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## “This Isn’t Your Father’s Oldsmobile”

Act More Like a Modern Consumer Brand in a Competitive Market.

### **Brian Rockey**

Director, Nebraska Lottery  
President of the North American Association of State and Provincial Lotteries (NASPL)



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### **Romana Girandon**

Chief Executive Officer, Loterija Slovenije  
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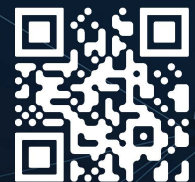
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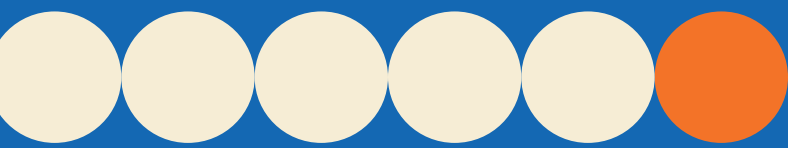
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# CONTENTS



## FEATURED INTERVIEWS

---

10

**“THIS ISN’T YOUR FATHER’S OLDSMOBILE”**  
WHY THE COMPETITIVE MOMENT FEELS DIFFERENT, AND WHY LOTTERY MUST THINK AND ACT MORE LIKE A MODERN CONSUMER BRAND IN A COMPETITIVE MARKET.

**Brian Rockey**

*Director, Nebraska Lottery and President of the North American Association of State and Provincial Lotteries (NASPL)*



14

**FROM ADVOCACY TO ACTION: THE EUROPEAN LOTTERIES’ STRATEGIC RENEWAL**

**Romana Girandon**

*Chief Executive Officer, Loterija Slovenije  
President, The European Lotteries*

18

**BRIGHTSTAR’S INNOVATION PLAYBOOK**  
THE FUTURE WON’T WAIT – WHY SHOULD LOTTERY?

**Scott Gunn**

*Chief Operating Officer, North American Lottery, Brightstar Lottery*



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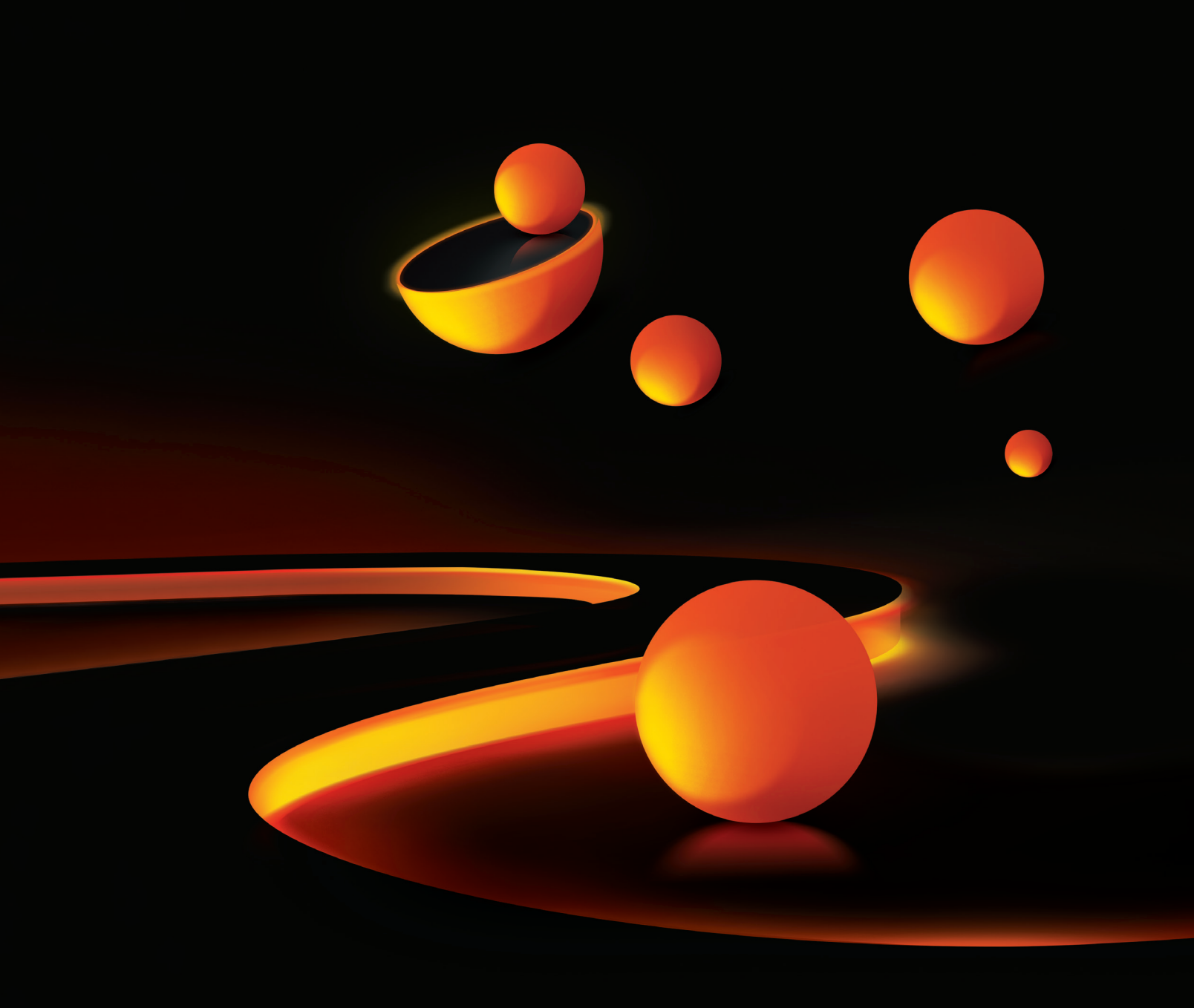
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## FEATURED ARTICLES

20

### THE FUTURE OF MUSL: NEW GAMES, NEW PARTNERS, AND A BIGGER VISION FOR POWERBALL®

**Matt Strawn**, President and CEO of the Iowa Lottery and Chair of the Powerball Group

**David Barden**, President and CEO, New Mexico Lottery

**Mary Harville**, President and CEO, Kentucky Lottery

**Adam Prock**, Director, Minnesota Lottery

**Drew Svitko**, Director, Pennsylvania Lottery; President of MUSL

**Bret Toyne**, Executive Director, MUSL



24

### ILOTTERY 2.0 FROM EXPERIMENT TO INFRASTRUCTURE

**Khalid Jones**, Executive Director, Virginia Lottery

**Shannon DeHaven**, Vice President of Digital Engagement, Pollard Banknote

**Jason Lisiecki**, Executive Vice President Global at IWG

**Stephanie Weyant**, Deputy Executive Director of Marketing & Products, Pennsylvania Lottery

**Andrea Williams**, Vice President of Marketing, Intralot Inc.

**Tina Wolf**, Vice President of Business Development, Aristocrat Interactive



## DEPARTMENTS

8

### FROM THE PUBLISHER

*Paul Jason*

48

### SCENES FROM PGRI LOTTERY EXPO NASHVILLE:

Photo Collage

26

### HOW PLAYER BEHAVIOR, LIFESTYLE SHIFTS, UTILITY-DRIVEN EXPERIENCES, AND OMNICHANNEL DESIGN ARE RESHAPING LOTTERY MODERNIZATION

Aristocrat Interactive

28

### WOMEN, WAGERING, AND THE POST-PANDEMIC SHIFT\*

**Simon Jaworski**, Chief Executive Officer, Lotto Research

30

### 2026 HOLIDAY PLANNING DELIVER MOMENTS OF MERRY WITH NEW INSPIRATIONS AND INNOVATIONS

Scientific Games

34

### INSIGHTS TO IMPACT: THE MAKING OF SUCCESSFUL INSTANT GAMES

Brightstar Lottery

36

### THE NEW FOUNDATION FOR DIGITAL LOTTERY ENGAGEMENT

Pollard Banknote

38

### RETHINKING LOTTERY ENGAGEMENT AND LOYALTY FOR POWERBALL

How Players Are Pushing for a New Paradigm **Splashdot**

43

### INTRODUCING THE PGRI AI LAB THINKING, AMPLIFIED

44

### CONTENT IS QUEEN: CROWNING THE ART OF STORYTELLING

EL/WLA Marketing Seminar, Barcelona

50

### PROFILES OF THE LEADERS OF THE LOTTERY INDUSTRY

57

### PULSE OF THE INDUSTRY: SYNOPSIS OF RECENT GAMING INDUSTRY NEWS

## Visit Our Family Of Websites



**PublicGaming.com**

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## From the Publisher

Team Lottery is navigating a moment of quiet but profound disruption. The games-of-chance marketplace is expanding rapidly, shaped by digital innovation, an explosion of new gaming options, evolving consumer expectations, and regulatory developments that simultaneously create opportunity and uncertainty. Faced with faster, more immersive, more lucrative games — and more economically aggressive competitors — the first impulse may be to respond in kind, offering higher prize-payouts, faster play, and more stimulating experiences in pursuit of competitive parity. Yet this moment raises a deeper strategic question: **Does long-term success depend on becoming more like commercial gaming, or on more confidently embracing the qualities that have always made lottery different?**

As lottery emerges from a monopoly era into a marketplace defined by consumer choice, operators are re-examining how the lottery experience should evolve to engage digital-native players while preserving the trust, accessibility, moderation, and social acceptance that remain lottery's greatest strengths. The challenge ahead is not simply adaptation but clarity — modernizing the player journey and retail experience in ways that ensure lottery remains unmistakably lottery in a rapidly changing world.

Which brings us to our conference theme (Smart-Tech Ft. Lauderdale, March 10–12): **What does it mean to be a “Lottery” in 2026 and beyond?** Welcome to everyone joining us; with well over 250 attendees, this marks the highest participation ever for a PGRI conference. As always, we video-record presentations and panel discussions and make them available at PGRItalks.com. Executive summaries are published in this magazine, on PublicGaming.com, or both, extending the conversation well

beyond the event itself. This issue highlights sessions focused on iLottery as well as current and future initiatives of the Multi-State Lottery Association (MUSL).

The theme of defining lottery's future was explored further last month at the EL/WLA Marketing Seminar in Barcelona. Lottery is far more than gambling; it is an experience rooted in dreams, emotions, and aspirations. Its value proposition cannot be fully measured by prize-payout percentages or game mechanics alone. Connecting with players at that deeper level requires telling a rich and authentic story — the story of lottery and what it represents for players, beneficiaries, and society. My thanks to Teams EL and WLA for a timely and outstanding conference, and to EL President **Romana Girandon** for a thoughtful interview that examines how lottery's societal role can be translated into actionable strategy.

A conversation with NASPL President **Brian Rockey** at last year's conference evolved into the interview 'This Isn't Your Father's Oldsmobile', continuing this exploration of how lottery can preserve its identity and core values while evolving to compete for the attention and participation of today's consumer.

Brightstar Lottery is likewise helping shape the industry's next chapter. **Scott Gunn**, appointed last year to lead North American Lottery operations, shares an expansive vision in *The Future Won't Wait — Why Should Lottery?* In this interview, Scott outlines strategies and actions positioning lotteries for what is becoming one of the brightest eras in their history.

**My sincere thanks to our editorial contributors — Brightstar Lottery, Scientific Games, Aristocrat Interactive, Pollard Banknote, Splashdot, and**

**LottoResearch' Simon Jaworski** — whose insights continue to enrich the dialogue across our industry.

This issue also introduces **PGRI's AI Lab. Thinking, Amplified.** I regularly engage with AI large language models as thinking partners — exploring emerging trends, testing ideas, and examining how the industry may evolve in the years ahead. We are now sharing selected insights from those conversations as articles developed through human judgment and AI-assisted exploration. Excerpts appear here, with the full articles available at PublicGaming.com.

Looking ahead, the industry calendar remains full. Upcoming events include **EL Industry Days** in Marrakech (June 7–10), the **NASPL Professional Development Seminar** in Seattle (July 27–30), the **NASPL Annual Conference & Trade Show** in Orlando (Sept. 21–24), **PGRI Lottery Expo Nashville** (Oct. 20–22), and the **World Lottery Summit** in Sydney (Nov. 9–12). Visit [european-lotteries.org](http://european-lotteries.org), [naspl.org](http://naspl.org), and [PublicGaming.com](http://PublicGaming.com) for additional information about these conferences and our ongoing services.

Paul Jason, Publisher  
Public Gaming International Magazine



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# “This Isn’t Your Father’s Oldsmobile”

Why the Competitive Moment Feels Different, and Why Lottery Must Think and Act More Like a Modern Consumer Brand in a Competitive Market.

**Brian Rockey**

Director, Nebraska Lottery and President of the North American Association of State and Provincial Lotteries (NASPL)



**Paul Jason:** How has the year been going for NASPL, and for you personally as president?

**Brian Rockey:** There is no shortage of exciting work going on at NASPL; retail modernization, RFP best practices, responsible gaming, mentorship—you name it. I’m excited to add to that list raising awareness of the impact of our industry.

In a setting like a conference or a panel discussion or an interview like this, we need to stay mindful of the reach our words can have. The lottery industry does operate in the public policy arena. We’re public enterprises, stewards of the public trust. So when we communicate internally, externally, on stage, in press, it helps to be thoughtful and on-point.

That same principle applies to how we present the lottery story more broadly. It isn’t enough to “be right.” We have to be specific, intentional, and consistent, because audiences are hearing us through filters: legislative filters, media filters, competitor narratives, and their own assumptions about what lottery is. We need to be clear about our “why.”

**You’ve said one of your priorities is “getting outside our industry.” Why is that so important right now?**

**B. Rockey:** We do ourselves no favors by thinking we are so different, so unique that there’s not much we can learn from others.

Of course, lotteries are different, even unique in many ways. Unlike commercial market-driven enterprises, the lottery belongs to the public, and exists to serve society and good causes. That changes the nature of our mission, and it changes the story we have to tell. Even so, we are still a business like any other in the sense that we have customers, products, distribution, competition, and the need to innovate and evolve. I think we should focus on those commonalities as that is where we will find inspiration for insights and learnings.

First, let’s integrate our unique role of generating value for the common good right into our story as consistently as possible. If a soft drink company says, “Listen to our story,” it

may be an interesting brand story, but it’s still fundamentally about private market competition and in the service of private shareholders. When a lottery says, “Here’s who we are and what we do,” it’s about creating meaningful beneficiary impact that serves the public instead of individual stockholders. We support programs that touch people’s lives. We operate within a regulatory framework designed to protect players and public trust. We contribute to state finances in ways that benefit taxpayers, communities, and public services.

Ours is a story worth telling, precisely because it extends beyond great products, service, and operational excellence. But when it comes to carving out a role in a hotly contested consumer market, we are competing for market share, for consumer mind-share and engagement, for retail space, media attention, and to increase sales and net earnings, just like our counterparts in the world of private shareholders.

**“Audiences are hearing us through filters: legislative filters, media filters, competitor narratives, and their own assumptions about what lottery is. We need to be clear about our why.”**

It's not only about telling our story. It's also about learning from other sectors. Cross-pollination should run in both directions. We need to be in the rooms where policymakers, public administrators, and other industry leaders gather.

We should promote lottery within a wide range of interest groups. But we also want to learn about them and from them: how they think and operate, what pressures they face, what objectives they prioritize, how their values and methods may differ from ours, what language resonates, where lottery fits in broader public policy or industry conversations, and how to shape our messaging for optimal impact within this wide variety of audience profiles.

We want to increase awareness and legitimacy for lotteries among influential audiences who aren't necessarily immersed in our lottery world every day. And we want to expose ourselves to the fresh ideas, frameworks, and best practices from other industry sectors that can sharpen how we operate and communicate.

We also want to correct the misconception that lottery is a niche category that only matters inside state government. In reality, lotteries are major public enterprises with a broad network of stakeholders: retailers, beneficiaries, regulators, legislators, public administrators, vendors, and of course players. If we don't tell that story, someone else will tell it for us in a tone we don't care for, or worse they'll ignore us.

**Do you think the competitive environment is truly different now than it was in years past? Or does everyone always think that, and now isn't that much different?**

**B. Rocky:** Are the challenges today meaningfully different than the challenges lotteries faced in the past? Short answer: yes, in important ways. Not because lotteries didn't have competition before. We have always had competition. But the environment has changed in how fast competition moves, especially in response to regulatory changes.

Additionally, modern technologies and communications push everything to the tipping point of mass-market adoption faster than ever. That, and the ability and willingness of the modern consumer to change behavior in response to new options, leaves little time to regroup and catch up. The lottery sector has always been justifiably conservative because the cost of mistakes is so high. But the "fast-follower" approach, waiting to see how a new idea, a new game, an innovation, or a marketing and promotional initiative works for others before we jump in, doesn't serve us well going forward.

Technology is part of it. The delivery mechanisms for entertainment have exploded: mobile devices, streaming platforms, on-demand everything, app ecosystems, machine-based sales, digital wallets, frictionless transactions. It's similar to the evolution of media. Forty years ago, the idea of 24-hour news was mind-blowing. Before that, the nightly news was a half-hour segment and then it was on to the Johnny Carson show.

But once you had continuous channels, more content rushed in, audience expectations changed, and all that caused more media players to enter the space. More

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“product” options created more competition in this nascent space. The massive news industry that exists today went from 0 to 60 in like ten years. So it may be misguided to assume that can’t happen in the games-of-chance industry.

Today, it’s the mechanisms of capturing attention and engagement that matter as much as the content itself. The mechanisms that enable instant and always-on access, hyper-targeting and personalization, and digital relationship-building are changing the competitive landscape.

Another part is geography and convenience. Years ago, certain entertainment choices required commitment: you got on a plane to go to Las Vegas; you traveled to a casino destination. Today, most people are within an easy drive from a casino. Or you don’t drive at all; you simply turn to your mobile phone to open an app.

That incredible convenience collapses barriers between categories, minimizing friction that used to impede players from migrating across game categories and channels of distribution. That can blur brand loyalty across consumer-facing industries.

Gambling has been de-stigmatized. Now, casino gambling and sports betting are a mainstream entertainment commodity. That shift doesn’t just create new customers for new operators; it changes the baseline of consumer expectations for all of us.

Lotteries are revisiting some of the old assumptions. Like “some people are lottery people and don’t go to casinos or bet on sports and everyone pretty much stays in their lanes” may be less true than it once was. As lanes get blurrier, the rate of change gets faster through social channels, media, and technology platforms.

So yes, the competitive landscape is different now. It just means we need to be realistic about the threats to our bond with the largest customer base in the games-of-chance industry. We will need to be bolder and more strategic in defending our business against these mounting competitive threats.

Every brand, every business, every consumer-facing enterprise lives or dies on remaining relevant to the lives and preferences of its customers. The lottery has a strong foundation because our relevance is real and visible, and our product has enduring appeal. Beneficiaries are all around us; retailers

## “We also know that history isn’t destiny. Relevance has to be communicated in ways that land with the modern audience and next generation of players.”

and players are all around us; our impact is measurable and public.

But we also know that history isn’t destiny. Relevance has to be refreshed to be maintained. And it has to be communicated in ways that land with the modern audience and next generation of players.

We should also recognize that our competitors are highly capable. Sports betting operators, digital gaming platforms, and new forms of gray-market competition are extremely sophisticated in player acquisition, data science, personalization and nurturing a digital relationship, and delivering a satisfying user experience. We need to act now to avoid losing players at the margins and raise our own standards of player acquisition and retention.

That’s why the “Oldsmobile” analogy matters to me. The point of that campaign wasn’t that the company stopped making cars. The point was perception: this isn’t the product you assume it is based on outmoded impressions. It’s fresh. It’s current. It fits your identity and how you want to be perceived now. That is the challenge for lotteries, especially with younger audiences.

### **When you look at lottery’s competitors in the games-of-chance sector, what are they doing especially well, and what could lotteries learn from them?**

**B. Rocky:** Notice how other gaming and entertainment businesses diversified their value proposition. The modern casino is an experience beyond gaming that includes shows, restaurants, architecture, destination travel, luxury, climate, nightlife, “exotic fun.” You can walk into a casino and be entertained and feel the energy even if you never gamble.

Sports evolved similarly. The modern NFL game experience is not what it was thirty years ago, or even ten years ago. Stadiums are multi-billion-dollar entertainment complexes because the product is not merely the game. It’s the event, the identity,

the culture. And sports betting, for better or worse, has added another big layer of engagement. It changed fandom by adding stakes, micro-moments, prop bets, social gaming and a feeling of participation with the in-crowd.

The lesson isn’t “lotteries should copy casinos” or “lotteries should copy sports betting.” The lesson is that consumers increasingly buy experiences and identity, not merely transactions or even the chance to win a life-changing event. They buy a feeling. They buy a story. They buy membership and the sense of belonging and participating in a community of like-minded enthusiasts.

That’s true in everyday consumer categories, too. Soft drink marketers don’t just sell sugar water. They sell symbolism and emotion. Coffee companies don’t sell caffeine; they sell ritual: “five minutes of me time,” an escape, a vibe. Fast food brands create scarcity moments and cultural buzz around products that everyone knows are essentially the same category.

None of that happens by accident. It’s research, strategy, messaging, and the vision to think bigger than the literal product you’re selling.

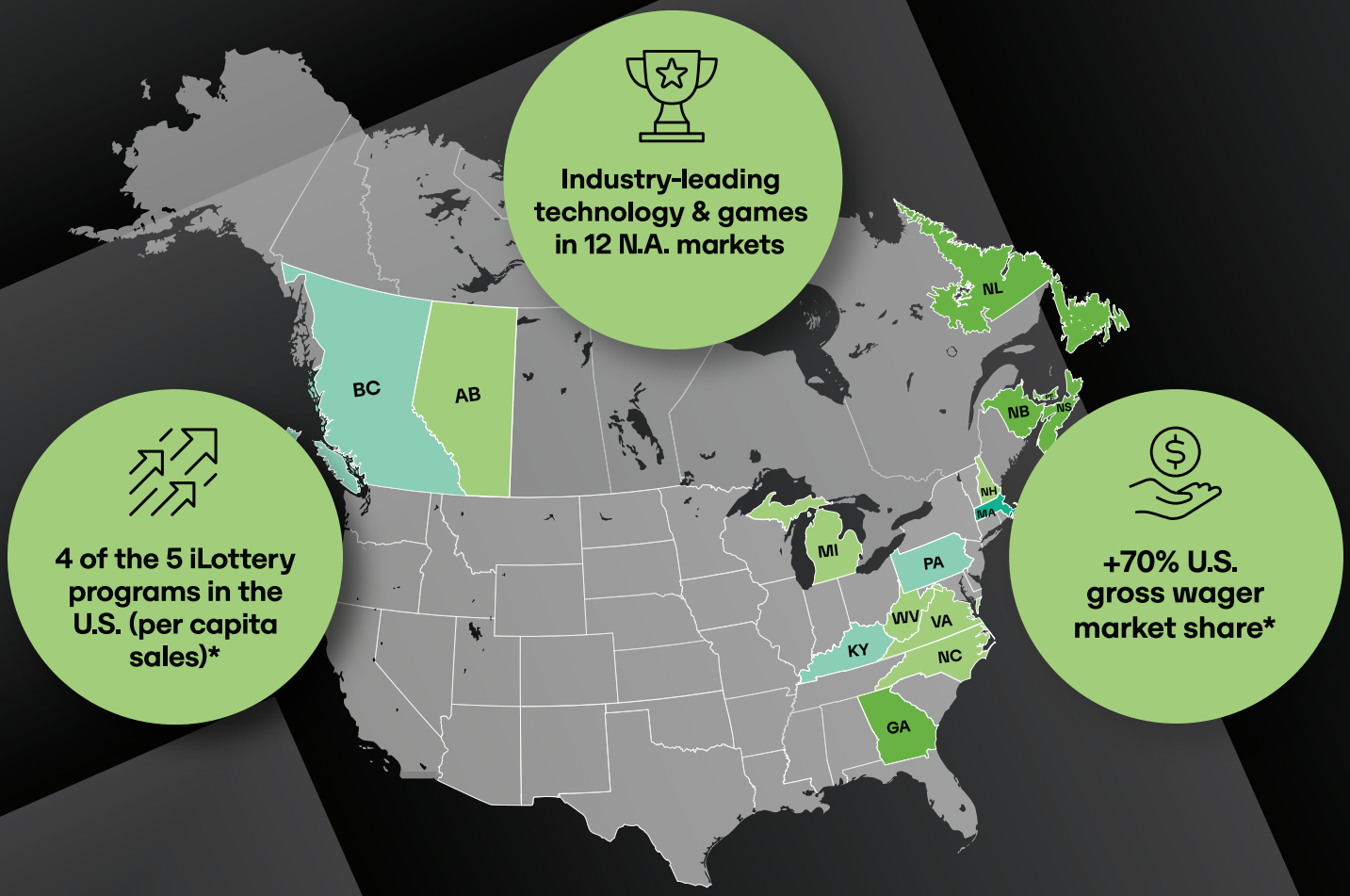
Lotteries have a major advantage here: we have a decades-old relationship with our customers. We know our players in ways that most competitors don’t. Our retail network is a formidable competitive advantage. Lottery websites have an extraordinary level of visibility and engagement. Our loyalty programs and responsible gaming practices set us apart as well. And we have the most unique and proprietary “why.” We exist to create beneficiary impact. Our very reason for being is to return material value to the public. That could be the foundation of how we think about modernizing lottery: focusing as much on brand meaning and story as on product.

There’s always a balancing act between customer acquisition and customer retention:

*Continued on page 39*

## INNOVATION BUILT FOR GROWTH

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■ Aristocrat iLottery platform & content customers  
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\*Source: U.S. State Lotteries & Eilers & Krejcik Gaming, LLC

\*\*Source: Gross sales per capita for both retail and iLottery is from reported data in La Fleur's FY21-25 Sales Reports. iLottery is estimated based on average game payouts.

# From Advocacy to Action: The European Lotteries' Strategic Renewal

**Romana Girandon**

Chief Executive Officer, Loterija Slovenije  
President, The European Lotteries



THE EUROPEAN  
LOTTERIES  
FOR THE BENEFIT OF SOCIETY



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**Paul Jason:** During your first term, you placed great emphasis on the positive societal impact of lotteries and the importance for lotteries to demonstrate this. This remains a key focus under your leadership. How can The European Lotteries go even further to assist its members in emphasizing that lotteries are different compared to other operators and other forms of gambling?

**Romana Girandon:** In today's fast-paced world, where attention spans are short and nuances are often lost, lotteries cannot assume their societal role is understood. The difference must be clearly demonstrated, and integrated into their brand messaging. Lotteries create value through lower-risk products, high responsibility standards and by reinvesting revenues into good causes. Our task is to show this clearly and consistently. A recent communication by EL during the Winter Olympics, underscoring the essential role national lotteries play in sustaining the Olympic movement, is one such example.

That is why The European Lotteries, together with the World Lottery Association, will invest more in shared data and transparency, giving our members solid evidence when engaging with regulators, policymakers and the public. This supports advocacy at European level while also strengthening national discussions.

But facts and data alone are not enough. We must also tell our story better and show what these figures mean in real life. Lotteries have helped build fairer, more just, and more caring societies, and have become part of everyday life across Europe, woven into our culture, leisure and shared moments of communities and families.

**The marketing seminar in Barcelona focused on exactly this – the importance of storytelling and why lotteries need to invest in it. You also commented on the initiatives you have undertaken in Slovenia to inform stakeholders and the wider public about the social contributions of the lotteries. How can these experiences help European lotteries connect more effectively with stakeholders across Europe?**

**R. Girandon:** I shared this story because it was an important lesson for me personally. Lotteries have such a rich history, yet much of it remains surprisingly unknown. In Slovenia, no institution had ever systematically recorded or researched this history, not even the lottery itself. So Loterija Slovenije decided to fund this research as a gift to the community for our organization's 50th anniversary.

We found clear evidence that the lottery in our region has existed to support the common good for at least 300 years. Whenever society faced a major challenge, the lottery helped address it. Today you can

actually read Slovenian history through lottery tickets: wars, social crises, earthquakes, community and religious needs, patriotic initiatives, and more. This led to an exhibition with a clear message: without the lottery, our towns, streets and lives would not look the way they do today.

Sharing these stories publicly changed the tone of many of our relationships, from beneficiaries and employees to regulators, shareholders, players and the wider public. One key stakeholder even checked our claims about the Ljubljana Cathedral and was amazed to discover that our connection goes far beyond the funds we provide for good causes today.

Taken together, stories like these across Europe show that lotteries are much more than just games. They are an important social mechanism that has helped co-create European culture as a long-term societal partner. That is why we should seek broader recognition of this legacy - why not even be recognized by UNESCO.

**Positive societal impact is not just about returning money to society, but also about minimizing harm. Regulators and governments are increasingly sensitive to this, especially in markets with multiple gambling providers competing with each other. Governments impose additional requirements not only on high-risk gambling, but also on lotteries, some of which impair**





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**our ability to connect with the consumer while having little impact of protecting the consumer. What initiatives can lotteries expect from EL to assist them in their efforts to inform, perhaps even influence, regulators and legislators on issues that affect lotteries?**

**R. Girandon:** Minimizing harm is a core responsibility of lotteries, but regulation must be proportionate to risk. Treating low-risk lottery products the same as high-risk gambling is counterproductive, weakening player trust and making safer play harder to achieve. The effect of misguided regulations like this is to channel players away from low-risk lottery over to higher-risk gaming options.

That is why EL is leading responsible gaming in Europe with a risk- and evidence-based approach, aiming to set a practical European gold standard - clear, effective, comprehensive, pragmatic, and future-proof.

As regulators become more demanding and technology opens new possibilities, EL is updating its responsible gaming standards and certification framework, with an independent expert panel developing the content.

The revised standards will help members continuously improve while respecting the different regulatory environments in which they operate in. At the same time, the certification process is being modernized with a shared digital platform and a central independent assessment panel, reducing costs for members and ensuring high quality. The draft Standards are being shared with EL members for input, with the updated framework then set for final approval by the EL General Assembly in June.

In short, members can expect EL to maintain a strong presence at European level while also providing some practical KPIs, benchmarks and tools to strengthen both EL's advocacy and members' dialogue with national regulators.

**Expectations regarding responsible gaming are high for lotteries. At the same time, competition is increasing, which can be detrimental to citizens. This is certainly the case when it comes to illegal providers of lottery games and games of chance who do not follow the rules, while lotteries strictly adhere to them. What can EL do to help lotteries combat the proliferation of illegal operators?**

**R. Girandon:** Illegal providers of games of chance are one of the biggest challenges. They don't pay taxes, don't contribute to good causes, and operate irresponsibly,

putting players at risk. Still, they often gain visibility on major digital platforms, which helps them generate significant revenue.

In addition to monitoring and interpreting legal cases and ensuring a coordinated sector response at European level, EL strengthens its support to members by systematically collecting and sharing best practices that have proven effective against illegal operators. We aim to make these practices available to EL members, European institutions and national regulators, so that effective tools can be applied more widely.

**Some regulators in Europe are calling for a joint approach. They advocate harmonization and common standards in the area of responsible gaming, because they consider themselves unable to combat this phenomenon of illegal providers of games of chance.**

**R. Girandon:** Recent experience shows why caution is needed. Last year, an initiative within the European standardisation framework to introduce EU-wide responsible gambling standards was stopped after EL, together with 34 member lotteries, demonstrated it could have undesirable societal consequences. This highlights the importance of subsidiarity and evidence-based input.

Member States already have powerful tools at their disposal, such as payment blocking, website blocking and advertising restrictions. It is EL's role to support members, and where relevant, their regulators, by sharing best practices and helping to find ways to implement these tools as effectively as possible.

The EU Digital Services Act also offers an important opportunity, as it strengthens mechanisms to remove illegal content online. EL is exploring pilot projects with interested members to encourage major platforms to act more decisively against illegal gambling content.

**You mentioned the EU Digital Services Act. More legislation is being created in Europe that is not intended to regulate the gambling sector as such, but to regulate general aspects of consumer protection or to regulate certain phenomena in terms of digital crime. Don't these initiatives have the effect of moving towards a harmonized EU approach to gambling as well?**

**R. Girandon:** Player protection is not primarily a question of harmonized rules, but of controlling the supply of gambling activities - what fundamentally distinguishes gambling from other economic services. Moral, cultural and social attitudes to

gambling differ significantly across Europe, so regulation must remain the responsibility of each Member State, which decides how to protect its citizens and how far gambling in their environment should be offered. This principle needs to be clearly recognised at EU level.

At the same time, EL advocates for explicit recognition of the unique role of lotteries in funding civil society. As Count Herman Van Rompuy, President Emeritus of the European Council and former Prime Minister of Belgium, highlighted at the 2025 EL Congress in Bern, the long-standing contributions of lotteries to good causes deserve a place in European policy discussions. Koen Lenaerts, President of the European Court of Justice, at a Colloquium in Brussels in 2024, also emphasized that lotteries are part of the EU's societal fabric, playing a formidable role on both sides: in how they engage with players, and in how proceeds are used to support charities and societal initiatives.

EL will continue to actively engage with European institutions and relevant stakeholders to ensure this perspective is properly recognised.

**Let's circle back to the beginning of this interview. EL is very ambitious, but how can these ambitious goals be achieved?**

**R. Girandon:** By uniting to be a singularly powerful voice, EL can be more than just the sum of its members. From my first experiences with EL, I've always seen it as a large and diverse community whose collective expertise, legacy, and reach are our real strength. While this diversity can be challenging, it sharpens our positions and constantly brings us back to our shared societal purpose. Our task is to use this diversity to clarify our commonalities and drive initiatives that matter both for our members and for society as a whole.

It is also essential that all EL members – regular, observer and associate – feel that the Association's work is relevant to their strategic and day-to-day activity. With this in mind, we recently adopted a new *Strategic Outline* with a concrete action plan for the period 2025-2027. It builds on our long-term priorities and clearly defines our focus areas. Maintaining a lean operational structure allows us to act efficiently. And with a renewed, motivated EL team and a new Secretary General, we also have the right people in place to make it happen.

*In short, balancing ambition with focus, and turning strategy into daily action, is what will make EL vision a reality. ■*





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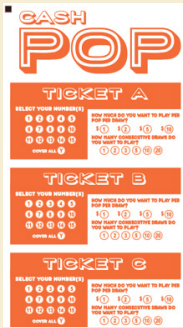
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# Brightstar's Innovation Playbook

The future won't wait – why should lottery?

**Scott Gunn**

Chief Operating Officer,  
North American Lottery, Brightstar Lottery



**PGRI Introduction:** As Brightstar Lottery's Chief Operating Officer North America Lottery, Scott Gunn is responsible for sales and operations throughout the U.S. and Canada, including Global Instant Ticket Services. He brings more than two decades of industry experience to the role to ensure that Brightstar's products, technology, and services support each customer's business objectives.

While many know Scott for his leadership in public affairs and government relations since 2009, he credits an earlier period with the company — 1999 to 2009—as the most formative. During that decade, Scott held operational and general manager roles that shaped his approach to lottery leadership, customer partnership, and long-term success. His experience as a district sales manager in

Texas, general manager in California, and later as a Regional Vice



President gave him an unusually comprehensive view of lottery operations and the importance of aligning organizational capabilities with customer needs.

Our discussion with Scott explores how he is applying those insights to Brightstar's broader goals, preparing lottery customers for an era of digital acceleration, evolving player expectations, and heightened responsibility to protect public trust – while balancing innovation with the principles of integrity, transparency, and partnership that keep lotteries strong.

**Paul Jason: Brightstar has returned to its roots as a 100-percent lottery-focused company. How does that shift benefit your customers?**

**Scott Gunn:** The impact is profound. As a pure-play lottery company, every Brightstar resource—our people, capital, technology, and leadership attention—is dedicated exclusively to supporting lottery clients. Our whole corporate culture is fully immersed in lottery for the benefit of our customers.

Over the past decade, lottery remained critically important within the organization, even as it existed alongside

other game categories. Those divisions sometimes had divergent objectives and competed for investment and strategic focus at the corporate level. Today, that ambiguity is gone. Every discussion about innovation, technology, staffing, and investment is centered on lottery and the needs of our lottery customers.

Our renewed focus draws on a deep heritage—from GTECH's founding in Providence and decades of pioneering lottery advances, to Lottomatica's experience operating one of the world's largest, most competitive and innovative lotteries. Bringing that collective

experience back into sharp focus is energizing for our teams and highly beneficial for our customers.

Returning to our roots means aligning not just with our customers but with the interests of the government lottery sector, to act boldly with the conviction that what is good for the lottery industry is good for Brightstar. My responsibility is to ensure that we are strategically focused, operationally excellent, and properly staffed so that our customers receive the value, service, and partnership they need to succeed, and have come to expect from us. Everything we do flows from that commitment.



## What exactly is “lottery gaming”? And what is not?

**Q: Some people are wondering if the fast-play, high prize-payout lottery games are starting to resemble casino play-styles. Is there any kind of definition for “lottery gaming”?**

**S. Gunn:** Lotteries and their technology partners such as Brightstar are working hard to retain and build playership in an unprecedented competitive market, one that now includes online casinos, sports betting, online eGaming, and recent entrants to the pipeline such as predictive markets. We want to preserve the core principles, values, and public trust that define what lottery is, and always has been, even as we compete for the attention and engagement of the modern consumer.

Lottery gaming is what each state determines to be the best pathway for that lottery to serve the mission of raising funds for its communities and causes. That definition has proven durable precisely because it allows for evolution. Lottery’s standards of excellence are also higher than other game categories when it comes to responsible play, security, integrity, transparency, and player protection. Brightstar’s mission is to support and strengthen everything that differentiates and elevates Brand Lottery and its state lottery operators. That is core to who we are.

**Q: But now some state lotteries operate and/or regulate casinos and sports betting, categories which nobody thinks of as “lottery gaming.”**

**S. Gunn:** Let’s first unpack this by looking at your question about definitions: In the United States, a lottery is not simply a category of games. Lottery is a public institution, a public trust authorized by the state to raise funds for good causes. According to Federal law, lotteries operate under state authority, with the state determining which games may be offered, how they are sold, and how proceeds are distributed. That is the foundational framework. States decide what lottery gaming is and is not. Full stop.

The point is that when the concept of “lottery” originated, it was in a time and place when there was no internet, casinos weren’t available everywhere you looked, and TV advertising wasn’t awash in sports betting advertising. The first lotteries were raffles, similar to today’s draw-based games but certainly not with millions of consumers playing to win a billion-dollar jackpot. Move into instant scratch-off games and the departure from the original concept of lottery becomes even more vivid. Likewise, it would certainly appear that the evolution of lottery games going forward may well include new styles of play and more stimulating games with higher prize-payouts.

In fact, I think the phenomenal success story of state lotteries is based on their ability to effectively innovate and update their products to appeal to the consumer, and to change and modernize along with the changing play-styles and preferences of the players. The willingness to boldly innovate is essential for state lottery operators to engage their consumers in an increasingly complex and competitive environment. Brightstar’s focus is on the singular goal of helping lotteries succeed and prosper for the benefit of the causes that lotteries support.

**Q: And creating compelling, entertaining games remains part of that mission.**

**S. Gunn:** Absolutely—but the mission extends far beyond individual games. We think in terms of the entire player journey. That journey begins with awareness, hopefully moves into interest and engagement, and continues with the player’s response after the experience. It includes whether they feel entertained, respected, and inclined to play again.

That journey is supported by an ecosystem that we continue to invest in, innovate within, and evolve for modern players: retail and digital channels, technology platforms, payment systems, data infrastructure, and operational processes. All of it must be integrated and work seamlessly. At the same time, we work closely with our customers to

ensure that innovation aligns not only with the legal framework, but with the political culture, regulatory environment, and stakeholder expectations within each jurisdiction.

## Adapting to a rapidly changing consumer market

**Q: Brightstar collaborates with leading market-research companies worldwide, and you invest heavily in your own consumer research. How is that research shaping the way you and your customers think about their players?**

**S. Gunn:** You’re right — we do put a lot into research. Just on the proprietary side, Brightstar completed 317 studies last year covering more than 800 markets, with input from more than 345,000 players and retailers. We collaborate with many of the most important market-research partners worldwide. We dig into consumer patterns that matter most to lotteries, and we share not only the insights but ideas about how lotteries can act on them to strengthen their strategies, advance digital innovation, and offer next-generation solutions.

In the past few months alone, we released a trend report for 2026 exploring the digital-first mindset, as well as a set of white papers to help lotteries understand how consumers think about payments today – and what to expect next.

When it comes to players, we and the industry know the fundamentals: players want entertaining content, convenience, and intuitive experiences across channels. What has advanced is the depth of insight now available through new methodologies, data analytics, and AI.

In the past, research focused primarily on which games players liked. Today, we deconstruct games into individual attributes—payout structures, volatility, themes, mechanics, session length, everything broken down into granular detail—and analyze how those attributes resonate with different player segments.

This allows us to answer much more sophisticated questions. Why does a

*Continued on page 40*



Left to right: Adam Prock, Mary Harville, David Barden, Bret Toyne, Drew Svitko, Matt Strawn

## The Future of MUSL: New Games, New Partners, and a Bigger Vision for Powerball®

**B**y the time the post-lunch crowd settled back into their seats, **Matt Strawn** was already framing the moment as something more consequential than an ordinary panel. The Multi-State Lottery Association and the Powerball Group weren't just managing a successful product; they are stewards of a global property, one of the most recognized lottery brands anywhere in the world.

"We have the opportunity to contemplate some of these initiatives today only because of the work of so many who went before us," Strawn told the room. "Powerball is the brand that represents global lottery. We are just temporary custodians and trustees of that brand."

The organizing principle behind the entire discussion: how do you protect what Powerball stands for while pushing it forward with more ambition than in any period in MUSL's history?

**Matt Strawn**, President and CEO of the Iowa Lottery and Chair of the Powerball Group

Panelists:

**David Barden**, President and CEO, New Mexico Lottery

**Mary Harville**, President and CEO, Kentucky Lottery

**Drew Svitko**, Director, Pennsylvania Lottery; President of MUSL

**Bret Toyne**, Executive Director, MUSL

**Adam Prock**, Director, Minnesota Lottery

Together, they described a strategic plan built on a blunt premise that has become a mantra inside MUSL meetings: "Legacy brands don't evolve by doing what's always worked."

As **Drew Svitko** put it, the organization has reached an inflection point, created by Powerball's scale, the impetus to generate more funds for good causes, and a consumer market that demands more relevance, more engagement, and more disciplined innovation. "It's going to take aggressive, progressive, active management to fulfil the promise of this humongous gaming brand."

What follows is a look at the initiatives already in flight; new draw games, new brand partnerships, a national Powerball mobile app, and a more expansive vision of what MUSL can become by 2030.

### A Strategic Pivot: From One Big Game to a Portfolio

MUSL's leaders were candid about a practical reality: Powerball can be the strongest brand in draw games and still experience the familiar peaks and valleys that come with jackpot-driven behavior. The strategic solution is to build a portfolio with new national games that diversify the draw category and deliver steadier performance.

"One of the things the MUSL group is

looking at is building a portfolio of games, not just being dependent on one game," said David Barden. "When we do have those jackpot peaks and valleys, the other games in the portfolio pick up where Powerball and Mega Millions encounter their inevitable valleys."

That portfolio strategy is already taking shape through a major consolidation and refresh: Millionaire for Life.

### Millionaire for Life: A New National Draw Game at a Higher Price Point

**Bret Toyne** described Millionaire for Life as the product of a clear opportunity. Two popular "for life" game families, Lucky for Life and Cash for Life, had proven the concept. The next step was to merge and modernize the offering with a bigger top prize and a simpler national proposition. "There was an opportunity to merge those two games into something that may be more attractive to consumers," Toyne said. "So now we have a game—Millionaire for Life, with a plan to launch February 22, 2026."

The headline prize is designed to compete on aspiration, not just odds. "Top prize is a million dollars a year for life," Toyne said. "Second prize is \$100,000 a year for life, which is still enough to get your attention." And the product introduces a \$5 price point—an intentional appeal to value perception over price sensitivity. It will be



launched in over 30 jurisdictions, reflecting the widespread confidence in success.

For lotteries that already offer “for life” games, Millionaire for Life is positioned as a needed refresh. **Mary Harville**, who has watched multiple “for life” cycles in Kentucky, emphasized how these products need periodic reinvention to stay compelling. “In my 21 years, we’ve always had a for-life game,” Harville said. “But after a while, it needs a refresh. This will be our fourth for-life game. And what a fantastic refresh, unlike any other really, with the ability to offer this top prize.”

Harville also addressed the psychological question MUSL leaders have been testing: will younger consumers accept a \$5 draw ticket? “The value proposition is there” she said. “And the younger players, the folks using GrubHub and Uber Eats and going to Starbucks, they don’t find that \$5 price point to be a turnoff.”

Barden framed it through the lens of profit and the durability of returns. “These are the games that bring your highest return, so they should be our strength,” he said.

“We all love scratchers, but the net return on scratchers is not what you’re seeing on Powerball and these for-life games.”

If Millionaire for Life is the portfolio strategy’s first big expression, Powerball X’s & O’s is its most ambitious bet on brand partnership and cultural relevance.

### **Powerball X’s & O’s: The NFL Partnership and a Different Kind of Draw Experience**

Toyne described the progress as substantial and the timeline as aggressive. “Timelines are always challenging with multi-jurisdictional games,” he said, “but the product group has made great strides... Logo approved, rules approved, play slip layout approved; so we’re meeting timelines required to hit that late August, early September launch.”

The game design is intentionally different from anything else in MUSL’s stable. “It’s really eight of 32,” Toyne explained. “You choose eight teams of the 32 NFL teams, so that’s different.” And unlike jackpot-

driven behavior, this game is built to run on affinity: fandom, identity, and the pull of the NFL shield. “This won’t be a jackpot-driven game,” Toyne continued. “This will be driven by that affinity with the NFL.”

The prizing strategy is equally deliberate: not merely second chance, but promotional prizing tied to experiences that feel exclusive and culturally meaningful, especially for younger demographics. “It’s not second chance,” Toyne clarified. “It’s promotional prizing. We talked earlier about experiential prizing which reaches some players who might be less interested in traditional formats. Everyone wants cash, but some players are also interested in experiences you can’t buy.”

**Adam Prock**, who has seen the impact of local NFL partnerships in Minnesota, described the NFL deal as a “next level” moment for Powerball’s brand strategy. “Powerball is a huge global legacy brand,” Prock said. “And if we’re going to be successful, we’ve got to find culturally relevant brands to partner with. I don’t know how you get much bigger than the NFL.”

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Prock also framed the partnership as a bridge to “next generation” consumers, an audience the draw category must win if it wants to shape what lottery looks like in 2030. “MUSL has proven with NASCAR and other brand collaborations that we can take experiential prizes and connect with that newer player,” he said. “So we are really excited about it.”

Strawn underscored the scale and the ambition. With states and consumer markets comprising roughly 150 million in population already committed at the time of the panel, he emphasized that the NFL’s own research suggested MUSL could have pushed ticket pricing higher than was ultimately chosen, because the “money can’t buy” element changes the value equation. “We’re not talking just tickets to go see your local team play,” Strawn said. “We’re putting you in a suite at the Super Bowl. We’re putting you at a podium on draft night potentially making a pick for your favorite team.”

Svitko, speaking from the perspective of selling the concept to jurisdictions still on the fence, said “It’s pretty easy to justify on brand power alone,” he said. “Powerball has 85% awareness among adults 35 to 54 and beyond. And the NFL is probably one of the few brands bigger than Powerball.”

But he also emphasized a deeper strategic point: MUSL’s brand research showed players want these partnerships. “Our research highlighted not only the ability for us to reach out to big brands and prove the value of Powerball,” Svitko said, “but also that our players want us to do that.”

That is where Mary Harville became the panel’s most passionate advocate: if you’re a MUSL member, participate. Not because it’s safe, but because success depends on breadth. “Not every lottery is participating,” Harville said. “But you should.” She went on to address the usual objections in a way only a former general counsel could. “I’ve heard, ‘Our state already has a pro team.’ I’ve heard, ‘Our state does not have a pro team.’ I’ve heard, ‘We’ll wait and see how it goes,’” she said. “Folks, this is not multiple choice. The answer is D: none of the above are good reasons not to participate.”

Harville also offered a telling detail about how far MUSL has come in negotiating with world-class brands. The NFL’s initial terms were daunting. “When we started negotiating with the NFL, the fee they were

proposing was much higher than the fee we ultimately agreed to,” she said. “In the beginning, they acted like we were privileged that they were even talking to us.”

What changed? New decision-makers on the NFL side and a clearer recognition on the MUSL side of what Powerball represents. “The NFL brought in new staff,” she said, “and I think he heard us. He saw the value of the Powerball brand, and they did the deal with us. I was amazed at the deal that was ultimately negotiated. Win-Win.”

The take-away: if Powerball is going to keep growing, it must meet consumers where they are, behaviorally, digitally, and emotionally. That is exactly why the next initiative became the panel’s pivot point.

### **The Powerball App: Protecting the Brand, Creating National Scale**

Strawn acknowledged that a national Powerball app had been discussed for years: often budgeted for, often delayed. Now it is imminent, slated to launch in August 2026, alongside the NFL game and its promotional prizing.

“This app has been in the strategic plan every year,” Strawn said. “We’re on the doorstep now to have a Powerball app that not only provides nation-wide access to check Powerball tickets, but enables the functionality for those experiential prizing opportunities in the NFL game.”

The app’s rationale comes down to two ideas: scalability and brand protection. Strawn shared a startling data point: during a major Powerball jackpot run, eight of the top ten downloaded “Powerball apps” were not Powerball apps at all. “They were imposters,” he said.

“I was nervous about a Powerball app at first,” Svitko said. “Being an iLottery state, we have an app, and we want that digital relationship with our players. But we voted to move forward because we know it’s best for the organization as a whole.” Crucially, he emphasized that the app is being designed to integrate and augment rather than compete in-state digital apps and initiatives. “We’re designing it in a way that will interact with the state’s own app,” Svitko said. “The two work well together.”

And the strategic objective is not just ticket checking; it is engagement that drives retail, strengthens the brand’s legitimacy,

and prevents others from monetizing Powerball’s name. “There’s a ton of value in meeting players where they are,” Svitko said, “providing them an app, interacting with them, and then using that relationship to drive them into retail and sell more tickets.”

Adam Prock brought it back to the user experience and the reputational risk of letting third parties own the consumer’s first impression. “We’ve got to make real investments in our players’ experience,” Prock said. “If those players are going to one of those imposter websites, they are not likely to have a great experience, and that reflects badly on our brand. We’ve got an opportunity to control and grow our digital footprint, presence, and mind-share, so that’s what we are doing.”

Strawn offered an even larger view of consumer behavior: loyalty isn’t to channel; it’s to experience. “During the jackpot run that concluded with that September 6 drawing, Powerball.com had 442.4 million engagements,” Strawn said. “They weren’t looking for or coming to the Iowa Lottery website, or the Minnesota Lottery website. They were looking for Powerball.”

Toyne described the app’s launch functionality as familiar but necessary, and its next-phase value as foundational for the NFL partnership. “It’s going to have that functionality at launch for players to check their ticket for winning numbers,” Toyne said. “The bigger lift for X’s & O’s will be with promotional prizing: you check your ticket, you get points, you allocate your points in prize buckets, or reallocate if you change your mind.”

He framed the app as a prerequisite for Powerball to act like a true national brand. “My board talks about Powerball being a national brand,” Toyne said. “I don’t think you could find a national brand that doesn’t have its own app.”

### **Partnerships as a Pipeline: NASCAR Renewals, New Targets, New Audiences**

With the app as infrastructure, MUSL leaders described brand partnerships as the content engine—something that can diversify the draw category while also invigorating relevance for different demographics.



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Left to right: Khalid Jones Shannon DeHaven, Tina Wolf, Andrea Williams, Jason Lisiecki, Stephanie Weyant

# iLottery 2.0 (Part 1): From Experiment to Infrastructure

The lottery industry has crossed an invisible but decisive threshold. Even in the U.S., iLottery is no longer an experiment, a pilot, or a speculative future-state. It is infrastructure.

That was the clear, and data-backed, message from the iLottery 2.0 panel, moderated by **Khalid Jones**, Executive Director of the Virginia Lottery, and featuring senior executives from across the lottery ecosystem. The discussion deliberately moved beyond early product life-cycle discussions of the past and toward a more mature examination of what comes next: scale, integration, collaboration, and long-term relevance.

“iLottery isn’t new anymore,” Jones told the audience early in the session. “We all know what iLottery is, and why it has become such a vital part of our portfolio. The question now is how we evolve it, how we evolve our business models, our strategies and methods, and ourselves.”

To ground the conversation, Jones began with a historical and demographic comparison. In year 2000, Powerball states represented a combined population of roughly 39 million. By 2006, Powerball participation surpassed 100 million. “Today,” Jones noted, “states that offer either eInstants, draw-only online sales, or are moving toward iLottery represent about 100 million people. On a

population basis, iLottery today is where Powerball was in 2006.” In other words, iLottery today occupies a formidable space in the lottery, and even in the broader games-of-chance market-place.

With that framing, Jones posed the central question of the panel: Can lotteries of the future survive without a digital offering?

## Thinking of Digital not as a Channel, but as the essential Consumer Interface

**Shannon DeHaven**, Vice President of Digital Engagement at Pollard Banknote, offered a concise answer. “When we talk about digital, we’re not just talking about iLottery,” DeHaven said. “We’re talking about how consumers interact with your products. So, no. I do not think that lotteries can survive, and will not thrive, if they don’t build out their digital UX, consumer-facing presence, and offerings.”

Several panelists emphasized that the notion of “digital” should not be reduced to online sales. **Tina Wolf**, Vice President of Business Development at Aristocrat Interactive, stressed that digital engagement now defines the brand experience itself. “It’s not just about selling online,” Wolf said. “It’s about how players engage with your brand. In the long term, and probably sooner than later, we’ll see product lifecycle curves start to tail off if we don’t adapt.”

**Andrea Williams**, Vice President of Marketing at Intralot Inc., reinforced that perspective by pointing to familiar consumer behavior. “Think about Starbucks,” Williams said. “The app isn’t a nice-to-have. It’s part of the experience. Digital is no longer optional, even for products that are fundamentally physical. That same mindset applies to lottery. The digital experience has to be thoughtfully integrated into the overall player journey.”

**Jason Lisiecki**, Executive Vice President Global at IWG, added that even lotteries not yet selling online should begin building digital foundations. “Even if you don’t offer iLottery today, having a digital platform is paramount,” Lisiecki said. “It’s where people are, and it’s what enables you to build a player database. The most successful iLottery launches we’ve seen — anywhere in the world — are built on databases developed over years.”

## From Patchwork Adoption to National Momentum

Jones next asked panelists to identify the single most important takeaway for lotteries thinking about iLottery today.

**Stephanie Weyant**, Deputy Executive Director of Marketing & Products for the Pennsylvania Lottery, pointed to geography — and opportunity. “When you look at the map, most iLottery adoption is concentrated on the East



Coast,” Weyant said. “Broader coverage across the U.S. would benefit all of us. A rising tide lifts all ships.”

She argued that states with established iLottery programs stand ready to help those still on the sidelines. “Anything we can do as an industry to learn together and support each other is critically important,” she said.

Lisiecki framed that idea even more simply. “Learn,” he said. “This is one of the few industries where lotteries can openly talk to each other. Vendors are willing to share their extensive global experiences. iLottery is constantly evolving, and the best thing you can do is learn from peers who’ve already walked the path.”

Williams emphasized how much the industry has matured. “This isn’t 2015 anymore,” she said. “We’re no longer debating whether iLottery harms retail. Years of data clearly show it does not cannibalize retail sales. When executed thoughtfully, cross-promotions and an integrated, multi-channel marketing approach actually strengthen retail performance.”

That body of data, Williams added, has become critical in legislative discussions. “When states evaluate iLottery, it comes down to clear communication, research, and evidence,” she said. “Today, we can demonstrate that iLottery is a net positive for lotteries and the communities they serve.”

Wolf framed the issue in mission-driven terms. “We are on a mission,” she said. “And that mission is growing funds for good causes. When I started in this industry, growth came from things like Powerball cross-selling and game tweaks. Going forward, that alone won’t be enough to fuel sustainable growth.”

Wolf noted that players who engage both online and at retail are demonstrably more engaged overall. “It’s no different than Starbucks or Target,” she said. “Omnichannel players are more valuable players.”

DeHaven concluded the segment with a warning about accessibility. “Our products are simply not as accessible as they once were,” she said. “iLottery helps solve that. Consumer behavior is changing daily, and we can’t keep up fast enough. My hope is that the map showing U.S. lotteries with online offerings fills in quickly and that more states move to adopt iLottery.”

## Coexistence, Not Conflict: iLottery and Retail

Jones then turned to one of the most persistent questions surrounding iLottery: ***How to ensure that iLottery complements and augments your retail channel?***

Weyant, representing one of the longest-running U.S. iLottery programs, emphasized that alignment must begin inside the organization. “It starts internally,” she said. “If leadership isn’t aligned, that misalignment shows up externally. In Pennsylvania, we have integrated teams responsible for growing sales across all channels.”

She recalled early concerns among sales staff. “Some people worried about losing their job. That didn’t happen,” Weyant said. “You have to explain the ‘why’ — the strategy — so everyone delivers the same message to retailers.”

Jones asked vendors how they support lotteries in telling that story.

Williams also highlighted the importance of active retailer engagement. “It’s critical that retailers understand this is not a single-channel strategy, but an interconnected ecosystem,” she said. “The objective is growth across the entire portfolio. A more engaged omni-channel player ultimately becomes a stronger retail customer.”

Lisiecki offered a consumer-centric analogy. “Think about your favorite brand,” he told the audience. “Mine’s Titleist. When you get something physical from that brand, it feels good. Retail isn’t going anywhere because it alone provides that tactile, personal, real-world experience that consumers, i.e. people, will always crave.”

He argued that physical tickets remain a powerful differentiator. “There’s something meaningful about holding a ticket, scratching it, feeling that excitement,” Lisiecki said. “That’s why retail and digital complement each other.”

Wolf added that lessons from other industries reinforce the same conclusion. “My favorite brand is Rent the Runway,” she said. “It’s incredibly digital and data-driven, but there’s still a tactile, physical product involved. The key is personalization and engagement, not replacement.”

She urged lotteries to leverage the experience of peers. “You won’t be the first lottery to go online,” Wolf said. “Talk to

others who’ve been through it. From the partner side, we can provide transparent data — including third-party data — to help tell the story.”

DeHaven reframed the issue: “These aren’t iLottery conversations,” she said. “They’re lottery conversations. Different channels. But, there’s one brand. One mission.”

She cautioned that data alone is not enough. “You can give retailers numbers, but you also need a strategy that shows how you’re continuing to support them,” DeHaven said. “When they understand the broader plan, the numbers make sense.”

## iLottery 2.0: A Mature Conversation

If iLottery 1.0 was about permission—legal, cultural, and operational—then iLottery 2.0 is about performance. The panel made clear that the industry has entered a new phase: one defined less by debate over whether iLottery belongs, and more by how effectively it is integrated into the broader lottery enterprise.

As Jones said, “We’re past the introduction. Now it’s about execution.”

For lotteries facing mounting competition, shifting consumer behavior, and increasing pressure on revenue growth, the message from this panel was unambiguous: digital is not the future of lottery — it is the present.

## iLottery 2.0 (Part II): Competition, Coexistence, and the Next Frontier

If the first half of the iLottery 2.0 panel established that digital lottery is no longer optional, the second half confronted a more uncomfortable question: ***What happens when lotteries are no longer the dominant digital gaming option in their own markets?***

Moderator Khalid Jones moved decisively to examine competition from sports betting and iGaming, the economics of digital margins, and how lotteries can position themselves strategically rather than defensively in an increasingly crowded online marketplace.



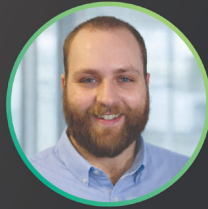
Please go to PGRI news website **PublicGaming.com** to view the rest of this article.



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# How Player Behavior Is Reshaping Lottery Modernization

## How lifestyle shifts, utility-driven experiences, and omnichannel design now define iLottery and retail

Imagine a player scans a barcoded retail lottery ticket through the lottery app. The result: Winner. Instead of driving 30 minutes and spending time at a physical claim center, the player finishes the entire process from the couch—including ID verification, tax paperwork, and secure funds transfer.

A decade ago, this sounded far-fetched. Today it may feel expected by players. Not because players don't desire physical stores or interaction, but because players are looking for options and convenience. In fact, Aristocrat Interactive has studied player behaviors in iLottery and non-iLottery markets in the U.S. and found:

- **Convenience is personal** — Players desire digital lottery options because online play offers them convenience by removing barriers such as not getting to a retailer in time, while more than one-third still prefer retail for the routine it provides.
- **Loyalty programs and promotions are motivators** — One in four cross-channel players choose online because of stronger incentives, and two-thirds of non-iLottery players say promotions would motivate them to engage digitally.
- **Digital utilities are redefining lottery experiences** — Players who haven't played online say practical tools like payments, results access, and digital cash-out options would drive their engagement, signaling a shift toward function-first digital experiences to complement retail.

Players who once planned weekly retail

routines now enjoy both the routine and the added layer of convenience. Lotteries are increasingly focused on seamless, cross-channel experiences. These omnichannel experiences are paramount for addressing the growing expectation of convenience, since they connect retail and digital touchpoints into a single cohesive player journey. Other approaches often treat online and retail as two separate channels, instead of one intertwined experience.

In this article, members of the Aristocrat Interactive iLottery team Stephanie DuVal (Director of Customer Marketing, North America), Sidney Sabbag (VP, Product Solutions) and Victor Marmorstein (Head of Games) discuss the behavioral shifts lotteries are seeing, and the tangible ways data and technology are being deployed to meet these changes.

### Understand Players and Meet Players Wherever They Are

Traditional lottery structure has historically limited the ability to fully understand players, due to the lack of connected data and personalized engagement tools. For many players, it has been anchored in routine and place. Think about players who are playing at their favorite stores or picking their preferred numbers.

"Many traditional retail player cohorts have a routine," DuVal says. "They go to the same store, play the same numbers, and chat with the same clerk. Many emerging players build personal routines based on convenience, whether that is where and how they play. And

that shows up differently. They may buy a Quick Pick on their phone while waiting for a coffee, play an instant game after dinner, or remotely cash in a retail ticket win."

There's also a third group of players whose behaviors aren't mutually exclusive to retail or online. In fact, DuVal notes, customers who engage across both channels tend to be the most engaged, and therefore, build loyalty with lotteries, over time. For them, convenience and continuity are nonnegotiable.

So how do players choose between retail and online? The truth is, increasingly they don't. While the industry can sometimes see online and retail as two competing brands, consumers simply do not compartmentalize the two. Instead, they see it as one brand. The decisive factor is convenience without sacrificing trust, security, or choice.

That is why capabilities like digital registration, payment options like card, bank, or wallet, and mobile-first game lobbies are quickly becoming an expectation. The same practices are often associated with long-time lottery players (for example, going to the same store at around the same time after buying groceries) aren't disappearing. Instead, they're diversifying.

Nowadays, time-pressed, digitally fluent consumers want the same trusted brand experience, but with the flexibility to register, deposit, play, claim, and withdraw on their terms, whether that is in their home, on a commute, or in a checkout line. That cross-channel behavior lifts value and unlocks visibility that anonymous retail alone cannot provide.



## The Digital Extension of Retail

Against this backdrop, lotteries should not view retail as a declining channel. Instead, the goal is to extend it into a digital space, for the convenience of players. This is why Aristocrat Interactive's work with lotteries increasingly starts by charting the whole customer journey.

Sabbag walks us through the journey. At the core is a player account system that seamlessly manages registration and KYC, deposits and withdrawals, risk checks, and permissions, so that players can get to their entertainment more conveniently and more responsibly. The Aristocrat Interactive platform also integrates cards, bank links, and digital wallets so that players can access games safely and easily.

Through this same platform, retail and digital are meaningfully connected, allowing players to move between channels while reinforcing the lottery's physical presence in communities.

Sabbag points to remote ticket cashing as a pivotal proof point. "If a player won a meaningful amount on a paper ticket, they had to drive, sometimes for hours, to a claim center," he explains. "Now, for eligible tiers, players can complete the entire claim in-app. We verify identity, handle tax forms, and release funds quickly and securely. That single capability improves player satisfaction and reduces operational friction." It also underscores a broader truth: when you respect a player's time, trust grows.

Sabbag describes three product priorities that state and provincial lotteries consistently request—and that Aristocrat Interactive's roadmap is designed to deliver:

### 1. Frictionless account & payments.

Players expect to register, verify, and fund an account in minutes. They also would like the option to withdraw funds securely without long delays. "We've poured years into automating claims securely and responsibly," Sabbag says. "The aim is simple: keep it safe, make it fast."

**2. True omnichannel features.** These include giving players the ability to add to their online balance at retail, cash out online wins in-store, register with retailer assistance, scan tickets to enter promotions, play crossover titles in both paper and digital formats, and cash tickets remotely. Together, these capabilities connect retail and digital into one unified experience.

**3. Continuous innovation, not one-and-done.** "For us, a contract signing is the starting line," Sabbag said. "Aristocrat Interactive does not treat an agreement with a lottery as simply a list of deliverables. Instead, it is a collaboration that requires continuous innovation." In fact, Aristocrat Interactive works closely with lotteries to release meaningful upgrades on a predictable and safe cadence.

## The Play-style Evolution: From Digital Scratch to Deeply Gamified elnstants

If changes in lifestyle explain why players move across digital and retail channels, evolving play styles explain what keeps them engaged once they arrive online, and what encourages them to return to retail.

According to Marmorstein, the evolution of elnstant games over the past decade reflects a simple but critical shift: players now expect elnstant lottery games to be entertaining digital experiences, not just digitized versions of paper tickets.

When elnstants first appeared in North America around 12 years ago, early titles closely mirrored retail scratch cards with flat visuals, basic reveal mechanics, and limited bonus interaction. These designs emphasized familiarity at a time when digital lottery was still new, and trust was paramount. As players became more accustomed to engaging with mobile games, streaming platforms, and other interactive digital entertainment, expectations changed.

Marmorstein identifies three key inflection points in this evolution.

**1. Introduction of Multiticket (2015).** By resolving multiple low-cost tickets within a single play, developers improved pacing, reduced repetitive interaction, and accelerated access to bonus moments. Player response was immediate and positive, with multiticket formats quickly outperforming single-ticket designs.

**2. Rise of Cascade and Cluster-based Match-3 (2019).** These games incorporated richer math models, cascading symbols, multipliers, and layered bonus features, creating far greater variety across play sessions. Importantly, players could experience multiple rounds without seeing the same outcomes repeatedly. This format quickly surpassed earlier designs

due to its engaging mix of gameplay elements.

**3. Progressive Jackpots (2021).** The most recent evolution builds that success through jackpot-augmented cascade games, which integrate progressive or pooled jackpots directly into familiar mechanics. This enhancement extends engagement for players.

As Marmorstein emphasizes, the takeaway is to apply proven digital design principles such as pace, polish, clarity, and variety within lottery's distinct, regulated framework.

"Players respond to experiences that feel dynamic, polished, and rewarding," he explains, "but they still want the structure, transparency, and trust that comes with lottery."

The most successful elnstants balance that equation: they borrow proven design principles from the wider digital entertainment ecosystem (like pacing, visual feedback, and variety) without importing gambling mechanics that are inconsistent with lottery's public-interest mandates.

In this way, play-style innovation becomes a pillar of modernization alongside product infrastructure and marketing strategy, supporting sustainable growth without compromising the values that define the lottery category.

## Conclusion

Lottery isn't choosing between physical counters and pixels on a screen. It's choosing how to connect them responsibly, so the experience makes sense and is safe to players who live hybrid lives. The lotteries that succeed will be those that build continuous learning loops across products, games, and marketing. These loops must be grounded in data, executed with creative excellence, and governed by responsible gaming principles. From remote cashing to elnstants to digital marketing innovations, the future lies in an omnichannel strategy that respects the tradition of retail while embracing the realities of how some people prefer to play now. ■

Sources:

*Online Lottery Engagement, Aristocrat Interactive – September 2025 (n=1,000)*

*iLottery Market Study, Aristocrat Interactive – January 2026 (n=1,008)*

# Women, Wagering, and the Post-Pandemic Shift\*

LOTTO  
RESEARCH

Simon Jaworski, Chief Executive Officer, Lotto Research



It has been six full years since COVID-19 reshaped the world. Many aspects of daily life changed permanently—shopping habits, screen time, social behavior, and attendance at live events. Yet one subject rarely discussed is what has happened to the female gambler since March 2020.

Examining data from the past five years reveals important shifts in what women are doing, what they plan to do, and how these changes may affect the lottery industry in both the short and medium term.

## A Post-Pandemic Bounce—and Pullback

Between 2021 and 2023, the percentage of women who purchased Scratch tickets in the past year rose above 50%—a meaningful jump as in-person shopping patterns returned, and people resumed more regular routines.

In 2025, however, female participation in Scratch-offs dropped sharply to 44%. At the same time, informal games of chance—such as card games with friends and social games played for entertainment rather than money—appeared to be on the rise.

Recency has also declined. Just over one quarter of women report playing any lottery game in the past week, compared with more than one-third two years ago. Past-week Scratch play as an individual purchase has also fallen, mirroring broader national sales trends.

## The \$3/\$5 Sweet Spot

There is some encouraging news within Scratch price points. Among women who do play Scratch, a higher percentage are purchasing \$3 tickets (26%, up from 24% in 2023) and \$5 tickets (51%, up from 50%).

However, declines are evident across other price

tiers. The \$1 and \$2 tickets remain popular but are each down roughly five points in participation. Higher-priced tickets—\$10 and above—have also experienced modest declines.

When asked about preference, the \$5 ticket ranks highest, but only 31% of female players name it as their favorite. More than half still prefer a \$1, \$2, or \$3 ticket. Value remains central to the female Scratch player.

## First Impressions and Trial Matters

Why is it so important to ensure women in the U.S. try Scratch tickets at least once? Because Scratch games remain the primary trial product. For decades, more than two-thirds of women report that Scratch tickets were their first experience with lottery games.

If Scratch participation erodes, the onboarding pipeline may weaken.

## Shifts Across Gambling Categories

Spending patterns offer further insight. Significantly more female Scratch players report spending less on Scratch in 2025 than spending more—a net decline of 10%.

In contrast, female spending on sports betting has increased sharply, with a net gain of 20% versus the prior year. More than one-third of female sports bettors now wager multiple times per week. Average monthly spend on sports betting and casino slots is nearly four times that of their average Scratch spend.

## Responsible Play Considerations

Women demonstrate a stronger grasp of gambling's pitfalls than men. Female lottery players are significantly less likely to agree with problematic statements such as:

- "It's okay to buy lottery tickets for kids."
- "If the odds are 1 in 4 and I buy five tickets, I'm sure to win."
- "Problem gambling is only an issue for low-income people."

At the same time, when asked whether they fully understand lottery odds or probability, only 23% of women say they "completely or mostly" understand—compared to 45% of men. Women appear more cautious in interpreting odds.

## Evolving motivations and friction points

Nearly two-thirds of female lottery players cite

"to win money" as their primary motivation. Just under half say they play for entertainment.

Yet the percentage citing "to win money" as their main reason has declined by 10% over the past four years. Even more striking, entertainment as a motivator has also declined significantly over the past two years.

If women are less motivated by winning—and less motivated by entertainment—what is filling that recreational space? Notably, the same pattern appears among men, suggesting a broader shift in how lottery competes for attention.

**Implications for the Industry** Fewer than one quarter of U.S. women view gambling as a very or somewhat important recreational activity—significantly lower than men. That lower prioritization also correlates with women being less likely to engage in high-intensity lottery play.

Women currently represent a higher proportion of safe and reliable gamblers than men, yet participation is softening. That presents both a warning and an opportunity.

There is an opportunity to better understand how female players in the U.S. engage with lottery products and ensure that offerings align with their expectations and comfort levels. However, the first step is not promotion—it is understanding motivations and friction points for female players. State lotteries should focus on maintaining appropriate engagement standards, delving into what female players actually want from their lottery experience, potentially through qualitative research, ethnographic study, or deeper secondary analysis.

What emotional benefit are they seeking? What price sensitivity matters most? What friction points discourage frequency? What alternatives are capturing their time? What is their definition of value? How can we responsibly enhance their play experience? How can we, as an industry, keep them engaged?

Without those answers, re-engagement strategies risk missing the mark.

Women have historically been the biggest fans of Scratch games, but their behavior is evolving. The industry would be wise to pay attention.

Trust me, I'm a researcher.

Simon Jaworski, Founder & CEO, Lotto Research.

*\*Data referenced in this article come from research conducted by Scientific Games. Interpretations expressed are those of the author.*





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# 2026 HOLIDAY PLANNING

## *Deliver Moments of Merry with New Inspirations and Innovations*

The Scientific Games 2026 Holiday Catalog is designed to spark ideas and inspire success, delivering merriment to your players—and performance to your portfolio—with twinkling finishes, inspired themes and insight-led game innovation.

From premium indulgences and giftable favorites to extended play moments, omni-channel experiences and eye-catching enhancements, here's a sampling of games that can help drive your holiday growth.

### *Go for Gold with Omni-Game Play*

Meeting players where—and how—they want to play drives brighter holiday sales, and it begins with omni-game play. *IT'S GOLD OUTSIDE* is a holiday family of games offering something for everyone, from giftable cash prizes to bonus digital play and Fast Play opportunities.

*Scratch Connect* extends the magic, bridging retail play to digital with a seamless new brick-to-click experience on your players' mobile phone.

### Connect Across a Family of Games

Spread more cheer with retail-redeemable prizes across gift-friendly price points, letting players share the season without worrying about gifting away life-changing wins.

### Don't Forget Fast Play Players

Younger adult consumers (ages 18–34) are significantly more likely to play Fast Play games, with 31% participation compared to other age groups. Don't miss out on engaging this important audience in your *IT'S GOLD OUTSIDE* family.

### Extend the Gold

As your players slow down and savor the holidays, extended play experiences matter more than ever. From 2019 through 2024, extended play grew 32.6%, highlighting sustained player demand for longer, more immersive play experiences.







## ❄️ Savor the Scratch

Extended play games—from crossword to bingo and beyond—are having more than a moment, and holiday games are no exception. The colorful, new *ORNAMENT CROSSWORD* elevates the category with variably printed fir trees integrated directly into the marking system, enhancing both gameplay and visual appeal.

## ❄️ Sprinkle in Some Magic

Developed by the Scientific Games *DREAM TEAM*, *ORNAMENT DROP* refreshes your holiday lineup with an innovative maze-and-collection mechanic, two ways to win and bonus play. The *Holographic Pillars* pattern and *Dimension Stella* (stars) pattern product enhancements elevate the game for the holiday season.



## ❄️ Elevate the Scratch with Premium Games

It's the season to indulge, and players are showing a clear appetite for premium games. In fiscal year 2025, \$25+ game sales grew 277%, confirming strong demand for bigger, bolder play experiences, especially during the holidays. The new *SPARKLING FOR THE HOLIDAYS* features the new *Diamante Holographic* paper stock with an all-new *Rose Cold* design, exclusively from Scientific Games.

## ❄️ Add All the Holiday Smells

Few things say “the holidays are coming” like the scent of chocolate in a steaming hot cup of cocoa. The *HOT CHOCOLATE CASH* game brings a sip of nostalgia to the scratchable play area. The game was the top-rated game for purchase intent compared to other \$2 games in a recent online player panel.

## ❄️ Spend Time with Family

It wouldn't be the holidays without family. In calendar year 2025, 53% of game families incorporated product enhancements, delivering stronger performance across portfolios. Families of games help build recognition, encourage repeat play, and extend engagement with your players during the holidays. The new *HOLIDAY TREE* family features a *Premium Metallic Ink* product enhancement on *Platinum* paper stock.







## ❄️ Make New \$20 Holiday Traditions

HOLIDAY CASH is a premium game loaded with bonus play and multiple ways to win. Festive holiday-themed symbols vary from ticket-to-ticket, creating a fresh experience every time your players scratch. Rated No. 1 for purchase intent in a recent online player panel, the game features HD Games, VariPlay and Sparkle Select enhancements.

## ❄️ Wrap Up Luxury

Glimmering with brilliant holographic and elevated finishes, higher price point holiday games like MERRY MONEY deliver a luxurious seasonal treat for your players, tapping into the treat of self-gifting during the holiday season. This festive new game rated No. 1 for purchase intent in a recent online player panel.

## ❄️ Reach for Intuitive Innovation

Scientific Games designers know how to package intuitive innovation into holiday extended play scratch experiences. LUCKY STARS shines brightly with a unique layout featuring five different number match games in one engaging experience.



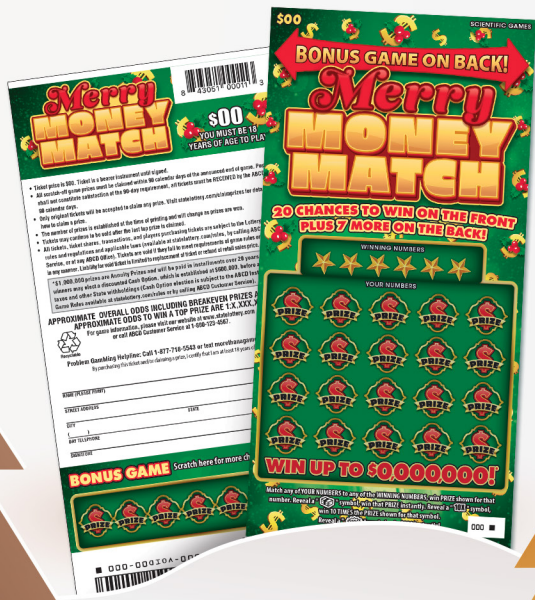
## ❄️ Give More Play

Scratch My Back delivers more ways to win throughout the season with additional playspots on the back of the game, like MERRY MONEY MATCH. The average index of Scratch My Back holiday games was 116 compared to 111 for other holiday games. It's more fun, more value—and the four-color ticket back is perfect for highlighting a holiday promotion.



## ❄️ Multiply the Fun

New from the Scientific Games DREAM TEAM, COOL CASH MULTIPLIER features a unique multiplier next to every single "your number". HD Games and Platinum product enhancements were added for a perfectly crisp, cool effect.







### ❄️ *Reflect Good Taste*

Created on *Platinum* paper stock, *MERRY MULTIPLIER* features snowflake designs accented with a *Sparkle Stella* (stars) pattern in the game name and overprint play-spot markers.

### ❄️ *Celebrate the Spirit of the Season*

Our latest consumer study found that 57% of consumers have gifted instant scratch games, with another 26% saying they would consider it. That means 83% of U.S. consumers are open to gifting instant games—unlocking a major opportunity for holiday portfolios. The four festive scenes in *MERRY & BRIGHT* feature the *Premium Metallic Ink* product enhancement design-formulated to gift responsibly, of course.

### ❄️ *Ring in the New Year*

Celebrate 2027 with new reflective game designs that bring sparkle and excitement into the new year. The two-scene 2027 game is designed using *Platinum* paper stock and finished with the *Metallic Silver Sparkle* product enhancement to bring the reflections right into the scratchable play area.



Explore the full holiday catalog:



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INSIGHT TO IMPACT:

# The Making of Successful eInstant Games



As iLottery continues to evolve, eInstant games have emerged as a critical engine for growth. Behind every standout title, from Lucky Coins Disco Pig to Money Strike Jackpots, Brightstar Lottery's iLottery Game Studios utilizes a disciplined process built on market insight, creative vision, and close collaboration. At the center of that process is a commitment to designing experiences that resonate with players and sustain engagement.

## Concept to Creation

Every intriguing eInstant begins with clarity of purpose. First, the iLottery Game Studios team focuses on understanding the market. Player behavior, performance data, and competitive trends help identify opportunities and define the role a new game should play within the broader Brightstar portfolio.

This early research informs decisions around game mechanics, prize structures, visual themes, and expected gameplay duration. Factors such as target audience, market specifics, and thematic tone are considered. Once a direction is set, the team moves into rapid prototyping, testing ideas collaboratively, and refining them based on both data and instinct. "The data acts as a compass," explains Adele Lawton, Vice President Content iLottery, Brightstar. "It helps ensure that creativity is aligned with clear goals, while still allowing room to explore new ideas."

## Balancing Analytics with Creative Freedom

Top-performing eInstants strike a balance between data and creativity. Player insights, customer feedback, and performance metrics provide critical signals, and help the Game Studios ask the key questions: Which themes will resonate emotionally? What mechanics feel intuitive and rewarding? How can visual storytelling elevate the experience? Inspiration for eInstants can come from varied sources, such as player behavior, cultural trends, gameplay innovations, and internal brainstorming sessions. The challenge is translating that inspiration into experiences that feel cohesive, entertaining, and sustainable.

"Turning data into actionable insight is a big part of what separates good games from great ones," says Lawton. "But equally important is knowing when to let creativity lead."

## Collaboration at the Core

One of the defining elements behind the success of the Brightstar iLottery Studios is cross-functional collaboration. Rather than working in silos, Brightstar iLottery Studios operates with dedicated "game squads" that bring together designers, artists, developers, analysts, and product specialists.

Each squad focuses on a single project, creating alignment around shared objectives and enabling



faster iteration. This approach helps teams move efficiently while maintaining a consistent vision for the player experience. “Everyone involved understands the role they play in delivering value to the player,” Lawton notes. “That level of collaboration makes a real difference.”

## The Player Experience

Every successful eInstant game, like Zlota Kula – which recently achieved records of +58% daily active players vs. past games – demonstrates the Game Studios’ strong focus on player retention and experience. eInstant games that maintain momentum over time offer more than the promise of a big win. They benefit from engaging mechanics, intuitive gameplay, and a sense of progression. Just as importantly, the iLottery Game Studios team continually listens to player feedback, using it to inform future updates and new releases.

## Hitting the Engagement Jackpot

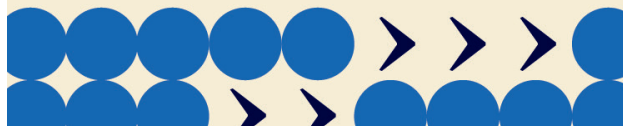
eInstant jackpot games have proven especially effective at driving engagement and revenue when deployed strategically. Brightstar titles such as Elephant King Jackpots have seen results of +145% sales vs. any other eInstant game. This demonstrates how eInstant games with potential large jackpots can attract new players and boost engagement. Sustainable gameplay remains central to the eInstant experience. Big win excitement works best when paired with engaging core mechanics, loyalty-building features, and a sense of progression. Visible jackpot promotions, milestone celebrations, and personalized communications all help amplify games’ impact. “Jackpots bring players in,” Lawton explains. “Satisfying gameplay is what keeps them coming back.”

## Incorporating Artificial Intelligence

For Brightstar iLottery Game Studios, the key to leveraging technology is adopting new tools in ways that enhance the quality of the player experience. Technology continues to play an expanding role in how eInstant games are developed. AI creates new opportunities by accelerating workflows, supporting ideation, and enabling the Brightstar iLottery Game Studios team to test more creative variations efficiently.

“Trends will shift, and tools will change. Putting the player experience first is what ultimately defines long-term success.”

Adele Lawton,  
VP Content iLottery,  
Brightstar Lottery



AI tools allow the Game Studios creators to explore ideas more quickly and focus more time on refining player-facing elements. As AI matures, it is expected to continue to open new creative directions while improving efficiency across the development process.

## Future Foward

Deep player understanding, thoughtful use of data, creative exploration, and strong collaboration continue to drive the most impactful results. “Trends will shift, and tools will change,” Lawton says. “Putting the player experience first is what ultimately defines long-term success.” From record-breaking product launches to sustained increases in revenue, the eInstant jackpot games created by Brightstar iLottery Game Studios are proving their worth as essential tools for the growth of iLottery. If you are looking to refresh your portfolio, drive more revenue, and retain your player base, visit <https://info.brightstarlottery.com/drivinggrowthcasestudy> to read Brightstar’s latest case study and learn more about how eInstant can help transform your approach to iLottery strategy.



THE POLLARD CATALYST™ GAMING PLATFORM:

# The New Foundation for Digital Lottery Engagement

*Accelerating Digital Growth and Player Impact*

As digital experiences become central to how players engage with lotteries, digital platforms have evolved far beyond their original back-end role. Today, a lottery's website and mobile app are the first and most frequent touchpoints for players.

This shift has elevated platform design from a technical function to a strategic priority. Modern platforms don't just power gameplay; they enable discovery, support personalized marketing, connect data across channels, and turn insight into action. When thoughtfully designed, the platform becomes both the foundation of engagement and the engine of growth.

Delivering on this foundation is the Pollard Catalyst™ Gaming Platform. Developed in close collaboration with our lottery partners, Catalyst™ was shaped by over a decade of real-world insight into what drives engagement and what digital tools lotteries truly need. It integrates marketing, data, and player experience into a single system that supports both day-to-day operations and long-term strategy.

According to Shannon DeHaven, Senior Vice President of Digital Engagement, Pollard Banknote, "Catalyst™ reflects our commitment to building flexible, intelligent platforms in partnership with lotteries. It is shaped by strategic input from our team of experts whose years of deploying and operating lottery systems give them a deep understanding of what truly drives success. Their real-world experience informs every aspect of Catalyst™'s architecture and design, ensuring the platform is practical, adaptable, and built for measurable impact. This is collaboration at its core, making Catalyst™ more than just a digital offering. It's a trusted, adaptable system designed to grow alongside each lottery and deliver meaningful results."

This commitment to collaboration is already reflected in the results our partners are achieving. The Kansas Lottery is a prime example, where more than a decade of working together, beginning with instant tickets and expanding into loyalty before evolving into a full iLottery program, has produced one of the strongest digital success stories in the industry. This long-standing relationship created a foundation of trust, shared insight, and operational alignment that made the transition into iLottery both efficient and

highly effective. Kansas achieved the fastest iLottery rollout in U.S. history by launching in under 10 months after scoping and outperformed all previous U.S. launches in registrations, deposits, and overall instant performance per capita. Despite several restrictions related to game content and marketing, such as no progressive jackpots or reactor/cascade games and no external advertising at launch, the program closed its first year this past February with an NGR per capita of 6.21. This is 18% higher than the previous record and a clear demonstration of how a collaborative, player-focused platform strategy can accelerate growth.

This momentum is now extending beyond North America as Catalyst™ expands into new markets. The upcoming launch with the Belgium National Lottery represents the next evolution of this partnership-driven model and showcases how the platform can scale to meet the needs of complex, multi-channel environments.

In Belgium, Catalyst™ will become the foundation of the lottery's first unified omnichannel ecosystem, powering loyalty, the mobile app, iLottery, and retail transactions. Belgium selecting Pollard as their new system provider reflects both confidence in our technology and trust in our collaborative approach. This project marks a significant milestone for Catalyst™ and underscores its ability to support large-scale modernization efforts.

These advancements illustrate how Catalyst™ continues to evolve in step with the needs of modern lotteries. As expectations rise and digital and retail channels converge, delivering a frictionless, player-centric experience becomes even more essential.

## A FRICTIONLESS EXPERIENCE FOR PLAYERS

Modern digital platforms must do more than support registration or ticket entry. They need to deliver a consistent, player-centric experience across every touchpoint. They should empower lotteries to launch smarter campaigns, respond to player behavior in real-time, and adapt quickly as strategies evolve. In a market where players expect digital experiences on par with other entertainment and gaming options, staying competitive requires technology that elevates, rather than restricts, the overall journey.

A platform should never slow down innovation. Rigid or disconnected systems can limit access to critical data, create bottlenecks for marketing teams, and make it harder to deliver personalized, timely experiences. When technology becomes a barrier, it undermines the very strategies it is meant to support.





Pollard Banknote takes a different approach, one that puts the lottery and the player at the center. Our platform design reflects how lotteries operate, how players engage, and how both continuously evolve. Using real-time interactions and data, our platforms guide players smoothly through their journey via web layers, emails, push notifications, and contextual banners. These dynamic touchpoints ensure each experience feels cohesive, relevant, and responsive to player behavior. At the same time, our systems remain intuitive for lottery teams and scalable for long-term growth.

Pollard's Clickstream Analytics program analyzes player activity across the iLottery platform to identify gaps that impact acquisition and retention. In Kansas, the analysis revealed that maintaining separate retail and digital websites was creating unnecessary complexity for players. Based on these insights, Kansas engaged Pollard to merge both sites into a single, unified destination, strengthening engagement and improving acquisition by simplifying how players move through the experience.

## PLATFORM INTEGRATION ACROSS MARKETING CHANNELS

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Catalyst™ brings together the ideas explored in broader engagement strategies, such as CRM, loyalty, and data activation, and delivers the infrastructure that makes them actionable. While those strategies define how to engage players, the platform ensures they can be implemented consistently, efficiently, and at scale.

The platform empowers lotteries to deliver highly personalized player journeys through AI-driven recommendation engines, dynamic content delivery, and real-time messaging. These capabilities help players discover games and content that match their interests without requiring them to search or navigate extensively, while automated CRM tools make it easy to trigger campaigns based on behavior, lifecycle stage, or player preferences. This approach has already shown meaningful impact, with emailing players dynamic game content based on their recent behavior leading to a 39% lift in eInstant bets compared with players who did not receive the email. This segmentation-driven personalization strengthened cross-game engagement and demonstrated how timely, relevant recommendations can influence play behavior across multiple stages of the player lifecycle.

By bringing data, tools, and channels together, Catalyst™ creates a unified environment where insights flow freely, and strategies can be executed without friction. Whether a lottery is welcoming new players, re-engaging inactive ones, or building long-term loyalty, Catalyst™ enables responsive, data-informed engagement across all digital channels.

Expanding beyond transaction functionality, the Catalyst™ platform incorporates social media and feedback-driven features that deepen player engagement. Integration with social media channels allows lotteries to broaden acquisition strategies and maintain consistent messaging across every environment. The platform is also evolving with new tools such as the Holistic Engagement Level Index, which brings together Loyalty and iLottery data to provide a more complete understanding of player behavior from a responsible gaming perspective. By translating insights across both verticals, this feature helps lotteries strengthen RG literacy and make more informed, player-focused decisions.

Catalyst™ was designed with real-world lottery operations in mind, not as a theoretical platform, but as a practical, adaptable solution built to flex with market-specific needs. Whether a lottery is just beginning its digital journey or evolving an established system, Catalyst™ supports that growth with tools that align with strategy and improve performance.

The Kansas Lottery is a clear example. They needed a partner who could launch a customized iLottery program and add new functionality quickly, without slowing their momentum. Catalyst™ delivered, and the strong growth Kansas saw in its first year demonstrates the platform's ability to respond rapidly to Lottery needs and industry changes.

## CONCLUSION

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Catalyst™ unifies the digital experience for players and offers lotteries the tools to act on real-time insight. Campaigns can be launched faster, results are clearer, and adjustments can be made with confidence, an essential advantage in a fast-moving digital landscape.

Built to evolve with the industry, Catalyst™ provides the foundation for innovation and a direct line to the player. At Pollard Banknote, we design products that support long-term success, and Catalyst™ reflects that commitment: a system built to grow with our partners and deliver value at every stage of their digital transformation.



POLLARD  
**CATALYST**™  
GAMING PLATFORM

**POLLARD**  
banknote limited

Rethinking Lottery Engagement and Loyalty for Powerball

# How Players Are Pushing for a New Paradigm

By Patrick Watson



For decades, lottery play has been defined by a familiar and largely passive model: purchase a ticket, wait for the draw, and hope for the best. While jackpots and large prizes still remain the headline attraction, this model has increasingly shown its limitations, particularly among younger and more digitally native audiences. These players expect more for their dollars - more entertainment, interaction, and value beyond just a single moment of anticipation.

Recent Powerball research has made this clear: players desire more than a single transactional experience. Instead, they are actively seeking ways to engage more frequently, feel more involved, and gain a stronger sense of control and enjoyment from how they play. This shift in player interest is not theoretical as it has been observed in some of the leading NASPL member lotteries and is already reshaping the future of lottery products and experiences.

## Forging an Innovative Path Forward for Powerball and National Games

Recognizing these challenges, MUSL has teamed up with Splashdot, a trusted leader in lottery loyalty and engagement, to introduce its new national Powerball app and CRM program. Splashdot has led the way in transaction-adjacent rewards that provide players new ways to experience greater value and excitement from their lottery purchases. With one app and one program designed for genuine engagement with the world's most recognized lottery brand, this initiative is poised to deliver a major win for lotteries.

## Powerball Xs & Os: Designed for Engagement from the Start

As the inaugural always-on program in the

new Powerball app, the upcoming Powerball Xs & Os game is a direct response to this changing mindset. Purpose-built to address the engagement gap identified in research, the game introduces mechanics that encourage active participation and repeated interaction while remaining firmly rooted in the trusted Powerball brand.

**At its core, Powerball Xs & Os is about giving players more to engage with**, i.e., more moments of interest, more reasons to return, and more ways to feel connected to the game, and to the NFL and Powerball beyond draw night. By incorporating interactive elements, it creates opportunities for players to participate in ways that are far more rewarding.

This approach enhances traditional lottery play by layering engagement on top of a proven foundation to create a more complete and modern player experience.

## Proven in Market: Engagement That Works

This evolution is backed by years of real-world experience and delivery. Splashdot has worked with numerous NASPL lotteries, consistently demonstrating that interactive, engagement-led experiences drive measurable benefits for both players and lottery operators.

These programs show that when players are given meaningful ways to engage, whether through games, challenges, missions, second-chance and bonus mechanics, or interactive experiences, they participate more often, understand the products better, and remain active for longer periods. Importantly, this engagement is sustainable and responsible, built around entertainment and enjoyment rather than increased risk. Delivering meaningful 'Microwins' enhances the experience far more than just hoping the jackpot grows to drive sales.

## Known Play and Responsible Gaming at the Core

One of the most significant advantages of this engagement paradigm is its impact on known play and responsible gaming. Interactive and account-based experiences naturally encourage players to engage in more transparent, trackable ways. This allows lotteries to better understand player behavior, offer tailored experiences, and promote as well as reward healthier play patterns.

Rather than just encouraging spend, engagement-focused models emphasize frequency of interaction. In effect, players return because they enjoy the overall experience rather than merely the chance of a big win. This distinction is critical and aligns closely with modern responsible gaming principles.

## Leading the Shift Forward

As Powerball research continues to underline changing player expectations, and as products like Powerball Xs & Os come to market, the direction is clear. The future of lottery engagement lies in experiences that are interactive, entertaining, and player-centric without losing sight of responsibility or integrity.

Splashdot has been at the forefront of this shift for years, partnering with lotteries and, most recently, MUSL and Powerball, to help drive the evolution of the lottery experience. The results speak for themselves: more engaged players, stronger brands, improved data visibility, and experiences that resonate with modern audiences. These are all crucial to ensuring lotteries remain meaningful and relevant in 2026 and beyond.

Visit [Splashdot.com](https://www.splashdot.com), [Powerball.com](https://www.powerball.com), and [MUSL.com](https://www.musl.com) to get fully engaged!



what does it cost to obtain a customer, what does it cost to keep a customer, what behaviors do we reward, and how best to allocate limited resources? When we respond to competition, we should be clear on whether we are retaining our core players, attracting new players, or chasing customers who may never be "ours" no matter how much we try to win them over.

Considering these questions pushes us toward a more sophisticated understanding of player motivation. Why do people spend money on games-of-chance anyway? Why do they choose instants over draw-games, or casinos over sports-betting? Or skill-style devices, or even "gray" machines? It would appear that the lines between "chance," "skill," and "entertainment" are blurring as well.

Three people can do the same activity and have three different motivational responses because humans are complicated. So, we should apply as much insight to the process of evolving the games as possible.

**You've emphasized partnerships and collaborations, with retailers, with major brands like the NFL, and with our lottery counterparts in other states, as representing a huge opportunity to innovate, inject more value and impact into our marketing and promotional initiatives, and deliver more value to the players. What do modern collaborations do for lotteries that the lottery couldn't do alone?**

**B. Rocky:** Partnerships and brand collaborations allow lotteries to express themselves as modern consumer brands, and to do it at scale.

The industry has made real progress here. Years ago, game groups were asking a narrower set of questions: how do we optimize performance? Do we adjust the matrix? Do we grow jackpots? What does research say about player behavior? A lot of that work was necessary and valuable. We already knew that when jackpots get big, existing players play more and occasional players come in. But we learned that promotions and experiences can matter just as much as jackpot size for certain segments. Lotteries have long been good at in-state promotions, and vendors have helped create effective campaigns.

But the evolution now is larger: we're building relationships with major brands: NFL, NASCAR, and high-profile national

moments like New Year's Rockin' Eve programming. The key is multi-year commitment and refinement. If something is worth doing, it's worth doing long enough to learn it, improve it, maximize awareness with repetition and consistency, and get a real return on investment.

Association with these major brands is conferring legitimacy and unlocking new windows for how lotteries can be seen. There's an old expression about "the company you keep." It's true in life and it's true in branding. Mainstream brands that choose to partner with you are signaling their respect for your brand to the public. They're telling their own fans that your brand is "like one of us". If you like NASCAR or the NFL, then you'll probably like lottery too.

The industry is unlocking the incredible value that Brand Lottery brings to these collaborations. There's the retail connection that no other operator can replicate. There's the foot traffic and point-of-sale visibility. There's lottery's broad awareness and trust built over decades. There's the intrinsic value of our mission to serve the public and billions in beneficiary impact. There is the massive scale that includes hundreds of thousands of retailers and tens of millions of consumers. Affiliation with Brand Lottery delivers incredible value to our collaborators.

The days when lotteries sold themselves short are over. We need to act less like a product category and more like a massive public enterprise with brand equity, distribution power, and a unique value proposition. Now, the more we monetize our real strengths, the better we negotiate, the better we partner, and the better we tell our story.

**As NASPL president, what are you doing concretely to tell that story outside our own lottery world?**

**B. Rocky:** One of the things I've tried to do is expand the venues where we tell that story. We've had NASPL leadership at the Council of State Governments conference. Simply showing up, making relationships, working the room and figuring out how we can have a bigger voice on future programs. We're engaging with audiences like NCLGS and similar policy-adjacent forums. And we're continuing to look for platforms where the lottery story belongs because it intersects with public administration, public finance, retail economics, entertainment, recreation,

consumer products, and probably a lot more.

For example: we're participating in the American Society of Public Administration conference with a panel of lottery leaders. That's a room full of academics, researchers, and public administration professionals, which is exactly the kind of audience that benefits from understanding the history and structure of lottery as a public business. It's also a room we can learn from. That's the kind of two-way exchange we should be pursuing.

Another example is our relationship with retailers. The lottery is still deeply anchored in retail, and that will remain true for the foreseeable future. People still buy fuel, food, and everyday goods in physical locations. We should engage with national retail trade groups like NACS and the National Retail Federation, just as we engage with our respective local organizations.

My goal is to create a steady cadence. At least monthly, we should be doing something that extends our story beyond our industry: panel discussions, programs, media engagements, retailer events, policy forums. Visibility and understanding matter in a world where perceptions shift quickly.

And that's the bigger strategic point: we should be thinking not only about freshening products, but about elevating what "lottery" means, so that it connects emotionally and culturally to something larger than jackpots. The "Coca-Cola moment" that makes us want to "teach the world to sing in perfect harmony" is really about meaning: what do we stand for, what's our "why," and how do we communicate it in a way that resonates with modern audiences?

We exist to produce public benefit. We just have to learn to express that "why" with the same sophistication and creativity that top consumer brands use.

Because in the end, the question isn't whether the world is changing. It is. The question is whether lotteries can adapt while staying true to their mission, and whether we can do it in a way that keeps us relevant, trusted, and strong for the next generation of players.

I believe we can. But we have to be intentional. We have to tell our story. We have to learn from other arenas. And we have to treat relevance as a discipline, not a hope. ■

game succeed at retail but not online? How can we adapt it for a digital audience that has different motivations and play styles? Which elements drive engagement without compromising responsibility?

The goal is to help lotteries offer a broad portfolio of competitive products, some of which may resemble offerings from commercial gaming, while never relinquishing their unique position in the public consciousness. We think about this as a “both-and” strategy. Lotteries must be relevant to modern, digital-native consumers and remain true to who they are. Those objectives are not mutually exclusive.

## The market is changing faster than the rules

**Q: What about the competitive landscape is shifting most for lotteries? What should lottery leaders be paying closer attention to right now?**

**S. Gunn:** The pace of change is accelerating, and some of it is coming from places the industry didn't expect. If you asked this question a couple of years ago, the competitive set was relatively well defined; there were casinos, sports betting, online eGaming in certain states, and the broader recreation and entertainment economy. Now, predictive markets have entered the conversation. Presently, these platforms, such as Kalshi, are regulated at the federal level by the CFTC (Commodity Futures Trading Commission) as if they are offering financial contracts and not gambling. That, in spite of the fact that most of Kalshi's trading volume is wagering on the outcome of sporting events, i.e. sports betting. Some states' attorneys general are demanding the right to regulate predictive markets as gambling. We don't know where that dispute will land. The main idea, though, is that the market is shifting in ways that fall outside of traditional regulatory structures and assumptions.

For Brightstar, this means we have to constantly reassess what the market looks like in order to ensure that the actionable insights we derive about

consumers and play preferences hold up against all other offerings that compete for consumer attention and spending. The competitive set is expanding, the rules are lagging, and lotteries need to be equipped to compete without compromising the integrity and brand image that make them distinctive.

**Q: Why do legislators abide the aggressive marketing tactics, bonus structures, and ridiculously low tax contributions associated with some sports-betting while crippling their own state lotteries with prohibitions against iLottery?**

**S. Gunn:** I'll simply say this: the lottery sector has a great deal to be proud of and an extraordinary reputation to protect. We, as an industry, should never take for granted that our stakeholders understand who we are and what we stand for. We must tell our story—clearly, confidently, consistently, and persistently. Policymakers and the public need to appreciate what makes lotteries different; they need to understand our mission to support good causes, our dedication to player protection and transparency, and how our entire reason for being is to serve society.

There is a practical strategy that has proven effective in some states. When legislators consider expanding gaming—whether through sports betting, casinos, or online eGaming—that is precisely the moment for lotteries to engage, because it is an opportunity to explain why lotteries, as state-owned enterprises, should be granted comparable flexibility to modernize through tools like iLottery, cashless payments, and enhanced digital engagement.

That external competition is only part of the story. The other is how lotteries choose partners—and what procurement is really designed to measure.

## Instant tickets: a technology story, and a people story

**Q: Instant tickets remain the economic engine for most lotteries. What is Brightstar doing to push innovation—and performance—in that category?**

**S. Gunn:** We are introducing a ton of innovation, and this is an area I'm

especially passionate about.

Brightstar, and IGT before it, has made significant investments in our instant production capability, particularly at our facility in Lakeland, Florida. We were first to deploy advanced presses and printing technology with what is now the fastest, highest-capability equipment in the industry. We've raised the baseline on print quality and features, including elements that used to be treated as enhancements but are now standard in what we do.

The broader direction is clear: instant tickets need to feel more contemporary and visually compelling, with graphic sophistication that increasingly mirrors what players see digitally.

But here is the most important lesson from 2025: the solution isn't always another machine. There were periods when we were not performing at the level our customers expect or the level we expect of ourselves. The way we solved it was focusing on people: recruiting the right talent, placing the right skill sets at critical points in a complex production line, and ensuring that best-in-class technology is operated at peak performance. That was the answer, and we've made that correction. We recognized that the results would not come overnight but are confident that these decisions will result in more consistently achieving higher standards aligned with customers' expectations.

What's exciting now is that we have the production capability and throughput to deliver consistently—not just to serve existing customers better, but also to bring those innovations to a broader group of lotteries. Everyone sees iLottery as a growth story, which it is, but our optimism and momentum around instants is real as well. We believe our technology, our people, and our operational strength will drive our growth as a top-tier global instant service provider.

## Retail is evolving — and the “back office” is becoming the battleground

**Q: As major retailers change front-of-store operations, with more**

*Continued on page 42*



**self-service, fewer staffed lanes, innovative merchandising strategies and more, what must lotteries do to stay aligned with retailers who are modernizing?**

**S. Gunn:** Retail transformation is happening now, and lottery has to keep pace. We're investing heavily in point-of-sale technology and self-service experiences that fit how retailers are redesigning front-of-store operations. Multi-state retailer operators in particular are evolving quickly. Lottery has to be compatible with their retail model, and this takes collaboration and innovation. Brightstar is pleased to work alongside our lottery customers to meet the needs of retail partners.

The front-of-store experience matters, but from a category perspective, the friction point for lottery is the back office. Chain retailers increasingly want lottery to function operationally like the rest of their product portfolio—manageable, trackable, reportable, and compatible with the systems they use across their enterprise.

They are demanding consistency in reporting and controls across their operations: sales reporting, reconciliation, and especially loss prevention. Retailers want to view lottery as a product they can manage on the back-end the same way they manage other consumer goods.

And this matters not only to protect and strengthen existing retail relationships. If the industry wants to recruit the next wave of major retail chains—many of which have been on our recruiting lists for years—it won't be won purely on the point-of-purchase experience. These retailers need to be confident that the lottery product can be managed efficiently through our back-office systems. Brightstar is investing in the back-office experience to ensure its customers remain a priority category for major retailers. We also advocate strongly for uniformity and standardization within our industry, as evidenced by our involvement with the NASPL API Standards initiative. Another way we've put this advocacy into action is by developing and managing

a national lottery sales database, Retail Market Insights® (RMI), a unique tool filling a gap for the industry by providing lottery sales staff and their retailers with the cross-jurisdictional sales data they need to inform decision making.

**Cloud: not just infrastructure—an innovation enabler**

**Q: What are the most pressing and practical reasons lotteries should be moving toward cloud architecture?**

**S. Gunn:** Cloud architecture provides benefits that are becoming more and more essential, capabilities that you just do not get with in-house or single-purpose data centers. These include a higher level of security and integrity at enterprise scale, along with scalability that supports spikes in demand. These capabilities will be mission-critical going forward.

But it's more than that, as the cloud is also an innovation enabler. When applications live in a cloud environment, it becomes much easier to support mobile applications, offer software-as-a-service capabilities for retail tools, integrate new technological capabilities, and scale analytics. Digital and mobile environments lend themselves naturally to cloud architecture, which is why our iLottery offering is already cloud-based, and the rest of lottery business process and applications are moving to the cloud.




Operating in a more unified environment facilitates the organization of data, supporting the ability to analyze correlations across customers, across channels, and across games.

We're seeing increased willingness among lotteries to migrate away from strictly state-based on-premises models, provided the cloud environment meets the same physical and non-physical security standards and requirements. That's something we encourage lotteries to consider during RFP processes, because it supports scalability, aligns with industry best practices, and it helps address everyone's desire to increase speed to market.


**Q: What's the biggest friction point that slows cloud adoption in lottery?**

**S. Gunn:** Lotteries have built operating rules over time that are part of their "secret sauce" that distinguishes their brand and their operations. Every jurisdiction has the right to run its business how they think best. Unfortunately, that means that every jurisdiction has different operating rules. If the industry wants to move faster – if we want a world where updates deploy overnight the way consumer apps do – then there needs to be a level of consistency across implementations. Cloud architecture requires some measure of standardization and letting go of at least some of the state-specific rules. The trade-off is not only worth it — moving to the cloud will soon become a necessity; not because Brightstar thinks so but because the consumer market and our retail partners will demand it.

So the real work is to identify operating rules that can be standardized and reduce the number of local jurisdictional requirements that simply can't be amended

Cloud: Expected Benefits for Brightstar Customers			
 Lottery	Improve System Operation Processes	Digitalization of Player Experience	Leverage AI & Automation
 Operations	Improved Cybersecurity	Deployment Speed & Agility	Maximize System Availability & Scalability
 General	Modernize Technology	Enable Future Mobility Opportunities	Accelerate Innovation

**Latest Technology Always**



to the more uniform standard. Staying aligned with our retail partners, staying relevant to lottery players, and staying competitive in a hotly contested games-of-chance market requires us to move faster with standardized tools, reusable scripts, and scalable platforms. Multi-state groups wrestle with this constantly, and it's a topic that's only going to become more important.

## AI: internal efficiency and external value

**Q: When Brightstar talks about AI, how do you frame it—what are the major buckets that matter for lotteries?**

**S. Gunn:** I think about AI in two categories: internal applications—how AI enables the enterprise, in our case Brightstar, to operate smarter and more efficiently; and external applications—how the enterprise helps its partners and customers achieve better results. For Brightstar, that would include lotteries, players, and retailers.

Externally, the use cases for lotteries include better game content; personalized experiences and promotional content, where allowed; the ability to optimize instant ticket planning; chatbots and virtual assistants that can answer complex questions for players, retailers, and lottery staff; service optimization that reduces hold times and accelerates problem resolution; and responsible gaming support that can identify potential risk signals, especially in registered digital play.

Internally, the use cases are also substantial: software development and increased productivity, coding acceleration, improved time-to-market and quality, forecasting, analytics, compliance intelligence, and faster development of new game concepts. It is a profound mistake for anyone to underestimate the transformational impact that AI will have on the world, and on our industry.

But I always come back to this: Integrity is the most valuable asset in lottery. It is more vital than ever to strengthen fraud detection, cyber defense, and anomaly monitoring that enable the flagging of

issues that may require human intervention. The application of AI is absolutely essential to that purpose.

## AI is becoming a new “front door” for consumers

**Q: You mentioned that AI is changing consumer shopping behavior. What should lottery executives infer from that trend?**

**S. Gunn:** It's still early, but it's directional. People are starting to use tools like ChatGPT as a discovery layer—asking where to buy things, compare prices and product specs and attributes, what else to think about or look for, etc.

That raises an interesting lottery question: when someone asks an AI tool, “Where can I buy a Powerball ticket tonight?,” what answer do they get? Where are they directed? And how will the shift away from traditional search toward AI-driven recommendations affect consumer shopping behavior and buying decisions?

My point isn't that this changes lottery tomorrow; just that cloud and AI are becoming foundational layers underpinning how consumers find and interact with brands, products, and services. Lottery needs to be ready; not only with player-facing experiences, but also with responsible policies and rules that support adoption of the best technologies and distribution models.

**Q: How might you briefly sum up Brightstar's role in lottery leadership?**

**S. Gunn:** It boils down to our aim to be a true partner to our customers. To provide what our customers need to evolve as they serve players and continue to fulfill their mission. From what I've learned and experienced across the various stages of my career, that means showing up with relevant strategies, player insights, and bold ideas. Being willing to invest at the level it takes to build out those bold ideas and to trial them. Putting our new concepts and prototypes in front of those who will ultimately use them, to get their feedback firsthand and refine the innovation. It means making sure our solutions are flexible enough to grow with lotteries and fit the changing environments they operate in—not some hypothetical or “perfect”



one, because that never exists. It means building strong partnerships in the retail space to help ensure that our products and solutions meet evolving needs in the context of retail and distribution.

We've talked a lot here about the increasingly complex challenges lotteries face, so this shared effort matters more than ever. When everyone lifts together—strategists, marketers, technologists, lottery teams—the heavy parts shift, and progress becomes possible. We've seen time and again that when we and our customers pull in sync, we end up farther along than either of us could have navigated alone. ■



# Thinking, Amplified.

An exploration of the forces shaping the games-of-chance industry. Integrating real-world observation, human judgment, and AI-assisted modeling to expand perspective, stress-test hypotheses, and examine long-term consequences. Visit [PublicGaming.com](http://PublicGaming.com) to view PGRI AI Lab articles.

## Predictive Markets and the Future of Games of Chance

*How a new way of monetizing uncertainty is quietly reshaping gaming — and what it means for lotteries*

The rapid emergence of predictive markets has introduced a new and potentially disruptive force into the broader games-of-chance ecosystem. At first glance, these markets look like a niche cousin of sports betting: users take positions on future outcomes and profit if they are correct. And the majority of the “positions” taken in these markets are in fact on the outcome of sporting events. But that surface similarity masks a more consequential shift. Predictive markets do not merely offer another wagering option; they propose an entirely different way of relating to uncertainty, and of monetizing the human impulse to place a wager, or take a “position”, on the outcome of an event.

Rather than presenting participation as entertainment, chance, or “play,” predictive markets position themselves as instruments of insight. In doing so, they challenge not only existing gaming products but the cultural definition of what betting itself means.



## The Future of the Sports Betting and Online Casino

*(Next Week, Part II: The Story of Lottery's Enduring Appeal)*

There are moments in an industry's evolution when incremental thinking no longer suffices; when the conversation has to rise above quarterly sales reports and jackpot cycles and ask a more consequential question: What, exactly, are we becoming? And are we being intentional along the way to getting there?

The games-of-chance marketplace has expanded at extraordinary speed over the past decade. Sports betting legalization spread state by state. Online casino gained footholds. Digital payments normalized. CRM systems matured. AI modeling entered mainstream conversation. The surface narrative has been all about growth and disruption. But growth alone is not strategy. Direction matters. Sustainability matters. Legitimacy matters.

Five years from now, the marketplace will not only be larger. It will also be more polarized, more regulated, and more politically fragile than it is today.



## The Story of Lottery's Enduring Appeal

*Durable, Legitimate, Under-Leveraged*

*The future of lottery is not about becoming more like gambling.*

*It is about having the confidence to be unmistakably lottery — leaning into the attributes that hold a distinctive place in our hearts, our communities, and our everyday lives.*

Five years from now, lotteries may not be the fastest-growing segment in gaming. That honor goes to the product du jour, the flash-in-the-pan that didn't exist five years ago and won't be the king-of-the hill five years on. Lottery is the game that is most likely to be the most durable — built for longevity rather than velocity.

Why? Legitimacy.

Lottery is not merely legal. It is embedded. It exists in grocery stores and gas stations. It is referenced in nightly news stories and state budget discussions. It is explainable to voters. Defensible to legislators. Familiar across generations. That level of cultural embedding is extraordinarily rare in gaming.



## Why Lottery Still Competes

*Consumer Behavior, Legitimacy, and the Enduring Role of Lottery in a Faster Gaming World*

The central question facing lottery today is straightforward: why will players continue to choose lottery in a world filled with faster, more immersive, and often more lucrative gaming alternatives? A generation raised on interactive video games, personalized digital platforms, and always-on entertainment is encountering games-of-chance that move at unprecedented speed. Online casino gaming offers endless variety and rapid play cycles. Sports betting delivers real-time engagement tied to cultural passions. Both frequently offer higher prize-payout percentages than lottery can ever sustainably match. If excitement and player financial return were the primary drivers of choice, the outlook for lottery would appear uncertain.

Yet consumer behavior rarely follows purely rational or technological logic. Games-of-chance compete not only on stimulation or payout, but on psychological fit — how comfortably an experience integrates into everyday life.



Continued on [PublicGaming.com](http://PublicGaming.com) where you can read the entire articles and other PGRI AI Lab articles.

# EL/WLA Marketing Seminar 2026

## Content Is Queen: Crowning the Art of Storytelling in Barcelona



**T**he EL/WLA Marketing Seminar returned to Barcelona (21–23 January 2026) for the second year in a row. With a record number of participants – over 200 – lottery executives, marketing professionals and creative leaders came together to explore how storytelling can help lotteries remain relevant, trusted and emotionally connected in an evolving landscape.

More than an exploration of the latest tools and trends, this year's edition returned to the very heart of communications and marketing: content and storytelling.



To kick off the Seminar, **EL President Romana Girandon** emphasised in her opening words that lotteries must demonstrate how they maximise benefits for society by connecting their numbers to purpose and play through compelling stories.



**WLA President Andreas Kötter** echoed this message, emphasising that lotteries must clearly communicate their positive impact in raising funds for good causes and place customers at the heart of their stories, making their products and services part of customers' dreams.

### Keynotes: From the foundations of storytelling to the importance of emotion and trust

*"You have a great product or service, but people aren't responding to your marketing – or your message. You're brimming with enthusiasm, but you don't know how to spread the word. You need a story".*

The Seminar opened with **Jack Murray**, CEO & Founder of MediaHQ and All Good Tales, who introduced "The Magic Slice" – the point where what you want to say



meets what your audience wants to hear. In a sector where magic and creativity matters, this intersection of authenticity, meaning and audience desire is what turns a message into a story that truly resonates.



In his Keynote "The Invisible Contract," award-winning director **Marco Gentile** explored storytelling as a relationship of trust between brands and audiences – a trust now

being tested in the age of automation and AI. Marco reminded us that capturing attention is an act of trust, and that "storytelling is a moral



act". While AI can scale stories, only humans carry the emotion, intention and credibility that makes them meaningful. Trust remains the foundation of communication – for the lottery sector and for society as a whole.

Closing the keynote sessions, **Yiğit Sardan**, Chairman of the Güzel Sanatlar Group & Medyapim reminded us that powerful storytelling is rooted in shared emotions and dreams. From ancient theatre to modern marketing, Yiğit showed that emotion, not logic, drives behaviour. "Your heart is not just a pump; it's your emotional project manager".

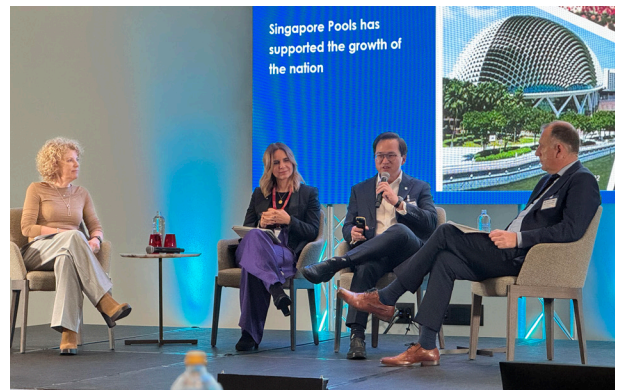


## CEO Panels: Purpose, Values and Reputation

Interactive panel discussions with lottery CEOs provided strategic insights into how storytelling supports long-term trust and reputation.

**Ray Bates**, EL Honorary President and **Andreas Kötter**, CEO, WestLotto, explored how storytelling drives engagement and cross selling strategies, and how lotteries can innovate responsibly while keeping true to their mission, with meaning and authenticity at the core of their communication.

Integrating values into lottery storytelling, **Lam Chee Weng**, CEO Singapore Pools, **Rita Prates**, Vice President, Santa Casa, Portugal and **Romana Girandon**, President/CEO, Loterija Slovenije and EL President highlighted – in a panel moderated by **Piet**



**Van Baeveghem**, EL Secretary General – the importance of coherent narratives that reflect lottery values beyond products alone. From the importance of cultural heritage and the history of lotteries to showcasing good cause contributions and employer branding, it is clear that responsibility, trust and integrity lie at the heart of lottery values and storytelling. The panelists emphasised the importance of stories that reflect who lotteries are – not just what they sell.

Moderated by **Luca Esposito**, WLA Executive Director, a US panel with **Rebecca Paul**, President and CEO, Tennessee Education Lottery Corporation (USA), **Gretchen Corbin**, President and CEO of the Georgia Lottery Corporation and **Mark Michalko**, Executive Director, North Carolina Education Lottery, shared insights into storytelling, elaborating on the regulatory aspects that differ between states and impact what, and how they communicate with their players.





an evolving digital landscape, AI should not be seen as the enemy of creativity. Instead, it can act as a powerful tool reshaping how stories are made. Through evolving creative partnerships between lotteries and agencies, the key to good storytelling is authentic narratives with a human touch.

can continue to build meaningful connections with players and society alike through the fundamental art of storytelling. After all, **content really is queen.**

Thanks to all the speakers – **Hana Barochova** (Allwyn International AG), **María Núñez** (SELAE), Laura Feliziani & Lorenzo Elia (Brightstar Lottery Italy), **Sara Jdily** (MDJS), **Cian Murphy** (PLI) and **Ecem Erdem** (KANTAR). The EL Level I Partners & WLA Platinum Contributors **Brightstar & Scientific Games**, and WLA Platinum Contributors **Pollard Banknote Ltd**, and EL Level II Partner & WLA Gold Contributor **Aristocrat Interactive** also brought their perspectives on storytelling from the suppliers side. Finally thanks to the moderators who led us on this journey – **Luca Esposito**, WLA Executive Director and **Lucy Lenaers Mathieson**, EL Communications Officer. ■

## Creative partnerships of the future: Rethinking how we work together

This year’s Seminar also explored the changing partnerships between lotteries and creative agencies. Examining how client–agency relationships should evolve in response to new technologies – including AI – and changing expectations, a conversation with lottery marketing professionals and creative leaders emphasised the need for deeper partnerships built on trust, shared goals, and mutual accountability.

**Steve Parkinson**, Marketing & Brand Director, Allwyn UK, **Michael Rittmannsberger**, Director Lottery Products, Austrian Lotteries and **Jack Blanga**, VP Executive Creative Director, Newlink Italy all gave their expert perspectives on the topics from how partnerships are evolving to expectations in the coming years. The session was moderated by **Lucy Lenaers Mathieson**, EL Communications Officer.

Whether it’s working with a big international agency or a smaller in house studio – the principles and values remain the same – the partnership is built on trust. In

## Key takeaways

In addition to the inspiring keynotes and insightful panel discussions, lottery marketers themselves brought the importance of storytelling to the Seminar. Whether it was through creative commercials or the Gen Z lens, this year’s edition reaffirmed that while channels and tools continue to change, emotional and trustworthy storytelling remains the cornerstone of effective lottery marketing.

By staying true to their purpose and values – where message comes before medium – lotteries

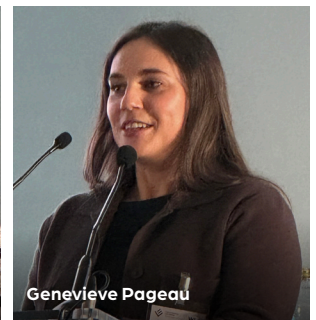
Book now your calendar for the next edition : The 2027 EL/WLA Marketing Seminar will take place January 20-22, 2027, again in Barcelona (ICE 2027 dates : Jan 18-20, 2027).



Hana Barochova



Francesca Allison



Genevieve Pageau



Cian Murphy



Sara Jdily



María Núñez



# RESILIENCE BREEDS CHAMPIONS

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**-18** LET'S PLAY  
RESPONSIBLY



MAKE SPORTS WIN



# SCENES FROM PGRI LOTTERY EXPO NASHVILLE CONFERENCE



1. Kasia Cahill 2. Wendy Montgomery, Courtney Arbour, Michelle Gillcrist, Rebecca Paul 3. Mike Pollard 4. Khalid Jones  
5. Adam Prock, Mary Harville, David Barden, Bret Toyne, Drew Svitko, Matt Strawn





1. Richard Bateson 2. Harj Chima, Adam Prock, Dolly Garfield, Brian Rockey, Alec Thomson, Helene Keeley 3. Tina Wolf  
 4. Khalid Jones, Shannon DeHaven, Tina Wolf, Andrea Williams, Jason Lisiecki, Stephanie Weyant 5. Sarah Taylor, Michelle Carney, Mike  
 Cardell, Julin Shaw, Rich Wheeler, Lester Elder 6. Simon Butler 7. Ali Beyrer 8. Scott Gunn, Lynne Roiter, Bret Toyne, Mark Michalko,  
 Rebecca Paul 9. Frank Suarez, Amy Drooker, Jeremy Kyzer, Tyson Barr 10. Laura Higgins, Mike Cardell



**PGRI**

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## DOUBLE PLATINIUM INDUSTRY LEADERS



## PLATINIUM INDUSTRY LEADERS



## GOLD INDUSTRY LEADERS





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## SPOTLIGHT ON THE LEADERS OF THE GOVERNMENT-GAMING INDUSTRY

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

### ★ DOUBLE-PLATINUM INDUSTRY LEADERS ★

#### **BRIGHTSTAR LOTTERY**

*North America Lottery*

*Headquarters:*

*10 Memorial Boulevard*

*Providence, RI 02903*

*Phone (401) 392-1000; Media line (401) 392-7452; Fax (401) 392-1234*

*[www.brightstarlottery.com](http://www.brightstarlottery.com)*



**BRIGHTSTAR™**

Brightstar is a global leader in lottery focused on innovation and forward-thinking strategies and solutions, building on our renowned expertise in delivering secure technology and producing reliable, comprehensive solutions for our customers. As a premier pure play global lottery company, our best-in-class lottery operations, retail and digital solutions, and award-winning lottery games enable our customers to achieve their goals, entertain players, and distribute meaningful benefits to communities.

Brightstar delivers unparalleled player experiences and results for lottery customers around the globe and across the entire lottery value chain, including as a lottery operator, retail and digital systems and technology provider, full-service instant ticket services provider, and game creator. A commitment to responsible play and the opportunity to invest in the public good make lotteries unique in the gaming world. By focusing all our energies exclusively

on lottery — developing products and solutions that drive business and excite players — we believe Brightstar is the best partner in this industry. We continue to modernize core technologies and blend heritage with innovation, providing responsible, sustainable solutions to customers around the world through our products, services, technology, and insights.

Brightstar's global sustainability initiatives are encompassed within Sustainable Play™, which celebrates our dedication to our people and planet as we deliver innovation and excellence that is "Ahead of the Game." Brightstar's commitment to responsible gaming is woven into the fabric of everything we do. We maintain responsible gaming certifications for lottery and iLottery through the World Lottery Association. As a member of the United Nations Global Compact, Brightstar aligns its strategies with 10 universal principles related to human rights, labor, the environment, and anti-corruption. We also support the United Nations' Sustainable Development Goals (SDGs).

Brightstar serves nearly 90 lottery customers and their players on six continents. We are the primary technology provider to 26 of the 46 lottery jurisdictions in the U.S. and eight of the world's 10 largest lotteries. Brightstar has approximately 6,000 employees. For more information, please visit [www.brightstarlottery.com](http://www.brightstarlottery.com).



**Bally's Intralot**

19th km, Markopoulou Ave.,  
19 002 Peania - Attica, Greece  
Phone (+30) 210 615 6000  
[intralot.com](http://intralot.com)

**INTRALOT, Inc.**

11360 Technology Circle  
Duluth, GA 30097  
Phone (+1) 678 473 7200  
[intralot.us](http://intralot.us)

Bally's Intralot formed following the October 2025 acquisition of Bally's International Interactive, a leading global provider of regulated digital gaming and lottery solutions. Listed on the Athens Stock Exchange, the company benefits from access to international capital markets that support long term growth and strategic investment. Bally's Intralot is a leading provider and operator of technology driven lottery and regulated gaming solutions, serving public sector and regulated operators worldwide. Founded in 1992, Bally's Intralot operates in more than 40 regulated jurisdictions and is widely recognized for its commitment to innovation, integrity, and responsible gaming.

By combining Bally's International Interactive's proven digital B2C expertise with Intralot's long standing leadership in regulated lottery gaming across five continents, Bally's Intralot is uniquely positioned across lottery, iLottery, online gaming, and sports betting. This strategic combination creates a scaled, independent global champion with deep regulatory expertise and complementary operational strengths.

With a unified, vertically integrated structure, Bally's Intralot enables operators to modernize retail and digital offerings, deliver personalized and responsible player experiences, and operate with greater agility in an increasingly convergent gaming ecosystem. Backed by the scale and

long-term strength of Bally's, the Bally's Intralot structure reinforces financial stability while ensuring Intralot's North American operations remain positioned for public sector lottery work.

In North America, the company operates as Intralot, Inc. and Intralot, Canada, each a Bally's Intralot Company, maintaining a trusted and independent operating presence aligned with the regulatory requirements of government lottery partners. As a technology focused organization, Intralot partners with public sector lottery and gaming operators to enable responsible play and generate returns that support community programs and public initiatives.

Guided by its strategy of "Driving Lottery Digital Transformation with flexible, reliable, and secure solutions," Bally's Intralot focuses on modernizing lotteries through advanced technologies, omnichannel player experiences, and operational efficiency.

With more than 23 years of continuous operations in the United States and Canada, Intralot, Inc. employs over 600 professionals and supports 14 contracts across 13 jurisdictions. The company delivers a comprehensive portfolio of services, including lottery and online gaming systems, retail sports betting platforms, instant ticket warehousing and distribution, and VLT and COAM monitoring services.

Responsible gaming, security, and sustainability are embedded at the core of Intralot's operations. The company holds WLA Responsible Gaming Framework Certification, NCPG iCAP Ready Accreditation, and a broad portfolio of international certifications covering security, quality, environmental responsibility, and anti-bribery compliance. Bally's Intralot is also an active member of leading global industry organizations, reflecting its commitment to responsible growth, innovation, and best practices across the regulated lottery ecosystem.

**Pollard Banknote Limited**  
[www.pollardbanknote.com](http://www.pollardbanknote.com)



Pollard Banknote Limited  
[pollardbanknote.com](http://pollardbanknote.com) Pollard

Banknote provides lotteries across the globe with a wide range of industry-leading print, retail, and digital products and services. As the lottery partner of choice, we empower our clients by delivering strategic recommendations and innovative tools that promote responsible growth and maximize proceeds for good causes.

Our team of lottery specialists focuses on three key dimensions of success: Outstanding Games that excite loyal players while attracting new ones, Retail Excellence through effective in-store strategies and retail network expansion, and Digital Innovation to enable a seamless, fully integrated lottery experience across online and retail channels.

Pollard Banknote supports our clients in achieving their business objectives with comprehensive marketing strategies and related

services that aim to create engaging player experiences and drive lottery performance. At the same time, our revenue-generating instant games redefine industry standards with captivating designs, innovative playstyles, and popular licensed brands that boost entertainment value.

Our retail solutions enhance and expand the lottery presence in retail spaces. These include best-in-class in-lane, self-serve, and vending solutions, as well as instant ticket merchandising, dispensing, and POS display options from our Schafer Retail Solutions + portfolio. Furthermore, our Pollard Charitable Games Group is the leading provider of pull-tab tickets, bingo paper, bingo markers, ticket vending machines, and electronic games and devices to charitable and other gaming markets in North America.

We offer a growing range of world-class digital products designed to elevate the lottery experience. These include advanced mobile applications, innovative Space Between™ games, and player engagement solutions like our gameON™ second chance and playON® loyalty



platforms. Additionally, Pollard Banknote offers a suite of lottery management and optimization tools, including warehousing and distribution platforms and services, to enhance lottery operations.

Drawing on our extensive iLottery experience in North America, Pollard Banknote developed the Pollard Catalyst™ Gaming Platform which is now live and delivering meaningful results. This state-of-the-art platform utilizes modern, cloud-native technology and a modular system architecture to give lotteries unrivaled flexibility and extensibility. Designed as an omnichannel solution, it can also seamlessly integrate online and retail play for a unified player experience. Paired with exciting iLottery games from our Pollard Digital Games Studio and

expert-led business services, the Pollard Catalyst™ Gaming Platform enables lotteries to drive engagement, increase revenue, and adapt to evolving market demands.

Our unwavering commitment to innovation across these areas has resulted in exponential growth and the establishment of a global family of companies with over 2,200 employees collaborating across 20 locations in eight countries worldwide. With a diverse range of innovative products and solutions supported by unparalleled expertise and experience covering all aspects of lottery, Pollard Banknote continues to be the premier partner for lotteries around the world and a driving force in the industry.

**Scientific Games**  
[scientificgames.com](http://scientificgames.com)



Scientific Games is driven by a mission to responsibly maximize funding for vital good cause programs in communities around the world. As the leading global provider of lottery games and solutions, we bring more than 50 years of relentless innovation and unwavering security and compliance to every partnership. Today, our teams of experts serve 150 government-regulated lotteries in 50 countries.

Since 1973, Scientific Games has integrated science into everything we do. Our portfolio of games, technologies, analytics and services delivers entertaining omnichannel lottery experiences that allow consumers to have fun and play healthy, while helping lotteries operate securely and responsibly.

We developed the world's first secure instant scratch game using patented mathematical formulas and engineering innovation, and we continue to power the industry with breakthrough, science-based products. From engaging player entertainment experiences to enterprise gaming systems and advanced retail and digital solutions, our products and programs drive lottery performance and profits.

Headquartered in metro Atlanta, USA, Scientific Games is a 100% lottery-focused private company owned by Brookfield Business Partners, a leading global investment company. Our global workforce of 3,500 employees spans five continents. Powered by Scientific Games' data analytics, our game designers create what players want to play, while our technologists deliver how and where they want to play—at retail or digitally. We're also leading innovation that streamlines how retailers manage and sell lottery products in stores.

We are the world's largest creator, producer, and manager of lottery games, and the fastest-growing leading provider of lottery systems and retail technology. Our integrated ecosystem of products and applica-

tions seamlessly connects lottery retail and digital experiences into a true omnichannel environment, making Scientific Games the partner of choice for iLottery and lottery sports betting markets.

Scientific Games leads by investing in innovation with a constant focus on the player and retailer experience. Lottery is not just a game—it is a moment of entertainment and one of the world's largest consumer product categories. We help lotteries modernize by solving market challenges and unlocking new opportunities across retail and digital channels, while maintaining a firm commitment to responsible gaming. As a result, the future of lottery beneficiary funding remains strong.

That future is built on game security paired with the excitement of winning, all backed by science and world-renowned security and compliance protocols. Scientific Games powers many of today's favorite lottery games and delivers the most advanced retail, digital and gaming systems technologies to support our customers' long-term sustainability.

**Our proven portfolio of lottery products, technology, and services includes:**

**Player Experiences**

Retail instant scratch games, draw-based and Fast Play games, Digital, iLottery, and hybrid games, Licensed brands, Linked games, Lottery sports betting

**Player Engagement**

Second-chance promotions, Loyalty programs, Customer relationship management, Mobile apps, Winners' events

**Retail Solutions & Systems**

Enterprise gaming systems, Clerk-operated and self-service retail technology, Retailer technology systems, Payment solutions

**Data-Driven Intelligence**

Consumer analytics and insights, Business and retailer intelligence

**Operational Excellence**

Performance-driven partnerships, Managed services

**Allwyn North America**  
[Allwyn-NorthAmerica.com](http://Allwyn-NorthAmerica.com)



Allwyn North America is a full service lottery operator, supplier and business partner to North American lotteries. We make play better for all with innovative lottery technology and services, engaging content, and tried-and-tested playbooks that responsibly grow lotteries' playerbase, revenue and returns to good causes over time.

Our local team of experienced lottery professionals based in Chicago, Illinois are deeply familiar with all aspects of lottery operations. Globally, we're connected to over 8,000 employees in six different markets across North America and Europe, and our lottery operations and technology supports

over 130 million players and generates more than \$9 billion USD in annual gaming revenue.

As the commercial operating partner of the Illinois Lottery, we work in partnership with the Department of the Lottery to operate a modern lottery that benefits the people of Illinois. Our focus is to drive responsible and sustainable growth to maximize revenue, while building the Illinois Lottery's brand and reputation as a champion for the people of Illinois. Together Allwyn and the Department have grown the Lottery's player base to two-thirds of the adult population, delivered year-over-year growth in online players and sales, delivered record total sales, and delivered record proceeds to the State of Illinois.

**Aristocrat Interactive™**  
[aristocratinteractive.com](http://aristocratinteractive.com)



Aristocrat Interactive is Aristocrat Leisure Limited's (ASX: ALL) regulated online Real Money Gaming (RMG) business and was formed in 2024 with the combination of Anaxi and the NeoGames businesses.

With a commitment to responsible gameplay, the business delivers land-based gaming systems, content, and technology solutions for online RMG, with a full-service offering that includes content, proprietary technology platforms, and a range of value-added services across iLottery, iGaming, Online Sports Betting (OSB), and Customer Experience Solutions (CXs).

Recognized as the long-term partner of choice by many of the world's leading online lotteries, Aristocrat Interactive's iLottery business unit helps authorized lottery operators build and accelerate high-performing online lottery programs.

Aristocrat Interactive's iLottery business unit currently serves 32 global lottery customers, more than double the number served just four years ago. It delivers comprehensive, turnkey solutions that include cutting-edge iLottery platform

development and operations, award-winning instant games through its NeoGames Studio™, third-party digital content via the industry's most robust content aggregation platform, and performance-driven marketing services.

Aristocrat Interactive supports lotteries in creating tailored iLottery experiences that drive engagement and maximize returns for worthy causes. Its omnichannel strategies are designed to attract new player segments and expand the reach of the lottery ecosystem.

Trusted by leading lotteries worldwide, Aristocrat Interactive's technology enables partners to scale their online operations and drive player interaction.

As the interactive partner to many of the most successful online lotteries globally, Aristocrat Interactive's iLottery team is committed to continuous innovation, responsible gaming, and industry collaboration for end-to-end iLottery technology solutions.

*Aristocrat Interactive's regulated gaming products are only for use in accordance with local regulatory requirements. Aristocrat Interactive promotes Responsible Gameplay. Learn more at: <https://www.aristocrat.com/responsible-gameplay/>.*

**Inspired Entertainment**  
[inseinc.com](http://inseinc.com)



**Engaging the next generation of Lottery Players**

Inspired offers an expanding portfolio of content, technology, hardware and services for regulated gaming, betting, lottery, social and leisure operators across land-based and mobile channels around the world. The Company's Gaming, Virtual Sports, Interactive and Leisure products deliver winning entertainment that appeals to a wide variety of players, creating new opportunities for operators to grow their revenue.

Inspired Entertainment operates in approximately 35 jurisdictions worldwide,

supplying gaming systems with associated terminals and content for approximately 50,000 gaming machines; Virtual Sports products through more than 32,000 retail venues and online; interactive games for 170+ websites; and a variety of amusement entertainment solutions with a total installed base of more than 16,000 gaming terminals.

As a large gaming provider, Inspired produces machines that deliver a winning combination of innovative technology, hardware, content and services. Inspired's proven online and mobile interactive slots and iLottery products are currently some of the highest-performing games. And Inspired is the creator and best-in-class producer of award-winning Virtual Sports that are popular with players around the globe.

**FDJ UNITED**  
[fdjunitied.com](http://fdjunitied.com)



FDJ UNITED is one of Europe's leading betting and gaming operators, with a vast portfolio of iconic brands and a reputation for technological excellence. With over 5,000 employees and a presence in more than 10 regulated markets, the Group offers a diversified, responsible range of games, both under exclusive rights and open to competition: lottery games in France and Ireland, via an extensive point-of-sale network and online; sports betting at

points of sale in France; and online games open to competition (sports and horse-race betting, poker and online casino games, in markets where these activities are authorized).

FDJ UNITED, who has proven Lottery International footprint and ambitions, has placed responsibility at the heart of its strategy and promotes recreational betting. The Group is listed on the regulated market of Euronext Paris (FDJU) and is part of the SBF 120, Euronext 100, Euronext Vigeo 20, EN EZ ESG L 80, STOXX Europe 600, MSCI Europe and FTSE Euro indices.



# ★ PLATINUM INDUSTRY LEADERS ★

## **Instant Win Gaming (IWG)** [instantwingaming.com](http://instantwingaming.com)



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

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

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

# ★ GOLD INDUSTRY LEADERS ★

## **ABACUS Solutions International Group** **In-lane Solutions for Innovators** [lotteryeverywhere.com](http://lotteryeverywhere.com)



Abacus believes that part of the future of lottery lies in integrating into the existing retailer point of sale and other consumer infrastructures by providing a highly secure transaction gateway that enables both the Lottery Operator and Retailers to work together and create mutual growth. Abacus is the leading solution provider that allows retailers to sell lottery tickets at all points of sale, including self-checkout and eCommerce. With proven success in international markets and partnerships with all the industry vendors at retail, Abacus is the trusted solution for modernizing lottery sales in the retail environment

### **Retail Core Values**

Abacus empowers retailers to boost revenue, streamline operations, and enhance customer convenience by seamlessly integrating lottery products and services into retail points of sale, without extra hardware in store.

### **Lottery Core Values**

Abacus enables lotteries to boost revenue and enhance customer convenience by opening additional sales channels for your products by seamlessly integrating lottery products and services into retail points of sale.

Our service offers a feature rich transactional gateway platform which facilitates :

Integration into retail sales channel for both staffed, self-checkout and eCommerce lanes to facilitate :

The sale of draw tickets

The sale of instant tickets

Connectivity to third party instant ticket dispensers

Enquiry and validation of all games

Integration to eCommerce and digital channel platforms.

A feature rich Management Portal which will manage:

Configuration and management of the point-of-sale estate

Reporting capability across all platforms and channels

Advanced fault diagnosis and tracking

## **Gaming Laboratories International (GLI®)** [gaminglabs.com](http://gaminglabs.com)



Gaming Laboratories International (GLI®) is a proud associate member of WLA, NASPL, CIBELAE, and the EL Lottery trade associations. GLI offers independent and world-class services designed to provide the gaming and lottery industries with an unparalleled range of comprehensive services, including certification, unsurpassed consultation, full lifecycle compliance services, testing and project management.

Since 1989, GLI has worked closely with lotteries around the world to help them operate more effectively and to deliver solutions that meet the highest standards of quality. Drawing from experience in more than 710 jurisdictions worldwide, over 74 lotteries rely on GLI to help achieve their business objectives by maximizing efficiency, security and compliance. GLI has a global network of laboratory locations across six continents, with U.S. and international accreditations for compliance with ISO/IEC standards for technical competence in the lottery, gaming, and wagering industries.

GLI offers a broad range of services in lottery modernization, including:

iLottery/Instant Support

Cybersecurity Services

Responsible Gaming Services

End-to-End System Implementation Planning

GLI also assists lotteries as they add new games to their portfolios, upgrade existing systems, or transition to new vendors or technologies with services such as:

Project Management

Quality Assurance & Testing Services

Technical and Automated Testing

Game Testing, Math Analysis, Random Number Generator (RNG) Testing and Draw System Analysis

For more information, visit [gaminglabs.com](http://gaminglabs.com).

**Fennica Gaming**  
[fennicagaming.com](http://fennicagaming.com)



Fennica Gaming is an international content and technology partner to National and State Lotteries, with a clear focus on growth and customer success. We expand only with regulated, licensed operators because we believe that playing by the book, being a trusted teammate, and drawing inspiration from players are the only ways to build a sustainable money gaming business. Rooted in the legacy of Veikkaus – the Finnish National Lottery and the world’s first national online gaming operator – Fennica Gaming brings decades of operational excellence, data-driven insight, and Nordic integrity to the global stage. Born in one of the world’s most tight regulated markets, we design responsible, high-performing products that succeed under strict oversight. Our pioneering elnstant games, first designed in Finland 20 years, have evolved into one of the world’s most advanced, mobile-first portfolios: fast, intuitive, snackable entertainment that attracts new player groups and now engages audiences in 17 countries across 3 continents. Alongside elnstants, our online casino games are crafted with the same precision, rigor, and deep operational insight, consistently capturing over half of the market share in a highly competitive international offering at our home market. “Nordic by Nature” defines how we work and what we deliver: quality as standard, transparent and compliant partnerships, deep roots in regulated gaming, and a distinctive Nordic “spice” in quality, design, and mechanics – always in collaboration with regulated, licensed operators to build truly sustainable money gaming businesses.

**Carmanah Signs, a Division of STRATACACHE**  
[carmanahsigns.com](http://carmanahsigns.com)



Carmanah Signs is the Lottery & Gaming Division of STRATACACHE, the world’s leading provider of intelligent digital signage and in-store marketing technology. Providing **best in class retail signage to 55+ lotteries** on four continents, Carmanah has **over 230,000 networked sign installations** at lottery retailers worldwide. The company offers products designed to engage players at retail, including digital sign **Content Management Software, Media Players, Commercial Grade LCD Displays, All-in-One Interactive Tablets, and Wirelessly Updated Jackpot Signs**. Carmanah also offers a complete suite of services to help lotteries build and operate effective digital communication platforms at retail, including network hosting, network monitoring, content creation and scheduling, and specialized field services. The Carmanah team is made up of retail technology experts and customer experience strategists with deep roots in lottery. Carmanah is your partner in transforming lottery at retail to deliver exceptional player experiences – growing sales and responsibly raising funds for beneficiaries.

**Alchemy 3**  
[alchemy3.com](http://alchemy3.com)



Boasting over 150 years of combined lottery industry experience, our team at Alchemy3 expertly creates unique, memorable gaming and marketing solutions tailored to the lottery’s goals and objectives. We create premium programs, branded promotions and integrated cross-channel campaigns that appeal to both new and existing players, powered by innovative technology such as digital games, mobile apps and loyalty platforms as well as a broad portfolio of more than 30 brand partners. From strategic planning to seamless prize fulfillment, we handle every detail with creativity and care. At Alchemy3, we don’t just build games. We build full-service experiences that engage, excite and deliver results.

**Splashdot**  
[Splashdot.com](http://Splashdot.com)



Splashdot is redefining player loyalty for lottery and gaming through cutting-edge CRM, dynamic interactive promotions, and loyalty experiences that surprise and delight. Splashdot is the industry leading CRM and engagement provider focused exclusively on lottery and gaming. The company is currently working with the Multi-State Lottery Association (MUSL) to launch a new engagement environment and mobile app for Powerball... Coming soon! At the core of Splashdot’s offering is a best-in-class CRM platform (nCentive) designed to transform player data into meaningful engagement. The nCentive platform enables advanced segmentation, real-time personalization, flexible contest features, and system-generated automations that allow player centric organizations to engage players before, during, and after play. Splashdot provides digital contests and loyalty environments that help organizations build known-play databases, promote cross-play, drive gross gaming revenue (GGR), enhance perceived winnability, and add sustained value to the player experience. Guided by the belief that loyalty is more than collecting rewards, Splashdot focuses on creating relevant, timely interactions across the entire player journey. With a strong emphasis on security, flexibility, responsible gaming, and rapid speed to market, Splashdot helps lotteries turn CRM strategy into measurable results. Splashdot — always be engaging.

**SCA Promotions**  
[scapromotions.com/lottery-solutions](http://scapromotions.com/lottery-solutions)



SCA, has supported lotteries for over 25 years, providing unique **budget management and risk mitigation services**. New competitive challenges demand new approaches. SCA has developed a portfolio of solutions designed to help lotteries **win market share against commercial competitors**, even with limited budgets and resources. Solutions include:

- On demand GLI-certified random number generation
- Proprietary verification methods to enhance public trust, while meeting internal and external audit needs
- Game start-up prize risk transfer
- Sponsorship activation & sports-themed campaigns
- Retailer compliance incentive
- Adding mega-prizing to second chance promotions
- Experiential prizing financial risk transfer
- **Complimentary risks & opportunities assessments for US-based lotteries**

Our team of promotion experts, data scientists, and lottery veterans offer a unique skillset that assists lotteries, their agencies, and service providers with maximizing player engagement, sales, and contributions to good causes. We also provide the unique benefit of mitigating financial risk through risk transfer agreements. Join the dozens of lotteries and service providers that have utilized SCA to increase consumer engagement and gain competitive advantage. Schedule your Complimentary Risks & Opportunities Assessment today. Dan Rogge – dan.rogge@scapromo.com 214.860.2526 Donald Silberstein, Client & Partner Solutions Lead donald.silberstein@scapromo.com 860.205.6309 Lottery Solutions | SCA





# PULSE of the Industry

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## NORTH AMERICAN NEWS

**Scientific Games Appoints Rich Wasserman as Senior Vice President of Product Engineering**



**U.S lotteries Launch Millionaire for Life™ with Daily Chances to Become a Millionaire**

**Gaming Laboratories International (GLI®) Promotes Patrick Cottingham to Director of Client Services, North America**



**Scientific Games and Delaware Lottery Launch Evolutionary iLottery Program with Focus on Sustainable Growth**

**Scientific Games Announces Ovie Doro as Senior Vice President of Data, Analytics & AI**

**Brightstar Lottery and its World-Class Solutions Chosen to Power Wisconsin Lottery**

**Brightstar Lottery Delivers Industry-Leading Sales Force Automation Solution to Ontario Lottery and Gaming Corporation**



**Inspired Entertainment Launches Game-Changing Lottery Platform STRATA**

**Powerball becomes title sponsor of Pickleball, a rapidly growing US sport**

The Professional Pickleball Association (PPA Tour) has announced that lottery game Powerball will serve as the official title sponsor of the Pickleball State Championship Series.

**MUSL Confirms Launch of Multi-State X's and O's Game**

Powerball is partnering with the National Football League (NFL) to launch a new multi-state game that will bring 'the best of both worlds'. Called X's and O's, the game will have a unique prize structure and is expected to begin in late August or early September 2026. Instead of offering a huge cash jackpot that might roll into the billions of dollars, X's and O's will put its emphasis on lifestyle experiences that are linked to the NFL.

**Powerball Launching New Nationwide Lottery Draw Game**

The Multi-State Lottery Association, the nonprofit group that runs Powerball on behalf of the interstate lottery game's 48 participating member jurisdictions, launched a new nationwide game on Feb. 22. The draw product is called Millionaire for Life, and each draw gives players a chance to win up to \$1 million a year for life.

**DC Lottery's "Scratcher Symphony" Scores Double Platinum Awards for Excellence in Advertising**

The DC Lottery has been recognized with two Platinum-tier honors for its Scratcher Symphony commercial, including the 2025 MUSE Creative Awards' Platinum Winner in the category of Single Advertising Ad—Online and the 2026 AVA Digital Awards' Platinum Winner in the category of Commercial and Promotional Video.

**PGRI AI Lab: Thinking, Amplified. "Predictive Markets and the Future of Games of Chance"**



**Missouri AG warns businesses to start removing illegal gambling machines**

**Scientific Games' Scratch-Off Partnership with Florida Lottery Shatters Retail Sales Record with \$7.093 Billion in 2025**

**Analyzing the five biggest opportunities to help bolster contributions from the Lottery industry for 2026.**

## WORLD NEWS

**FDJ United names Pascal Chaffard as head of online betting and gaming**

**France launches regulatory framework for Web3 gambling-like games**

The ANJ's move is one of the first attempts in Europe to regulate blockchain-based gaming mechanics and oversee games that feature monetisable digital objects. It applies to games that blur the line between traditional video gaming and regulated gambling, allowing players to acquire digital assets such as NFTs or blockchain-based items that can later be traded on secondary markets.

**The Lottery Corporation posts steady earnings and dividend for 1H26**

Digital sales continue to rise, making up 41.2% of total Lotteries turnover. Looking ahead, the company plans to review its brand architecture and explore new product opportunities while investing in Keno and digital transformation. Strategic technology upgrades, portfolio enhancements, and a focus on local market growth are all expected to support ongoing sustainable shareholder returns.

**PGRI INTERVIEWS: Robert Chvátal, Chief Executive Officer, Allwyn**

**CJEU Confirms Player's National Law Governs Illegal Online Gambling Claims**

The Court of Justice of the European Union (CJEU) has delivered a landmark judgment in Case C-77/24, Wunner, clarifying that claims for losses resulting from illegal online gambling are governed by the law of the player's Member State of residence. Crucially, the damage is deemed to occur where the player is habitually resident, meaning the player's Member State law governs the claim. The Court emphasized that the location of the gambling operator, servers or licensing authority is irrelevant for determining where the loss occurs. So, even though the operator may be located in Malta, for instance, the jurisdiction which adjudicates the litigation is the country where the player resides.

The Court further clarified that directors may incur personal liability if their conduct directly causes damage, ensuring that company officers cannot escape responsibility for illegal gambling operations.

**Finland's new gambling watchdog to revoke licenses and block gambling websites**

**Fennica Gaming rolls out instant games with Germany's Sachsenlotto**



**German Regulator Cranks Up Fight Against Illegal Gambling**

**Scientific Games Enters Digital Collab with European Lotteries Group LEIA (Lotteries Entertainment Innovation Alliance),**

a collaboration between five leading European lotteries: Danske Spil in Denmark, FDJ United in France, Norsk Tipping in Norway, Svenska Spel in Sweden and Veikkaus Oy in Finland.

**CASINOS, SPORT BETTING, AND PREDICTIVE MARKETS NEWS**

**Prediction Markets Are The Super Bowl's Breakout Winners**

Kalshi eats into sportsbook app download share during NFL Playoffs, surging to a new high in consumer adoption. Kalshi reported more than \$500 million in Super Bowl contract trading by the end of the event, compared to roughly \$27 million last year. Meanwhile, Nevada sportsbooks saw Super Bowl betting drop to \$133.8 million, the lowest handle since 2016. BetMGM downloads fell 25% year over year during the Divisional Round, while Caesars saw an 8% decline. FanDuel recorded a 14% drop, continuing a period of weaker acquisition metrics that began around midseason.

**Prediction Markets v. State Gaming Laws: The Kalshi Litigation Gamble**

Over the past year, Kalshi has become the focal point of a fast-moving legal battle over the reach of federal preemption. What began as an innovative model has now triggered a wave of litigation across federal courts, drawing in state regulators, tribal governments, and private plaintiffs. The outcome has implications far beyond Kalshi itself. If Kalshi's theory prevails, it will open the door for a significant culture shift in enforcement and compliance activities for new business models to challenge the role of state regulatory authority. If states prevail, this business model becomes far more complex to operate, and the resulting precedent would extend well beyond prediction markets.

**Bally's chair Soo Kim details Star Entertainment Group success strategy**

**UK Treasury Committee: taxes should be increased on online gambling, while sparing other areas of the industry which are viewed as less harmful.** The changes will see remote gaming duty (charged on operations including online casinos) increase from 21% to 40% from 1 April this year, while the tax rate for remote sports betting will jump from 15% to 25% from 1 April 2027.

**New York Lawmakers on a Tear to Change Laws About Legal Betting**

**Nevada regulator goes on offensive against Kalshi, Launching civil enforcement action**

**Prediction Markets and College Sports: NCAA Pushes for National Rules**

**NCAA President Charlie Baker is calling for an immediate suspension of prediction markets tied to college sports,**

**Tennessee, Mississippi Make Moves To Ban Sweepstakes Casinos**

**Social media site X bans gambling paid partnerships**

**New Zealand Rules Prediction Markets Are Illegal Gambling**

**Indian Gaming Association urges Congress to curb sports Predictive Markets "event contracts"**

**Massachusetts court upholds state ban on prediction markets**

**Polymarket receives warning from The Netherlands Gambling Authority (KSA)**

**Prediction markets, betting operators join new CFTC (The Commodity Futures Trading Commission) advisory committee**

**Google to tighten requirements for gambling advertisers**

New requirements will apply to Google gambling advertisers in Europe, the Middle East, and Africa. UK.

**Gambling stocks sag as prediction markets steal Super Bowl bets**

**Feds Look To Be Expanding Scope Of Investigation into NBA Betting Scandal**



# PGRI LOTTERY EXPO

## NASHVILLE 2026

Co-Hosted by the Tennessee Education Lottery Corp.

OCTOBER 20, 21, AND 22 | NASHVILLE, TENNESSEE

The Graduate Hotel by Hilton

For hotel, registration, and conference information:

Visit news website [PublicGaming.com](http://PublicGaming.com) or

Conference website [PublicGaming.org](http://PublicGaming.org)



## STATE-LOTTERIES

### *Connecting with the Modern Player*

October 20, Tuesday: Opening Night Reception

October 21, Wednesday: Conference Sessions all day, followed by Reception

October 22, Thursday: PGRI Conference Sessions conclude at 12:30 pm.

## Lotteries Reshaping the Games-of-Chance Industry

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

- 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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## MONOPOLY

### GAME TOKENS PROGRESSIVE

**CURRENT PROGRESSIVE JACKPOT: \$XXX,XXX**  
**PROGRESSIVE JACKPOT STARTS AT \$5,000**

A DICE ROLL is the total of both dice appearing under each DICE ROLL. To Play, start in GO and count squares clockwise around the board for that DICE ROLL to land on YOUR SYMBOL. If that YOUR SYMBOL matches a WINNING SYMBOL, win that prize! If you land on CHANCE, win that prize plus the amount on the CHANCE CARD. If you land on GO, win \$200 automatically! Each DICE ROLL starts at GO and plays separately.

**WINNING SYMBOLS**

CAR	WHEELBARROW	PENGUIN	THIMBLE
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**DICE ROLL 1**

**DICE ROLL 2**

**DICE ROLL 3**

**DICE ROLL 4**

**DICE ROLL 5**

**DICE ROLL 6**

**YOUR SYMBOLS**

BATTLESHIP <b>\$10.00</b> TENDOL	DUCK <b>\$50.00</b> FIFTY	THIMBLE <b>\$100</b> ONE HUNDRED	CHANCE <b>\$50.00</b>
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