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Olli Sarekoski
Chief Executive Officer, Veikkaus



Ángel Sánchez
General Manager, ONCE (Spanish National Organization of the Blind)

Also Featuring the leadership of the
Multi-State Lottery Association (MUSL) ...

National Games, Global Vision: How
Collaboration Is Shaping the Future
of Lottery

Also Featuring ...

The 2025 Class of Lottery Industry Hall of Fame



Piet Van Baeveghem,
EL (European Lotteries
Association)



Richard Bateson,
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Michelle Carney,
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Stephen Durrell,
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**Elisabeth Römer-
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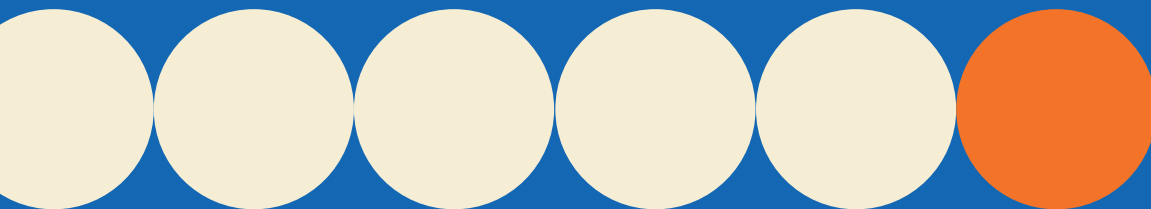
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Powerball Product Group Chair and MUSL Vice-President*

David Barden, CEO & President, New Mexico Lottery and Chair, MUSL International Working Group

Jay Finks, Executive Director, Oklahoma Lottery and Chair, MUSL Marketing and Promotions Committee

Sarah Taylor, Executive Director, Hoosier Lottery (Indiana) and Chair, MUSL Development Committee

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Valentin Ramognino, Vlaemminck.Law



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From the Publisher

Susan and I are so looking forward to seeing you at the three big lottery conference events this fall. First up is **NASPL Niagara Falls** where at least some of you are right now as you read this. And right after this week wraps, we head straight to Bern, Switzerland, for the bi-annual **EL Congress**. And just a few weeks later we'll be in Nashville, November 4–6, for our own **PGRI Lottery Expo**. Check out NASPL.org, European-Lotteries.org, and PublicGaming.org for more on these organizations and their events.

The theme of EL Congress is “Building a Better World.” EL President **Romana Girandon** is a true champion of that vision — lotteries not only serving good causes, but of lotteries as active agents of societal progress, shaping communities and driving change far beyond the role of selling lottery tickets. Which brings us to the extraordinary story of **ONCE**. What started in 1938 as a way to create dignified work for the blind has grown into the world's largest employer of people with disabilities and a global model for the social economy. **Ángel Sánchez** explains how ONCE keeps evolving its unique business model. This isn't just smart leadership — it's social transformation in action.

Europe has long been caught up in waves of regulatory change. On one side are the political and economic forces pressing for gambling to be treated like any other consumer product. On the other are the voices of reason who point out the obvious — that gambling is different because it carries higher social costs and generates oversized profits, so it demands a different set of regulations. The monopoly model best protects consumers and ensures funds flow to good causes. In the U.S., that's never really been debated. States have the clear right to run a monopoly lottery if they choose. In Europe, it's much less straightforward.

The changing European regulatory scene, and the lack of clarity about what the EU Commission and Court of Justice expect of member states, has left space for confusion. And where there's confusion, illegal operators

thrive — working in gray zones where laws are vague or unenforceable. **Philippe Vlaemminck's** article sorts out this somewhat complicated scenario to explain how and why lottery needs a safe harbor.

Veikkaus has long been admired for its pioneering spirit, its ambitious approach towards technological and business-process innovation, and the stability of its games-of-chance market. Finland is now rewriting the rules of gambling, and Veikkaus is at the center of it. As the country shifts from a monopoly model to a competitive multi-license system in many game categories (though not in lottery), CEO **Olli Sarekoski** sees not just disruption but opportunity. In this candid interview, he explains how Veikkaus is preparing to lead in a more competitive market — leveraging data, AI, and international expansion—while keeping responsibility and player protection at its core. His vision reveals how a national lottery can transform regulatory upheaval into strategic advantage.

Simon Jaworski conducts valuable research on brand awareness, player behavior, and changing play styles — currently with a spotlight on Powerball® and Mega Millions®. And speaking of those games, see the slightly edited transcript of a wonderful panel discussion with the leaders of the **Multi-State Lottery Association (MUSL)**. They are on quite a tear, have been for the last five years, forging collaborations with iconic brands like Nascar and the NFL and launching new games and moving forward at a fast and furious pace.

As lotteries strategically reshape their operations to adapt to changes in consumer behavior, digitalization, and new forms of competition for players' attention, taking action requires flexible solutions that meet current needs and support ongoing evolution. In its transformation to **Brightstar Lottery** from IGT Lottery, Brightstar has set the stage by purposefully evolving its lottery product roadmaps and aligning its resources with these objectives in mind. The result is

forward-looking products and services that meet the challenges lotteries have cited as high priorities. Brightstar Lottery has a huge story to tell and we are so pleased to feature it so prominently.

The world of Instant Games is more exciting than ever. Just check out the article on **Scientific Games** explosive, bold portfolio of ultra-premium enhanced scratch games called **Obsidian**. Named for their dark, glasslike appearance like naturally occurring obsidian rock, the games feature a dramatic combination of all-black and holographics and represent the next generation of lottery-playing experiences.

The new world of iLottery is reshaping the player experience, enabling two-way interactive communication, and a variety of new tools to improve access and manage play, like digital wallets. **Cloud-native technology platforms** are the pathway towards managing the complexity by transforming innovation, scalability, and security, offering a clear path for lotteries to stay competitive in today's digital world. **Pollard Banknote** and **Brightstar Lottery** have both contributed insightful articles that bring us up to speed on this ground-breaking topic.

And **DraftKings** challenges us to think about how the modern shopping experience is changing towards a concept known as **distributed commerce** — a model where brands embed shopping opportunities directly into the platforms and ecosystems consumers already frequent. Consumers are making purchases in the same digital spaces where they scroll, chat, and browse. And increasingly, these platforms don't just sell—they fulfill.

See you in Niagara Falls, Bern, and Nashville!

Paul Jason, Publisher
Public Gaming International Magazine



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PGRI LOTTERY INDUSTRY HALL OF FAME

Congratulations to the six newest members of the Lottery Industry Hall of Fame

The 111 members of the PGRI Lottery Industry Hall of Fame have voted for and elected six industry leaders to be inducted into the Lottery Industry Hall of Fame for 2025.

The Lottery Industry Hall of Fame was founded in 2005 as a means of honoring those who have done the most to promote excellence and integrity in our industry and make the world lottery industry the great success. The recipients of this award are all a credit to that ideal and are joining a select and distinguished group of world lottery industry professionals. Visit the "Awards" section of PublicGaming.com (or LotteryIndustryHallofFame.com) to read more about the Hall of Fame.

The Induction Ceremonies

to induct the newest members of the Lottery Hall of Fame will be held at the NASPL Annual Conference at 4:45 pm on Weds Sept 10 at the Niagara Falls Convention Centre and a second ceremony will be held at the EL (European Lotteries Association) Congress at 3:45 pm on Tuesday September 16.

Visit LotteryIndustryHallofFame.com for info about the Lottery Industry Hall of Fame and its members. Thank you for your support of the Lottery Hall of Fame.



PIET VAN BAEVEGHEM
Secretary General, EL (European Lotteries Association)

Piet Van Baeveghem is a seasoned legal and public affairs executive whose lottery career spans over fifteen years, with deep expertise in regulatory frameworks, public procurement, and European legal affairs, and how all these affect and shape the lottery sector. Until June 30, Piet served as Secretary General and Head of Legal & Regulatory Affairs at the Nationale Loterij (Belgium), where he was also Company Lawyer. Piet joined

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STEPHEN DURRELL
Executive Director, Kansas Lottery

Stephen began his career in the gaming industry in 2004 as Assistant Attorney General assigned to the Kansas Racing and Gaming Commission. In 2008, Stephen transitioned to leading the Kansas Lottery as General Counsel. In 2018, in his role as Executive Director, Stephen streamlined operations to boost efficiency and profitability. Under his leadership, the Lottery achieved record sales and state fund transfers, solidifying Kansas as a leader among progressive lotteries and launching innovative programs to propel KSL's player offerings forward.

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RICHARD BATESON
Chief Executive Officer, Intralot, Inc.

A distinguished and successful leader in our industry, Richard Bateson has more than 20 years of experience in the industry as both an operator and more recently a vendor. His rare combination of commercial expertise, digital innovation, and collaborative leadership has delivered measurable, lasting value to lotteries across Europe and North America.

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ELISABETH RÖMER-RUSSWURM
Managing Director, Austrian Lotteries

Since 2017, Elisabeth Römer-Russwurm has served as Managing Director, overseeing the development, marketing, sales, and secure operation of all traditional products of the Austrian Lotteries. Elisabeth graduated from The Vienna University of Economics and Business and began her lottery career at the Austrian Lotteries in 1990. As the long-time Head of Marketing and Product Development, she launched major campaigns for the Austrian Lotteries' brands. Among her achievements, she led the development of

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MICHELLE CARNEY
Vice President of Global Lottery Marketing, Brightstar

Michelle Carney is a highly respected colleague within the lottery industry experienced in cultivating partnerships that contribute to Brightstar's global lottery leadership. In her 25-year career with the Company, she has spent much of that time collaborating with customers and industry associations to drive the evolution of lottery forward. Michelle holds herself and her

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CHARLES SCANNELLA
Vice President of Commercial Sales and Client Relations, Scientific Games

Charlie Scannella has spent over 40 years shaping the success of lotteries across North America through his leadership, innovation, and trusted partnerships. His deep industry knowledge, strategic vision, and dedication to client success have set the highest standard for excellence. Charlie's contributions have fueled lottery growth, mentored future leaders, and strengthened the industry at every level. His legacy of service and achievement deserves our highest recognition.

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VEIKKAUS DRIVES FORWARD ITS STRATEGIC PRIORITIES WHILE FINLAND RESTRUCTURES ITS GAMBLING SYSTEM

Olli Sarekoski

Chief Executive Officer, Veikkaus

PGRI INTRODUCTION: Around the world, policy-makers and regulators are sprinting to catch up with an industry that no longer waits. The way games of chance are marketed and delivered to players is shifting at a breathtaking pace—driven by digital platforms, shifting consumer habits, and surging play-ership. These transformations bring with them urgent public policy questions, particularly around problem gambling, consumer protection, and market integrity.

The regulatory questions that arise are not unique to any one country. They echo across borders: How do we articulate public policy before drafting the laws meant to enforce it? How do we safeguard vulnerable players without stifling innovation or individual freedom? How do we preserve market integrity—fairness, stability and equilibrium in a competitive market? How do we enforce the laws and defend regulated systems from the shadow economy of unlicensed illegal operators? These are just a few of the issues that transcend borders and affect jurisdiction all across the world.

These are global questions. And to answer them, we look to those jurisdictions that are not just keeping up with change—but helping to shape it. Enter Finland: a nation whose quiet efficiency has often masked its pio-

neering spirit. In 1996, it became the first country in the world to legalize and regulate online lottery sales, blazing a digital trail that others would follow. Today, Finland—and indeed its Nordic neighbors as well— require player identification for all games of chance, whether online or in retail. Now, in its most sweeping reform to date, Finland is transitioning from a monopoly model to a multi-license system in key product categories, even as it preserves exclusive rights for lottery.

The stakes are high, the process is complex—and the implications are global. I have found the reporting on Finland’s regulatory reform helpful but usually leaving me with more questions than understanding. That’s why I’m especially grateful to Olli Sarekoski for taking the time to provide his clear and thoughtful perspective. Olli also articulates how Veikkaus is confronting disruption not as a threat, but as a proving ground for reinvention. His vision is not merely about adapting—it’s about leading; it’s about transforming regulatory overhaul into strategic momentum, and reaffirming the value of a purpose-driven lottery in an increasingly competitive landscape.



Paul Jason: Finland is heading towards license model – current feelings?

Olli Sarekoski: The reform of the gambling system is expected and welcome. It will be a great opportunity for Veikkaus, and we have worked long-term to prepare for the near future. Our vision is to be a respected and successful international money gaming group by 2030. We want to

continuously develop ourselves in the spirit of our new mission of “we passionately drive better gaming”.

How has Veikkaus been preparing for the future overall?

O. Srekoski: We have been pushing data-driven culture to achieve our ambitious goal to become the most data-driven gaming company in the

world – utilizing AI as one of the core value drivers. Already, we are utilizing AI in Veikkaus’ web site and mobile app, digital marketing, betting odds, responsible gaming, compliance and naturally generative AI to improve efficiency.

Veikkaus’s in-house Game Studio was transferred few months ago to Veikkaus subsidiary Fennica Gaming. This strategic



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move brought game development and B2B sales under the same roof thus streamlining operations. We design and produce high-quality games for Finnish and international markets using the latest technologies. We utilize powerful modern software and cloud technologies for the implementation of our gaming services.

We have been extremely goal-oriented in recruiting top-notch professionals, including game, front-end, and back-end developers, cloud specialists, architects, data engineers, and mathematicians - not to mention cyber security and quality assurance experts. Our team delivers only the best, both B2B and B2C.

“As a result of the reform, Veikkaus keeps the monopoly in lottery-type games, scratch cards and physical slot machines while betting (including horse betting) and online casino moves into a license model. Veikkaus will naturally apply for a license to operate these license model games.”

Now, as Finland restructures its gambling system we are investing heavily in renewal and development work to be ready when Finland transitions to a partial multi-license system for gambling by the beginning of 2027. As I mentioned in the beginning, our vision is clear and ambitious towards 2030. We have three clear strategic priorities:

1. Responsible market leader in Finland
2. Significant international business
3. Goal-oriented, efficient and productive team

As part of preparing for the upcoming market change, we have already divided our domestic business areas to correspond to the product division in the new gambling market. Now we have Lottery and Land-Based Gaming, where Veikkaus will keep the monopoly, and then we operate Betting and iCasino – a portfolio which will be open for competition.

You are targeting to be the responsible market leader in Finland after the market is reregulated?

O. Sarekoski: Yes, all our actions are aimed at this result. Our strategic priorities

help us to navigate towards this goal.

Let's talk about these strategic priorities. First, responsible market leader in Finland: How do you achieve that in the upcoming license model?

O. Sarekoski: Inside Betting and iCasino business area, our actions are massive due to the fact that our target and identified need is to be extremely competitive. We have a new sportsbook platform, OpenBet, which was selected after a tender process. We have opted to integrate new PAM and CRM platforms. The scope of the several development streams is massive. Currently, for example, ongoing processes

include new website frontends and apps. Our in-house trading team will create a competitive advantage while generating in-house odds. Veikkaus has already increased the player playback rates to improve the offering and the product's price perception. We are heavily focusing on improving the consumer experience all the time – powered and supported by our strong brand.

Lottery and Land Based Gaming also require new development. Product development is an important part of maintaining Veikkaus' game range even after the upcoming reform. The launch of Milli was executed in early June this year. Milli is Veikkaus' newest draw game, with a jackpot of one million euros every single day. The new game Milli (a Finnish abbreviation of the word million) has been an important and long-anticipated update to Veikkaus' product portfolio. The first few months have been really successful. We are extremely happy and proud that the product itself, using our own platform, has already attracted international interest.

At the same time, it is naturally crucial to develop sustainability, and we have

made massive steps. A few years ago, we repositioned ourselves and created an even safer and more responsible gaming environment. Starting from the beginning of 2024, all Veikkaus games have required identification, with scratchcards being the latest addition. Consequently, we have comprehensive customer data available to prevent and reduce gambling harm. We have updated the harm prediction model predicting risk behavior and developed the care model. We have also piloted care calls particularly targeting young adults.

Secondly you mentioned significant international business?

O. Sarekoski: Our tool for this is Veikkaus subsidiary Fennica Gaming. Fennica Gaming, powered by Veikkaus, started its operations in 2022 and within three years the company has achieved impressive results and positive reception. Fennica Gaming first strengthened its B2B position in the eInstant market. At the same time, the company has expanded its product portfolio by offering slot games and delivering online casino games to internationally licensed operators. Our games are now live in 15 countries and 3 continents — superb start! Currently Fennica Gaming is naturally seeking strong growth and scalability. Latest achievements include, for example, a B2B license in Greece and a Gaming Related Vendor License in the UAE. Clearly, our strategic choice — exporting unique Nordic gaming services and content — has proven to be spot on.

All above requires talented staff, right?

O. Sarekoski: Agreed, and that is why our third strategic priority is building a goal-oriented, efficient, and productive team. Veikkaus' transformation is significantly boosted by talent acquisition. We have already hired several experienced iGaming experts into key positions and simultaneously we have recruited and continue to recruit representatives from the entertainment industry – to make sure that we are well positioned while targeting towards consumer's entertainment wallet.

At the same time this is really tech driven industry and to give perspective on how our team is evolving: solely in 2024 we hired a total of 99 new tech professionals.

Could you describe or clarify the ways in which the regulatory model has changed over the last few years, and what it will

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How ONCE is Redefining the Social Economy and Reinventing the Role of State Lotteries

Ángel Sánchez

General Manager, ONCE (Spanish National Organization of the Blind)



PGRI INTRODUCTION: The history of the ONCE Social Group is a singular example of how solidarity, organization, and innovation can transform the lives of thousands of people with disabilities in Spain. Its evolution has been shaped by a series of social, political, and economic milestones that have led to the creation of one of the world's largest social economy organizations.

At the end of the 19th century, blind individuals in various regions of Spain began organizing raffles as a means of subsistence. Later on, at the beginning of the 20th century, these initiatives gradually gave rise to coordinated efforts among different associations of blind people to legalize the sale of such draws. Finally, after several attempts, this process culminated on December 13, 1938, when the National Organization of the Spanish Blind (ONCE) was officially founded. Its mission was clear: to provide dignified employment for blind individuals through the sale of the "Cupón Prociegos" lottery ticket, under the auspices of the Spanish State.

Thanks to the sale of its social, responsible, and secure lottery products, ONCE has progressively expanded its services over the years. These now include education, rehabilitation, access to culture, and vocational training for blind individuals, along with broader support for people with other disabilities.

A pivotal moment came in 1988 with the creation of the ONCE Foundation, which extended ONCE's social initiatives to encompass all people with disabilities, not only those with visual impairments. The foundation's work focuses on training, employment, and universal accessibility, and is mainly financed by 3% of ONCE's lottery sales. Also at that time, companies began to be created by this Foundation and by ONCE itself, with the aim of generating sustainable employment for people with disabilities and thus raising awareness among Spanish businesses about integration in the workplace.

In 2014, the business arm of the organization was consolidated under the ILUNION brand (a combination of Inclusion and Union), which brings together a group of social enterprises operating in sectors such as services, tourism, social and healthcare assistance, consulting, and the circular economy. Its objective is clear: to demonstrate that economic profitability can go hand in hand with social impact.

In 2018, the concept of the ONCE Social Group was formalized, uniting ONCE, the ONCE Foundation, and ILUNION under a single, coordinated structure. This framework reflects a unified vision: to provide social services, generate employment, and promote inclusion under a common identity and shared mission.

Today, the ONCE Social Group is:

- An employer of over 77,000 individuals, making it the fourth-largest non-public employer in Spain and the largest employer of people with disabilities in the world.
- An organization where 60% of its workforce—more than 45,000 employees—has some form of disability.
- A group where 45% of employees are women, many of whom have disabilities, reflecting a firm commitment to gender equality.
- An example of cultural diversity, with almost 100 different nationalities integrated into its workforce.
- An international benchmark in social economy, inclusion, and accessibility.
- A model of sustainable management, in which all profits are reinvested into social programs.

The success of the ONCE Social Group lies in its unique formula: solidarity, professionalism, and a forward-looking vision. **ONCE does not merely generate employment—it creates opportunity, dismantles barriers, and builds a more just society.** Its model, unparalleled anywhere in the world, proves that profitability and solidarity not only coexist but mutually reinforce one another.

I am grateful for this opportunity to share with you the vision of Ángel Sánchez and the leadership of ONCE. Its storied history is inspiring and thought-provoking. Let's find out what the future holds for this ground-breaking enterprise called ONCE.



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Paul Jason: How has the system of street posts and kiosks operated by people with visual impairments or other disabilities changed or evolved over the last ten years?

Ángel Sánchez: The nearly 21,000 people—each with a legally recognized disability—who make up ONCE's main sales network are part of the fabric of our city and street life and reflect how our society has evolved. The changes we have experienced in this decade show everyone what we have been through together: from emerging out of a deep economic crisis to facing a pandemic that struck at the very core of our reality—human interaction—without forgetting the impact of the war in Ukraine, which brought the horrors of war back to Europe and opened Pandora's box of inflation.

We must always remember that, as an organization, we exist to serve society. The community of ONCE has continued to overcome challenges. We have expanded our portfolio of both proprietary and third-party products. We have broadened and improved our payment methods, making them safer, more secure, and more accessible. We have invested even more resources in responsible gaming and, as could not be otherwise, we have prioritized the quality of life of our people with new points of sale—our well-known kiosks—which allow us to bring our social, responsible, and secure lottery to all our customers with greater proximity and transparency.

We have also worked to improve daily operations at non-fixed points of sale. This includes new portable stands that are more comfortable and better equipped; standardized, more professional, and easily recognizable uniforms; and greater comfort and security for our sales team. Over the past decade, we have strengthened our responsible gaming policy, ensuring consumer protection through specific commitments and action plans that have been integrated into our commercial communications, sales channels, and protocols for detecting problematic behaviors. We are committed to the WLA's responsible gaming principles and are certified at the highest level—Level 4. We also meet the European Lotteries standard, which has granted us special recognition for achieving our fifth certification.

We are especially concerned about protecting vulnerable groups and have developed and implemented a special plan for the protection of minors with 40 specific measures that clearly demonstrate our level of commitment. We have reinforced communication and training for our sellers, using the point-of-sale terminal as a tool to support this communication, and we run an annual mystery shopping program to ensure the effectiveness of these measures.

Finally, we are also integrating our sales force into online accessibility, allowing our customers to locate our points of sale through updated technological solutions.

How do you expect ONCE to change over the next three years?

Á. Sánchez: We work to ensure that changes are always for the better—for both our people and our customers.

We will continue to prioritize human contact in selling our lottery. That is our model. It is our reality, embedded in the organization's DNA. We will therefore keep investing time and resources in expanding our improved kiosks and continually iterating our portable sales stand options.

We are committed to internal innovation and active listening to solutions proposed from all levels of the organization, with continuous improvement programs and changes designed to make everyday work better and easier for everyone. For example, we are currently developing counterfeit banknote detection tools integrated in our terminals and analyzing payment systems that can block card use by minors.

The ONCE system does much more than raise funds for good causes. Talk to us about how ONCE leverages its business operations to support a wide variety of activities and initiatives that advance broader social goals?

Á. Sánchez: I always like to emphasize that our operational logic has not changed: we base our work on the strict control of the management of products and business processes, with all income fully reinvested in our social mission.

Our core objective as ONCE is clear: to improve the quality of life for people who are blind or severely visually impaired, promoting their personal autonomy and full social and workplace inclusion.

We provide social support to more than 71,000 affiliated blind individuals.

From there, we extend that reality to everything we do: we seek inclusion and autonomy in all areas of life for people with other disabilities as well. We leverage the tools and capabilities acquired over years of experience to achieve similar goals across a broader range of societal needs.

But our focus remains firmly fixed on the mission of serving our stakeholders, the community of ONCE. Knowing that Rome wasn't built in a day, we have a clear vision. While we will continue to remind society of our purpose and our aspirations, we recognize that listening to everyone adds value. Towards that purpose, we are an active and driving part of the third sector. (The "third sector" refers to the network of non-profit and voluntary organizations—distinct from government and private business—that put their resources back into projects that help people and communities; that support social, cultural, or community objectives rather than distributing profits.)

With Ilunion, and thanks to society and our lotteries, we have developed a unique business model, based on people and the pursuit of excellence. Our business model generates both economic and social benefits, diversification, and sustainability. We seek to create jobs for people with disabilities and those at risk of social exclusion, maintaining a balance between social and economic objectives. **Helping people with disabilities build a life based on pride and ownership is as important as the funds generated by the sale of lottery tickets.**

Ilunion has six divisions (services, circular economy, hotel and hospitality, social and health care, communication, and consulting) and operates 50 lines of business with 535 workplaces across Spain. We are also particularly proud of opening ourselves up to international investment and development, as we now operate industrial laundry centers in Colombia focused on the social integration of people at risk of exclusion.

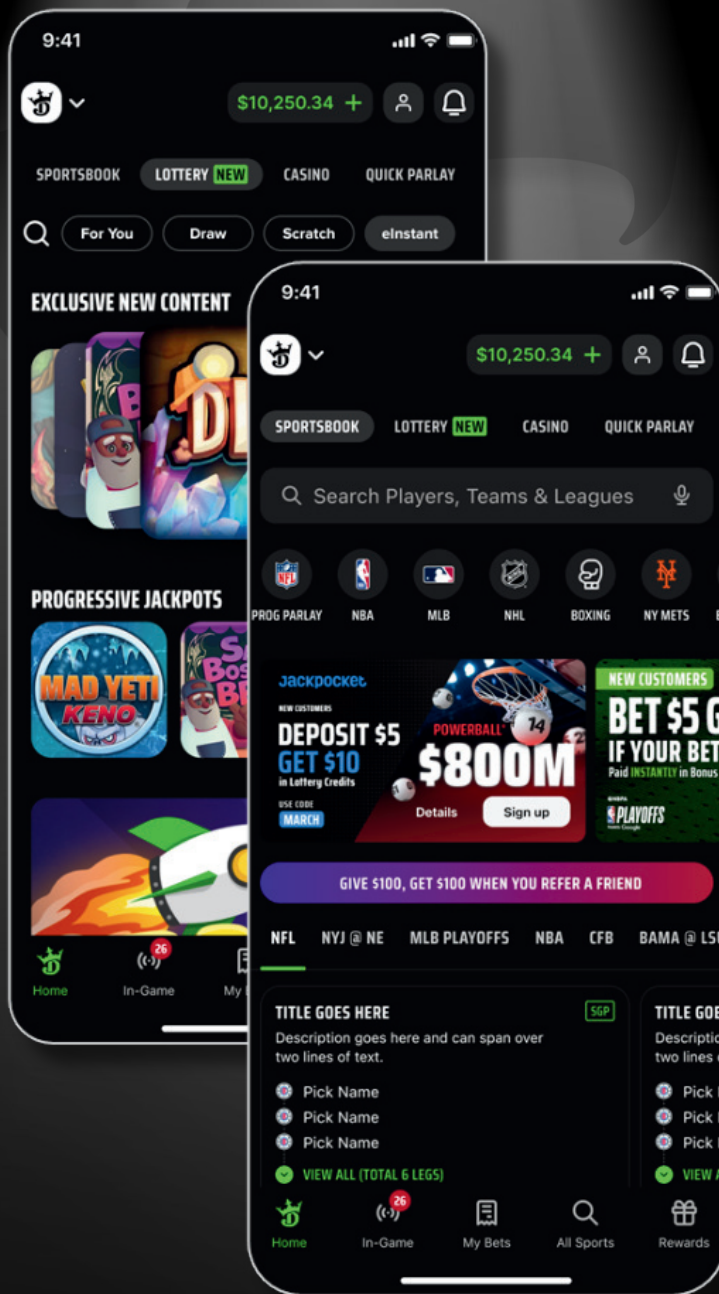
Returning to Spain and focusing on the ONCE Foundation, our aim is full labor integration, and we invest in improving professional qualifications, job skills, and personal and professional abilities to increase employability. We will continue

Continued on page 38

55%

say they'd play
iLottery more if it
were in their regular
sportsbook app.

Meet players
where they are –
DraftKings Digital
Retailer Solution.



Source: Lotto Research Study, July 2025. Question 28: "If online lottery games were added to your regular online sportsbook or casino app, how would that change how often you play them?"
Screen images and other offers shown used for illustrative purposes only.

This article is based on a panel discussion held at the PGRI Smart-Tech Conference on March 6 in Fort Lauderdale, FL. You can view the video on [PGRItalks.com](https://www.pgri.com/pgri/talks).

National Games, Global Vision: How Collaboration Is Shaping the Future of Lottery



L to R: David Barden, Bret Toyne, Sarah Taylor, Jay Finks, Matt Strawn

Moderator: **Matt Strawn**, Chief Executive Officer, Iowa Lottery Powerball Product Group Chair and MUSL Vice-President

David Barden, CEO & President, New Mexico Lottery and Chair, MUSL International Working Group

Jay Finks, Executive Director, Oklahoma Lottery and Chair, MUSL Marketing and Promotions Committee

Sarah Taylor, Executive Director, Hoosier Lottery (Indiana) and Chair, MUSL Development Committee

Bret Toyne, Executive Director, MUSL

Matt Strawn: As we talk about what's next for national games, we can't forget one of the biggest reasons we do what we do. It's not just about benefiting good causes in our jurisdictions—it's about the brands we

represent and the life-changing prizes they offer. As directors and lottery leaders, we're often one or two steps removed from that moment when someone wins. But I was there in Phoenix last year for the climax of the Nascar promotion when Megan Lewis won a million dollars, and the feeling was indescribable.

So how do we keep creating those moments while strengthening the games that deliver such tremendous returns? Before we dive in, let me thank Bret and his team—Bret, Barb, Anna, Shannon—for the incredible work they do. Consider how small the MUSL team is, and yet we're able to do so much because of their collaboration with working directors like Jay, Sarah, and David—who all have day jobs back in their home states.

If you were here Tuesday, you saw four hours of work from Sarah's committee. It's inspiring to see directors roll up their

sleeves to ensure a vibrant national draw games category. None of this happens by accident. I think back to last year's panel here, when Bret and then-MUSL-President David Barden laid out a roadmap for the national games category. That plan, built during our biennial strategic planning session, is now being executed—and we'll see a dramatic difference over the next two to four years.

Before we hear from Bret, one final shoutout to our colleague Drew Svitko. Drew, my predecessor and past Powerball Product Group Chair and MUSL President, had a major hand in the strategy we're discussing today.

Bret, let's start with you. Last year, you introduced what seemed like an aggressive timeline for directors, lotteries, and the vendor community. Take it away.

Bret Toyne: Thanks, Matt. I appreciate the kind words and support, and thanks to the

“Something's shifted in this industry. There's a real entrepreneurial spirit, with tenacious follow-through that is pushing ambitious ideas across the finish line.”

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MUSL team and all the board of directors for their leadership. We're four weeks out from the rollout of the enhanced Mega Millions. We are very excited to see how the market responds. A shout-out to the Mega Millions consortium for managing significant changes across many lotteries.

At the same time, directors and staff have been working on a national "For Life" game. We currently have Cash4Life and Lucky for Life, both performing well. But there's an opportunity to combine them into something even more compelling. We're starting research this month with plans to finalize decisions by April and aim for a Q1 2026 launch. This could attract a broader—and younger—demographic.

Jay Finks is also chairing the NFL product group. Working with the NFL is no small feat, but we've got something exciting planned for fall 2026, just ahead of football season. The idea is to fill in the revenue valleys between the jackpot peaks of Powerball and Mega Millions. The "For Life" and NFL products could help level those cycles.

And finally, Sarah Taylor and the development committee are looking at ways to refresh Powerball. We're very early in the process and watching how Mega Millions performs before making big changes. But changes to Powerball require years of planning. Nothing would happen until 2027 at the earliest. Overall, we've got some strong opportunities ahead to grow revenue and support good causes.

Matt Strawn: Thank you, Bret. That aggressive timeline last year really helped our members work with system providers to coordinate their own state initiatives around national games. I think the response has been very positive.

And shout-out to Mary Harville from Kentucky, who's been our liaison with the Mega Millions consortium. Most of us are through testing and ready for the change. I'd be remiss if I didn't mention that this rollout also creates a window for jurisdictions not yet offering Double Play to jump in. We've seen a solid lift in Powerball sales with Double Play—23 jurisdictions now offer it, and two more are preparing to add it in the next 6–12 months.

As Bret mentioned, game development starts in MUSL committees. These com-

mittees do the heavy lifting, and chairs are working chairs. Sarah, you and I spent time earlier this week reviewing plans. Would you share an update?

Sarah Taylor: Thanks, Matt. Honestly, I was hesitant to chair this committee. It's a lot of hard work, and not every idea crosses the finish line. But the timing worked well—we completed Phase 1 research on Powerball with Simon last year and Phase 2 qualitative with Angus Reid this year. That research helps support new initiatives.

We also discussed potential international Powerball sales and how that could impact product strategy. There's more to come, but those were a few of the teasers.

Matt Strawn: Sarah, music to my ears. Once over half the jurisdictions adopt Double Play, it makes sense to consider making it standard. Much to discuss.

You mentioned the research, and it's already being used by MUSL's marketing and promotions committee and the NFL product group. Jay Finks, you've got a full plate—give us an update on national marketing.

“The NFL is invested in developing the game and partnering with us.”

I've also been focused on timelines. Bret's probably tired of hearing me talk about them, but locking in timelines really matters. We're reviewing 2by2 and Lotto America as well, looking for ways to lift their sales. However, Powerball remains the biggest opportunity.

Value proposition is a key theme. We've heard that repeatedly in the research—especially from younger demographics. Good cause messaging matters, but only when it's clearly communicated. Many players still don't know where the money goes unless it's a high-profile program like Georgia's HOPE Scholarship. We need to be more strategic in how we spend our marketing dollars.

Jay Finks: Thanks, Matt. A lot of exciting things underway. NASCAR is still on the promo list, but the upcoming NFL game has opened even more doors. We're getting calls and emails from brands wanting to partner with Powerball now that the NFL relationship is public.

Some of these are traditional sponsorships, but some offer revenue potential we can reinvest into marketing. We've had interest in a national game show featuring Powerball or Mega Millions. We're meeting with Team USA about Olympic collaborations. And we're working on improving our national social media presence.

We've also partnered with Splash Dot to launch a national Powerball app by

“And beyond the NFL, this collaboration has shown us what's possible when Powerball and Mega teams work together. We need to merge resources, get everyone in the same room, and amplify our reach.”

This week we invited four vendors to share ideas for Powerball. Some were simple, some more ambitious. Simple ideas—like redesigning the ticket—could help newer or lapsed players and younger audiences understand the game. Others proposed changes such as new draw days or pricing options. All of these suggestions are under review.

year-end. The app will support brand engagement and second-chance promotions. It's a key piece of the NFL game, which we're finalizing now.

Thirty-six states—covering over 200 million people—are already signed on. We expect to reach the mid-40s in the next few months. The game is a \$5 Sunday

Continued on page 47



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Introducing Obsidian:

Where Intrigue Meets Luxury

18 Hot New Designs for Unique Premium Scratch Games

Scientific Games has unveiled an explosive, bold portfolio of ultra-premium enhanced scratch games called *Obsidian*. Named for their dark, glasslike appearance like naturally occurring obsidian rock, the games feature a dramatic combination of all-black and holographics.

"Our game innovators have followed holographic trends on high-end luxury items and were inspired to create an all-new, exclusive line of games centered on value proposition for our lottery partners' premium games," says **Danielle Hodges, Senior Director, Global Product Innovation & Development for Scientific Games.**

The world's largest lottery games company continues to feature holographics as an enhancement for scratch products to elevate visual appeal by diffracting light into a spectrum of color in the game designs.

"All black represents a sophisticated, exclusive experience. By combining holographics with all black designs, we have created ultra-premium scratch experiences," shares Hodges. "The magnitude and intensity of the *Obsidian* games are off the charts."

Whether it's a high-end car, luxury perfume or premium tech gadget, consumer brands like Nike, Chanel, Apple and Sony use black because it can be timeless, modern, mysterious and edgy all at once.

Against the contrast of holographics, the richly designed all-black *Obsidian* games capture attention and make a bold statement at retail.

"At a time when the market basket average is increasing, *Obsidian* games allow lotteries to differentiate premium games in their portfolio by adding drama and intrigue," she explains. "In sneak previews of *Obsidian* with several lotteries, the response we've received is pure excitement."

Obsidian games were developed by Scientific Games' Innovation and Discovery teams at the company's metro Atlanta global headquarters, the largest instant game production facility in the world. *Obsidian* games will also be produced at the company's Canadian and UK facilities.

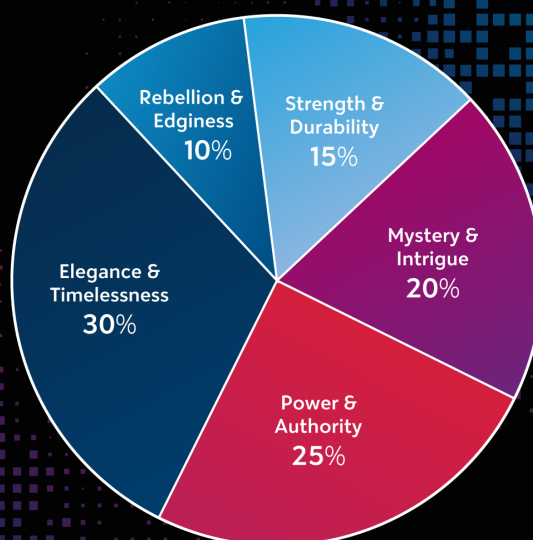
In total, 18 *Obsidian* games are currently available to lotteries.

Color alone contributes up to **90%** of the information that forms consumers' first impression of a product.

81 of the top **100** performing instant games in the U.S. are Scientific Games products. *(based on weekly per capita sales).*

In fiscal year 2025, holographic games outperformed non-holographic games by **4%**. *(based on fiscal index)*

Psychology of the Color Black in Branding





BLACKOUT BLOWOUT

Unique Factor: Featuring large *Lens* holographic pattern and *Premium Metallic Gold Ink*, the game glows with a solar eclipse and a blowout prize structure offering loads of cash prizes redeemable at retail.

ONYX

Unique Factor: The bonus game value proposition glows from the four corners of the dramatic all-black landscape design, which can feature *Wavy*, *Diagonal*, *Tinsel* or *Fluid* holographics.

CASINO NIGHTS

Unique Factor: Glowing with luck and an optional *Burst* pattern in the design, the game's dice and poker chip casino design elements get more real with colorful *Fluorescent Ink*.

SNAKE EYES

Unique Factor: Various *Lens* holographic patterns add depth to the slithering snakeskin background, with optional holographic show-through in the game title. Add more pop with *Fluorescent Pink Ink*.

HOLIDAY BLACK

Unique Factor: A beyond dramatic holiday game featuring *Premium Metallic Gold Ink* in the design and many options for incorporating holographics. With the *Dimension Stella* pattern star effects, it's perfection.

VIP BLACK

Unique Factor: For your most important players, this game emulates prestige with *Premium Metallic Gold Ink* and a number of holographic pattern options including *Tinsel*, *Lens*, *Fractal* and *Pillars*.

LIQUID ASSETS

Unique Factor: This game will get play going with \$500 prizes and the appearance of movement made possible by holographics. Add *Premium Metallic Gold Ink* throughout for an even richer scratch experience.

ROSES & RICHES

Unique Factor: Beautifully dramatic, the game offers a number of holographic pattern options including *Silver Maze* which emulates thorns (shown here), *Rainbow Pillar* for under color and the possibility of more pop with *Fluorescent Pink Ink*.

BLACK DIAMOND

Unique Factor: Diamonds are everyone's best friend, especially in a scratch experience. This game glows best with large or small facet holographic patterns and a holographic show-through in the diamond. Adding *Premium Metallic Gold Ink* makes play even more precious.

BLACK SPECIAL

Unique Factor: For an extravagant scratch, the game delivers with its chance to win \$1,000 and lots of options for holographic patterns in the design, including *Lens*, *Rainbow*, *Diamonds* and *Circles*. *Premium Metallic Gold Ink* throughout brings more magic to the design.

BUCKET LIST BUCKS

Unique Factor: Here's a game that makes life complete. *Pillar* and *Lens* holographic patterns are the optimal choice for a surreal Northern Lights effect. *Fluorescent Green Ink* can be added to the title or other elements to play off the glowing lights.

QUICK SILVER

Unique Factor: Evoking the Wild West, this scratch experience glimmers with *Premium Metallic Silver Ink* and lends itself to many holographic patterns, including *Lens*, *Rainbow*, *Diamonds* or *Circles*. Get extra creative with a *LuxVelvet Thumbprint* pattern throughout.





INFINITE RICHES

Unique Factor: Design possibilities are limitless, including a holographic Lens pattern and holographic solar flares that bring depth to a space theme. Call out the top prize in the 'Outer Limits' at the center.

STELLAR RICHES

Unique Factor: This space-exploration game looks to the future with the celestial glow of planets, stars and solar flares—and the 'Outer Limits' at the center.

GOLD RUSH

Unique Factor: A proven top performer just got more golden with a background of intriguing holographic pattern options enhanced by *Premium Metallic Gold Ink*.

BLACK FRIDAY BLOWOUT

Unique Factor: Another one packed with prizes redeemable at retail, this festive seasonal game works best with tighter holographic patterns in the game title, holiday ribbon and bursts. *Premium Metallic Gold Ink* adds to the scratch experience. Two scenes or pulses available.

Scientific Games, the world's largest creator, producer and manager of lottery instant games, offers more than **100** strategic enhancements for its world-leading scratch products. The company's products represent **70%** of lottery instant game global retail sales.

**FOR MORE INFORMATION ON OBSIDIAN,
CONTACT YOUR SG REPRESENTATIVE**

SOURCE: Ofspace, The Power of Black in Branding and Marketing, February 6, 2025. University of Southern California, Color Psychology Used in Marketing: An Overview, November 17, 2023.

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MEGA MILLION'S FIRST MAJOR NATIONAL CONSUMER DATA SUGGESTS A GOOD ROLL (OUT) COULD MAKE IT ROCK.

Simon Jaworski, Founder & CEO, Lotto Research

**LOTTO
RESEARCH**



With a last name echoing the Polish Rifle (or Uncle Ron as we call him locally here in New Jersey), **Simon Jaworski**, Founder and CEO of **Lotto Research**, decided to poll a large, representative sample of Americans to discover what's happening 'in the huddle' of one of America's favorite pastimes.

Since its relaunch in April 2025, the Mega Millions game has been fighting an uphill battle on various fronts, several of which are outside the games' control. Please don't judge me too harshly for the NFL-inspired puns in the article below. Let's focus on the facts.

1st and 10, calling plays with statistics

As of early July 2025, only half of all Americans (51%) are aware of the changes to the Mega Millions game. That means approximately a quarter of Americans who have played the previous iteration have no idea what to expect the next time they roll into a convenience store on a whim and go to buy Mega. However, men are significantly more likely to be aware of the Mega change than women, and it's not even close. **(See Fig.1).**

Perhaps more disconcerting is the fact only 37% of Americans are aware there is a bonus multiplier included that increases all non-jackpot wins by either x2, x3, x4,

x5 or x10. **(See Fig. 2).** However, this is significantly higher (61%) among recent jackpot game players (past month), which means that at least a majority of the core players have seen and understood the new benefits of Mega Millions. Sadly, only 13% of lapsed Powerball or Mega Millions currently know about this play-friendly bonus multiplier feature.

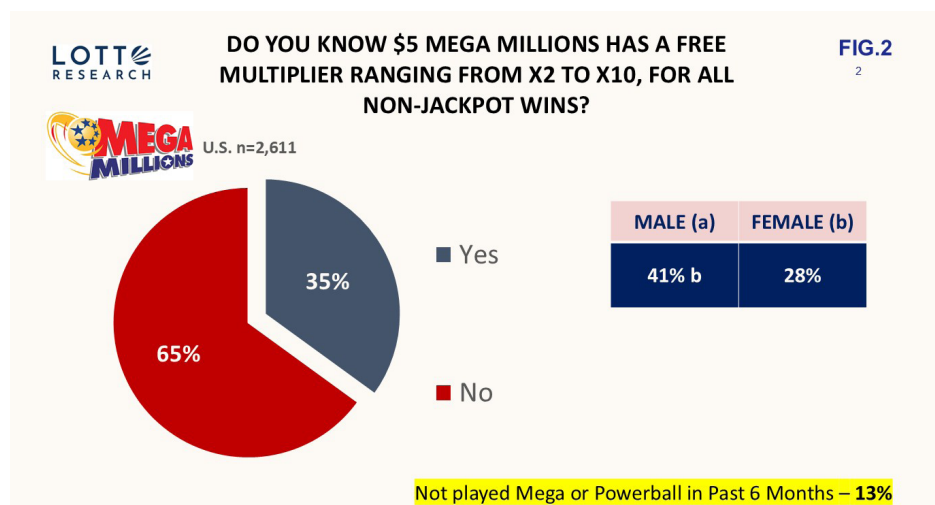
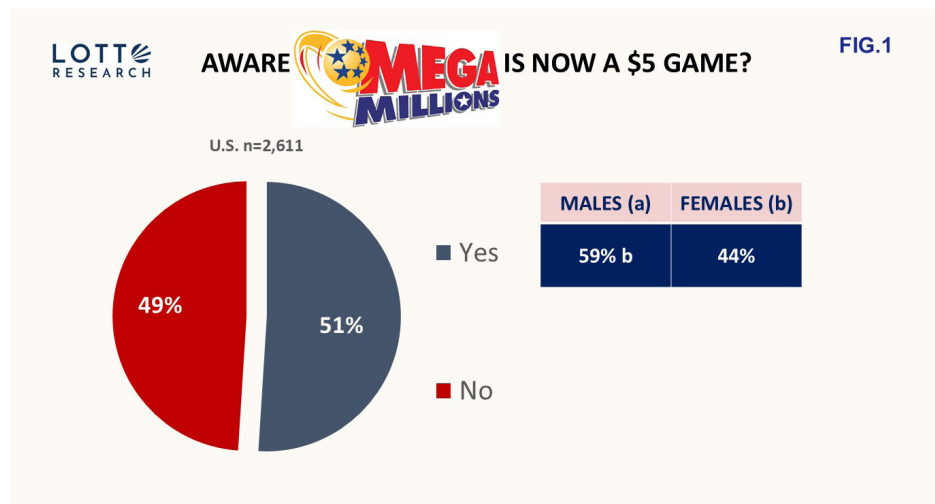
1st and 15. False Start (penalty)

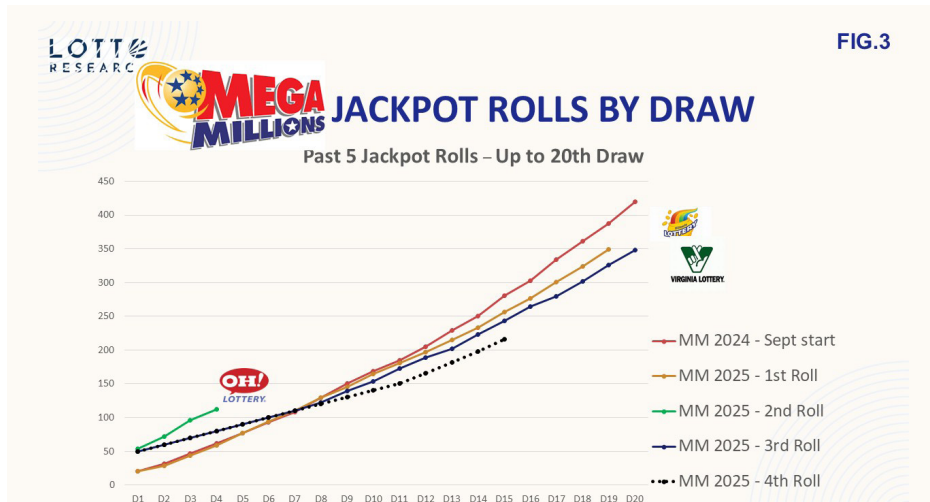
Jackpot growth trends are currently down **(See Fig.3)**, with the latest August jackpot about two rolls behind pre-\$5 Mega levels, so one of the key questions the industry has to answer is ... how

do we attract former players back into Mega Millions before they stop thinking about it altogether and never play again? (I wrote a piece on this for the May/June PGRI magazine that I highly recommend reading as a complimentary piece to this. Spoiler alert of one research finding, older Americans, especially women, are finding other forms of entertainment to replace Lottery).

2nd and 5 reasons to be optimistic

1. Among Americans who have 'ever played' Mega Millions or Powerball, 30% say the changes to Mega Millions are positive, with only 17% saying





negative, a +13% net positive, with more than half remaining neutral. This bodes well for future sales.

2. Younger Americans (18-34 year olds) are significantly more positive about the changes to the new \$5 Mega Millions game, with 39% stating it is a positive and only 9% saying it's negative, yet they have less awareness of the bonus multiplier. This could potentially be an easy, short-term win for state lottery organizations: that is, to raise awareness of this new feature among Gen Z and Millennials.
3. Older Americans (55+) are significantly more aware of the changes to Mega Millions. Great! They have been the lifeblood for Lottery for the past three decades. However, they also have a more negative view of the cost increase of 150%, even though the cost increase itself isn't the focal point of why they might not play Mega Millions (that's a teaser for later!).
4. When asked to choose their favorite jackpot game, Powerball edges out Mega Millions by 7% (46% v 39%). However, this means only 15% of Americans state they would choose neither of the Lottery behemoths, again showing the power of the combination of both national draw games for all forty-five U.S states (and D.C.).
5. Powerball's current jackpot is over \$600m. A high jackpot in Mega's sister game should bring additional traffic and sales for both games. Can lotteries ensure signage and information in-store and online is active and enticing during jackpot runs?

3rd and long (game)

Players just want to win. When lapsed Mega Millions players were asked why they have not played in the past 6 months, the #1 reason they chose was that they "never seem to win" (36%), followed by "the economy" (29%) and "I am sick of losing" (19%). The least mentioned reason was the price increase to a \$5 ticket (only 15% of lapsed players).

4th and forever...

More than half of all Americans have not engaged with the revamped \$5 Mega Millions, but around 12% of Americans say they plan on playing once the Mega jackpot hits \$500m, with another 10% waiting until it hits \$1bn, which accounts for 22% of potential players who have yet to experience the new multiplier and the significant increase in prizes (See Fig.4). Is there a way we can tempt these procrastinators to add a \$5 Mega Millions to their next convenience

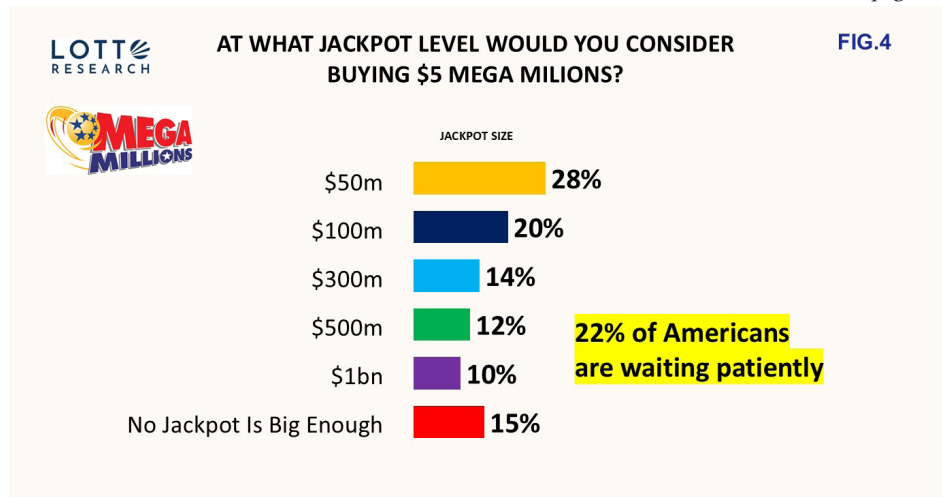
store trip, or gas fill up, before the jackpot hits half a billion?

...or a Powerball punt

A majority of draw game lottery players who have stopped playing Mega Millions, have switched their Mega spend into other games, including Powerball, State Lotto games and other regional draw games that are state based (Lotto America), which offer value at either \$1 or \$2 price point per draw.

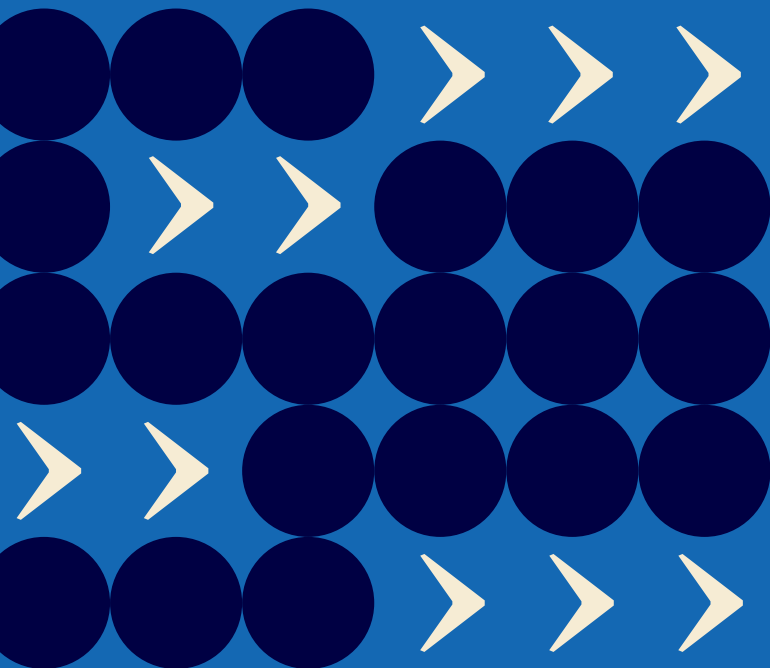
1. Future intent to play \$5 Mega Millions is now at 40%, but it is significantly higher among men and 25-44 year olds. This is key for developing the future lottery pipeline.
2. Future Intent to play Powerball (47%) is significantly higher than Mega Millions right now, especially among older Americans. Among recent players, 83% say they will definitely or probably purchase Powerball in the next month. That's a BIG number.
3. Boomers have switched their allegiance to Powerball en masse. 49% prefer Powerball versus just 30% for Mega Millions.
4. Anecdotally, from in-person player research in New Mexico Lottery: players have been switching their spend into more local-based games such as the \$1 Lotto America, and the increasingly popular Roadrunner Cash (also a \$1 game). Ensuring other lottery options are visible and affordable can give players reasons to continue to support good causes through their continued lottery play.

Continued on page 39



Innovating with Intent

Solutions & Investment
Where It Matters
to Lotteries



As lotteries strategically reshape their operations to adapt to changes in consumer behavior, digitalization, and new forms of competition for players' attention, taking action requires flexible solutions that meet current needs and support ongoing evolution.

In its transformation to Brightstar Lottery from IGT Lottery, Brightstar has set the stage by purposefully evolving its lottery product roadmaps and aligning its resources with these objectives in mind. The result is forward-looking products and services that meet the challenges lotteries have cited as high priorities.

Here are just some of the ways lotteries can take action to unlock more potential today, in accordance with their specific needs, and drive sustainable and meaningful revenue growth for lottery beneficiaries.



CHALLENGE

We're not an iLottery jurisdiction. What can we do to engage new players at retail?



The brick-and-mortar channel still accounts for the lion's share of lottery sales in North America, while the iLottery channel has advanced the industry's approach to **player acquisition** by successfully demonstrating how it can be done with a registered player base and the data and analytics to segment, build offers, and understand consumers' preferences and purchase response. If you're not an iLottery jurisdiction, you can still take advantage of the learnings and adopt a similar approach using Brightstar's **Connected Play** solution. Connected Play functionality enables retail players to engage, purchase, and claim lottery in a more modern way, via their own mobile device at retail, and it is available to any lottery, whether regulated to offer internet wagering or not. Beyond refreshing lottery's relevance and meeting players' changing preferences, Connected Play provides previously unavailable retail-player transaction data that lotteries can use to create more personalized offers, enhance the player experience, and **support acquisition in a way similar to iLottery programs.**



Integrated second chance and loyalty products from Brightstar foster increased player engagement by rewarding players for purchases made at retail and enabling digital interactions and participation in second chance promotions, allowing them to enter tickets into special drawings for more opportunities to win. Brightstar's solution supports drawings for instant and draw games and no-purchase-necessary promotions, and allows players to convert loyalty points for entries into exclusive drawings.



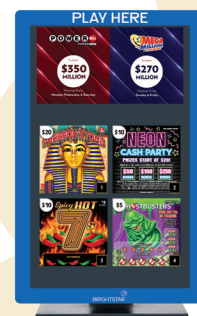
Exciting, experiential second chance prizes are attention-getters that can appeal to new players and enhance the overall player experience. Whether supporting a single game, a family of games, or a licensed game, Brightstar's **Winner's Choice™** second chance offering allows lottery winners to **select their own unique prize**, whether cash, merchandise, trips, or some combination – enabling a lottery to truly offer something for everyone. Brightstar delivers each program with its unparalleled white-glove customer service that has set a new standard for serving lottery winners.



Mobile Claims, with improved prize redemption, makes lottery easier for retail players by allowing them to claim larger prizes conveniently via a mobile app, supporting repeat play and eliminating the barriers of additional driving and time required to receive a prize when they win. In two jurisdictions where Brightstar's mobile claims solution has been recently deployed, lotteries have seen successful implementation with 20% of prizes \$600-\$5,000 claimed through mobile in one jurisdiction and 14% of prizes \$115-\$5,000 claimed by mobile in the other.



77% of weekly lottery players (35% sometimes + 29% often + 13% very often) consider purchasing a product or service after noticing digital signs in-store or on their way to the store, according to 2025 global research by Brightstar in partnership with Foresight Factory. Brightstar's **Digital Menu Board** software solution makes it easy for shoppers at retail to be aware of new scratch games as they launch and view current, in-stock games, supporting trial and adoption. It can also feature dynamic content, for example to support jackpot awareness. This unique software solution is integrated with the lottery terminal application, allowing retailers to easily update the available-game displays in real time, and it can drive just about any digital signage hardware on the market. Brightstar's Digital Menu Board solution can also drive a mini-display to showcase a smaller selection of lottery tickets in limited in-lane spaces.



Lotteries can pursue new retailer channels to connect with potential players: Brightstar's award-winning **LotteryLink™** solution makes it easier. This small device integrates lottery sales with a retailer's existing point-of-sale (POS) system, simplifying in-lane expansion and enabling players to buy draw games and instant tickets in the same transaction with other items purchased at retail. With LotteryLink's ability to connect lottery marketing campaigns with retailers' existing loyalty programs, the deployment opportunities are vast.



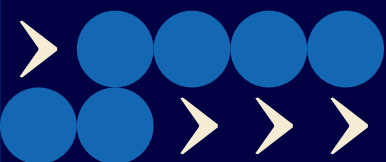


Advanced Vending for Modern Retail.

GameFlex 48 boasts the highest instant game capacity in the industry, plus ticket-by-ticket activation for enhanced security, control, and inventory tracking. We're redefining what's possible in lottery vending.

Learn how at BrightstarLottery.com/GameFlex48


BRIGHTSTAR™



CHALLENGE

How do we make lottery relevant, profitable, and easier for the retailers who sell our products?

To help lotteries access more of retail's untapped potential, Brightstar has evolved its technology solutions and developed the teams and analytics tools to simplify lottery sales for retailers, help optimize retail operations, improve the experience for players in-store, and expand lottery into corporate chains and other new retail spaces. Here are just some of the solutions lotteries can access:



Brightstar's **LotteryLink™** solution (see previous pages) assures **ease of in-lane adoption for retailers**. Integrated accounting, with lottery sales included in regular POS data and reporting, **streamlines retailers' reconciliation process**. LotteryLink also supports **better inventory management** for retailers, as all activations/sales are accounted for on a ticket-by-ticket basis, making it easier for retailers to track and maintain their instant game inventory. LotteryLink contributes to **theft deterrence**, as non-activated tickets have no value, reducing the incentive and impact of theft.



41% of players and 50% of Gen Z have used self-service kiosks, showing high comfort levels with retail tech and opportunities for engagement through interactive screens, according to 2025 global research by Brightstar in partnership with Foresight Factory. Brightstar's **GameFlex Draw™** prototype, introduced to attendees at this year's NASPL and EL conferences, is built to sell all types of draw games and offer more **flexibility for retailers**: Its extremely compact design is suitable for both traditional and nontraditional retail environments, with placement options for floor, counter, and wall mount, giving lotteries the opportunity to penetrate a wider range of retail spaces with self-service offerings. Like all of Brightstar's self-service terminal options, this unique and flexible retail touchpoint **supports ease, relevance, and productivity for retailers** by enabling players to easily make their own game selections via a touchscreen, play their own numbers, scan their mobile playslips, and access a "play it again" feature to reuse the same numbers.



67% of players have used or would be interested in using retailer-specific digital wallets regularly, underlining the need for **cashless payment options** at vending machines and POS terminals, according to 2025 global research by Brightstar in partnership with Foresight Factory. Cashless transactions offer more than modern convenience for players – they **make it easier for retailers to sell lottery and avoid lost opportunities for a sale when a consumer isn't carrying cash**. Brightstar's Connected Play solution allows a consumer to pay for lottery purchases with their lottery eWallet, with the additional benefit of associating a player's unique identity with LVM transactions. Brightstar's lottery vending machines support all major card brands for payment using Swipe, Chip and Tap, and Tap payment methods can be made by card and mobile/eWallet.



Brightstar's **GameFlex 48**, the highest capacity lottery vending machine in the industry, accommodates up to four dozen instant games along with draw games, monitor games, and Fast Play games via a modern user interface and state-of-the-art ticket delivery system. Its **retailer-friendly design** makes loading tickets easier than ever for retailers and supports ticket-by-ticket activation and out-of-stock alerts to **help retailers stay on top of game replenishment**. It also supports theft deterrence, as non-activated tickets have no value.



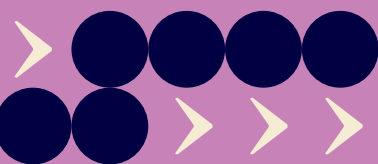
Lotteries and their retailers have access to **two robust, interconnected teams** within Brightstar that work in coordination to support retail sales growth and make the lottery category easier for retailers:



Brightstar's Retail Innovation and Partnerships team looks inside and outside the lottery industry for innovative retail solutions and identifies technologies and solutions that can be applied to the industry, with a focus on retail and omnichannel solutions. Among its activities, the team collaborates with **national retail chains** to help them optimize lottery performance, measure and manage lottery with the same confidence as any other product they sell, **recruit new chains** to lottery sales, and explore **retailer-led innovations for applicability to lottery**. The team is equally dedicated to solutions that make lottery easier to manage, monitor, and sell for smaller, **independent stores** that cater to their lottery-playing customers.



Brightstar's North American Sales Development team provides targeted services to help lottery customers achieve their goal of increasing funding for their beneficiaries. Services include: **game and portfolio performance analysis, sales opportunity development, retail optimization, and additional retail execution services**. To support U.S. retailer growth in the lottery category and solve a major industry need, the team developed and manages the **Retail Market Insights® (RMI) tool**, a national database that provides **lottery sales staff and their retailers** with the cross-jurisdictional lottery sales data they need to inform decision making.



CHALLENGE

What can lotteries do today to counter increased competition from other entertainments and non-regulated operators?

Solutions from Brightstar that support lotteries' ongoing ability to thrive and contribute include games rooted in creativity and forward-thinking strategies, resulting in groundbreaking experiences to redefine player engagement.



Brightstar's **Cash Pop™** draw game is attracting new and younger adult players—with frequent players averaging roughly 10 years younger than most other traditional draw-based games. **Player enthusiasm** has fueled the game's expansion, now live in 16 U.S. jurisdictions and counting. **Flexibility** is central to Cash Pop's player appeal: players can personalize their strategy and their play experience to improve their odds and winnability. Lotteries have launched Cash Pop in **both the retail and digital channels**, and have developed a wide range of creative promotions, including highly interactive live events, to amplify awareness and showcase new ways to play.



Lotteries can access Brightstar people for industry-leading data and custom tools to help identify and unlock opportunities for growth in the **draw-game portfolio**. Brightstar looks to recommend **innovative game changes and additions** to the portfolio that will fulfill game value propositions and add multiple layers and options to the existing portfolio. The team commits to not only developing new play mechanics, but to a focus on highly profitable draw games, such as the daily Numbers and the multistate large jackpot games, which help to balance a lottery's return to state in the context of rising sales and payouts from scratch and instant products. Applying learnings from across the globe, Brightstar provides **tailored draw-game planning and recommendations** based on each lottery's existing portfolio and player preferences, and continuously engages players for feedback on potential revenue growth opportunities.



Brightstar strategically focuses on acquiring **licensed content** that can be translated into entertaining and compelling lottery games and turnkey marketing programs, with standout examples including iHeartRadio and Wheel of Fortune. Lotteries can leverage the associated **brand equity** to enhance their portfolio of games with content that has the **relevance and reach** to connect with players across various demographics.



Omnichannel games give players a multidimensional experience, updating lottery's relevance and boosting category growth and competitiveness. Omnichannel games also allow lotteries to **leverage brand awareness through marketing**, for example by promoting the content on a lottery's website, app, and instant tickets, to spread awareness of games that offer a new player experience. Brightstar's award-winning omnichannel game portfolio features both proprietary brands,



including the unique, player-favorite draw game Cash Pop, and licensor-branded games to boost sales and player engagement through recognizability and **brand-appeal, enhanced media partnerships, and innovative printing techniques.**



With its ability to enhance virtually all elements of an instant ticket, Brightstar's **Infinity Instants™** technology has opened another world of opportunity: enabling **all-new play mechanics** and **customized graphics** that can be offered across multiple channels. By boosting visual impact, enabling new ways to play that are adaptable across a variety of game themes, and refreshing core categories like Crossword, lotería, seasonal families, and licensed properties, Infinity technology can help lotteries **level the playing field** with other forms of entertainment, supporting long-term growth across channels.

iLotteries can access Brightstar's diverse and engaging **instant game portfolio** of more than 200 instant games across categories—including bespoke licensed-branded options, record-breaking progressive jackpots, and Brightstar's first **AI-developed game, Viking Gold**, now in market—to stay competitive in this rapidly evolving channel.



37% of multichannel lottery players prefer promotions delivered via app notifications, supporting the importance of digital engagement through personalized communication, according to 2024 global research by Brightstar in partnership with Russell Research. Brightstar's **Player Marketing Services** team helps increase iLottery competitiveness and player engagement, in partnership with each customer, through **data-driven marketing, personalized player journeys, and omnichannel engagement strategies.** Brightstar's AI-powered front-end personalization features, such as real-time instant game recommendations, have **boosted player engagement by 24%**, as measured by the number of unique games per player. Digitalization of lottery at retail via Brightstar's **Connected Play** solution provides retail and iLottery **data for a single-player view**, enabling personalized notifications and targeted marketing communications to retail players as well.

CHALLENGE

What else can empower lotteries to reach their full potential?



Advanced Instant Ticket Services: Innovative instant-ticket printing technologies, state-of-the-art security, and all-new mechanics and game designs support lotteries' ability to adapt and grow in a competitive entertainment landscape. Brightstar has invested heavily in its Lakeland, Florida, printing facility, most recently with a brand new printing press with the largest capacity in the industry; state-of-the-art packaging automation that increases packaging capacity to match the new press; and automation supported by robotics to ensure efficiency and quality control throughout the manufacturing process. With a focus on leapfrogging the industry's status quo, the company's commitment to modernization includes the introduction of tools such as a ticket reconstruction portal, advanced proofing technologies, and enhanced data analytics to optimize workflows and improve the customer experience. These innovations are coupled with an end-to-end focus on sustainability and integrity.



Applying Research & Insights: To help customers and the industry stay ahead of the curve, and to inform and shape Brightstar's product plans, Brightstar has stayed at the forefront in adapting its research approach to incorporate the best newly available methodologies. The company regularly shares findings to highlight ideas that are actionable for lotteries and works with customers to leverage the insights and shape stronger business plans. Over the past year, Brightstar conducted 330 studies across global markets, engaging more than 370,000 players and retailers.

A recent lottery industry study from Brightstar, **"Who Are Our Players, By Game?"**, presented at NASPL PDS, offers a comprehensive demographic and behavioral profile of lottery players across the U.S., examining detailed data on **game preferences, spending habits, broader gaming behaviors, and retailer choices**.

And watch for two forthcoming whitepapers based on Brightstar's recent **global study on payment modalities** for new findings that impact playership at retail, including: **cashless/contactless payments, mobile wallets; courier and delivery ecosystems**; updated paths to purchase, and more.



Unlocking New Possibilities: Brightstar has established a new, dedicated innovation team to actively build **partnerships with universities and third-party vendors**, with the objective of sourcing novel solutions, creating faster feedback loops, and unlocking new possibilities to help customers stay at the forefront. This team is exploring, for example, new delivery paradigms, the use of advanced technologies including AI, and other potential areas of innovation.



Product Feedback: Customer feedback is welcomed by Brightstar and used to **validate and improve products and solutions**. Final products such as LotteryLink™, GameFlex 48, and the Retailer Pro S2 terminal debuted in concept or prototype form at industry events and were refined based on lottery feedback. Products like these, shaped through listening and collaboration, represent Brightstar's commitment to work in partnership with customers to reimagine what's possible, incorporate the feedback into roadmaps and development plans, and deliver final products that expand the lottery category's potential.

Listening to Customers

The latest Brightstar customer satisfaction survey, recently completed, adds to the company's understanding gained over years of customer feedback, conversations, observed trends, and research, and provides direct insights into customers' latest priorities and challenges.

As a partner that is fully committed to the lottery space and is invested for the long term, Brightstar will continue to transform lottery needs and priorities into solutions and strategies that empower customers to evolve, defining the future of lottery success together.

To learn how these solutions could be applied to your lottery, speak with your Brightstar general manager.

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BORN IN THE CLOUD



Outstanding Games.
Retail Excellence.
Digital Innovation.

Let's Talk Cloud-Native

Unlocking the Future of Lottery Innovation

POLLARD
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The lottery industry is facing rapid change, and understanding cloud-native technology is more important than ever. In this insightful conversation, Shannon DeHaven, Vice President of Digital Engagement at Pollard Banknote Limited, and Pedro Melo, Executive Vice President of Information Technology & Digital at Pollard Banknote Limited, discuss how cloud-native platforms are transforming innovation, scalability, and security, offering a clear path for lotteries to stay competitive in today's digital world.

Shannon DeHaven: We've been working in the digital space together for years, and through countless conversations with lotteries, one thing keeps coming up: the cloud. Specifically, what it really means to go cloud-native. I thought we could walk through the key questions, starting with the big one. What's your take on how the industry's responding to cloud-native technology?

Pedro Melo: Absolutely, and it's a topic that's gathering pace in the lottery industry. It's not just a buzzword but a key step to staying competitive. A recent Akamai report showed over 75% of gaming companies had moved most applications to cloud-native platforms, with nearly all others planning to follow within a year. That's a rapid and significant shift.

Lotteries can't afford to fall behind. They're competing with iGaming and sports betting operators already leveraging cloud-native advantages. This isn't just a tech upgrade; it's a strategic necessity to stay relevant in a fast-evolving digital landscape.

Digital transformation is accelerating across gaming, but it's also causing some confusion. Many lotteries say they've "moved to the cloud," but often that just means their legacy



systems are just hosted in a cloud environment, not built for it.

That's where the Pollard Catalyst™ iLottery Platform stands apart. It's cloud-native from the ground up, unlocking capabilities that legacy-based systems simply can't deliver.

Shannon DeHaven: Before we go further, what's the difference between being in the cloud and

an on-premise solution?

Pedro Melo: Let's use a restaurant analogy. Imagine a traditional restaurant with a fixed space and equipment to serve 50 people. It works fine until 100 show up. Then the kitchen slows, orders get delayed, and customers leave unhappy. That's what on-premises systems look like during traffic surges.

Now picture a cloud-native restaurant. If 50 guests come in, it operates efficiently. If 500 show up, it instantly expands: more prep stations, tables, staff, no drop in service quality. That's the cloud-native difference: dynamic response without costly infrastructure changes.

Shannon DeHaven: And how does migrating legacy solutions to the cloud differ from your cloud-native example?

Pedro Melo: It's like moving the same 50-seat restaurant to a new spot but when demand rises the walls are still in the same spot and there's no consideration for more prep stations, tables and ect. - increasing complexity and limiting scalability. Migrating to the cloud may check the cloud box technically, but it's still constrained by the same on-premise architecture. It doesn't unlock the same agility, efficiency, or innovation lotteries need today.

Shannon DeHaven: That agility is key, especially for speed to market. How does cloud-native impact that?

Pedro Melo: In a big way. Cloud-native systems are modular, letting you add new features, games, or integrations without overhauling the whole platform. It's like a modular kitchen where you add a new station

as demand grows, without tearing down walls or disrupting the rest.

It's also like having universal kitchen outlets: you can plug in kiosks, apps, or loyalty tools without rewiring. APIs make adding new games, payments, or tools seamless and future-proof.

For lotteries, this flexibility is one of the biggest advantages of modern, well-architected solutions. You can quickly launch, test, and adapt in days, not months, without slowing down or risking platform stability, just as we did with Kansas iLottery.

Shannon DeHaven: Considering the nature of jackpots, scalability is another critical factor, especially where traffic spikes happen overnight.

Pedro Melo: Exactly. Cloud-native architecture means scalability is automatic. If a Powerball jackpot spikes, the system expands in real time. If there's a lull, it contracts again: no manual effort, no overbuilding capacity "just in case."

You're not guessing demand. The system adapts as it happens, driving cost efficiency and peace of mind.

Shannon DeHaven: Security is always a high priority. What's the cloud-native advantage?

Pedro Melo: Cloud-native systems approach security differently. Updates happen continuously in the

background, often multiple times a day: patches, vulnerability fixes, compliance tweaks.

No downtime, no manual deployments, no waiting for maintenance windows. You stay protected, always. It's security by design, not an afterthought.

Shannon DeHaven: When lotteries evaluate their options, what's the key takeaway they should keep in mind?

Pedro Melo: It's not just about moving to the cloud. It's about what you're building for. Migrating systems might feel like progress, but they're the old model in a new place.

Lotteries should watch for outdated systems and the growing challenges they bring. Upgrading them can be disruptive for both customers and vendors.

Cloud-native platforms like the Pollard Catalyst™ iLottery Platform set you up to move faster, scale smarter, stay secure, and deliver what players expect. But it's more than technology. It's a long-term investment that helps your lottery grow, adapt, and innovate in a fast-moving market. ■

How ONCE is Redefining the Social Economy and Reinventing the Role of State Lotteries — continued from page 18

investing resources in technological solutions that enable more people to join an increasingly complex labor market.

We also fund initiatives by other organizations that carry out activities aligned with our objectives. In 2024, we co-financed 2,234 projects, focusing on employment and training (68% of funds) and universal accessibility (32%). We also signed a total of 219 collaboration agreements.

But above all, we will continue listening to society—its demands and needs—so we can respond effectively and apply our expertise to improving the lives of people with disabilities. We hope to continue growing, knowing that 2024 closed with record figures in all our areas of activity — not just sales, but metrics on our impact on society, the community of ONCE stakeholders, and a wide variety of KPIs. What truly matters to us is that

these figures directly reflect the underlying human reality. Everything we are and do, we owe to Spanish society, and we will never fail it—always doing what we say and saying what we do. **We will continue to demonstrate how the sale of social, responsible, and secure lotteries can create opportunities for those who need them most, while fostering social values of solidarity, inclusion, and sustainability.** ■

Play some defense (it wins championships I hear)...

One forward thinking subject matter that Lotto Research asked Americans was a very simple question: If you had \$5 to play one of the following, which are you most likely to play? The answers were clustered so tight, it looks like a whole bunch of defensive backs crowded in one area protecting the 'Hail Mary' pass. However, the top two answers both had one thing in common – they were both Scratch ticket related.

The #1 answer was a tie between a \$5 Scratcher (1 ticket) and 5 x \$1 Scratchers (5 tickets), both with 24% of the vote. (And we know the NFL doesn't like ties, that's strictly for silly games like soccer). The \$5 Mega Millions ticket came in a strong 3rd place with 19% of the vote, followed by a Powerball option (1 x \$2 and 1 x \$3 tickets) with 15% of the vote. A \$5 sports bet achieved 6% of the total, although this was 10% among men. Competition for the American disposable dollar is at an all-time high in gaming.

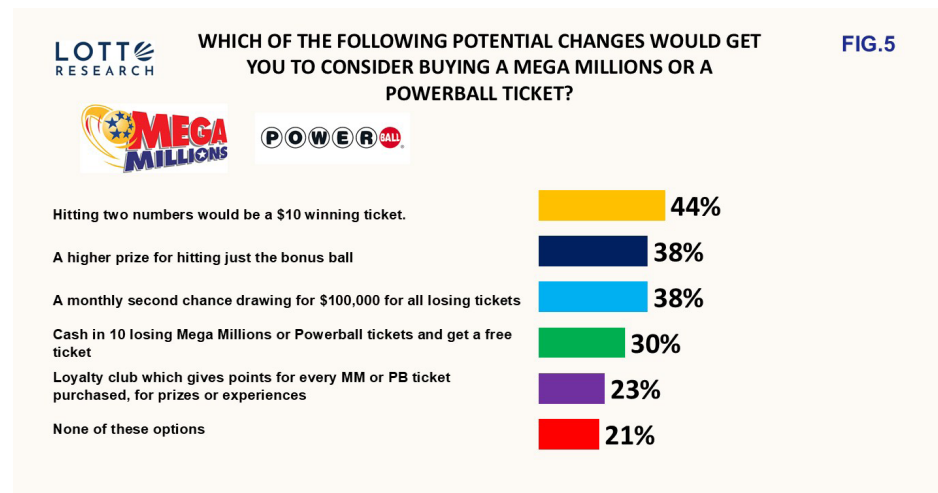
...however, sometimes the best defense is a great offense!

Lotteries have the equivalent of Andy Reid and Patrick Mahomes at their disposal in terms of the power, trust and awareness in their two main brands of Mega Millions and Powerball. So knowing this, how can the lottery industry reach out to the casual player and coax them back into playing? We already know that the real NFL is going to be part of the portfolio of (most) state lotteries come September 2026, but in the interim, what should the strategy be in the intervening 12 months?

"Just win, baby!" (Al Davis)

A final hypothetical question was dropped on our respondents. Which of the following potential changes would get you to consider buying a Mega Millions or a Powerball ticket?

The #1 answer was 'Hitting two numbers would be a \$10 winning ticket' with 44% of all Americans selecting this



option. Two other answers garnered 38% positive responses – 'A higher prize for hitting just the bonus ball' and 'A monthly second chance drawing for \$100,000 for all losing tickets.'

(See Fig.5)

All three options, you dear reader will note, are all about giving our players a better chance of winning. Among recent Powerball/Mega Millions players, **58% agreed** with the winning option of 'Hitting two numbers would be a \$10 winning ticket'. This is your base speaking out in no uncertain terms. Winning gets people back, and it also allows for a better chance at churn.

"Winning isn't everything, it's the only thing". Questions to ponder.

Often attributed to the great Vince Lombardi, this quote was actually from the lips of UCLA coach Red Sanders in the 1950's. Maybe the Lottery industry can take a leaf from the NFL sports betting play book?

On an almost daily basis, the likes of DraftKings and FanDuel offer 'No Sweat Bets', so even the gambler who loses gets a free second chance bet to place on another wager the next time they bet. I am sure we all hope the Eagles get dethroned in their quest to repeat as Super Bowl champions, but in the interim, here are five valid questions that lotteries and their vendors should be thinking about for both Mega Millions in the short term, and lottery games in general.

1. How can we engage older lapsed players, and also female players, to woo them back to Mega Millions (or Powerball)?
2. Is there a lottery equivalent of the 'sports betting second chance', through more of an 'instant' second chance option?
3. Are there ways lotteries can help cushion a loss into feeling more like a win?
4. Are there special prizes or partnerships the lottery industry can develop to make that all elusive 2 ball match a winning experience? Example: Rocktober promo – Hit two Mega balls, get \$10 off at your next Ticketmaster show.
5. And finally is there enough primary research being conducted with the modern consumer on what winning in 2025 means to them?

Trust me, I'm a Researcher

Simon "Ron" Jaworski
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Lotto Research (proud sponsors of the Marshall Island Soccer Federation)

Why the Future of iLottery Starts in the Cloud

For decades, the lottery industry has relied upon on-premise systems operated on owned infrastructure, meticulously maintained by internal teams. While this approach offered control, it has also resulted in significant limitations, including isolated systems, complex integrations, and challenges with scalability during periods of rapid growth.

Today, the move to cloud-based solutions is transforming the lottery sector, breaking down these barriers and solving those issues.

Giuseppe Portoricco, Senior Vice President iLottery Technology at Brightstar Lottery, highlighted this transformation during his presentation, "The New Cloud Approach," at the recent NASPL PDS conference in Louisville, Kentucky. Sharing insights into the transition of iLottery systems to the cloud, he also detailed lottery successes and future implications. "In North American jurisdictions that are regulated for iLottery, playership is

growing like mad," said Portoricco in conversation following the conference. "An associated point, which isn't trivial, relates to the far greater complexity of the digital architecture for iLottery – including the digital wallet, player registration, and the richness of the user experience in digital games – to get the performance where you need it to be, compared to when the business was retail only. If you haven't migrated those iLottery systems to the cloud, it's very difficult to meet the associated challenges. You need higher availability and scalability to support the increasing demand. In one jurisdiction we serve, the penetration of digital playership is now more than 55%; in another

it's in the range of 45%. Lotteries can easily meet that demand if on cloud. In jurisdictions where Brightstar has migrated most of the customer's iLottery platform to cloud, the average revenue per player was significantly up following migration, and you could clearly observe that step-up, before and after."

"In one jurisdiction we serve, the penetration of digital playership is now more than 55%; in another it's in the range of 45%. Lotteries can easily meet that demand if on cloud."

Brightstar has proven expertise in cloud transformation: Since 2023, it has successfully delivered multiple cloud-based solutions for customers across Europe and in North America. Especially in the instant market, the 52% CAGR in sales growth over 3 years (2021-2024) is clearly demanding high performance that can be reached easily on real cloud technology.

"Today, the lottery sector faces a pivotal moment," notes Portoricco. "Technology, with a strong emphasis on cloud solutions, is revolutionizing how modern lotteries operate, innovate, and scale. What was once a cautious industry, hesitant to step into the digital future, is now being redefined by the opportunities that



"For lottery businesses, the cloud isn't just another technology trend; it's the foundation for scalable, flexible, and future-ready operations," said Giuseppe Portoricco, Senior Vice President iLottery Technology at Brightstar Lottery, shown presenting at the recent NASPL PDS conference.

cloud adoption brings. For lottery businesses, the cloud isn't just another technology trend; it's the foundation for scalable, flexible, and future-ready operations."

Cloud as a Competitive Advantage

Cloud adoption isn't just an upgrade but a critical investment in the industry's future. In addition to the increased performance and scalability, Brightstar Lottery's cloud solutions empower iLottery operators to thrive with frequent updates, rapid feature deployment, and AI-driven personalization. This approach drives results, enhances player engagement, and positions lotteries to be market leaders.

"By migrating iLottery platforms to our seamless, scalable cloud solution, these platforms can adapt more quickly to deliver the engaging and reliable digital experiences that players expect. They are not only seeing a significant increase in revenues, but also fostering better player experiences," says Portoricco.

"Cloud solutions create an edge for iLotteries by enabling agility and innovation," he adds. "New features can be rolled out across systems in real time, ensuring players receive fresh, engaging experiences without delays. Self-scalable and self-healing platforms powered by cloud-based AI improve reliability, guaranteeing that lottery systems can handle peaks in traffic, like major jackpots or seasonal surges."

Brightstar's advancements with cloud technology also simplify collaboration and integration. Lottery systems are no longer locked in silos. Eventually, cloud platforms enable smooth connections with retailers, regulators, and even new

Why cloud...?

Cloud brings innovation

- More frequent updates & enhancements **to respond to market needs**
- **Faster deployment** of new features including use of AI tools for a personalized player experience

- **Automated deployments**
- **Reliable and scalable** for peak demand

Cloud from a technology perspective

Impact

- Increase in total GGR
- Growth in average revenue per user
- Increased conversion of new players to depositing players

game providers, reducing time and resources spent on technical roadblocks. All of this contributes to strengthening the competitive position of modern lotteries.

Future-Proofing the Lottery Industry

The shift to the cloud isn't just about solving today's technical challenges; it's about creating a foundation for sustained success. A modern lottery must be agile, forward-thinking, and equipped to evolve alongside rapidly changing technologies and consumer expectations.

Notes Portoricco, "With quarterly updates rolled out across platforms and the ability to experiment with features like predictive analytics, cloud technology unlocks innovation at an unprecedented pace. This approach allows iLotteries to roll out new game offerings more quickly and easily, not only to meet current demands but to introduce novel digital gaming products and launch new styles of games to appeal to different audiences and demographics."

Additionally, each successful implementation of cloud technology helps to drive education and awareness of what's possible. When forward-

thinking lotteries adopt cutting-edge cloud technology, they inspire others to follow suit, driving innovation across the entire sector.

A Call to Action for Lottery Leaders

The cloud is more than a tool; it's the key to unlocking growth, modernizing operations, and staying ahead in an increasingly digital world. It offers scalability, innovation, and reliability that on-premises systems cannot match, ensuring that lotteries not only remain relevant but thrive.

Within iLottery and beyond, more than 20 customers globally now operate at least one cloud product with Brightstar Lottery. Not only have sales, Average Revenue Per User (ARPU), and Gross Gaming Revenues (GGR) seen measurable improvements, but the lotteries' success has sparked demand for additional digital cloud solutions across the industry.

To learn more, contact your Brightstar general manager.



Piet Van Baeveghem – cont. from page 10

The National Lottery in Belgium in 2010. Since 2013, he led the organization's legal strategy and compliance agenda.

Effective July 1, Piet Van Baeveghem assumed the role of Secretary General, EL (European Lotteries association). The appointment of Piet by the EL Executive Committee is a key step for the Association's future, ensuring that both the EL team and the membership continue to grow and strengthen its unique societal mission. As part of his responsibilities at The National Lottery in Belgium, Piet had been deeply engaged with EL for many years - most notably as Executive Chair of the EL Legal & Regulatory Working Group, but also in various other capacities. His extensive experience and deep understanding of the lottery sector make him well-prepared for his new role as Secretary General.

Piet is also a prolific contributor to the global lottery community. He has authored publications on gaming law and regulation, and frequently presents at international conferences on topics such as responsible gaming, advertising standards, GDPR, and online gambling regulation. Piet is a recognised leader in strategy, governance, and regulatory affairs. An experienced team leader, he brings over 25 years of expertise in policy-making and stakeholder engagement, making him a valuable addition to the EL team. Piet holds a Master's degree in Law from Ghent University, where he was also an active member of the Faculty Board and the University Education Council. His contributions to public policy began in government, serving as an advisor to the Belgian Prime Minister and Minister of Justice, and later as Deputy Director to the Minister of Economy. He went on to hold leadership roles at FEBELFIN, the Belgian financial sector federation, and served on various oversight bodies, including the Kamer voor Verwijzing en Instaatstelling and ACCOM, ensuring auditor independence and ethics.

Fluent in Dutch, French, and English and with passive knowledge of German, Piet is recognized for his rational, results-driven leadership style grounded in trust, empathy, and team focus. His strategic insights and regulatory acumen continue to shape the European gaming landscape.

Richard Bateson – cont. from page 10

Richard's achievements are extensive and many. Early in his career at Camelot UK, Richard held leadership roles across Marketing, Sales, Digital

– in fact across all consumer touch-points of the UK National Lottery. Under his guidance, Camelot's annual sales grew from 5bn GBP to 7bn GBP (c. \$10bn), in so doing Richard revitalized the core game brands of the UK lottery, and expanded its retail estate and its digital player base by more than four million. Richard project managed the launch of EuroMillions and later served as President of EuroMillions, and Chairman of the Board, helping transform the game into the world's most successful international lottery — a testament to his ability to lead with strategic vision at both local and global levels.

Richard's influence extends far beyond the UK. He led Camelot's consortium bid for the Irish National Lottery (PLI), subsequently overseeing digital operations through Camelot Global and serving as Commercial Director. In North America, Richard has worked across more than a dozen states, partnering closely with MUSL on licensing initiatives and new game development.

Since joining Intralot, Inc. in 2023, Richard has led the North American business through a bold transformation. As Chief Commercial Officer and now CEO, he has launched the industry's first multi-state, omni-channel progressive jackpot Fast Play game and has overseen vast change and transformation of Intralot's business – something that will be felt by its customers for years to come.

What truly sets Richard apart is not only what he has achieved, but how he leads. With a leadership style defined by strategic clarity, collaboration, and forward-thinking optimism, he consistently earns the trust of teams, regulators, and industry peers alike. He inspires innovation, drives results, and elevates the organizations and people around him.

Michelle Carney – cont. from page 10

team accountable to the core values of our highly regulated industry— integrity, reliability, accountability, and commitment to the highest ethical standards.

Michelle's career in the lottery industry has truly grown from the ground up, starting with her earliest role as a marketing analyst at GTECH. By combining an entrepreneurial spirit of innovation with her commitment to building mutually beneficial, long-term business relationships, she has worked with customers around the world to launch new products to grow the lottery business. Michelle contributed to the execution of the lottery industry's first in-lane solution in the U.K., the first

U.S. digital signage implementation, and the introduction of 'G3' the first instant win terminal games in Minnesota, the precursor to today's Fast Play games.

Michelle has demonstrated her passion for industry collaboration over many years. In 2009, she was a key contributor to the development of the industry's first Jackpot Vision Plan, a collaborative effort to advance the multi-state game category in the U.S. This included a detailed plan to execute the cross-selling of Mega Millions and Powerball, and a roadmap for the evolution of the multi-state category. Michelle also led the project implementation on the initial Cash 4 Life draw game introduction in NY and NJ in 2014, which has subsequently expanded to ten jurisdictions and become an important multi-state product to drive incremental revenue beyond large jackpot games.

Michelle has held various positions throughout her tenure at Brightstar, assuming increasing levels of responsibility and taking a customer first approach to her work. In her current role, Michelle is responsible for the development of marketing and communication strategies that support growth for Brightstar, including product and content launches, trade shows and customer events. She also manages Brightstar's relationships with industry associations such as the World Lottery Association (WLA), European Lotteries (EL) and the National Association of State and Provincial Lotteries (NASPL), advocating to advance collaboration across the lottery industry.

Among many highlights of her career, Michelle most recently led the development and implementation plan to deliver a \$5 Mega Millions game in April 2025, on behalf of the Mega Millions Consortium. She developed an inclusive technical, operational and retail execution strategy that provided the framework for a successful project delivery of key milestones across 11 subcommittees. Her comprehensive oversight and leadership ensured that 47 U.S. lotteries experienced a successful game launch.

Michelle's accomplishments are largely a result of her inclusive leadership style and she is a champion for propelling the lottery industry forward. Her passion, authenticity and conviction of character are the reasons why she is a trusted leader and friend to so many across the lottery industry.

Stephen Durrell— *cont. from page 10*

Stephen's innovative approach to the Kansas Lottery was exemplified by the 2017 launch of Kansas PlayOn® Loyalty, a game-changing shift from transactional engagement to a relationship-driven, entertainment focused model. PlayOn was so successful in Kansas that the lottery eventually had 16% of the adult population registered. Following this, Stephen used his detailed knowledge of the Kansas Lottery enabling legislation to identify an opportunity to launch iLottery. Combining the legislative possibility, with an identified beneficiary for the new funds, Stephen was able to secure support for iLottery. The lottery then moved quickly and in less than a year launched online sales of e-instant games, Powerball® and Mega Millions®.

With the highly engaged PlayOn loyalty player base, iLottery has been a huge success in the state of Kansas, exceeding all expectations. Stephen continues to evolve the Lottery as an entertainment brand, leveraging partnerships with movie studios, sports teams, and streaming platforms to offer players unique experiences and exclusive prizes— further positioning the Kansas Lottery as a dynamic, player-focused enterprise. Stephen has served on the Executive Committee of the Multi-State Lottery Association (MUSL), first as Chair of the Security and Integrity Committee, and currently as Chair of the Legal Committee since 2023. Stephen's 21 years in the gaming industry and longstanding leadership and commitment to the Lottery industry, through a blend of legal expertise, strategic vision, and innovation, combined with a focus on operational efficiency, digital growth, and partnerships has positioned Kansas as a leader in the lottery industry. With a proven track record in managing intricate regulatory landscapes and driving player engagement, Stephen continues to shape the future of state-run lotteries and contribute to our industry in a variety of ways.

Elisabeth Römer-Russwurm

— *cont. from page 10*

products such as Lotto Plus and, most recently, EuroDreams, and she directed the introduction of EuroMillions—Europe's first pooled lottery—in Austria.

The current EuroMillions TV commercial was named the world's best lottery TV spot at the 2022 World Lottery Summit in Vancouver. Firmly rooted in the EuroMillions community and as a board member of the Belgian company Services aux Loteries en Europe, Elisabeth actively fosters

international exchange with industry peers. She is also passionately committed to mentoring young female talent through her involvement in the Women's Initiative in Lottery Leadership.

Her team is recognized for effective marketing carried out within strict Responsible Advertising guidelines. This includes the voluntary implementation of the responsible 18+ rule—one must be over 18 to play with the Austrian Lotteries—under the guiding principle of “playsponsible.”

Charles Scannella — *cont. from page 10*

As Scientific Games' Vice President of Commercial Sales and Client Relations, Charlie leverages his extensive knowledge of and experience in strategically and responsibly growing game portfolios to lead the North American Sales team and drive success for the company's lottery partners. Throughout his career, he has worked closely with lottery customers, embedding himself as an extension of their teams and business operations. This deep collaboration has provided him with a comprehensive understanding of their operational needs and has set the gold standard for client partnership and support.

Prior to joining Scientific Games in 1990, Charlie gained valuable foundational experience in the lottery industry at the New Jersey Lottery and seven years as a Project Manager for Webcraft Games Inc. In this role, he directly supported the Oregon, Maryland, New Jersey, and Indiana lotteries, contributing to instant and draw game training in New Jersey and Indiana. Notably, he played a key role in the start-up operations for both the Indiana and Oklahoma Lotteries, providing him with crucial insights into the initial stages of lottery development and implementation.

Since joining Scientific Games, Charlie has been instrumental in driving success for numerous U.S. lotteries. As Regional Director, he contributed to the development and implementation of thousands of instant games and spearheaded successful strategic customer marketing plans. His tenure as Regional Vice President of Licensed Properties demonstrated his ability to strategically leverage popular brands to enhance game portfolios and engage players. In his most recent roles as Regional Vice President of Instant Products, Vice President of Business Development and Customer Support for the company's Scientific Games Enhanced

Partnership business and now VP of Commercial Sales and Client Relations, he has served as a key business lead for major customers including Arkansas, Illinois, Ohio, Florida, New Mexico, Massachusetts, and Georgia, consistently providing expertise in portfolio management that has directly contributed to their sales and profit goals.

Throughout his distinguished career, Charlie has not only learned from industry leaders but has also become a respected mentor and teacher to colleagues and lottery customers alike. He embodies the qualities of a true partner, known for his unwavering trust, exceptional integrity, and consistent delivery of his commitments. His deep understanding across all aspects of the industry, gained through close collaboration with internal and external partners alike, has significantly impacted the success of numerous lotteries within Scientific Games' network and has positioned him as a highly respected leader within the organization.

Charlie Scannella's four decades of dedicated service, his comprehensive understanding of lottery operational needs gained through deep collaboration, his proven track record of strategically and responsibly growing lottery clients' game portfolios, and his exceptional ability to build strong, trusting partnerships underscore his significant and enduring contributions to the lottery industry. His work has left an indelible mark, and his leadership continues to inspire those around him.



DRAFT KINGS

Meeting the Moment: The Rise of Distributed Commerce

There was a time when buying a lottery ticket was simple because it fit into people's every day routines. You stopped at a gas station or convenience store, picked your numbers, paid a couple bucks, and tucked the ticket in your wallet. The system worked—because the routine worked. But those routines are vanishing. The way people shop, discover, and transact has been fundamentally transformed by the digital age. The challenge for lotteries is clear: build a strategy that matches the pace of modern consumer behavior.

The Numbers Don't Lie

Today's consumers expect the world to come to them. Groceries arrive via Instacart. Dinner is one tap away on DoorDash. Even big-ticket items—phones, flights, hotel rooms—can be bought in seconds through embedded shopping flows on third-party apps. This isn't a passing phase. It's a permanent shift. A full 70% of consumers now expect to be able to complete purchases without ever leaving the app or platform they're using.¹ Embedded commerce has become the norm, and digital wallets now drive nearly half of all global online transactions,² cutting checkout friction to nearly nothing.

The writing is on the wall: shopping, as we once knew it, is being unbundled from websites and rebuilt around behavior.

What Is Distributed Commerce?

Behind this evolution is a concept known as distributed commerce—a model where brands embed shopping opportunities directly into the platforms and ecosystems consumers already frequent. More than half of U.S. e-commerce today takes place in these environments: marketplaces, social platforms, and fulfillment-integrated apps.³ Consumers aren't visiting brand-owned websites as often. They're making purchases in the same digital spaces where they scroll, chat, and browse. And increasingly, these platforms don't just sell—they fulfill. Amazon's Fulfilled by Amazon, Walmart Fulfillment Services, and Booking.com's reservation tools offer brands a ready-made infrastructure: inventory, shipping, returns, customer service—all bundled with massive reach and consumer trust. A product is no longer tied to a single digital shelf. Instead, it's dropped into the daily scroll of life: iPhone in your Amazon recommendations, Nike shoes in your Instagram feed, or a Marriott hotel room in Google Maps. Take Apple, for example. The tech titan, long known for its tightly controlled ecosystem, sells its products on Amazon through an official storefront. Fulfillment, customer service,

and delivery? All handled by Amazon. The reason is simple: access to 100 million+ Prime users and the infrastructure to serve them instantly. Today, nearly two-thirds of Apple's revenue comes through indirect channels.⁴ Distributed commerce isn't a backup plan for Apple—it's a pillar of their strategy.

Nike offers another model of blended execution. While still investing in direct-to-consumer efforts, Nike makes its products available through Instagram Shopping, influencer links, as well as Amazon. Now, 54% of Nike's revenue comes from indirect sales.⁵ Their model is clear: meet customers where they are, make the purchase effortless, and support fulfillment through a mix of in-house and third-party solutions.

In hospitality, Marriott sells its rooms on Booking.com, Google Travel, Expedia, and even Alexa. Roughly 14% of Marriott's bookings come from these external channels.⁶ But they do more than just list inventory—they integrate loyalty accounts into third-party flows. By encouraging loyalty participation, even when the transaction happens off-platform, it allows Marriott to retain customer data and deepen relationships.

Together, these examples show that distributed commerce is not about giving up control. It's about expanding access. When done right, it accelerates growth, reduces operational burden, and meets modern consumer expectations.

So, What Does This Have to Do with Lottery?

For lottery, this shift presents a real challenge. The issue isn't about brand recognition—it's about creating responsible access to lottery products. Are the products showing up where people spend their time?

Distributed commerce provides the

answer, as evidenced by leading brands such as Apple, Nike, and Marriott that have already embraced and validated this model.

And while it may sound new in a digital context, the concept is nothing new to the lottery industry. Physical retail has always been based on distribution—placing products where consumers are. Self-service kiosks, vending machines, in-lane checkout systems: all designed to meet buyers in their path. DraftKings' Digital Retailer Solution simply brings that same logic to the digital age—allowing purchase of draw games and instant games through a DraftKings website or mobile app.

Digital ecosystems evolve quickly. If iLottery fails to keep pace with the digital experiences consumers engage with daily, it risks plateauing—especially as consumer expectations for convenience, speed, and seamlessness continue to climb. While still a growing segment of the lottery industry, iLottery is already

showing signs of early maturity, as highlighted in recent analysis by Eilers & Krejci (below).

DraftKings Digital Retailer: A New Storefront for Lottery

If consumers now expect frictionless commerce on their phones, through apps they already use, the question becomes: Why wouldn't they buy a lottery ticket the same way they buy a pair of shoes or book a hotel—on a third-party site?

Recent data suggests they would. In fact, they already want to. In a recent study commissioned by DraftKings through Lotto Research, 55% of respondents say they'd play iLottery more if it were incorporated in a sports betting or casino app they already use.

This is where DraftKings comes in—with a **Digital Retailer Solution** designed specifically for today's digital consumer landscape. With its expansive

customer base of verified players, and a brand players already trust, DraftKings is a ready-made digital storefront for lottery products.

The upside is significant: expanded reach, increased frequency of play, and lower acquisition costs. DraftKings' existing marketing investments can supplement state-level campaigns, helping drive awareness and adoption. And for players, lottery becomes just one more category in a platform they already use, trust, and enjoy.

Distributed commerce doesn't mean giving up control—it means multiplying opportunities to connect.

For iLottery, the moment is now. ■

¹ Zendesk – "What is Omnichannel Retail? Examples and Trends".

² Capital One Shopping Research, Digital Wallet Statistics, July 2025.

³ eMarketer / Insider Intelligence Reports, 2023–2024.

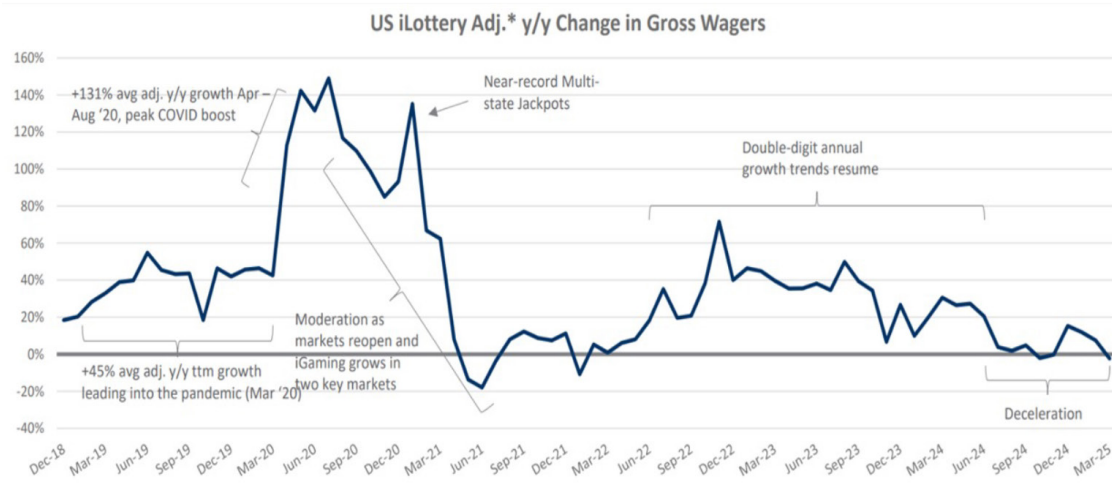
⁴ FourWeekMBA, Apple Distribution Channels, 2024.

⁵ Nike Investor Relations, FY2024 Earnings Report.

⁶ PhocusWire, "Marriott direct booking share versus OTA," 2021.

"GROWTH CONTINUES TO DECELERATE, APPROACHING NEXT LEVEL OF MATURITY"

In more competitive markets, results were suggesting **collective online gaming markets were entering a new phase of maturity** with iLottery and iGaming products showing an ability to concurrently grow, though there's **evidence of potentially more hurdles to iLottery sales growth** in results again this period.



look like when this “reform” project is completed at the end of this year?

O. Sarekoski: The big picture is that Veikkaus has held the exclusive right, but that has existed only on paper. Latest estimates show that annual offshore gross gaming revenue might be between 600–900 million euros. There is a clear and widely recognize need to update our model, and existing legislative reform is based on the Government Program, which was published summer 2023. Parliament will accept a legislative proposal, most likely during this autumn. There is a clear need for all operators to receive, before actual operations begin, as the most transparent possible guidelines related to marketing, duty of care -model and many other operational details. This is a long process.

What are the most relevant impacts of these changes on the way the Veikkaus operates in Finland?

O. Sarekoski: Veikkaus existing game portfolio is already definitely comprehensive and thus quite unique. We offer all possible money games on both channels. As a result of the reform, we keep the monopoly for example in lottery-type games, scratch cards and physical slot machines while betting (including horse betting) and online casino moves into a license model. Veikkaus will naturally apply for a license to operate these license model games. The exclusive operations and operations in competitive markets will be separated into different companies within the same Veikkaus group.

Under the new regulatory system, can commercial operators offer games that resemble the lottery game-playing experience? Lacking payment and IP blocking, do Finland consumers have access to “synthetic lotteries” like Lottoland?

O. Sarekoski: It is important that there is and there will continue to be clear differences, which consumers recognized, between game categories. Soon-to-be licensed offerings can’t resemble the lottery playing experience. Product differences must remain.

The current reform does not include any payment or IP blocking methods. Blocking is not proposed for adoption at this stage. So, at least in the near future, Finnish consumer will have access to these “synthetic lotteries”. The lack of blocking naturally challenges the government program, which has a goal of improving the channelization rate.

Does this change to a multiple-operator competitive marketplace alter the fundamental mission or the methods of business operations, i.e., maximizing playership and revenues, etc. of Veikkaus?

O. Sarekoski: The license model naturally means that there will be several, most likely a few dozen, legal operators. Veikkaus task is to match and exceed our consumers expectations – naturally, all this is done within the defined regulatory framework. From a competition perspective, the new reform creates, above all, a level playing field which we warmly welcome.

Will there be a competitive equilibrium between Veikkaus and commercial operators, i.e., with neither having a decisive competitive advantage? For instance, will the amount that Veikkaus is required to turn over to the government be the same as the amount that licensed operators are taxed? Will advertising restrictions apply equally to all?

O. Sarekoski: This might be one of the most monitored and supervised items: all operators in all aspects need to be treated equally. That is the basis, and we expect nothing else. Regarding operating income, our position remains unchanged and stands out: all Veikkaus’s proceeds benefit our society.

It would seem that turning Finland’s online gambling regulatory framework into a competitive consumer marketplace—with multiple operators competing to increase gambling revenues—is more likely to increase demand, increase playership, and increase amounts gambled. Why does the Ministry of Finance think this will “reduce gambling-related harm”?

O. Sarekoski: The current model, from a Finnish perspective, is clearly some short of “Wild West” where almost half of consumption, once again from a Finnish perspective, is unregulated and untaxed. When the overall channelization rate, like here in Finland, is only somewhere between 50–60%, it is clear that at least chance to successfully regulate is kind of a lost case. I firmly believe that a regulated environment is always a safer choice — something that is worth pursuing. So first, the vast majority of gaming consumption must be brought back under regulation so that, for example, work on preventing gambling problems can even succeed. Of course, having said all that, lacking payment and IP blocking will continue to challenge the upcoming reform.

You have always been a visionary innovator, adapting to disruption to reposition Veikkaus to deliver ever more value to its players and stakeholders. How will Veikkaus be changing over the next two to three years to preserve its position of strength and sustainability?

O. Sarekoski: Globally money gaming is a growth business – but digital gaming is still underdeveloped. I believe that to succeed, operators, including lotteries like Veikkaus, must reach sufficient size and seek growth from an extensive portfolio, partnerships and internationalization. Value is created when operators embrace scalable structure, technology, and operating models.

Transformation must be seen as a continuous process; we have lived it already for several years and the journey continues. Now Veikkaus is facing a new and interesting chapter as Finland moves towards a license model. So our transformation journey keeps ongoing. This journey has already demanded and will continue to demand a lot from our skilled personnel. I am proud of the Veikkaus team’s remarkable ability to embrace the opportunity to change, innovate, and turn challenge into opportunity. ■

HAZEN'S HOLOGRAPHY

HELPED BOOST MASSACHUSETTS LOTTERY HOLIDAY SALES



Instant Games produced on Hazen's holographic board by Scientific Games recently helped the Massachusetts Lottery increase its holiday sales and profits. That's because holographic games are dazzling holiday gifts.

Scientific Games has compiled data showing that sales of their holographic games have exceeded those of their non-holographic games by 13.1%*.

When compared with plain board games, games produced on Hazen's recyclable holographic board consistently generate higher lottery sales and profits due to their eye-catching designs and increased visibility at retail.

* Scientific Games MAP data for FY 2023 for U.S. games produced by the company over the past five years.



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FOR MORE INFORMATION CALL:

Bob Hazen at 1 (413) 538-8204

Scott Devens at 1 (201) 327-4414

HOLIDAY GAMES ARE PERFECT FOR HAZEN HOLOGRAPHY

Using Hazen's holiday holographic board can help boost your lottery's profits. These 3 Massachusetts Lottery holographic holiday games generated actual sales increases ranging from 43% to 75%. The lift was about 10 times the cost of the holographic material!



MA LOTTERY \$2 INDEX - 143



MA LOTTERY \$5 INDEX - 162



MA LOTTERY \$10 INDEX - 175

The difference between the actual sales increases generated and the cost of the holographic material demonstrates just how much additional profit you can generate by using Hazen's holographic board.

Check out Hazen's PROFIT CALCULATOR to see exactly how much you can grow your lottery's retail sales. Just enter your ticket's size, price, payout percentage, and quantity for your game produced on Hazen's holographic board and you'll instantly see a profit chart generated for you.

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draw, and the NFL is heavily involved. This isn't a passive sponsorship—they've been engaged from the start. They see this as a major partnership opportunity.

This game has huge potential. It aligns core NFL fans (over 225 million in the U.S.) with light lottery players—exactly the audience we want to grow. We're finalizing the prize structure now and aim to get game specs to vendors by August—giving us a full year to prep for launch in September 2026.

A robust second-chance program will also be a major component. We're excited, and there's more to come.

Matt Strawn: A lot to unpack. But let's take a moment to appreciate how far we've come. As David Barden said at our board meeting, none of this is by accident. It's the result of years of strategic committee work—starting with Dick Clark's New Year's Eve promos, then NASCAR, and now the NFL.

Having a global brand like the NFL want to work with us is a major achievement. It confirms the strength of our strategy and brand appeal. We're creating life-changing experiences not just through jackpots but through brands people already love.

And this initiative sets the stage for something even bigger: our national CRM system. This will be a powerful tool—for data, for promotions, for loyalty programs. It allows every lottery in the country to offer a consistent player experience while linking back to each state's own systems.

We've just approved a major CRM investment, a vision long in the making. It's a testament to the foresight of our members—and the foundation laid by those who came before us.

One of them is David Barden, our immediate past president. Bret mentioned earlier the sales peaks and valleys in Powerball. David likes to remind me that the peaks happened under his watch—and I may be in a valley. But in all seriousness, David is part of the international working group, and activity with potential overseas partners has really picked up lately. David, can you share your thoughts on protecting and growing the brand internationally?

David Barden: Before we begin, I just want to give a quick shout-out to our colleagues. I see Gretchen (Corbin) and Mark (Bracken). Thank you and all the Mega Millions directors for your collaboration. Working with you on the Mega game has been a pleasure, and I feel the relationship between our two groups has never been better. Credit to you all. It might've happened sooner had you sent chocolate, but better late than never.

We're excited about your new game and the growing camaraderie between our teams. I think we have seen a shift over the past couple years. More than ever, directors are all thinking beyond our own states. We're asking, "How can we improve the industry as a whole?" That broader mindset has brought fresh energy—people like Gretchen, Mark, and Josh (Johnston). It's made our work more collaborative and more fun.

When our teams get stronger, the whole industry follows. That's no accident—it's taken careful planning on both sides, and it's brought us closer. The same goes for the MUSL side. As a football guy, I'll say: it's always football season. Jay, I'm excited about the NFL game. Historically, we've always tried to expand the population of players or tweak the matrix to provide better value for players. Now we've done both successfully, and our next step—hopefully—will be the UK agreement. We're 99% there. Thanks to Stephen, our legal chair, who's shepherded the agreement. Adding the UK gives us access to a major population base and could lead to one, two, or three additional jackpots annually. That's a huge win. We've been working weekly with our UK partners, sometimes with 7:30 a.m. calls. Thanks to Bret, Pat, and Mark—who has also done great work as a lawyer in the International Working Group.

We also engaged with Australia, but their regulators have held things up. Hopefully, once the UK goes live, Australia will follow. Our international efforts help us protect the Powerball brand and trademarks worldwide. If you use it, you can protect it. Pat Lance deserves special recognition—she's been relentless, especially with Ireland. We've made real progress,

and I can't wait to see where we go next.

Matt Strawn: Thanks, David. When you talk about protecting the brand internationally, that ties right into our recent research. The Powerball brand has strong recognition—not just among players but the general public too. This is critical, especially as we develop the Powerball app. At our board meeting this week, we saw a slide on Powerball app store downloads. Powerball wasn't even listed. Only California and Texas lotteries made the top downloads list. The rest were imposters, websites which are not even authorized to sell Powerball.

So, creating a national app isn't just about user experience; it's about brand protection, globally. The research also showed how strongly we're viewed as responsible operators. One of the global leaders in responsible gaming has been Sarah Taylor. As a former NASPL President and chair of the Corporate Social Responsibility Committee for the World Lottery Association, Sarah has pushed us to keep RG front and center—even as we chase growth and brand partnerships.

Sarah, could you share a few thoughts about how RG has stayed integral to our conversations, especially through the development committee this week?

Sarah Taylor: Thanks, Matt. First, a few shout-outs. Gretchen (Corbin) has led NASPL's RG efforts, and we've had strong support on the WLA side too—first under Rebecca Paul's presidency and now President (Andreas) Kotter. Lynne Roiter has been an amazing mentor. RG has really become part of our DNA. We're investing serious resources in it now. Just this week, a fellow director told me they're hiring a full-time CSR/RG manager. We're helping each other level up—through buddy systems with WLA, supplier groups, and NASPL.

It's great to see development committee members now asking RG questions during presentations. We've come a long way. The MUSL team is stretching to make sure their promotions align with the highest RG standards. Vendors such as Kroger are also trying to implement best practices for in-store messaging.

Continued on page 48

We need to stay mindful of what's changing globally in RG. It's not just about doing what is expected. It's about making tools available to those who need them. Younger players especially appreciate these safeguards and good cause messaging. RG should be front and center, not something we shy away from. It's part of who we are.

Matt Strawn: Beautifully said. As Bret discussed earlier, nothing happens in a silo. Whether it's the Mega game changes, the Millions for Life project that Tom Seever and Jim Carey are leading, or the NFL game Jay (Finks) outlined—it's all interconnected. Jay, you've mapped out a national marketing plan tied to these efforts. Can you talk about how we're building a pipeline of promotions—not just huge prizes like Super Bowl tickets, but smaller-scale efforts to keep engagement steady?

Jay Finks: Absolutely. Right now, our national calendar lists NASCAR—and that's it. We need more layer; more touchpoints for players to engage with the brand on the national stage. Whether it's second-chance drawings or creative prize structures, national promotions can create efficiencies and ease the burden on local jurisdictions.

For the NFL game, we're running everything—entry collection, prize fulfillment, etc.—at the national level. That means less work for individual states. A portion of that game's revenue goes into a national marketing fund, which helps offset local advertising costs. That fund will allow us to offer prizing and experiences many states couldn't pull off alone.

And it's not just MUSL. I've had more talks with my Mega Millions counterparts lately—like Khalid Jones from Virginia. We're finally having joint conversations. These brands are active five days a week. If we combine forces, there's massive potential for national promotions, sponsorships, and revenue generation.

Matt Strawn: Looking ahead three to four years, what excites you most about MUSL—whether it's programs, promotions, or marketing?

David Barden: For me, it's about experiential prizes. Players love things they can't usually access—like Super Bowl tickets, concerts, VIP experiences. We need to think outside the box to secure and use those strategically. Game changes take 2–3 years, so we also need modular solutions—plug-in promotions that can support our base games.

We're doing more research than ever—probably the most in ten years. Research tells us what players want and helps us adapt. If we want to offer something for everyone—jackpots, full-life games, experiential prizes—we need the insights to back those strategies.

Bret Toyne: I'm excited about the app. And like Sarah said, RG is part of the product development now. When we talk about new games, we're thinking about portfolio management—how to reach different people with differing play styles and motivations. We don't want to keep going back to the same base. Powerball and Mega Millions may not be for everyone. We need a more diverse portfolio of options to expand the player base.

CRM and app tools give us flexibility. We can market more precisely and test what works for different demographics. This tech lets us adjust quickly and address niches that individual lotteries might not reach otherwise. It's a chance to broaden the player base responsibly and efficiently.

Sarah Taylor: Powerball is the world's most recognized jackpot game. It is vital that we manage it thoughtfully. I wasn't there for the \$2 ticket change, but I was in the room when Mega made its recent change—and those are heavy lifts. The process takes time, courage, and smart risk management. But based on what we saw Tuesday, I think exciting changes are on the horizon. I can't wait.

Jay Finks: The NFL game is close to my heart. From the start—when the NFL wanted \$75 million upfront—we've come a long way. Now, they're invested in developing the game and partnering with us. That journey has shown us the NFL genuinely wants this to succeed.

We've even explored having a draw during halftime or working with Amazon on Thursday Night Football. But beyond the NFL, this collaboration has shown us what's possible when Powerball and Mega teams work together. We need to merge resources, get everyone in the same room, and amplify our reach. These new marketing efforts will help unify the two groups.

Matt Strawn: The collaboration across states and between the Mega and Powerball Groups is inspiring. We are blessed with a smart, hardworking group of lottery directors, and we enjoy working together. I'm excited for what's ahead.

Whether it's apps, second-chance prizing, or national promotions, MUSL can provide small states like mine the ability to connect with mega-brands like Nascar and the NFL. Huge thanks to Bret and his team for driving the plan forward.

Thank you all for kicking off the morning with us.

Paul Jason: I wish we had more time for questions, but I just want to say thank you and commend the entire community of lottery directors who are forging a more ambitious pathway to benefit good causes than ever. Something's shifted in this industry. There's a real entrepreneurial spirit, with tenacious follow-through that is pushing ambitious ideas across the finish line.

It's inspiring. You're getting it done. Thank you, all of you, for your leadership. ■

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CORPORATE PROFILES OF SPONSORS FOR LOTTERY EXPO NASHVILLE 2025

SPOTLIGHT ON THE LEADERS OF THE GOVERNMENT-GAMING INDUSTRY

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

★ DOUBLE-PLATINUM INDUSTRY LEADERS ★

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Brightstar is an innovative, forward-thinking global leader in lottery that builds 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, fulfill player needs, 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 can be the best partner in this industry. We will 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 seven of the world's 10 largest lotteries. Brightstar has approximately 6,000 employees. For more information, please visit www.brightstarlottery.com.

intralot

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INTRALOT, a publicly listed company established in 1992, is a leading provider and operator of gaming solutions, active in 40 regulated jurisdictions worldwide. With a global team of 1,700 talented professionals as of 2024, INTRALOT is committed to redefining innovation and service excellence in the lottery and gaming sector, supporting operators in achieving sustainable growth. As a technology-driven corporation, INTRALOT partners with public-sector lottery and gaming operators to enable responsible gaming and contribute to the generation of significant returns that support community initiatives.

Operating under the strategic approach of “Driving Lottery Digital Transformation with flexible, reliable, secure solutions and systems”, INTRALOT is committed to modernize Lotteries by offering innovative lottery and sports betting solutions, shaping the future of gaming. The company develops next-generation products based on players’ omnichannel experiences, the dynamics of the global gaming ecosystem, and the efficiency of the operators to provide engaging responsible entertainment for their players.

With more than 23 years of presence in the United States, INTRALOT has established a strong operational footprint through its U.S. subsidiary, INTRALOT, Inc. Employing more than 600 employees, the company currently manages 14

contracts across 13 North American jurisdictions—including Arkansas, DC, Georgia, Idaho, Illinois, Louisiana, Montana, Nebraska, New Hampshire, New Mexico, Ohio, Wyoming, and British Columbia, Canada. INTRALOT, Inc. provides a wide range of services including online gaming systems, retail sports betting, warehousing and distribution of instant tickets, and VLT/COAM monitoring. This long-standing commitment reflects INTRALOT’s strategic focus on the U.S. market and its role as a trusted partner in driving lottery digital transformation.

INTRALOT embeds sustainability into its business strategy, addressing ESG challenges through a strong governance framework and alignment with European Sustainability Reporting Standards. As a UN Global Compact member, it upholds the Ten Principles on human rights, labor, the environment, and anti-corruption—demonstrating its commitment to accountability and transparency.

INTRALOT has been awarded the prestigious WLA Responsible Gaming Framework Certificate and the NCPG iCAP Ready Accreditation, embedding responsible gaming into its corporate philosophy and operational integrity. The company fosters a safe and transparent gaming environment that prioritizes player protection and sustainable practices.

INTRALOT upholds the highest international standards and was the first gaming vendor certified under the WLA Security Control Standard in 2008. The company holds numerous certifications in information security, quality, environmental responsibility, IT services, training, anti-bribery, and governance—reflecting its ongoing commitment to excellence and ethical conduct.

INTRALOT partners with leading international industry associations to help shape the future of gaming. It is a Platinum Contributor to the World Lottery Association, a Level I partner of NASPL, an Associate Member of the European Lotteries, a Gold Sponsor of APLA, and a Silver Sponsor of the GSA.

Pollard Banknote Limited

www.pollardbanknote.com

POLLARD
banknote limited

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

www.scientificgames.com

Scientific Games is driven by our 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. Through more than 50 years of relentless innovation and unwavering security and compliance, we've built a foundation of trusted partnerships. 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 products, technologies, analytics and services delivers the most entertaining lottery experiences for consumers to have fun and play healthy.

We developed the world's first secure instant game with mathematical formulas and engineering innovation, and we continue to power our industry with breakthrough, science-based products. From enterprise gaming platforms to exciting entertainment experiences and trailblazing retail and digital solutions, we help lotteries drive 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 worldwide teams of 3,500 employees on five continents know what lottery players enjoy today and how to make lottery games easier to manage and sell at retail. With the power of Scientific Games data analytics, our game designers create what players want to play tomorrow, and our technologists deliver how and where they want to play.

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 applications seamlessly connects



lottery retail and digital experiences. It's why we are the partner of choice for the iLottery and lottery sports betting markets.

Scientific Games leads by investing in innovation. We're always thinking about the player and retailer experience. Because it's not just a game, it's an instant of entertainment and one of the biggest consumer products on the planet. We excel at solving market challenges and helping lotteries modernize with new opportunities, solutions and understanding of retail and digital. We're always evolving to keep pace with consumers and are firmly committed to responsible gaming. So the future of lottery funding shines bright.

It's a future of game security paired with the thrill of winning, all backed by science and our world-renowned security and compliance protocols. We're the driver of today's favorite lottery games and the most advanced retail, digital and gaming systems technologies that support our lottery customers' sustainability tomorrow.

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

Player Experiences:

- Retail Instant Scratch Games, Draw-based & Fast Play Games
- Digital, iLottery & Hybrid Games
- Licensed Brands
- Linked Games
- Lottery Sports Betting

Player Engagement:

- 2nd Chance Promotions
- Loyalty Programs
- Customer Relationship Management
- Mobile Apps
- Winners' Events

Retail Solutions & Systems:

- Enterprise Gaming Systems
- Clerk-Operated & Self-Service Retail Technology
- Retailer Technology Systems
- Payment Solutions

Data-Driven Intelligence:

- Consumer Analytics & Insights
- Business & Retailer Intelligence

Operational Excellence:

- Performance-Driven Partnerships
- Managed Services

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ABACUS Solutions International Group

In-lane Solutions for Innovators

lotteryeverywhere.com



Abacus is the only solution that allows retailers to sell lottery tickets at all points of sale, including self-checkout. By integrating with existing systems, Abacus helps retailers recover lost revenue, increase sales per labor hour, and boost average transaction value. With proven success in international markets and partnerships with industry leaders, 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 infrastructure or staffing.

Lottery Core Values

Abacus empowers 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 offering includes:

- Integration into retail sales channel (including manned and self-checkout lanes)
- e-Commerce and digital channel integration
- The sale of lottery draw and instant games at the point of sale
- Connection to third party instant ticket dispensers
- Enquiry and validation of all games
- Data management, tracking and control
- A feature rich Management Portal
- Control of the point-of-sale environment
- Configuration and management down to lane level
- Reporting capability across all platforms and channels
- Advanced fault diagnosis and tracking

Allwyn North America 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.

Instant Win Gaming (IWG) 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.

Aristocrat Interactive™ aristocratinteractive.com



Aristocrat Interactive is an industry leader in content and technology solutions for online Real Money Gaming, with a full-service offering that includes content, proprietary technology platforms and a range of value-added services across iLottery, iGaming, and Online Sports Betting.

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

A business unit of Aristocrat Leisure Limited (ALL), Aristocrat Interactive delivers comprehensive, turnkey solutions that include cutting-edge 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 good 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 iLottery division currently serves 32 global lottery customers, more than double the number served just four years ago.

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



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.

Carmanah Signs,
a Division of
STRATACACHE
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.**

DraftKings Inc.
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draftkings.com/draftkings-about

DraftKings is a digital sports entertainment and gaming company that provides users with online and retail sports betting, online casino and daily fantasy sports product offerings, as well as digital lottery courier, media, and other product offerings. DraftKings' mission is to make life more exciting by responsibly creating the world's favorite real-money games and betting experiences.

As a multi-vertical market leader in sports betting, iGaming, and daily fantasy sports, DraftKings has built a powerful digital footprint across North America. As of May 2025, our platform spans 44 U.S. states for fantasy sports, 28 states (plus D.C. and Ontario) for online and retail sports betting, and 5 states (plus Ontario) for iGaming. We are proud to have relationships with some of the world's most prominent sports leagues—including the NFL, NBA, NHL, MLB, WNBA, PGA TOUR, UFC, and NASCAR.

In 2024, DraftKings entered the lottery space by acquiring Jackpocket—the nation's leading digital lottery courier.¹ Jackpocket offers a secure, mobile-first platform for ordering lottery tickets.

Together, DraftKings and Jackpocket offer unmatched digital innovation, reach, and player engagement to help lotteries grow responsibly and reach new audiences.

DraftKings' Lottery Related Services and Capabilities Include:

- **Courier:** Operating in 17 jurisdictions, Jackpocket maintains a 4.7-star app rating (200,000+ reviews²) and brings in incremental players proves to complement traditional retail channels.
- **Digital Retailer Options:** DraftKings has the technological capability to partner with state lotteries and offer a first-of-its-kind distribution model that would allow players to purchase iLottery products—including draw-based games and eInstants—directly through a DraftKings mobile app and website.
- **Digital Lottery Innovation:** We have the ability to partner with state lotteries to offer digital solutions tailored to modern consumer expectations powered by top-tier content, product design, and user experience.

¹ "America's #1 lottery courier app" based on iOS download data collected by Sensor Tower from March-October 2024

² May 2025 iOS App Store Ratings

Gaming Laboratories International (GLI®)
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 65 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:

- Business Analysis and Requirements Management
- End-to-End System Implementation Planning
- Project Management
- Cutover Services

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:

- 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.

SCA Promotions



scapromotions.com/lottery-solutions

Our risk, Your reward

SCA, the leader in promotional risk management since 1986, provides specialized solutions for the lottery industry. SCA has worked with lotteries for 25+ years and provides a portfolio of innovative **budget management and risk mitigation** services to meet unique challenges facing the industry.

Featured Solutions Include:

- Prize Coverage
- Second Chance Promotions
- Jackpot Protection
- Retailer Incentives
- Customer Acquisition Promotions
- Sponsorship Activation & Sports-themed Campaigns
- Combination Concentration Coverage for Daily Pick 3 & 4 Games

Our team of promotion experts, actuaries, 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.

Lottery customers include: Texas Lottery Commission, Scientific Games, Alchemy3, New Mexico Lottery, Maryland Lottery, Louisiana Lottery, and many others.

Headquartered in Dallas, TX---Phone: 214-860-3752

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The NEED for a 'SAFE HARBOR' protecting public lotteries in the face of regulatory disruption and aggressive online gambling operators

By Philippe Vlaemminck, and Valentin Ramognino¹

The EU has evolved from an economic community (Treaties of Rome 1957) into a true union of citizens with a strong social dimension (as highlighted by former EU

Council President Von Rompuy at the Charlemagne Prize ceremony in Aachen 2014).

This shared European culture and social heritage are now embedded in the Treaties (article 167 TFUE). Within this common cultural framework, games of chance were common in ancient Greece, Rome or in Egypt, while the unique concept of lotteries found its origins in Bruges when the first 'lottery' named 'Lotinghe' (meaning lot or "taking fate into you own hands") was created.

Lotteries are indeed part of the social fabric of the EU, thanks to its model of offering low risk games with small stakes for potential big prizes played by a large community of adult citizens. Beyond entertainment, lotteries contribute significantly to the non-economic values of society, channeling funds to good causes that serve the public interest.

However, this societal role of lottery is in danger in a more digitalized and competitive environment. That is why, today, lotteries need to be protected at the EU Treaty level.



Philippe Vlaemminck and Valentin Ramognino

Nearly 600 years after the first lottery, lotteries in Europe and beyond are based on the same model: a large group of citizens who participate in a public and transparent draw. They do so for a very affordable stake, hoping to win a prize but also support the idea that the proceeds are used to fund causes that benefit society as a whole and are close to anyone's hearts.

Lottery now represents a common cultural heritage on a world scale. In some countries, the **role of lotteries is enshrined in the state Constitution** (e.g., Switzerland, India and several states in the U.S.). This should be the same in the EU.

As early as in 1994, the **role of lotteries in this historical and social context was outlined:**

"Given the peculiar nature of lotteries, which has been stressed by many Member States, those considerations are such as to justify restrictions, which may go so far as to prohibit lotteries in a Member State. (...) A final ground which is not without relevance, although it cannot in itself be regarded as an objective justification, is that lotteries may make a significant contribution to the financing of benevolent or public interest activities such

¹Philippe Vlaemminck is the managing partner of Vlaemminck.law; and Valentin Ramognino, associate at Vlaemminck.law. Brussels (Nederlandse and French) and Paris Bars, their views are personal.

as social works, charitable words, sport or culture”

In 2024, the European Court of Justice recalled (in ruling Chaudfontaine C-73/23) that **cultural factors** and **differences** relating to minimum and maximum stakes and winnings, as well as the chances of winning, **create a distinction**, in the eyes of the average consumer, between lottery and other games of chance or gambling.

However, in recent years, online operators have also proposed look-a-like games as lottery games contesting even though these are lottery games. Some of them try to target the lottery customer (the “carrot” policy) before steering them to high-risk games. These operators are typically based in classic ‘offshore’ countries that shelter illegal online gambling operators, many of whom offer “parasitic” betting on lotteries, whereby consumers bet on the outcome of legitimate legally-operated lotteries. Consumers often do not even realize they are playing on an illegal gambling website and not the authorized state lottery.

Even if online development and innovation were considered to be a fair part of a legitimate economic competition between operators, the fact that some operators or even regulators blur the line between authorized lottery games and other, higher-risk types of games of chance, is risky for the very reason of the historical, universal and societal role of lottery gaming.

In Europe and in the world, the debate is thus growing around fragmentation of regulations or harmonization and opening or controlled approaches (monopoly system). The European Court of Justice, however, always emphasizes that consumer protection is the key to any national gambling regulations and allows discretion in regulating gambling in the absence of harmonisation.

Indeed, the games of chance sector has contributed to the development of the Court’s case law on the four fundamental freedoms (movement, goods, services and capitals) enshrined in the Treaty.

This case law showed that restrictions on

lotteries and other games of chance have influenced the Court’s interpretation of the Treaty provisions on those fundamental freedoms, taking into account the **cultural, religious** and **moral** differences at stake in this area. The Court applies a more **deferential standard of legal control** but ensures that the objective underlying the restriction of any of these four fundamental freedoms in a gambling context is pursued in a consistent and systematic manner, and that the **proportionality principle** is respected.

The Court of Justice has judged that a policy whereby more dangerous games are largely available through many operators while low-risk games are controlled under a monopoly is not consistent. The Court has specified that the policy adopted by a Member State must take account of the different risks for the consumer according to the type of games involved, and lotteries are less dangerous than betting or casino games².

In particular, the caselaw of the European Courts requires that Member States uphold a consistent gambling policy. As such a “policy of **controlled expansion of gambling activities** may be consistent with the objective of channeling them into controlled circuits by drawing gamblers away from clandestine, prohibited betting and gaming to activities which are authorised and regulated.” (Placanica, C-338/04, para.56)

The fact that two categories of operators may appear to share the same objective (consumer protection) does not mean that their situations are comparable in terms of a given policy. The **structural, legal** and **functional** differences between lotteries and other games of chance justify the application of separate arrangements to them, which need to be explained at all levels (national, European and beyond).

The European Court of Justice and the EFTA Court both recognized that a monopoly system is compatible with EU law and can even be considered more ‘effective’ in ensuring the protection of national objectives³. The Courts always state that a monopoly can be justified only

in order to ensure a particularly high level of consumer protection, with means of a supply that is quantitatively measured and qualitatively planned to achieve this objective and subject to strict control by the public authorities.

Finally, the Court ruled that **online is recognised as more dangerous and not as just another form of distribution of games**. Moreover, according to the European Commission SNRA, with regard to the risks of money laundering (ML), online gambling is considered to be at level 4, the highest risk; while lotteries are at level 2 (low risk).

Therefore, it is very important to be able to defend at the national level, and in the European context, the **legal, conceptual** and **social uniqueness** of lotteries, including its low-risk approach.

If we want to protect the future of Lotteries and their broad societal role, we need to create a constitutional “safe harbor”, to guarantee the exclusive right model even in an otherwise less consistent environment so that Lotteries can continue to play an important societal role.

Lotteries are not only operating low risk games for the benefit of society, they also do so to provide consumers with a safe, low risk and entertaining alternative for high-risk “hard” games.

As the President of the Court of Justice of the EU said: Lotteries are not only part of our cultural heritage, but they also belong to our “social fabric”.

In the European Union area, it is long recognized that competition is detrimental in the gambling sector. Since the Advocate General opinion in Schindler (and later re-affirmed by other AGs and the Court), it is clear that competition does not benefit consumers but leads to overheating of the market which means more problem gambling and addiction.

In practice, online operators can only compete if they use tools and methods that tend to create problems (aggressive advertising, incentives to play like bonuses, VIP treatment, etc.).

²The primary risks are those linked to the behaviour of the player, and depend on the types of game: see Advocate General Bot’s opinion in Case C-347/09 of 31 March 2011, Dickinger and Omer, paras. 127 to 130 and Carmen Media, C-46/08, para 100. It is also recently stated in Chaudfontaine Loisirs C-73/23, para 44.

³Judgment of 20 September 1999, Läära, C-124/97, para. 42 Case E-1/06 EFTA v. Norway

However, because of their societal role and contributions, lotteries are not just gambling services like other gaming operators. The societal role of a lottery has two key components:

The first societal objective is to bring low-risk games to a large community of players providing entertainment and dreams of big prizes, which attracts and channels people to low-risk alternatives and away from high-risk games, which in turn makes society less dependent on high-risk games and less vulnerable to health problems.

The second objective is to return substantial amounts to non-economic parts of society (building civil society including education, sport, fight against poverty, development aid, culture & cultural heritage, R&D, scientific research, etc.), as recognized by the European Court of Justice 30 years ago in the Schindler case.

Both those components form part of the societal role of lotteries in the EU.

In 2010, in its December conclusions, the EU Council took a step further and officially endorsed the societal role of lotteries, specifically for their role in the funding of good causes. The Council recognizes *“that contributions, in particular from state lotteries or lotteries licensed by the competent state authorities play an important role for society, via for example the funding of good causes, directly or indirectly where applicable.”* (Council document 16884/10).

This was not followed by the political actions needed for it to take effect. In recent years we see this traditional role of lotteries generating funds for good causes to be under threat as the online gambling industry is aggressively advocating for liberalization, aggressive marketing strategy and diversity of games in spite of the growing problem of illegal gambling. This is, of course, the wrong answer. **More liberalization only leads to more problem gambling.** A strict regulatory approach (the controlled expansion theory) with a strong emphasis on responsible gambling as promoted by the Lottery associations like EL, combined with effective law enforcement, is the only way forward. However to be successful it is vital to give lotteries the support and the room they need to grow

and prosper for the benefit of society.

Indeed, it is time for Lotteries to be legally safeguarded within a policy that recognizes that high-risk games are already under-regulated and too accessible, and that lotteries should not just be subjected to the rules of the market and normal exceptions to economic freedoms (so not tested against consistency). Otherwise,

This calls for creating **constitutional safe harbor.**

This can be made by integrating the protection of lotteries in a Protocol to the TFEU (cultural heritage of lotteries and contributing to non-economic values/ social construction of EU, based on both article 3 TUE and article 167 TFEU).

The protection of lotteries in the EU, or elsewhere, is even a benefit for other (gambling) actors as it provides clarity and sustainability.

Lotteries will find themselves in a competitive environment which is in no way good from a consumer protection and public order perspective. Lottery games are even at risk of becoming irrelevant (especially mass parimutuel type of games which require maximum playership which is only possible through exclusive rights to operate the games.)

The concerns created by illegal gambling operators (operating mainly from Malta) have been in the spotlight recently at the Court of Justice, especially by a recent AG Opinion in the Wunner case (C-77/24). It is sometimes estimated, even at the European Parliament, that almost 70% of online gambling takes place on unlicensed (illegal) platforms. However, the real size of the illegal market is difficult to assess.

The European Court of Justice has already confirmed, in 2010, that the responsibility for an effective enforcement system and the fight against illegal online gambling lies with the Member States (C-46/08). Indeed, the analysis by regulators of illegal gambling being offered in EU countries demonstrate that

there is a **concentrated foreign origin of illegal operators:** 50% of illegal websites are based in Curaçao and 20% in Malta or Cyprus. Also, as established by the scientific community, illegal online gambling presents major risks in terms of public health and gambling addiction.

Even in this context, **states can still address illegal gambling in an effective way**, by monitoring the illegal market, by improving legislation and law enforcement, implementing geo-blocking (e.g. in Austria, France, Belgium) and payment blocking where necessary (the Netherlands), and developing a controlled expansion policy for operators to be legally taxed and regulated.

Some online operators advocate for expanding the regulated market, buy which they mean licensing more and more private operators, contending that this is the best way to combat illegal gambling. This is never the case. In countries who adopted this strategy (the Netherlands, Germany), we see a serious threat for the way lotteries operate, a rise of gambling addiction and not even necessarily a decline of illegal gambling. Indeed, unless there are serious limitations, the granting of more online operator licenses only makes it legally more difficult to argue that lotteries should retain their monopoly of low-risk games while hard-risk games are freely available.

The role of lotteries to channel players to legal, safe and responsible gaming, requires reflection on their specific role in society and the legal protection for it. This reflection focuses on the need to protect legal lotteries, as opposed to illegal or ‘parasitic’ ones, and to effectively regulate other games of chance, in order for lotteries to continue to contribute to the social fabric of the EU (by financing good causes) and to promote legal, safe and moderate gambling that puts consumer protection first.

Lotteries have been around for 600 years and are not going to disappear, but their role will be weakened if regulators and policy-makers fail to act against overly aggressive competition from illegal online operators. ■

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