and our stakeholders, while maintaining the commitment to the agency's mission and making a positive impact on its beneficiaries."

Mindell is a leader in the lottery industry, receiving the prestigious North American Association of State and Provincial Lotteries (NASPL) Powers Award in 2023 for making significant contributions to the lottery industry through exceptional job performance, and has frequently presented at national meetings and conferences.

Mindell works with NASPL, industry vendors and other lotteries to lead modernization efforts in the North American lottery market, most notably in developing a universal lottery API (Applied Program Interface). Mindell holds a Juris Doctor degree and a master's degree in psychology from Duke University. He also earned a bachelor's degree in psychology from the University of North Carolina at Chapel Hill.

### Khalid Jones appointed Virginia Lottery Director

Khalid Jones brings a unique blend of law, technology, and innovation to the role. Khalid's career has spanned roles as founding partner in a boutique investment firm with a strategic focus on real estate, media, sports, and technology, and a decade-long tenure as an attorney specializing in securities litigation. Most recently, as part of his business practice, Mr. Jones has become one of the nation's experts in licensing consulting, providing legal and strategic advice to state and national lottery organizations providing the expertise to lead Virginia's lottery system at a crucial time of growth and expansion. A proud alumnus of Wake Forest University and Stanford Law School, and his passion for addressing challenges with innovative solutions will guide the Virginia Lottery to new heights of success and integrity.

### Massachusetts Lottery Executive Director Mark Bracken asks state lawmakers to allow his agency to operate online lottery games and sell tickets via the internet to people aged 18 and older who are physically located within the commonwealth

### The Powerball® jackpot worth \$1.326 billion has been won in Oregon



The jackpot has a cash value of \$621 million. The Power Play® multiplier was 3X.

"Winning the Powerball is not just about hitting the jackpot, it's about the power to make dreams a reality and to create positive change in the world," said Drew Svirko, Powerball Product Group Chair and Pennsylvania Lottery Executive Director. "Lottery games, like Powerball, generate proceeds that are used to do so much good work in local communities across the country. Thank you to our players and retailers for helping us make a lasting impact from this jackpot run."

The lucky ticket holder will have the choice between an annuitized prize of \$1.326 billion or a lump sum payment of \$621 million. Both prize options are before taxes. If the winner selects the annuity option, they will receive one immediate payment followed by 29 annual payments that increase by 5-percent each year.

Even though the jackpot was won by a single ticket, participating lotteries are reminding players to check their tickets for one of the nine ways to win. Nationwide, the Powerball drawing produced more than 4.5 million winning tickets, including seven tickets that matched all five white balls to win \$1 million prizes. The \$1 million-winning tickets were sold in Arizona, Delaware, Florida, Iowa, Massachusetts, Michigan and Wyoming. There were also 81 tickets that won \$50,000 prizes, and 26 tickets that won \$150,000 prizes. Note: In California, prize payout amounts are pari-mutuel and determined by sales and the number of winners.

### Iowa lawmakers asked to ban online courier sales of lottery products

State officials are asking legislators to ban private "courier" or "concierge" companies from selling Iowa lottery tickets and games online.

Tyler Ackerson of the Iowa Department of Revenue said businesses called lottery couriers are operating websites and smart phone apps. "Customers sign up on there, fund their account, and then the courier uses that money to purchase lottery products on behalf of that customer," Ackerson said. "These lottery couriers typically partner with a business who sets up a stand-alone, brick and mortar location that becomes a licensed lottery retailer and then all of those lottery products are purchased through that location."



State officials have already turned down an application from Jackpocket, a New York based lottery courier that wanted to start selling Iowa lottery games online.

## MUSL RFP 2024 Operational Security Assessment Vendor Questions and MUSL Responses



## Scientific Games Commemorates Official Ribbon-cutting for Advanced Instant Scratch Game Production Technology at Global Headquarters in Atlanta



## Scientific Games and New York Lottery Continue Nearly 50-Year Primary Scratch-Off Game Partnership

## Scientific Games Promotes Lottery Industry Expert Beth Bresnahan to Chief Communications and Brand Officer

Bresnahan, a veteran lottery industry expert, spent nearly 10 years in leadership roles at the Massachusetts Lottery, including serving as its Executive Director, and headed the District of Columbia's Office of Lottery & Gaming. With a background in public relations, brand management and product positioning, she joined Scientific Games in 2022 and most recently served as Vice President of Strategic Communications.

The Chief Communications and Brand Officer is a new senior executive role that elevates strategic oversight of Scientific Games' global communications, ensuring a unified and consistent voice and a strong representation of the company's brand across all platforms and mediums. In this role, Bresnahan will continue to lead external and internal communications and customer proposals while expanding her leadership to include advertising, trade shows and events.

Pat McHugh, CEO of Scientific Games, said, "This promotion will come as no surprise to those who know and have worked with Beth. Her strategic vision, extensive experience in brand communications and deep knowledge of Scientific Games and the lottery industry have earned her the respect and support of our entire company and leadership team."

Bresnahan has dedicated nearly 25 years to developing impactful communications, marketing and business strategies for several public and private sector organizations.

## Virginia C-Stores Protest Skill Game Bill Amendments

C-store operators refused to sell lottery tickets on Monday and closed for an hour on Tuesday.

Virginia convenience retailers protested Governor Glenn Youngkin's proposed amendments on Senate Bill 212, which would impose a 35% tax on skill games and ban them altogether within 35 miles of a casino or horse racetrack. On Monday, hundreds of c-stores refused to sell lottery tickets.

## Scientific Games Announces Mike Cardell as Senior Vice President, Americas Systems

## Scientific Games and New York Lottery Continue Nearly 50-Year Primary Scratch-Off Game Partnership

## IGT to Launch Cloud-Based iLottery Solutions for Atlantic Lottery in Canada



## JOB: Carmanah Signs - Vice President, Sales, Americas



## JOB: Assistant Director of Business Services and also Assistant Director Operations, Oregon Lottery

## Lotto America expands to Mississippi and Nebraska

## Massachusetts is allowing the use of debit cards for the purchase of lottery tickets

## BCLC Launching New Lottery Terminals to Modernize Play

## WORLD NEWS

## WLA, NASPL, CIBELAE, APLA and ALA met last week to discuss the important role of lotteries and how to continue collaboration among the associations



On April 12, an important work meeting organized by the World Lottery Association (WLA) was held in the city of Nashville, Tennessee. The meeting brought together the leaders of the five regional lottery associations: North American Association of State and Provincial Lotteries (NASPL), the Corporación Iberoamericana de Loterías y Apuestas de Estado (CIBELAE), European Lotteries (EL), Association des Lotteries d' Afrique (ALA) and Asia Pacific Lottery Association (APLA), with the aim of discussing topics of common interest and establishing collaboration strategies.

Featured participants

The meeting was attended by WLA President Rebecca Paul ; the executive director, Luca Esposito ; the general secretary, Lynne Roiter ; together with representatives of regional associations:

NASPL: Cindy Polzin (President), David Gale (CEO), and Andrew White (Regional Director).

CIBELAE: Javier Milián (president) and Rodrigo Cigliutti (executive director).

EL: Romana Girandon (president) and Arjan Van't Veer (executive director).

APLA: Sue Van der Merwe (president) and John Teo (chief executive officer).

ALA: Younés El Mechrafi (general secretary).

Presentation of action plans and joint work proposals

During the meeting, the regional associations had the opportunity to present the most relevant aspects of their respective action plans. In the case of CIBELAE, the presentation was given by the executive director, Rodrigo Cigliutti.

Next, various proposals for joint work were addressed, among which the following stood out:

Creation of a global compendium of lotteries: it was proposed to create a compendium that includes detailed information on all lotteries in the world, both those that are part of the WLA and those that are not. This initiative seeks to centralize and facilitate access to relevant information about the industry.

Development of a single Responsible Gaming certification framework: it was agreed to work on the creation of a single Responsible Gaming certification framework, based on the existing frameworks of the WLA, EL and NASPL. The

objective is to establish uniform standards to promote responsible practices in the sector.

Combating Illegal Gambling: the problem of illegal gambling was raised as a common challenge for all regions. It was established to carry out an exhaustive study on the operating modalities of illegal gambling at a global level, in order to develop joint strategies to combat it effectively.

### EL Executive Committee names Mr Ionut-Valeriu Andrei as new member

Brussels, 16 April 2024 - The EL Executive Committee has named Mr. Ionut-Valeriu Andrei as its newest member during its meeting on 5 April. Mr. Andrei is the General Manager of Loteria Română since 2022, and succeeds Mr. Olgierd Cieslik, whose term as CEO of Totalisator Sportowy (Poland) has concluded.

"It is with great pleasure to welcome Mr Ionut-Valeriu Andrei as a new Executive Committee member. As an experienced executive, Mr Andrei has already contributed in various ways to our Association and the EL Executive Committee members trust he will continue to do so in the future," said Arjan van 't Veer, EL Secretary General.

Ionut-Valeriu Andrei, General Manager of Loteria Română & new EL Executive Committee member co-optation will be formalised during the upcoming EL General Assembly in Salzburg (Austria) on 17 June 2024.

### Cian Murphy to replace Andrew Algeo as CEO of Premier Lotteries Ireland

FDJ acquired the Irish National Lottery operator in November

Cian Murphy has been named the next CEO of the Irish National Lottery operator Premier Lotteries Ireland. He will replace Andrew Algeo, who will stand down as chief executive and as a member of the board at the end of June.

Murphy is currently chief product and digital officer. He was previously chief marketing officer at The AA. He has also held leadership roles at Paddy Power and worked as a consultant with McKinsey & Company.

Algeo joined PLI as CEO in 2019. His departure follows the completion of La Française des Jeux's (FDJ) acquisition of the operator in November 2023. France's FDJ acquired 100 per cent of PLI share capital in a €380m deal and planned to update lottery systems and the lottery's network of 5,300 points of sale.

### WestLottoGermany's Largest State Lottery Moving Retailers to Scientific Games' New Optical Technology

Scientific Games's high-performance Contour.v terminals move the retail lottery transaction to a more modern, transparent and contactless experience for both retailers and players. Scientific Games has served WestLotto for more than 25 years and currently provides the Lottery with its world-leading instant games, as well as a retailer

management system, retail point-of-sale technology, iLottery and sports betting

### Eurojackpot: Europe's Largest Lottery Remains the Responsibility of WestLotto Münster, May 16, 2024

The largest lottery in Europe remains the responsibility of WestLotto. At the general meeting of the 19 Eurojackpot countries, the state lottery company of North Rhine-Westphalia was confirmed in its administrative leadership role for another three years. In addition, WestLotto managing director Andreas Kötter was once again elected as chairman of the world's most successful lottery launch in recent years.

"The Eurojackpot is a European success story. We are proud to be significantly involved and to be able to continue our work," said Andreas Kötter. Since the first Eurojackpot draw in 2012, the threads for the Eurojackpot have come together at WestLotto. At the company headquarters in Münster, the tips from all participating countries are recorded and the winnings and odds are evaluated. In Bled, the total of 34 state-licensed lottery companies confirmed WestLotto's outstanding leadership role so far in the gaming offering, which reaches around 325 million people in Europe.

After starting with state-licensed lottery companies from seven countries, the Eurojackpot cooperation has now grown to 19 nations. Most recently, the Greek company OPAP joined the merger in March. Germany is involved with all 16 federal state companies from the German Lotto and Toto Block (DLTB). The draws are carried out every Tuesday and Friday. According to the formula 5 out of 50 and the Euro numbers 2 out of 12, a jackpot of between 10 and 120 million euros is played.

### Multiplay Gaming Joins Scientific Games' New SG Content Hub

### Scientific Games Consolidates Law and Public Policy Functions

Scientific Games announced the consolidation of its legal and public policy teams into a new unified department, Global Legal and Public Policy.

This team will be led by James D. Schultz who will assume the new title of Executive Vice President, Global Legal and Public Policy. Deputy General Counsel Phil Bauer, an indispensable 25-year veteran of the company, will be promoted to General Counsel and Corporate Secretary, and report to Schultz. Additionally, as part of this alignment, Christine Wechsler, currently Senior Vice President, Public Policy and Government Relations, will serve in the expanded role of SVP, Legislation and Litigation.

### Scientific Games Adds 7777 gaming As Newest iLottery Studio to Join SG Content Hub Partner Program

### Scientific Games and National Lottery of Slovenia Strengthen Instant Game Partnership

Scientific Games and Loteriya Slovenije, the national lottery of Slovenia, are moving to strengthen their instant game partnership and position the Lottery for more growth through a new, exclusive five-year contract. The new contract follows 26% growth in Loteriya Slovenije's instant game sales over the past four years. The agreement may be renewed for an additional two years.

"The move to this new partnership with Scientific Games heralds further progress for our Srečka games portfolio," said Loteriya Slovenije CEO and President Romana Girandon. "The enhanced partnership aligns our goals to responsibly grow these products and ultimately, grow proceeds to our good cause programs."

### Scientific Games and National Lottery of Estonia Continue Long-time Instant Games Partnership

The three-year agreement with the lottery in northern Europe may be extended for an additional year. Scientific Games has provided products and services to Eesti Loto, the national lottery of Estonia, for more than 20 years, helping grow the product category by 8% in 2023.

"We are pleased to continue our good work with Scientific Games and offer exciting scratch game experiences to our players to help grow funding for the State and the Estonian Cultural Endowment, which supports buildings of cultural significance and the promotion of creative work in the arts and folk culture in Estonia," said Riina Roosipuu, CEO for Eesti Loto.

### Poland's National Lottery Extends Partnership with Scientific Games Following Strong Growth

### Aristocrat Leisure Completes \$1.2 billion Acquisition of NeoGames

"We are excited to have successfully closed this transaction and joined forces with the Aristocrat team to further drive our success across iLottery, iGaming, and online sports betting," said Moti Malul, Chief Executive Officer of Neo. "We firmly believe that this Transaction represents a great outcome for all of Neo's shareholders, customers and employees. We are very grateful to all our stakeholders who have supported us since our inception. I would also like to thank all our employees for their commitment in making Neo the great company it is today."

### NeoGames' Christopher Shaban Appointed Managing Director iLottery



NeoGames, a technology-driven provider of end-to-end iGaming and iLottery solutions, has made a key appointment to the leadership team of its iLottery business unit with Christopher Shaban becoming Managing Director, iLottery.

This is the latest phase of NeoGames' organizational restructure to support its upcoming plans as the company progresses towards the closing of its acquisition by Aristocrat, expected in the second quarter of fiscal year 2024.

With his appointment effective immediately, Shaban will oversee all iLottery activity for the NeoGames Group globally, including new business, customer growth, the continued global expansion of NeoGames' iLottery solution, and lastly, NeoGames Studio, the Company's in-house game studio.

Shaban brings a wealth of knowledge to the position with over 27 years of experience in the global lottery industry. He joined NeoGames in 2021 in the role of EVP Global Business and Customer Development for the Company's iLottery business.

Moti Malul, Chief Executive Officer at NeoGames, said: "Chris is hugely respected within the lottery industry and his track record speaks for itself. I am thrilled about his appointment and look forward to seeing him drive us forward in our iLottery business."

Christopher Shaban, Managing Director, iLottery, at NeoGames, added: "It has been a few wonderful years with NeoGames and I am excited to continue in this new role as Managing Director, iLottery. Working together with the extremely talented people in our company, we are poised to expand our efforts under Aristocrat to best support our global lottery customers on their interactive journey."

## NeoGames extends agreement with Czech market leader, SAZKA

NeoGames announced a three-year contract extension with its long-standing Czech lottery customer, SAZKA, with the agreement to remain in effect until the end of 2028. SAZKA, a part of Allwyn, is a multi-national lottery operator with leading market positions in the Czech Republic, Austria, Greece, Cyprus, Italy, the United Kingdom, and the United States (Illinois).

## Allwyn today announced the appointment of Ifor Evans as its new Group Chief Technology Officer



## La Française des Jeux (FDJ) announces its revenue up 7% for the 1st quarter of 2024

## La Française des Jeux FDJ Reappoints Stéphane Pallez as Chair & CEO, Unveils Share Buyback

## Kindred's Journey Towards Zero: Q1 revenue from high-risk players

The first quarter of 2024 saw a slight increase in revenue from high-risk players compared to the final quarter of 2023, with 3.2 per cent of Gross winnings revenue from this group of players. Kindred remains fully dedicated to lowering this share of revenue and continues to see a positive behaviour change from players after interventions.

## Allwyn begins next phase of retail investment with new National Lottery PPOS rollout trial

Brand new National Lottery permanent point of sale (PPOS) has started hitting the walls, floors and counter tops of a small number of UK National Lottery retailers, as Allwyn begins testing the rollout of the specially designed kit.

Allwyn is trialling the rollout of modernised kit in a number of stores ahead of phased deployment. Strong accessibility and green credentials will help deliver on Allwyn's social value commitments. As the latest stage in Allwyn's retail investment, the new kit will help drive in-store sales.

## Germany: State Toto-Lotto GmbH Baden-Württemberg offers virtual slot machine games under brand "erwin". This makes the company the first German state lottery company in this segment

"We believe it is important that a state provider also offers those interested in gambling a legal and reliable offer in this segment," emphasizes Georg Wacker, Managing Director of Staatliche Toto-Lotto GmbH Baden-Württemberg. With the product expansion, the company is responding to the changing needs of its customers.

There are currently around 200 different games available at [www.lotto-bw.de/erwin](http://www.lotto-bw.de/erwin). The varied offering ranges from "Book of Games" to "Fruit Games" and is intended to be continually expanded. To this end, Staatliche Toto-Lotto GmbH Baden-Württemberg works with various international game studios.

The company takes its responsibility towards its customers very seriously, and the protection of young people and players is particularly important. The games are viewed and selected extremely carefully according to different criteria. In addition, every customer who wants to use the new online gaming offering must first register and identify themselves online. With the support of the Gambling Research Center at the University of Hohenheim, an automated system for detecting problematic gambling behavior was also developed.

## The Spillemyndigheden: Danish Gambling Authority's efforts against illegal gambling report released

## Inspired Entertainment is pleased to announce the launch of its Virtual Sports products in Spain with Luckia



**INSPIRED**

## Gaming Laboratories International (GLI®) First to Certify Betting Systems for Brazil's Fixed-Odds Lotteries

The accreditation means GLI is authorized to test and certify equipment, programs, instruments, and devices that comprise betting systems, live game studios, and online games to be used by fixed-odds lottery operators for the recently enacted national regulatory regime of Brazil.

## Poland's National Lottery Extends Partnership with Scientific Games Following Strong Growth

**POLLARD**  
banknote limited

Over the past three years (2020 to 2023), sales of scratch games in Poland have grown 39%. Totalizator Sportowy is among the top-performing instant game lotteries in Europe. "We've chosen to extend our instant games agreement with Scientific Games so that we can continue to responsibly grow this product category and generate proceeds for Polish sport and culture," said Katarzyna Woznica-Borkowska, Manager of Instant Products for Totalizator Sportowy.

Most recently, Scientific Games collaborated with Totalizator Sportowy on the I Love Big Cash game produced with the company's advanced Dimension technology which enhances the play experience with three-dimensional, reflection-at-different-angle refractions above and below the game graphics. Scientific Games has provided instant games to Totalizator Sportowy for more than 20 years. Currently, the company provides instant games to 114 government-regulated lotteries around the world, including 50 European lotteries.

## UK Gambling Commission directs bet365 to pay \$738K for anti-money laundering, social responsibility failures

## Fennica Gaming expands to a new vertical - Fennica Gaming's VLT content available now through IGT's VLT -platform

Fennica Gaming and IGT have agreed on a supply of VLT games on IGT's platform. This means that Fennica Gaming's VLT content

selection will reach an entirely new era and makes the games available internationally. The cooperation starts with Svenska Spel in Sweden and the agreement includes supplying multiple games to approximately 4000 VLTs all over Sweden, with the first game to be released to players now.

**Germany: Lotto Bayern launches regulated online gambling**

Those interested in games from Bavaria who want to play online casino now have a legal option on the Internet. On the new online casino game portal, we offer state-of-the-art casino games. The first state, legal online game offer in Germany includes roulette live on two automatic cass. In addition, other playing options such as roulette, blackjack and poker against the bank are virtually available.

In fulfillment of its public task from the State Treaty on Gambling and the Bavarian Implementation Act to the State Treaty on Gambling, the State Lottery and Casino Administration has developed an online gambling offer and is thus the first state provider in Germany to offer an online casino.

**Loterj, the Rio de Janeiro government body responsible for state lotteries, takes legal action to obtain an order from Anatel (National Telecommunications Agency) to block betting sites that do not have a state license.**

**The GLI Group Acquires Trisigma**



Trisigma, a leading global gaming testing, inspection, certification, and auditing laboratory servicing both online and land-based regulated gaming clients, will continue to operate its network of testing laboratories independently while coordinating its efforts with GLI's larger sales, operations, and back-office staff globally. The arrangement allows Trisigma's clients to continue to receive world class service from Trisigma while benefiting from GLI's global network of laboratories and relationships with regulators worldwide. Esther Ballart will continue to lead and manage both the Trisigma Geldermalsen Netherlands and Trisigma Barcelona Spain offices.

**China National Lottery Sales in March 2024 – Year-on-Year Increase of CNY5.809 Billion or 11.7%**

**Lottery Magic strikes in Mauritius where twenty people won the national lotto jackpot**

**SPORTS BETTING AND CASINO GAMBLING**

**The British Columbia Lottery Corporation replaces its retail sports betting offering with a new digital system**

**New Jersey Senator John McKeon introduces a bill that would increase tax for online gambling and sports betting to 30%**

**Flutter, owner of FanDuel and SISAL, to Move Primary Share Listing to New York Stock Exchange (NYSE) by the end of 2024 in a bid to attract more retail investors**

**Illegal Offshore Sportsbooks Took More March Madness Action Than Legal Operators**

**Entain Chairman Barry Gibson to step down, Stella David to lead as successor**

**Massachusetts Gaming Commission hosted a roundtable on betting limits. All 10 state sportsbooks opted out**

Every live sports betting operator in the state declined to participate. The Massachusetts Gaming Commission (MGC) held a long-awaited public roundtable Tuesday to seek more transparency from sportsbooks on how, when and why they set betting limits on some patrons. "I've been made aware that 10 active operators in the commonwealth, after initially signaling that they would attend and actively participate in this public roundtable, decided not to," said Jordan Maynard, the interim chair of the MGC. Maynard said the sportsbooks instead requested a private executive session in place of a public roundtable "as they felt that some information would be too sensitive to reveal in public." The MGC, though, is required by Massachusetts law to hold their meetings in an open forum, except in some special circumstances. According to the MGC, sportsbook operators including BetMGM, DraftKings, FanDuel, Caesars, Fanatics and PENN Entertainment (ESPN BET) informed the commission of their decision to withdraw within 72 hours of the public meeting. Only one sportsbook operator that is not yet live in the state, Bally Bet, sent a representative. Bally Bet will not be available in Massachusetts until June. In addition to Bally's representative, Justin Black, the meeting was attended by the com-

mission members, their legal counsel, a professional gambler representing the perspective of sportsbook patrons and two gambling industry consultants.

After an hour of conversation, the commissioners expressed frustration at the pointlessness of having the roundtable without the operators present.

"This was not a good use of our time today, given that we didn't have our primary stakeholders as part of the discussion," said Commissioner Nakisha Skinner. "I hope we can work to change that going forward."

Commissioner Brad Hill said he felt "anger" for "not being able to get a lot more information that I thought we would be able to get today to start this conversation."

Opinion: SCHUETZ:

**Operators' Snub Of Massachusetts Commission Shows A Total Lack Of Respect**

"The way that the ten firms stiffed the MGC was the absolute ultimate statement of arrogance and ignorance."

When I was a casino executive on the Las Vegas Strip, every now and then, I would get a call from an agent of the Nevada Gaming Control Board. He would want to have coffee or lunch, and it would be at the Peppermill on the Strip. It meant that we would be meeting that day, and I canceled whatever I had planned.

I went alone, for that was the unspoken rule, and when I arrived, there would always be two agents already there. Without fail, it had to do with an issue. The lead of the tandem would explain the issue, and the other person was just there to listen. About 90% of the time, the issue was resolved at the meeting. About 7% of the time, I would tell the agent I would get back to them within 24 hours, for I needed to talk to one of our lawyers, the company president or chairperson, or some such thing.

Every now and then, we would disagree, and I would explain my position. We would finish the coffee or lunch, shake hands, and go our own ways. Either I would hear nothing more about the issue, or it would be elevated to a formal complaint.

The one common element in all of this was that it was done with a high level of respect.

**What it's supposed to look like ...**

When I became a member of the California Gambling Control Commission, I made several trips to Nevada with other members of the California Commission to watch a Nevada Gaming Control Board meeting with Mark Lipparelli and later A.G. Burnett as chair. I wanted my fellow California commissioners to see the incredibly respectful way that the Nevada meetings were held. There were certainly disagreements and contentious moments, but they were held with a high level of respect.

I was proud to be a part of all of that, and I considered it an incredibly important part of the industry.

The point is that I grew up for 40-plus years in an industry with a culture of exhibiting the utmost respect for regulators, and importantly, they generally deserved it. It was the way it was done.

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# Hilton Fort Lauderdale Beach Resort

March 4, 5, and 6, 2025

**March 4, Tuesday:** Opening Night Reception

**March 5, Wednesday:** Breakfast, Lunch and Conference sessions all day followed by Reception

**March 6, Thursday:** Breakfast, Conference sessions followed by Lunch and Reception

See [PublicGaming.org](http://PublicGaming.org) for complete information and conference updates

- Conference Info & Details: [www.PublicGaming.org](http://www.PublicGaming.org)
- News website: [www.PublicGaming.com](http://www.PublicGaming.com)
- View video of conference presentations: [www.PGRItalks.com](http://www.PGRItalks.com)
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DON CLEMENTE

PLAYING BOARD

THE WINDMILL	THE LAZARUS	THE MOON	THE BANANA
THE PEANUT	THE WINDMILL	THE BELL	THE CELLO
THE PARROT	THE CROWN	THE WHIRLWIND	THE WINDMILL
THE FISH	THE WINDMILL	THE STAR	THE SUN

CALLER CARDS

?	?	?	?	?
?	?	?	?	?

Scratch off the CALLER CARDS to reveal 14 LOTERIA™ symbols. Scratch the identical symbols on the PLAYING BOARD that match the CALLER CARDS symbols. Match all 4 symbols in any complete horizontal or vertical line in the PLAYING BOARD to win PRIZE shown for that line.

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**LOTERIA**  
DON CLEMENTE

**FAST CASH**

SCRATCH OFF THE TICKET TO REVEAL YOUR WINNING AMOUNTS TO WIN!

CALLER'S CARDS  
PLAYING BOARD 1

THE WINDMILL	THE LAZARUS	THE MOON	THE BANANA
THE PEANUT	THE WINDMILL	THE BELL	THE CELLO
THE PARROT	THE CROWN	THE WHIRLWIND	THE WINDMILL
THE FISH	THE WINDMILL	THE STAR	THE SUN

PLAYING BOARD 2

THE WINDMILL	THE LAZARUS	THE MOON	THE BANANA
THE PEANUT	THE WINDMILL	THE BELL	THE CELLO
THE PARROT	THE CROWN	THE WHIRLWIND	THE WINDMILL
THE FISH	THE WINDMILL	THE STAR	THE SUN

BONUS CALLER'S CARD

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Scratch off the CALLER'S CARDS and the BONUS CALLER'S CARD to reveal 15 LOTERIA™ symbols. Scratch all the identical symbols on each PLAYING BOARD that match the CALLER'S CARDS symbols. Match all 4 symbols in any complete horizontal or vertical line in any PLAYING BOARD to win PRIZES shown for that line.

FRONT AND BACK PLAY SEPARATELY.

**\$0**

SCIENTIFIC GAMES

**LOTERIA**  
DON CLEMENTE

**Fiesta**

EACH PLAYING BOARD IS PLAYED SEPARATELY

CALLER CARDS

?	?	?	?
?	?	?	?

PLAYING BOARD 1

THE WINDMILL	THE LAZARUS	THE MOON	THE BANANA
THE PEANUT	THE WINDMILL	THE BELL	THE CELLO
THE PARROT	THE CROWN	THE WHIRLWIND	THE WINDMILL
THE FISH	THE WINDMILL	THE STAR	THE SUN

PLAYING BOARD 2

THE WINDMILL	THE LAZARUS	THE MOON	THE BANANA
THE PEANUT	THE WINDMILL	THE BELL	THE CELLO
THE PARROT	THE CROWN	THE WHIRLWIND	THE WINDMILL
THE FISH	THE WINDMILL	THE STAR	THE SUN

Scratch off the CALLER CARDS to reveal 14 LOTERIA™ symbols. Scratch all the corresponding symbols on each PLAYING BOARD that match the CALLER CARDS symbols. Match all 4 symbols in any complete horizontal or vertical line in a PLAYING BOARD to win PRIZE shown for that line.

CONTACT YOUR SG REPRESENTATIVE TO LEARN MORE.

