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JULY/AUGUST 2025



Accounting for Future Growth

Mary Harville,

Chief Executive Officer and President, Kentucky Lottery Corporation



Rooted in Mission, Driven by Innovation: Inside the Transformation of the California Lottery

Harjinder K. Shergill-Chima,

Director, California Lottery



The Mission Is Education: Inside the Strategy, Leadership, and Vision of the country's top-selling Lottery

John Davis,

Secretary, Florida Lottery

The Modern CFO: From Analyst to Strategic Ally

Maggie Garrison,

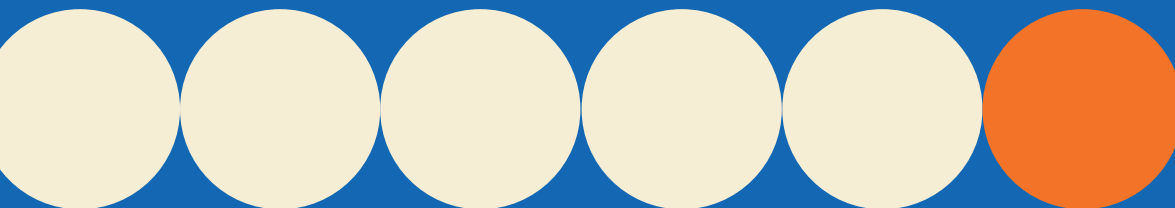
Vice President and Chief Financial Officer, Kentucky Lottery Corporation



IGT Lottery transitions to BRIGHTSTAR

Renato Ascoli, Chief Executive Officer Global Lottery, Brightstar

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Subscriptions

United States: \$145 USD

Canada & Mexico: \$160 USD

All other countries: \$225 USD

For email address changes, subscription requests and requests to be placed on our e-Newsletter distribution list, e-mail Susan Jason at sjason@publicgaming.com

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Public Gaming

International Magazine

Published six times a year and distributed to readers all around the world. Electronic version is e-mailed and is also available on our news website: PublicGaming.com

July/August 2025

Volume 54, Issue 4

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Public Gaming Research Institute

cISSN: 1042-1912

LETTER FROM THE CEO

To Our Valued Clients and Partners,

The gaming landscape is becoming increasingly complex, and that can pose a threat to your business today and to your plans for tomorrow. Increasingly complicated compliance requirements and growing cybersecurity threats can pose daunting challenges for suppliers, regulators, and operators. However, there's no reason to panic – at GLI, we have been planning for this moment, and we are fully prepared to help you succeed, anywhere and everywhere you want to go in the world.

For example, at our Regulators Roundtable this April, we welcomed over 450 attendees from around the world – comprised of regulators and suppliers – who came together to discuss critical and rapidly evolving topics. The presentations and discussions added essential clarity to the path forward, and we were honored to make it happen.

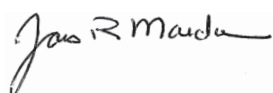
Beyond discussions, we have implemented tangible tools that are essential in today's landscape. The fact is, last year, \$184.4 million in regulatory penalties were assessed globally, and that's why our clients rely on our end-to-end integrated compliance, testing, and security solution. It's the only solution of its kind and is designed to keep you in compliance and away from fines throughout your product lifecycle. Additionally, we have global teams of cybersecurity experts and world-class solutions to ensure you are protected 24 hours a day, 7 days a week. We do all of this proactively, so you can successfully navigate regulatory complexities and cybersecurity threats and avoid costly fines and pitfalls.

Last year, I committed to you that we would staff up to stay ahead of demand and deliver faster time-to-market and the very highest quality along with improved efficiency, and since August 2024, we have increased our staff by more than 270 testing personnel (that's an increase of 20 percent) placed globally. We have also created a testing Innovation team headed by a VP of Innovation to create even smarter, more efficient tools and systems, continually refining our tools and processes while reducing friction and speeding time to market. Those efforts are already further reducing turnaround times and keeping you more informed of progress in real-time.

Additionally, we constantly review and update the GLI Standard Series, and we were thrilled to introduce the Gaming Security Framework last Spring. The GLI Standard Series provides essential standards and best practices for every aspect of gaming, from development to security. This September, ahead of G2E, we will be supplementing these standards and Security Framework with specific modules that fit within specific types of gaming equipment.

As gaming becomes more complex, we are prepared to help you meet challenges and opportunities head-on in over 710 jurisdictions. You don't stop half-way and neither do we. Every company has goals and ambitions, and we are here to make the complex simple so you can succeed, anywhere and everywhere you want to go.

I look forward to seeing you somewhere on the globe.



James Maida



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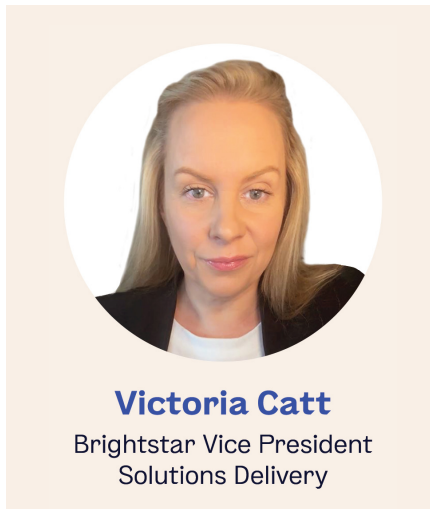
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PULSE OF THE INDUSTRY: *Synopsis of recent gaming industry news*



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From the Publisher

Our *Pulse of the Industry* section offers a very brief digest of the key developments shaping the world of lottery and games of chance over the past six weeks. For the full roster of original articles and unedited news items, visit our news site at PublicGaming.com.

There's no shortage of big stories in this issue. First up, IGT is now Brightstar. We spoke with **Brightstar CEO of Global Lottery, Renato Ascoli**, about what this means for Brightstar customers and the industry at large. The rebranding signals a renewed focus on the future—on innovation, on digital transformation, and on what's possible when an enterprise commits fully to the lottery space. It's an exciting time for the company and its partners. Onward and upward.

Another major move: **Intralot S.A. has acquired Bally's Global Interactive division**, gaining a world-class digital platform and strengthening its position as a global leader in both lottery and iGaming. The implications of this deal reach far beyond the expansion of technical capabilities—it represents a bold step forward in Intralot's transformation into a fully integrated, future-ready technology and services provider.

We're also proud to feature interviews with the directors of three of the most forward-leaning lotteries in the U.S.

In **Kentucky**, CEO **Mary Harville** joined us to talk about how the role of the Chief Financial Officer has evolved into one of strategic leadership. She brought **KLC CFO Maggie Garrison** into the conversation to explore how financial expertise is informing enterprise-wide vision, and being applied to drive innovation, support long-term planning, and help lottery organizations adapt to rapidly changing business landscapes.

In **California**, Director **Harjinder Shergill Chima** is bringing fresh energy and inventive mindset to a lottery ready for change.

What's remarkable is not just the internal transformation, but the way she built broad public support—from education advocates, legislators, and community leaders—to amplify the lottery's mission and impact.

It's a case study in how ingenuity and bold leadership re-energize a team and reinvigorate a brand.

And in **Florida**, Secretary **John Davis** leads the nation's top-selling lottery with a vision that extends far beyond the bottom line. His 2030 Plan is about setting stretch goals, yes—but the real success driver is cultural. Team Florida Lottery embraces the mission of public service, the support of education, and the belief that investing in people unlocks performance. It's a powerful formula.

We've also included an edited transcript of a panel discussion moderated by **Georgia Lottery CEO Gretchen Corbin**, featuring leaders from the major tech providers. The focus is on how digital platforms are evolving—not the games, but the infrastructure, systems, and tools that support them. It's a fascinating look into the technology stack behind the player experience.

Thanks to **Scientific Games** for sharing their research into player motivations and behavior. Instant games remain a rich canvas for innovation, and the data generated by Scientific's ongoing activity is yielding new insights that are helping lotteries better engage players, improve retention, and spark growth.

Also in this issue: **Adam Barry, Chief of Staff at Intralot, Inc.**, gave a terrific presentation on the applications of Artificial Intelligence for lottery and gaming. I asked him to adapt it into an article. If you're curious about how AI is already reshaping this industry, don't miss it.

Another bright spot: **Brightstar's** collaboration with its lottery partners on the **Mega Millions™ game change**. It's an inspiring success story that shows what's possible when Team Lottery works together toward a shared vision. Coordination, execution, and mutual trust delivered a win for everyone.

Looking more broadly, there are encouraging signs of a global trend toward stronger enforcement against illegal operators. Regulators used to refer to "gray area" markets. Now they are calling them

what they are: Illegal operators. Criminal enterprises. Online casinos that masquerade as "Sweepstakes", Coin-operated gambling kiosks and skill-based games that avoid being taxed or at least not as gambling machines, illegal sports betting and iGaming websites, illegal cross-border selling of lottery tickets – these are all coming under serious attack from regulators who are showing a vigorous resolve to actually enforce the law.

And then there's the country of **Malta**, Exhibit A in the Bad Actors Club. The European Commission has pursued ongoing infringement proceedings against Malta, accusing it of brazenly violating EU law by shielding its gaming industry from foreign court judgments. Malta's 2023 Gaming Act amendment is expressly designed to block enforcement of EU-wide legal rulings against Maltese gambling companies. It is a direct affront to the principles of mutual trust and judicial cooperation at the heart of the European Union. The EC's infringement notice cites Malta's failure to comply with EU regulation by compelling its courts to refuse to recognize valid foreign judgments. Two rulings from Maltese courts earlier this year flagrantly ignored binding decisions by Austrian courts, denying justice to consumers defrauded by Malta-licensed operators. European lotteries and legal experts have rightly condemned Malta's actions as dangerously undermining the rule of law across the Union.

Looking ahead, September brings the **NASPL Conference in Niagara Falls**, followed by the **EL Congress in Bern, Switzerland**, and then our own **PGRI Lottery Expo Conference** in Nashville the first week of November. See NASPL.org, European-Lotteries.org, and PublicGaming.org for details, registration, and updates.

Paul Jason, Publisher
Public Gaming International Magazine



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ACCOUNTING FOR FUTURE GROWTH THE MODERN CFO: FROM ANALYST TO STRATEGIC ALLY

Mary Harville,
*Chief Executive Officer and President,
Kentucky Lottery Corporation (KLC)*
and
Maggie Garrison,
*Vice President and Chief Financial Officer,
Kentucky Lottery Corporation (KLC)*



PGRI INTRODUCTION: When I was talking with CEO Mary Harville and asking her about how the role of the CFO has changed over the past decade, and how that is even more the case at the Kentucky Lottery Corporation, Mary suggested I interview her CFO Maggie Garrison. I suggested we feature an interview that includes both Mary and Maggie, and she agreed. Thank you! I think you dear reader will agree this turned into a most interesting study of how one of the most progressive lotteries in the country balances the need for fiscal responsibility with investment in change and innovation.

To understand the success of Mary and the entire team at the Kentucky Lottery, you first need to know Mary's vision when she took the helm of the Lottery in 2020 after being appointed by Gov. Andy Beshear. Prior to her appointment, Mary served as Senior Vice President, General Counsel, and Corporate Secretary of the KLC for 16 years before ascending to the C-Suite. Soon after taking the reins, Mary made multiple innovative changes that produced exciting results across the board and leaves the organization well-positioned to continue its mission in the future. These changes include partial corporate restructuring.

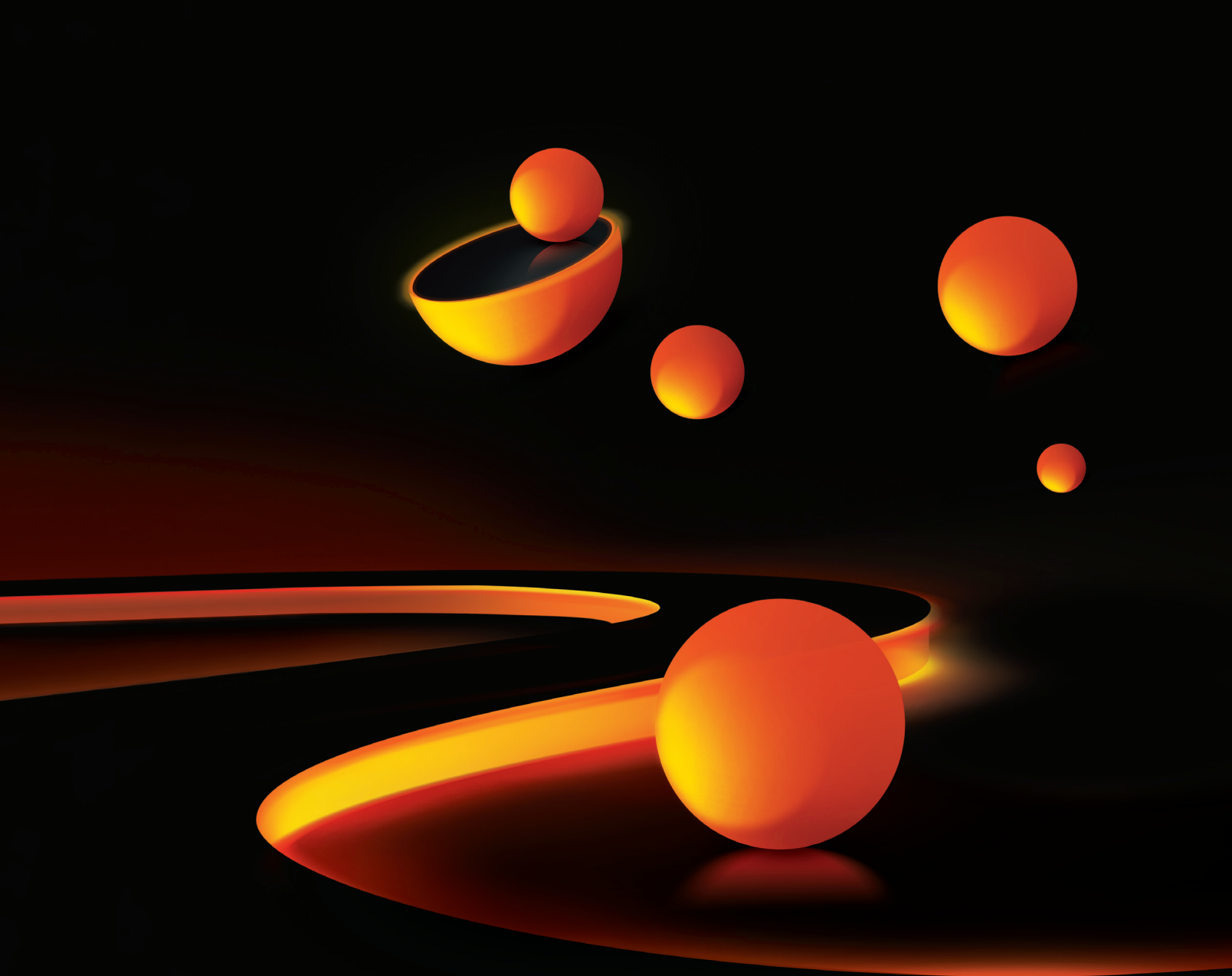
Significant structural changes to the organization began within months after Mary's appointment. Several long-time advisers in executive level positions announced their decisions to retire, while at the same time, emerging leaders were ready to advance to the next level. To move forward, Mary drew upon her innovative spirit to not only adapt and optimize organizational efficiency, but to ensure the company is strategically focused in the pursuit of its mission of funding college scholarships and grants. Today, every member of Mary's initial 2020 senior leadership team is no longer with the Lottery, and Mary has either hired or promoted nearly all of her executive leadership team to their current roles. Leadership coaching has been utilized to assist in this important time of transition.

One example of Mary's vision is Maggie's outstanding success at the KLC. Maggie joined the KLC in 2011, was promoted to Vice President in 2015, and Mary named her as CFO in February 2023. Mary's initiatives have broken down departmental silos and forged a multi-disciplinary approach to running a multi-billion-dollar enterprise, and at the forefront has been the expansion of the CFO role to champion of innovation and sustainable growth.



Paul Jason: Mary, how did you smooth the path for your senior executive team to work collaboratively; and support the transition of the CFO from the "sales prevention department" into the Department of "Let's figure out together how to turn this into a financially viable action-plan that optimizes performance and results."

Mary Harville: My career began at the Lottery in legal, as general counsel. We're a sales organization, and I wanted to support that. But others in leadership seemed to be habituated to certain kinds of unflattering stereotypes: calling the Legal Department the "Sales Prevention Department," for example, and they didn't even know me. So I am sensitive to that. In meetings, the departmental silos were interfering with productive communications between VPs. There was this feeling that Legal and Finance in particular weren't entirely welcome, especially when the discussion turned to product or sales. There was a clear "Stay in your lane," or "Don't tell us how to do our jobs" vibe.



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When I became CEO, I knew we could do better. I looked for opportunities to replace that adversarial dynamic with something more collaborative. So now, when someone brings forward a proposal – whether it’s a new product or a sales strategy – we don’t just say “no” and explain why it can’t be done. We say, “Let’s talk about it and try to find a way to make it work.” We’ll identify the obstacles and work together to overcome them – or find smart ways around them. Of course, some ideas don’t hold up under scrutiny. But no one can say we didn’t push every angle, explore every possibility, and stretch our thinking to create options, spark innovation and uncover new solutions.

I believe the VPs from all functional areas — Legal, Finance, Marketing, Sales, Products, Security, , Communications – should operate as one team. Managing the business should be a collaborative effort. That’s why we’ve hardwired in a weekly all-hands leadership meeting. One purpose is basic project management and accountability – to make sure we’re aligned. But the other purpose is to foster the kind of regular interaction that builds the deeper relationships necessary for real collaboration.

When I was general counsel, VP meetings were more ad hoc – small groups pulled together to address specific issues. Maybe the CEO, CFO, and Marketing VP would meet to review a proposal from a vendor. Or Legal, Security, and Sales might huddle over a compliance concern. But we never had what we have now: regular, consistent and productive meetings with the entire leadership team in one room. And then after those meetings, I trust the VPs to drill down further in smaller groups as needed. But it starts with that shared foundation. Now, when the Products Department shares a new game concept in our all-hands weekly, other VPs can informally raise any concerns or issues. This can all take place even before the concept is taken to the Project Steering Committee for formal approval to move forward.

Work may be organized around our need to specialize in order to acquire expertise. Then we create departments with experts in a particular discipline. But we shouldn’t forget that the real world is not actually organized into distinct silos.

“What we can do is invest prudently in innovation, knowing that sustainable growth requires more than just cutting costs or increasing operational efficiencies.” – Maggie Garrison

Whether it’s a new game, a sales strategy, a cost-cutting idea, or an operational change — it always overlaps multiple departments. We need to process ideas through an enterprise-wide lens. That’s how we make sure they’re truly viable. We need to stay vigilant in breaking down silos and turning ideas into actionable, cross-functional plans. It takes discipline and constant attention.

I’m sure we’re not doing everything perfectly. But I do think we’re all clear on the importance of communication, teamwork, and taking a multidisciplinary approach to planning and execution.

I thought this background might be a useful framework for Maggie to talk about the CFO’s role. Because de-siloing isn’t a one-and-done exercise. It starts with mutual respect for what each V.P. and department contributes. But, as Maggie will probably say, it’s something that has to be reinforced every single day. I have asked Maggie to join us because truly, Maggie has been the tip of the spear in making that happen — building bridges, earning trust, and championing real collaboration.

Some have called lotteries risk-averse. I say — of course they are. Their in-state stakeholders wouldn’t have it any other way. How has your strategy to engage your team, especially your CFO worked in this respect?

M. Harville: We’re state agencies, or quasi-state agencies, and we answer to governors and legislators who expect us to prudently manage this multi-billion-dollar enterprise. Our mandate is to grow its value and generate funds for good causes, not just this year but for decades to come.

I honestly encourage and welcome our vendor partners and others who bring new ideas, fresh perspectives, and a passion for innovation. And I understand their frustration when we can’t move as fast as they’d like. But we operate in a space where considerations that aren’t even on

their radar may be top-of-mind for us.

Maggie Garrison: I think we do push the envelope — but we do it within a well-defined, disciplined framework. Every new idea or initiative goes through a structured process: we gather data, measure outcomes, adjust, and then scale if it proves out. If it doesn’t, we recalibrate or pivot to more promising ground.

Of course we aim to mitigate risk. But we do know that there is no such thing as perfect visibility into the future which means that risk can never be eliminated. What we can do is invest prudently in innovation, knowing that sustainable growth requires more than just cutting costs or increasing operational efficiencies. Those things give you a quick bottom-line boost, and there’s nothing wrong with that. But maximizing net funds to our beneficiaries over the long term? That means growing the top line. And that demands smart investment in innovation and new ideas.

What happens when a proposal can’t be tied to a clear metric or quantifiable result? “Player engagement,” for instance. Just because it is hard to measure does not mean it isn’t important.

M. Garrison: There are ways to measure almost anything. Certainly there are metrics for Player Engagement. But your point stands — some outcomes are trickier to quantify. Not everything maps neatly into ROI formulas. That’s why, in addition to looking at direct costs and benefits, we also have to consider opportunity costs. What potential revenue or strategic gain might we be leaving on the table if we don’t act?

Sometimes, you have to lay the groundwork for future success even when the data is murky and the returns aren’t immediately visible. Like your example, player engagement. For instance, we’d pulled back from licensed property games after reviewing the data — the

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Rooted in Mission, Driven by Innovation: Inside the Transformation of the California Lottery

Harjinder K. Shergill Chima

Director, California Lottery



PGRI INTRODUCTION: Harjinder K. Shergill Chima served as Chief Deputy Director of the California Lottery for four years before being appointed Director in 2023. Prior to joining the Lottery, Shergill Chima was Assistant General Counsel at the California Government Operations Agency. Before that, she was an attorney at the California Department of Transportation from 2004 to 2018. She began her legal career as an associate at Reinecke & Daily in 2001, then at Rich, Fuidge, Morris & Iverson Inc. from 2002 to 2004. She holds a Bachelor of Science degree in Criminal Justice from California State University, Sacramento, and a Juris Doctor from Whittier Law School.

Sales and net funds for public education have been on a steep growth curve since Shergill Chima joined the California Lottery as Chief Deputy Director in 2019, rising from \$6.62 billion in sales and \$1.51 billion in net funds in FY 2019-20 to \$9.27 billion in sales and \$2.29 billion in net funds in FY 2023-24. For context, that's up from sales of \$6.27 billion and net funds of \$1.58 billion back in FY 2016. I asked Harjinder what's changed—what has the Lottery been doing over the last four years that's so different from the years leading up to 2020.



Paul Jason: The California Lottery is celebrating its 40th anniversary year. How have you used this promotional opportunity to increase sales?

Harjinder K. Shergill Chima: We marked the milestone with something we'd never done before—a \$40 ticket. That might not sound impressive to states that regularly launch higher-price-point games, but for us, it was a first. The ticket is stunning. It features the iconic California Golden Bear in our signature blue and orange, and we are offering a \$2 version as well. It's a beautiful, beautiful game, and players responded immediately. The \$40 ticket has been an absolute hit—awesome, really. You

never know for sure until it hits the market, but this one roared out of the gate. Our Sales and Marketing team led by Deputy Director, Sharon Allen, just really nailed it with this ticket.

We followed up in June with another California Bear edition—this one with fun scratch-off trivia about Lottery history, which adds a little education to the entertainment.

The actual anniversary lands in October, and we're working on a celebration for our team. As a state department, there are restrictions on the use of public funds, so we've had to get creative. But rest assured, the executive team and I are determined to

make it happen. We want to celebrate with every one of our employees—across all nine district offices, our warehouses, and HQ. We'll also be inviting local and state officials and other stakeholders. It's important that everyone who helps power this enterprise gets to share in the joy of this moment.

California is the fourth-largest economy in the world. That's an incredible concept. Are there any north-star guideposts that guide your approach to managing a Lottery that serves a market of that magnitude?

H. Shergill Chima: You'd think the scale of the economy would be a dominant



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factor, but honestly, what matters more is leadership continuity and operational stability. When (then-Director) Alva Johnson brought me on as his Chief Deputy, we were both laser-focused on bringing cohesion and long-term structure to the organization. That's not to knock previous directors—they did what they could under often difficult circumstances—but the fact is, we had something like 24 directors in 38 years. It's hard to build brand continuity, internal morale, or strategic momentum when the leadership baton changes hands that often.

"We're not just selling tickets—we're investing in schools, one game at a time."

Alva and I were determined to change that. We wanted to build something that would last—an organization that wouldn't just survive changes at the top but thrive through them. And when Alva left—making him the first director in our history to step down of his own accord—I was honored to be promoted. I'm also the first Chief Deputy ever to make that leap, which gives us a leg up on the mission to establish

stability and continuity.

How did you start working toward such an ambitious cultural transformation?

H. Shergill Chima: From the ground up. First, we had to get the foundation right. That meant documenting and reinforcing policies and procedures. Some were already on the books but weren't being consistently applied. So we made it clear—policies aren't just paperwork or a handbook that sits on a shelf. They're how we align, how we operate, and how we win together.

After that, it became all about people. We're very focused on ensuring every team member knows exactly what our goals are, what their role is, and how to collaborate across departments to achieve shared success. It's easy to assume everyone's on the

same page—but assumptions don't drive results. We stretch to actively reinforce the mission, every single day, and in every interaction.

Let's talk about mission. Many people assume Lottery funds just disappear into the state's general fund. That's a hard thing to rally around emotionally. How have you addressed that?

H. Shergill Chima: Exactly. That's a perception problem we knew we had to tackle. Carolyn Becker, our

The response was overwhelming. We heard from educators all over the state on how they used Lottery dollars—funding theater programs at community colleges, ESL books for elementary students, nursing programs, firefighter training academies, and support for underfunded rural schools. Real stories, from real people, doing the work.

And that's what makes the campaign so powerful. It's the people most affected by the Lottery telling their own stories. We hear directly from instructors—heroes who dedicate their lives to education. We hear from students whose opportunities are brighter because of what we help make possible.

Who better to speak to the impact of the California Lottery than the educators and students that the Lottery supports?

Ultimately, they remind us why we do this. Their stories re-energize our teams, deepen our sense of purpose, and help translate that inspiration into better performance, stronger alignment, and renewed commitment to our goals.

Other lottery directors may want to engage their beneficiaries as vocal supporters, but find that it's easier said than done. Is there a trick to getting them to speak up and rally around the Lottery?

H. Shergill Chima: I don't know of any tricks, but I think it is very important to engage your beneficiary stakeholders in a knowledgeable way. For us, it started with a study led by Jim Hasegawa, Deputy Director of Business Planning and Research, aimed at understanding how people perceive the Lottery. Do people even know where the money goes? Turns out, most didn't.

What we discovered was eye-opening: the general public and even our own players were largely unaware that Lottery profits are earmarked for public education. That disconnect gave us our starting point. And then educators and other stakeholders began volunteering to tell their own stories. They weren't just willing—they were excited to spotlight their programs and speak to how Lottery funding helps them make a difference.

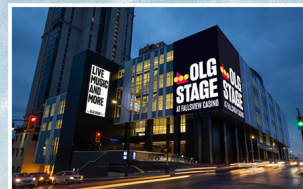
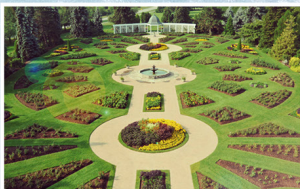
Some of those stories made it into commercials, and many more came to life through social media, newsletters, and community engagement. It was organic, authentic, and unexpectedly powerful.

Continued on page 36

Deputy Director of Public Affairs and Communications, launched a campaign around a simple, powerful idea: When you play, schools win. But we didn't want commercials with paid actors. We wanted authenticity. So we reached out to our educational partners and asked them to share their own stories. What are they doing with Lottery funds? How is it making a difference?



HERE to PLAY



HERE to PLAY

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The Mission Is Education: Inside the Strategy, Leadership, and Vision of the country's top-selling Lottery

John Davis, Secretary, Florida Lottery

PGRI INTRODUCTION: With over \$9.4 billion in sales for FY2024, the Florida Lottery ranks #1 in the nation. This isn't a story about marketing, promotions, or product. This is a story about visionary leadership, operational discipline, and a bold long-term strategy. It's about Plan 2030—the Florida Lottery's blueprint for sustained growth, innovation, and impact. It's about a team united behind a purpose: to fund education, empower futures, and serve the people of Florida with integrity and excellence.



Paul Jason: “How would you describe the mission of the Florida Lottery?”

John Davis: Our mission here is clear and impactful: to maximize revenues for the enhancement of public education in Florida, while upholding the highest standards of integrity and public trust, as outlined in Chapter 24 of the Florida Statutes. Every decision we make supports that purpose, and for us, it is more than just selling tickets, it is about delivering real value to Florida's students, families, and communities.

Paul Jason: “Florida leads the nation in lottery sales for the fourth year in a row, an impressive milestone. But behind those numbers is a deeper mission. How does the Lottery translate record-breaking sales into long-term impact for Floridians?”

John Davis: It starts with running a responsible, efficient, and forward-thinking operation. Since 1988, the Florida Lottery has contributed over \$48 billion to education; supporting K-12 schools, colleges and universities, and our vocational and technical schools. One of our most impactful efforts is being the primary funding source for the Florida Bright Futures Scholarship program, which has

helped more than a million students earn college degrees or vocational certifications. Record sales are only meaningful when they translate into real educational opportunities and that is our focus every day.

Paul Jason: “You often speak about education as more than just a cause—it's a mission. How has that shared commitment to educational opportunity shaped the culture and priorities of the Florida Lottery?”

John Davis: Great question. At the Florida Lottery, our beneficiary is education, and we believe it is the cornerstone and gateway to opportunity. Whether it is a degree or a certification, we want every student, regardless of their background, to have access to a better future. Our culture is built around that belief, which aligns with the priorities of the Governor and Legislature and is reflected in how we operate: through partnerships, student-focused programs that drive long-term success, and workforce alignment.

Paul Jason: “You have forged a powerful network of relationships with a variety of groups across the state of Florida. Talk about why they're so important to the Lottery's mission?”



John Davis: Partnerships independent of our retailers extend our reach and deepen our impact around education and expand awareness about the Bright Futures Scholarship program. Whether we're collaborating with school districts, nonprofits, or local organizations, it is an opportunity to meet students and families where they are. Programs like our work with the Orange Bowl Committee, Take Stock in Children, and the Orlando Magic help us support learning environments, mentoring, and college readiness. The Florida Lottery is the revenue engine, but these partnerships ensure that impact is felt where it matters most, by our students.

Paul Jason: “The Lottery operates with a unique blend of public mission and private-sector efficiency. How does that dual identity help translate your educational vision into real-world results—both in terms of revenue and student impact?”

John Davis: We run the Florida Lottery like a business, focused on results. While

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12th EL Congress and Trade Show 2025

Join us in Bern – a UNESCO World Heritage Site in the heart of Switzerland – for the lottery event of the year!

From 14 to 17 September 2025, the 12th EL Congress and Trade Show will bring together lottery leaders, policymakers, and experts for an unforgettable experience.

Hosted by **Loterie Romande** and **Swisslos** with the support of **EL Partners**, this year's edition explores the theme: **"Building a Better World"** – focusing on the evolving role of lotteries in society.

Participants will be inspired by high-profile Keynote speakers including **Count Herman Van Rompuy**, President Emeritus of the European Council, **Simonetta Sommaruga**, Former President of the Swiss

Confederation, and current President of the Board of the Equal-Salary Foundation, and **Laurence Rochat**, Olympic Bronze medalist and brand Ambassador, Audermars Piguet. A special welcome address will be given by **Nicolas Henchoz**, Founding Director, EPFL+ECAL Lab, the Design Research Centre of the Swiss Federal Institute of Technology in Lausanne.

As well as a dynamic business programme, the Congress will showcase cutting-edge products service at the **Trade Show**, celebrate excellence in lottery marketing with the **2025 EL Advertising Awards**, and host **unforgettable evening events**.

Join us as we unite to build a better world – for society and future generations.

Register today to secure your place!

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

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



SCAN ME

we are a state agency, we operate with a private-sector mindset, maximizing revenue to provide additional revenue for education. We are not just funding programs like Florida Bright Futures, we're also raising awareness and ensuring students, parents and communities throughout Florida understand what is available to them. Our partnerships amplify that message, and our efficiency ensures the highest possible returns to education.

Paul Jason: "Your dedication to the next generation of Americans is truly inspiring. You've also noted that the Florida Lottery is a multibillion-dollar business enterprise which means staying focused on delivering revenue for education. That requires adopting many of the same strategies used by large, market-driven commercial brands. Tell us about your sales incentive program."

John Davis: Prior to joining the Florida Lottery, I spent nine years in medical device sales, which helps me understand many of the things that motivate performance. About half of our employees are in product and sales roles, and the leadership team has worked to build a culture that rewards excellence, and this is one of many examples. The Governor and Legislature supported this legislative budget request, allowing us to formally incentivize the sales team and the overall results have been rewarding. We have led the nation in revenue generation for four years running, with average transfers ranging between \$5.5 to \$7 million a day to education. Competition, recognition, and incentives help drive performance and everyone wins.

Paul Jason: "Am I wrong to think that the incentive doesn't need to be large amount-it just needs to be enough to make it fun, spark little healthy competition, make things interesting, and show people that their hard work is noticed and appreciated?"

John Davis: You're exactly right. Incentives don't have to be large; they just need to spark competition, add excitement, and show appreciation. That mindset is key to how we operate. Every decision is ROI-driven, not just in dollars, but in team morale and as well. When people feel valued and supported, they perform at their best, and with the backing of the Governor and Legislature and a motivated team, we'll keep building on that momentum.

Paul Jason: "Your investment in people extends to the whole team, not just sales people. Can you talk more about how you harness the energy of the whole team to reach stretch goals?"

"We were created to operate like a business enterprise—and that's exactly how we run the Florida Lottery every day."

John Davis: You're spot on. I spend a lot of time traveling across the state, visiting our nine (9) district offices, with weeks passing at times with me not in Tallahassee. The Governor has emphasized that he wants his agency heads in the field sharing the work we're doing, which is in-line with my desire to spend as much time as possible in the field with our district teams. If we expect excellence, we must show support and express gratitude. These visits allow me to gain first-hand insight into their needs and gather ideas and suggestions to keep us moving forward. We maintain open communication, and I've made it clear to everyone: there are no repercussions for raising concerns. When you take care of your people, they will take care of the mission.

Paul Jason: "You've clearly cultivated strong relationships with the Governor, legislators, and stakeholders. How do you do that?"

John Davis: Paul, I consider myself very fortunate. One thing that makes the Florida Lottery unique is it's a standalone agency with the Secretary reporting directly to the Governor, which speaks to the value of this agency. With vast experience in both the public-private sectors; having served as a former political operative, and community and business leader- this combination has played an intricate role in establishing long-term relationships and building trust across various spectrums at every level. Relationships matter, and we've been able to build upon them by being transparent, strategic, and showing that we are results-oriented.

Paul Jason: "The Florida Lottery takes a firm stance against retailers who violate rules and regulations- especially around bulk purchasing or facilitating the re-selling of lottery tickets outside of Florida. Can you speak to your enforcement approach?"

John Davis: Integrity is non-negotiable. We have over 13,500 retailers, and when rules are broken or issues occur, we act quickly to rectify them without hesitation. The bulk purchase and resale of lottery tickets outside of Florida is a clear violation of our rules and regulations, and we make this very clear to our retailers. We have had recent reminders

that even when you're doing everything right, things can still slip through the cracks. That's why we remain vigilant.

Our Division of Security is a fully accredited, state law enforcement agency, and they work closely with our general counsel, the inspector general, and local law enforcement to ensure the integrity of our games. We have a law enforcement presence in every district, which isn't the case for every state lottery. They are backed by the latest technology to help us monitor and investigate anything unusual.

We constantly reinforce what is expected of our retailers, provide clear guidance, and maintain close relationships through our sales team, and we will continue tightening our processes to protect the public's trust in the Florida Lottery.

Paul Jason: "You've even shut down top-selling retailers who didn't comply with your directives."

John Davis: That's right, Paul. Florida is a very business-friendly state, and we welcome retailers who want to be a part of the Lottery's mission and succeed commercially. But violating the law or rules will not be tolerated. Even top-performing retailers will be shut down if they refuse to comply. Being highly successful while breaking the rules is not something we're going to reward.

Paul Jason: Going forward, can you describe your business planning process?

John Davis: Absolutely. We approach the Florida Lottery with a business mindset, guided by a 2030 strategic roadmap currently in development to align our short and long-term objectives. Over the past four years, we've consistently exceeded \$9 billion in annual sales, and our focus now is on how to sustainably surpass \$10 billion.

Our planning process includes continuous trend analysis, understanding consumer behavior, and evaluating emerging technologies to stay ahead of the market, and we will use SWOT analysis to anticipate opportunities and challenges.

As a business enterprise with government oversight, we will continue to engage with the Governor's team and the Florida Legislature to bring forward clear data, sound strategies, and a purposeful vision to maintain our status as an industry leader.

Continued on page 29



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There's a Whole New Interest in Extended Play Games



Danielle Hodges (left) and Haley Bobo (right)

No one knows lottery games—and players—like Scientific Games. The company's *ONE Segmentation Study* has long tracked player motivations, and while a significant shift in players' behavior was anticipated in a post-pandemic world, recent data reveals a striking trend. Extended play games are booming, largely fueled by a huge surge in player engagement.

In the past five years (CY 2019-2024), the extended play category has grown by 32%. It now represents 18.3% of U.S. lottery retail sales. What was once a niche product has evolved

into a major force, offered by 44 U.S. lotteries, with retail sales topping \$11.5 billion last year.

According to the *ONE Segmentation Study*, extended play has traditionally been most popular with two specific segments of players: *Fans* (fans of instant scratch games and the most avid lottery players)

and *Visitors EXT* (players that come and go with scratch games who tend to like games that take longer to play—and tend to be low frequency players).

"Comparing our 2024 to our 2014 study, the biggest shift is the size of those two segments. *Fans*' playership grew from 24% to 36%, with *Visitor EXT* playership growing from 16% to 27%," explains Haley Bobo, Director of Data Science, for the world's largest lottery games company.

Expanding Popularity—and Price Points

Extended play game revenue has grown at a much higher rate than non-extended play games in the past five years. The compound annual growth rate for non-extended play games in the U.S. from 2019 to 2024 is 3.36%, compared to 5.81% CAGR for extended play games.

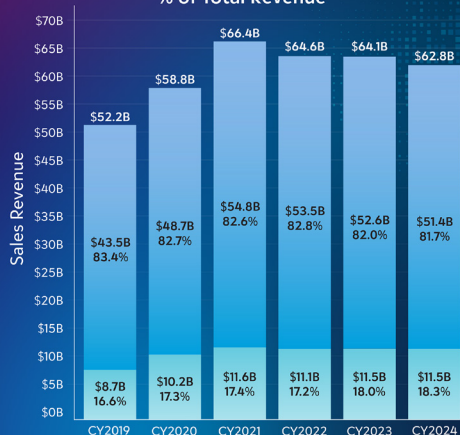
"Players are experiencing more extended play scratchers every year. Every reporting U.S. lottery had at least one extended play game in its portfolio in fiscal year 2025, and the number of games continues to grow," says Bobo.

While the \$3 price point remains the most popular for the majority of lotteries, the percentage of extended play at other price points has grown significantly, with lotteries offering games at almost every price point from \$5 to \$100.

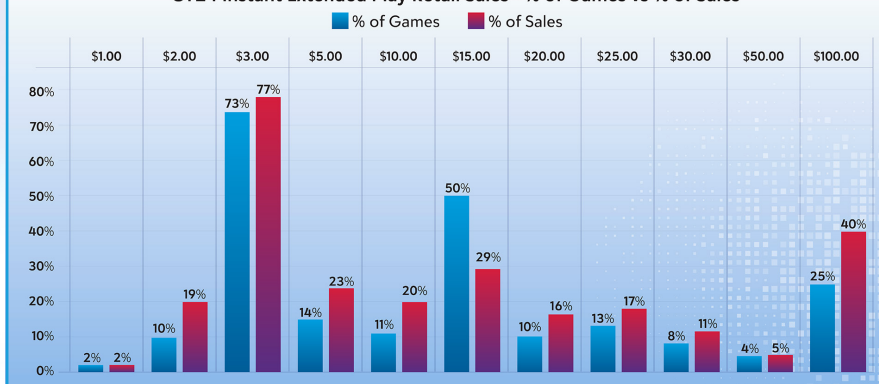
In 2019, 55% of lotteries offered a \$10 extended play game. This surged to 77% in 2024. Similarly, the \$30 price point, offered by only two U.S. lotteries in 2019, is now available from nine lotteries. Scientific Games research shows that higher price point extended play games are appealing to more players in the *Fans* segment than ever before, offering a longer scratch experience that's different from the other games they play.

"Based on sales trends and consumer research, interest in extended play games was not just a fluke coming off the pandemic. There's significant interest in these products across all price points. It's important that we continue to expand our product offerings in this category, and not just by going up the price point ladder," Bobo advises.

Instant Retail Sales - Extended vs Non-Extended Play % of Total Revenue



CY24 Instant Extended Play Retail Sales - % of Games vs % of Sales



For example, there is certain affordability to a \$1, \$2 or \$3 extended play games that play an essential role in the portfolio for entry-level and other player segments.

Researching the extended play experience from the player's perspective is an important long-term investment that lotteries

can make across both retail and digital products to achieve significant growth opportunities.



EXTENDED PLAY GAMES — CY 2024 —

- **\$11.5 Billion**
Retail Sales
- **44 U.S. Lotteries**
(reporting jurisdictions)
- **18.3% of U.S.**
Instant Game
Retail Sales



Innovating for Next Gen Players

From bingo nights at community gatherings and lazy afternoons spent working the newspaper's Sunday crossword, the two most popular extended playstyles came to scratchers in the 1990s. Although crossword games arrived five years after bingo, they've since surpassed bingo in popularity.

"Everyone has deeply ingrained memories of growing up with bingo and crossword. And of course, everyone wants to win when they scratch a lottery instant game. But the more leisurely experience of extended play games provides a glimmer of that same memorable fun and entertainment," says Hodges.



For more complex extended play games, she advises adding a callout with clear how-to-play instructions in the game design. The North Carolina Education Lottery cleverly calls out that its \$10 Cashword King game is "Puzzle Play" in the upper corner of the game to alert players to the extended experience.

With the recent surge in demand for extended play game designs, the Scientific Games' Dream Team has been busy developing all-new playstyle concepts and enhancing traditional games. For higher price point games, lotteries are adding special touches to the extended play experience with *Strategic Product Enhancements* to offer even more value.

"We've had customers add enhancements like holographic, *Platinum* and *Micromotion*—a highly reactive foil finish that gives the illusion of movement," explains **Danielle Hodges, Senior Director, Global Product Development & Innovation**. "We have a new way to produce extended play games with the holographics shining through the grid. So, players experience the holographic effect when they start to scratch."

Additionally, the company's patented, premium marking system, *Graphic ClearMark*, offers limitless creative options for game design by integrating colors and graphics into the play area to enhance the play action.

Graphic ClearMark

A premium marking system offering clean, easy-to-read play symbols in extended play games. The system integrates colors and graphics into the play area, expanding game design possibilities and enhancing the play action.

"With *Graphic ClearMark*, there is nothing comparable in the industry. The extended play scratch experience is much more leisurely as players take their time and savor the moment. Players enjoy the theme continued into the grid area, easy-to-read images and intuitive new ways to win on their favorite games," she says.

And speaking of the scratch experience, Hodges shares that an exciting new marking system is launching soon.

Licensed Brands, Playstyles On Trend & More

One of the most powerful tools lotteries have to create excitement and build loyalty is licensed brands. Scientific Games offers more than 100 brands to choose from. And its creative teams work closely with lottery product teams to develop new, brand-immersive experiences for their players.

“Some brands naturally lend themselves to extended play games,” says Hodges. “Those that immediately come to mind are *SLINGO*, *LOTERIA*, *SCRABBLE* and *UNO*. Brands offer highly recognizable logos, colors and visual elements that are part of the overall experience.”



With the heightened interest in extended play, some lotteries are setting trends and reaping the benefits of innovation with strong sales performance.

“Poker-themed extended play games have been on the rise in recent years,” says Bobo. “A great example is the South Carolina Education Lottery’s \$5 *Poker Night* game, which is performing 27% better than other \$5 games in its portfolio.

Bobo also points to tic-tac-toe games making a comeback. In 2025, the Mass Lottery brought back its \$1 *Luck of the Irish Tripler* with great success. The game is performing 25% better than its other \$1 games.

Another trend in extended play is the use of multiple playstyles in a single game, such as the Ohio Lottery’s *Casino Nights* game.

The \$10 game offers five separate games including tic-tac-toe, match 2, match 3, add up and key number match. It’s also performing well—25% higher than other \$10 games currently on sale in the state.



BATTLESHIP

Clue

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DEAL
OR
NO DEAL

FAMILY FEUD

LOTERIA
ON CLEMENTE

MONOPOLY

PLINKO

PRESS YOUR LUCK

SCRABBLE

SLINGO

UNO

Yahtzee
the SHAPE, SCORE, and SHOUT GAME!

WHAT LOTTERIES ARE SAYING

"*Poker Night's* strong performance—indexing at 127—shows how much players value extended-play experiences that blend entertainment with meaningful rewards. Casino-style games are seeing a resurgence because they offer a familiar, strategic format with longer play time. Our extended-play success is consistent at the \$3 price point; launching *Poker Night* as a \$5 ticket diversifies the product mix and offers a rich prize structure, hopefully drawing \$3 players to \$5. Adding a second-chance component gives players even more reason to engage, increasing retention and excitement. With neon colors and eight chances to beat the dealer's hand, *Poker Night* feels less like a ticket and more like a game night, which is exactly what today's players want."

Scott Warner
South Carolina Education Lottery
Product Manager

"Extended play games are experiencing a resurgence as Mass Lottery players seek more than just a quick scratch—they want engaging, puzzle-like experiences. Our \$1 *Luck of the Irish Tripler* is FY25's top \$1 game, indexing at 129 with \$6.1 million in sales over 23 weeks. Our \$10 *\$2,000,000 50X Cashword*, with rotating color pulses, remains the top extended play game. With strong performers across the \$2, \$5, \$10, and \$20 price point, extended play continues to drive steady sales and player satisfaction across our portfolio. In FY26, we plan to expand the extended play lineup into higher price points."

Tom Aiello
Mass Lottery Manager, Product and
Promotional Development - Instant Tickets

"Over the past couple of years, we have seen players coming back to the Lottery, and many of these players prefer the extended play versions of scratch-off games because they are looking for more game play for the value of their money. With multiple games on our *Casino Nights* ticket, it is engaging players and helping them feel like it is a low-cost form of play compared to a few seconds of engagement. Our *Cashword* games at the \$2, \$5, \$10, \$20 and \$30 price points are very popular. Post-pandemic, we released the \$30 *Cashword* game which has helped us attract more game play and revenue in this product line. We have also released, or are releasing, other extended type games like \$5 *PLINKO* and the *Gigantix* tickets with multiple games on the front and back."

Ron Fornaro
Ohio Lottery
Scratch-Off Product Manager

"Starting in July, the N.C. Education Lottery will brand extended play games as "Puzzle Play" games. Players will see the new branding with our \$5 *LOTERIA Fiesta* scratch-off in July and with \$10 *Cashword King* in August. Extended play games have proved so popular with players that we are adding different game mechanics and multiple price points. We are ending our \$3 price point, where extended play games first began. Puzzle Play branding will ensure players can identify extended play games at other price points and allow the marketing of these games as a subcategory within our scratch-off portfolio."

Vicky Scott
N.C. Education Lottery
Director of Product Development

"Montana has a long history of extended play games with \$2 crosswords and bingos comprising the majority of that price point. This approach is currently a major focus of our product department as we scrutinize product profitability, which will likely result in significant adjustments to extended play games in the future. Probably the largest contributing factors to their popularity are the decades these play styles have been in our market and the developed core player following. Additionally, the volume of games we offer at any given time are staple in retail locations."

Jay Boughn
Montana Lottery
Instant Product Manager



CONTACT YOUR SCIENTIFIC GAMES REPRESENTATIVE FOR MORE INFORMATION ON EXTENDED PLAY GAMES



PGRI INTERVIEWS

Forward-Thinking Global Leadership: IGT Lottery transitions to BRIGHTSTAR

Renato Ascoli, Chief Executive Officer Global Lottery

PGRI INTRODUCTION: Newly reborn in anticipation of the separation from IGT's Gaming and Digital Business, the company now known as Brightstar Lottery has a legacy of innovation, leadership, and a steadfast commitment to the lottery industry.

From its origins as GTECH and Lottomatica to its position today as a pure play global lottery leader, the company is known for its depth of experience, expertise, and commitment to elevating the lottery sector. With a presence in more than 100 jurisdictions across six continents, an impressive track record as a lottery operator in diverse regions around the world, and as the primary technology provider to seven of the world's top 10 lotteries, Brightstar has positioned itself as a trusted partner in the evolving gaming landscape.

At the heart of Brightstar's success lies a drive to evolve lotteries and revolutionize how the industry engages players. This focus has yielded groundbreaking games, connected digital experiences to evolve the retail channel, and innovative purchase and play solutions. These offerings not only prioritize player engagement but also deliver the data and insights to empower lotteries to expand their businesses in unprecedented ways. Brightstar's impact is evident in its reputation as a go-to resource for lotteries seeking to adapt and thrive in a changing market. In an exclusive interview, Renato Ascoli, Brightstar CEO Global Lottery, shares the company's vision, leveraging its rich heritage and forward-thinking mindset to empower customers and lottery dreams around the world.

Paul Jason: With the seamless transition from IGT Lottery to Brightstar, customers are retaining a trusted partner yet also getting a chance to “meet you again for the first time.”

Renato Ascoli: It’s true, and this separation has distilled our own vision of what we want to mean to customers and to the industry going forward. We retain some familiar “traits,” you could say, such as prioritizing reliability and trust, and reemphasizing our commitment to a Customer First mindset. This includes ensuring that our leadership works closely and directly with customers, that we are listening to their feedback and acting on it. With the current momentum around industry evolution, as various change-agents continue to emerge and impact the lottery business, we want to offer a clear vision, ideas, and leading-edge solutions to help customers navigate the path in line with their particular goals.

This relates to an aspect of the company that is new, which is our scope: With

● With a nearly 50-year history of reliability, innovation, and leadership in lottery, Brightstar brings a future-forward mindset to help lottery customers around the world succeed in an environment of digital adoption, shifting player expectations, and a profusion of gaming choices.

a highly experienced management team and a streamlined business now laser-focused on lottery, we can be even more agile in helping our lottery partners see and act on opportunities to achieve more for the good causes they support. Our operator role in Italy and in diverse regions around the world, along with our extensive global footprint, provide us a unique perspective that can help our customers grow and evolve their business. We also aim to further increase our speed to market in delivering exceptional products, ideas, and technology across the lottery value chain.

Ultimately, Brightstar reflects this single-mindedness and an ambition to reach higher. I have heard these sentiments echoed in discussion groups with our employees, who say they are excited to be even more nimble, to further focus our investments and take our lottery customers to another level in their evolution. We’re energized about sharing our products, solutions, and operational experience to help customers fulfill their vision for the future.

How will you approach the goal of advancing possibilities for customers?

Renato Ascoli: With a renewed commitment to putting customers first in all that we do, we are focusing and strategically investing across four interconnected areas of the lottery business to consistently deliver value to customers, starting with enabling play anywhere. Here we have a strong foundation in our longstanding market leadership in retail point of sale technology and innovation. Consider our new terminals that ensure a smaller counter footprint with top efficiencies; our advances in lottery vending and cutting-edge optimization analytics and services; and established relationships with top retailers. We have also introduced solutions such as LotteryLink, a plug-and-play device to expand access to lottery in-lane, and capabilities like our Connected Play solution to bridge the retail and digital channels, giving players a more seamless purchase and play experience.

The second area of focus is game innovation to engage players with more fun and winning experiences. For example, we have given players more strategic ways to play with Cash Pop™, a draw game that is attracting new groups of players in 16 jurisdictions and growing organically into a national game. Our advanced Infinity Instants™ printing platform has opened the door to entirely new game mechanics. Our digital game studios have developed a diverse and engaging game Portfolio, with more than 200 instant games across categories—including bespoke licensed-branded options and record-breaking progressive jackpots. They are now developing around three dozen new instant games annually bolstered by AI-driven creative and testing. And we retain our standout licensed properties, which offer recognizable titles that resonate with players across instant and instant formats.

Third is helping to build stronger connections with players. This includes the ability to leverage AI-driven tools and predictive analytics through CRM systems and our Player Marketing Services, to help lotteries enhance player engagement, optimize campaign targeting and delivery, and drive sales growth through iLottery and Connected Play.

This pillar also includes unique on-site tools such as our new Digital Menu Board solution, which enhances the visibility of instant games at the retail point of sale and is integrated with the lottery terminal application, making it easy for retailers to update their digital menu displays to reflect their inventory in real time. And our Retail Market Insights tool, the industry’s only national lottery sales database, provides lottery and retail partners with actionable data to shape promotional strategies and identify high-opportunity areas.

What I’m hearing is that you want to offer customers the most advanced thinking and capabilities, and each lottery can adapt whatever tools or services they need to suit their vision of growth?

Renato Ascoli: Yes, and to know that in doing so, they are collaborating with a partner that hasn’t focused their

Brightstar at a Glance

The primary technology provider to

26/46

lottery jurisdictions in the U.S.

Primary technology provider to

7/10

world's largest lotteries

Serves nearly

90

lottery customers worldwide

Trusted to operate Italy's Lotto concession, the world's largest, for

30+ years,

through constant innovation and the introduction of cutting-edge technology

vision on just one area in isolation. When, at the start of the separation process, we asked ourselves, what do we carry forward and offer to enable our customers' business strategies and fuel industry growth, we recognized a point of difference: We maintain a holistic vision that considers each aspect of lottery's potential evolution, enabling us

to offer products and solutions across the entire lottery value chain. We grow lotteries ourselves using compelling solutions that we have trialed and proven in the field. This perspective equips us to be a bold partner in the range of practical solutions we can apply and in the level of collaboration we offer our lottery partners to implement solutions that serve their strategic goals.

What is the fourth pillar of focus?

Renato Ascoli: It is centered on reshaping the lottery landscape with efficiency and scalability, continuing to push the boundaries of what is possible to deliver smarter, faster, and more efficient solutions.

Migrating customers' systems to the cloud, for example, is a game-changer for scalability, adaptability, and deployment speed. Through AI and machine learning integration, our cloud solutions are already enabling faster time-to-market, more seamless feature updates, and enhanced performance tailored to customers' needs. Upgrading the iLottery platform to our seamless, scalable cloud solution has brought up to a 20% revenue increase to our customers.

Also part of this pillar is our ability to offer cross-jurisdictional insights, a data-centric approach that enables lotteries to make better informed decisions and create tangible operational improvements. And we will continue working to expand the availability of cashless payment options across retail and vending, aligning with evolving player preferences and market trends.

Lotteries play a role in delivering important benefits to local communities. Does this come into play with the new company, when you think about engaging the next generation of players?

Renato Ascoli: The way lotteries contribute to society through good-causes funding is an important part of the industry's identity. Emerging generations are likely to resonate with this connection, perhaps much more so than in the past. We support lotteries in this goal, and we do not lose sight of the rest of the picture, which includes not

only promoting the responsible nature of the industry and advocating for that, but also prioritizing player health, enabling people to play responsibly and thoughtfully. Positive play is embedded in our culture and the solutions we offer to lotteries. So, too, are our efforts to apply innovative thinking to industry sustainability and competitiveness.

We are ambitious in each of these areas, which are all part of this long-established form of play. The industry's connection to community and efforts to embed sustainability can speak loudly – more loudly than in the past – about what differentiates lottery and makes it an appealing form of entertainment.

Finally, what makes you optimistic these days?

Renato Ascoli: It's the potential for lotteries. More is possible today than the industry has known in its long history. The paradigm shift in how our customers engage with and serve players is well underway, and it continues to propel our people to apply new ideas and achieve more for customers and players.

Knowing that our customers can leverage the expertise of world-class people to deliver on those opportunities is also cause for optimism. Because the lottery category itself does face a fundamental challenge – it is increasingly in competition with many other entertainment options. Yet, it is also the one gaming option that is structured with a commitment to responsibility and good causes, as we were just discussing. It's in this larger context that we are defining our role and working to sustain and elevate the category.

We know that to stay ahead we must keep changing too, and this, in itself, is an optimistic stance. The new brand represents a commitment, what we aspire to live up to. We are known for quality, for trustworthiness and technological innovation. We can keep the best of our identity and continue to be a catalyst for what's next. ■

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Q & A with Secretary John Davis and the Florida Lottery Team

Paul Jason: Do you try to preserve a product mix that drives growth in draw-based games? Or does the product mix not matter that much as long as net funds to good causes continues to increase every year?

Absolutely: Maintaining a healthy product mix—with targeted strategies for Draw game growth—is key to sustainable growth. While our overarching goal is to maximize funding for education, we know that a balanced, engaging portfolio helps drive consistent participation across a broad player base. This approach helps stabilize revenue during non-jackpot periods and mitigates the impact of payout variance.

That's why Florida has made strategic, sustained investment in strengthening our Draw game lineup. Over the past decade—particularly since the first billion-dollar jackpot—we've taken deliberate steps to reduce jackpot dependency and build long-term resilience in this category. That includes:

- Rebranding and optimizing in-state games
- Launching new offerings such as **PICK 2**, **PICK 5**, **CASH POP**, and **CASH4LIFE**
- Introducing add-on features to increase play flexibility
- Adjusting draw times to expand access
- Adding midday and additional weekly draws
- Running targeted promotions to drive engagement

This approach has helped us maintain momentum in the Draw category, even during periods of low jackpots, ensuring stable revenues and continued contributions to Florida's students.

Do players want a range of price points in the draw games like they do in the Scratch-Off games?

We've seen that price sensitivity varies significantly between product categories. Regarding draw games, while there was reluctant acceptance from casual players following previous price increases from \$1

to \$2, the jump to \$5 has alienated a larger group of players, including core players, resulting in a 40% drop in transactions.

That's why we remain committed to preserving a full range of price points in both Draw and Scratch-Off games. In Scratch, for example, we've observed a more natural migration to higher price points. Players are often drawn to the stronger value proposition: better odds, bigger prizes, and a more immersive experience. This shift happens organically, not because we've removed lower-priced options, but because players see the benefit.

Ultimately, choice matters. Providing options across the pricing spectrum helps keep the Lottery accessible while encouraging gradual engagement with higher-tier products.

Are Lottery Vending Machines the wave of the future or are we seeing retailers develop new ways to serve the consumer?

Self-service is absolutely growing, and Lottery Vending Machines are a big part of that trend—generating over 13.5% of total sales last year. They also play a strategic role by extending our footprint across Florida's busy retail landscape, increasing both visibility and accessibility, especially in high-traffic locations.

But convenience should never come at the cost of the customer experience. Take for example, a recent visit I made to a store that had completely eliminated staffed checkouts. Trying to navigate a self-checkout system with a cart full of construction materials wasn't only inefficient but also frustrating. It reminded me that technology should enhance service, not replace it entirely.

Lottery is no different. Our market research consistently shows that while some players enjoy the speed of self-service, many still prefer the personal connection and assistance that come with traditional counter sales. In fact, retailers that offer both tend to outperform those that go all-in on automation.

Self-service is here to stay, but our strategy is to integrate it thoughtfully, enhancing the customer journey without removing the

human element that drives long-term loyalty and trust.

How effective is your Lottery Sales Performance Incentive Plan? Describe it, how you got approval to implement it, and how well it is working?

Our sales incentive plan has been a tremendous success. From the start, we designed it to be a shared success story—for our sales reps, our retailers, and ultimately for Florida students, families and communities. It rewards performance, encourages innovation, and aligns everyone's efforts toward a common goal: increasing revenue to fund education in Florida. In that sense, the program truly pays for itself.

When I joined the Lottery in 2020, launching a performance-based incentive program was one of my top priorities. As someone with a background in sales, I've always believed in the principle that you have to invest in growth to achieve it. It required close collaboration with the Governor's Office, our state legislators, and their staff to bring the program to life—and their support was instrumental in getting it across the finish line.

Since implementation, we've seen measurable and meaningful results:

- Scratch-Off sales are exceeding early projections
- New game activation rates are strong from day one
- Float percentages remain low
- Retailer recruitment is reaching record highs statewide

The beauty of this model is that it doesn't just generate more revenue—it creates momentum. It motivates teams, fosters accountability, and builds a culture of continuous improvement. We're committed to building on this momentum by refining and expanding the incentive plan in the years ahead. As always, our focus is on delivering a positive return on investment and making data-driven decisions that support our mission to fund education in Florida. ■

Digital Lottery *and the* Player Journey: **PLATFORM**

How is the digital connection to the player becoming the hub of the player journey? How is the digital platform driving players to interact with lottery at retail as well as online, supporting the anywhere, anytime, any way fashion the modern consumer expects?

Moderator: **Gretchen Corbin**, President & Chief Executive Officer, Georgia Lottery Corporation

Panelists:

- **Shannon DeHaven**, Vice President of Digital Engagement, Pollard Banknote
- **Durba Sinha Roy**, Vice President, Platform Products, Draw and Customer Growth, IGT
- **Amy Warner**, Vice President, Digital Business Development, Scientific Games
- **Rob Wesley**, Vice President, North America Customer Development, Aristocrat Interactive
- **Stephanie Weyant**, Deputy Executive Director, Marketing & Products, Pennsylvania Lottery

Gretchen Corbin: Originally, we planned a single panel discussion about digital lottery and the player journey. But as Paul and I talked it through, we realized it made more sense to split it into two separate panels — one focused on content and the other on IT platforms. Our panelists signed up for the platform discussion and we appreciate them! It is exciting to see how the industry has started to adopt a mind-set and culture that supports a long-term sustainable growth strategy. Let's kick things off with a brief introduction from each of you on your areas

of focus and experience in the iLottery space, starting with Amy.

Amy Warner: I help lead Digital Business Development at Scientific Games. Over the past seven years, I've worked at the intersection of retail and digital, helping lotteries bridge the gap between traditional retail sales and the evolving world of digital engagement. That includes everything from iLottery and loyalty programs to CRM, responsible gaming, and our many innovations that are developed for the online space.

Stephanie Weyant: I just celebrated 25 years with the Commonwealth last month, with most of that time being connected to lottery in some way. As Deputy Executive Director for Marketing and Products at the Pennsylvania Lottery since 2016, I was the executive lead for our iLottery launch in 2018. I also oversee the marketing, digital, products, and research teams — all of which play critical roles in our iLottery operations. I've had the privilege of working with many of the people on this stage today, who have helped guide and support our iLottery journey.

Shannon DeHaven: I began my lottery career about fifteen years ago with the Michigan Lottery, where I helped launch our iLottery platform in 2014. I was appointed Deputy Director of Digital Operations in 2016. In 2021, I joined Pollard Banknote as Vice President of Digital Engagement. Today, I oversee the full digital player experience — everything from loyalty programs and players clubs to mobile apps, websites, and, of course, iLottery. We have, over the past few years, pushed the boundaries of what digital lottery can deliver, stretching to produce a re-envisioned iLottery platform.

Rob Wesley: I started my career in 1998 with the Virginia Lottery, working in software development at a time when we still managed our platform in-house. From there, I moved into leading the sales and marketing teams, and in 2018, I was tasked

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with creating a dedicated digital division, separate from traditional operations. We launched iLottery in Virginia five years ago. Then, after more than 25 incredible years with the Lottery, I joined NeoGames — the leading iLottery platform provider and game studio which has since been acquired by Aristocrat, the world's largest casino games manufacturer. Today, I am the leader for business development and account management in North America for Aristocrat Interactive.

Durba Sinha Roy: I worked in the oil and energy sector as a product specialist before joining IGT 17 years ago. I started in retail lottery marketing and, in 2013, was appointed Director of Product Marketing for Player Platforms, focusing on digital initiatives. At one point, I focused a lot of attention on improving the project delivery process, which led to my appointment as Senior Director of Delivery for PlayDigital, IGT's division focused entirely on digital solutions. Today, as Vice President of iLottery Product and Customer Growth, I lead a team responsible for shaping the vision, strategy, and creation of products that are relevant, engaging, accessible, and rooted in responsible play. I also oversee our digital transformation initiatives and drive lottery business growth. I'm passionate about building strong partnerships, breaking down silos, and pushing forward a unified, player-centric vision across all our products, services, and experiences.

G. Corbin: Thank you all so much. I think that you touched on something very important there, Durba, and that is the intersection of retail and online play. At the Georgia Lottery Corporation, we apply a multi-disciplinary approach towards the goal of optimizing iLottery performance because the different business areas overlap and intersect with each other. We literally talk every day about how we can make anything and everything better. And, to Durba's point again, the timeline in this business is right now — how can we move the needle today and see results tomorrow?

When Paul asked me whether I'd like to moderate the content panel or the platform panel, I chose platform — because I believe we're all still climbing a steep learning curve when it comes to fully leveraging technology to drive sales and maximize funding for good causes. We understand the transformational power of a strong

technology platform — but we also know it's a moving target. The investments we make today must be built to deliver results not just today and next year, but three and five years from now.

Shannon just spoke about the incredible progress iLottery has made in just the past few years — and I expect we'll continue to see that kind of exponential improvement as new launches roll out.

Before we go any further, let's make sure we're clear on what exactly is meant by "iLottery platform"? How is it similar to — and how is it different from — the Central Gaming System (CGS) that powers retail? Shannon?

S. DeHaven: When we think about the Central Gaming System, or CGS, for retail, we're talking about a system designed to monitor, process, and manage transactions — the plays themselves — across a network of terminals. An iLottery platform does that too, but across a digital network. And the way it delivers those business functions are quite different.

For example, cloud infrastructure is baked into the digital environment, giving iLottery platforms the flexibility to rapidly update and swap out different components. As you've already heard earlier at this conference, functional components like marketing, CRM, KYC (Know Your Customer), and geolocation are deeply integrated into the iLottery platform — whereas in a traditional CGS, those functions are either separate or not built-in at all.

Another key difference: the iLottery platform has to be modular. It must support rapid deployment of new technologies and content. Retail CGS systems are evolving in that direction, but they were never designed for the kind of speed, scalability, and agility that digital demands.

And then there's data. In retail, play is anonymous — so the CGS isn't capturing individual player behavior. Digital, on the other hand, tracks player activity in real time, generating vast amounts of actionable data. This fundamentally changes not only how we market and engage players, but also how we approach Responsible Gaming. With iLottery, we're able to have an actual dialogue with players, based on their individual behaviors and preferences —

something that's simply not possible in the anonymous retail environment.

Of course, with that tremendous capability comes tremendous responsibility. Every aspect of data use has to be governed by strict privacy and confidentiality standards. While we're creating more personalized experiences, we must never lose sight of the importance of protecting the player.

G. Corbin: Absolutely. Durba, let me ask you this: how would you compare the early iLottery platforms IGT built years ago to the more advanced technology you're working with today? How has the platform evolved over time?

D. S. Roy: Let's humanize it for a moment — imagine I'm interviewing an IT platform for a job. How would it introduce itself? First, the modern candidate wouldn't even call itself a "platform." It would proudly say, "I'm a framework," because it's not just about running transactions anymore — it's about delivering scalable functionality that empowers you to do far more than you can even envision today.

Then, the clever IT framework candidate might turn the tables and ask: "Do you know how your needs will evolve over the next five years?" You might respond with a clear statement of where you want to go — maybe even a roadmap based on today's technology. But technology is moving so fast that much of what we rely on today will be replaced by even more advanced solutions in two years.

At that point, the sales-savvy IT framework candidate would nod approvingly and say: "Exactly. That's why you need an open, modular architecture — so you can swap out and upgrade components without replacing the entire system." It's still an investment, but it's a future-proofed one.

Today's IT frameworks — compared to the platforms of just a few years ago — deliver profoundly greater capabilities. CRM, KYC, data analytics, player engagement tools — they've exploded in sophistication and impact, and the pace of change is only accelerating.

We're also moving into new frontiers: ever-stronger encryption and cybersecurity, more efficient data storage, seamless integration between digital and retail, and a fully connected player experience across every channel and touchpoint. AI is starting

to play a major role too — recognizing patterns of behavior across both retail and digital, and helping us serve the right games and messages to the right players at the right moments.

As Shannon mentioned, these same capabilities are transforming our ability to promote responsible play — creating a more personalized, supportive, and sustainable player experience.

If we were designing a system from scratch today, we probably wouldn't even distinguish between a CGS, an IT platform, and an iLottery platform. We'd build a single open-architecture framework — modular, flexible, and ready to evolve with every new wave of technology.

Frankly, many of the things we're working on right now weren't even imaginable five years ago. And that's what makes this moment so exciting.

G. Corbin: Amy, we know that every lottery is at a different point on the journey when it comes to building digital capabilities — whether that's CRM, KYC, loyalty programs, mobile apps, or selling games online. How do you guide your clients through those stages? Is it difficult for lotteries to take that leap and invest in digital?

A. Warner: I would say it should be less of a leap and more of an evolution. Lotteries have been doing second-chance promotions for decades, and that's often where the digital journey naturally begins. Second-chance promotions can evolve into loyalty programs, player clubs, and other digital engagement features. Then, once we've established a solid foundation, we start integrating more sophisticated tools like KYC and CRM — which have incredible headroom for growth and value creation.

As you progress, we unlock more ways to personalize the player experience, deepen engagement, and drive incremental sales with our CRM solutions. It stops feeling like a risky "big leap into the unknown" for lotteries and becomes a series of smart, measured steps toward a fully integrated digital platform.

And eventually, when the time is right to move into full online game sales, it feels like a natural extension of everything we've already built — not a massive, risky jump, but the next logical step in an ongoing journey.

G. Corbin: That leads perfectly into our next question: how do we truly connect with players and take them from casual loyalty participants to deeply engaged lottery players?

I recently had the pleasure of meeting someone I would describe as the ideal lottery player. She told me that she enjoys our entire product mix from our Scratchers to Cash 3 and Cash 4 to our online Diggi Games. In that moment I thought, this is the model lottery player. She engages with both instant and draw games, and she's active at both retail and online.

Rob, how do we create more players like that? Not just moving players from loyalty to CRM, but truly connecting them across both retail and digital channels?

R. Wesley: The first thing I'd say is that it's important to distinguish between a CRM program and a CRM system. A basic CRM program — often built around second-chance promotions and loyalty clubs — tends to treat all players as if they want the same thing, as if they're having the same experience. And honestly, that's a perfectly fine place to start.

But real growth happens when you move beyond that. When you dive into the data and start to truly understand individual players — that's when you shift from a general loyalty program to actually owning a one-to-one relationship with your players.

An effective CRM system enables Marketing teams to leverage those insights: What games does this player like? What time of day do they usually play? How often do they respond to messaging? What types of offers or experiences seem to resonate with them?

Instead of marketing to everyone the same way — or even to broad segments — you start designing experiences that are more narrowly defined so that they feel personal and relevant player by player. And that personalization is where real engagement happens.

The final, critical piece is giving players choices. Whether they want to engage at retail, online, or both, or receive more or fewer messages and promotions — we must meet them where they are and make sure that every interaction is a great experience. Respecting a player's choice, and delivering an excellent player experience across every channel, is what

ultimately keeps them coming back.

S. DeHaven: Another important piece of the puzzle is understanding that player preferences aren't fixed — they evolve over time. A player might fit neatly into one segment when they first register and begin their iLottery journey, but those preferences will likely change over time.

We have to make sure we have the right tools in place — tools that let us monitor and assess player behavior, identify trends as they emerge, and pivot our strategies accordingly. It's been said that our goal is to connect with the right player, at the right time, with the right message, the right games, and the right promotions. The one thing we can count on is that at least some of those preferences will change over time. These shifts are natural — and it's our job to recognize them and evolve the player experience to meet them wherever they are in their lifecycle.

At the end of the day, it's not about the product. It's about the player — understanding where they are, what they want, and how we can deliver an experience that feels seamless, relevant, and personal at every stage of their journey.

G. Corbin: Shannon's comments cause me to think about how much we depend on our vendor partners. There's so much involved in launching and managing iLottery — it's a massive undertaking. Stephanie, from your experience, what can a state lottery operator do to build the most collaborative and productive relationships with vendor partners? And how should a lottery decide which tasks to outsource versus handling them in-house?

S. Weyant: When we launched iLottery, we were starting from scratch. We knew very little about it, so we leaned heavily on our vendor partners to help guide many of those early decisions.

We've had countless conversations — including with some of the folks on this panel — about the best ways to structure, launch, and manage iLottery. And the truth is, there's no one-size-fits-all model. Some lotteries integrate digital directly into their existing organization to drive collaboration across departments. Others create a separate digital division — giving it more independence and freedom to innovate outside the constraints of legacy systems and mindsets. Some start with a separate

team for ideation and design, and then fold it back into the broader organization later. And I'm sure there are many other aspects to this question of how to organize for optimal effectiveness.

There are pros and cons to each approach. You have to look at your own organization — your starting point, your culture, your goals, your timelines — and decide what makes the most sense for you.

Then comes the critical resource assessment. You have to clarify your in-house capabilities. Do you have the flexibility to hire quickly? Can you ramp up fast enough to meet your launch timelines? As a state agency, we don't move as nimbly as the private sector. We had just six months to launch iLottery — not nearly enough time to hire a new team. So we launched with our existing staff, leaned heavily on our vendor partners, and then gradually supplemented our team as we moved forward.

Ultimately, it comes down to clearly defining the workload needed to meet your goals, realistically assessing your internal resources, and deciding where you need vendor support to fill the gaps. Setting those expectations early — and maintaining open, honest communication throughout — is key to building a strong, effective partnership.

G. Corbin: I would say we found the same to be true in Georgia, Stephanie. We've tapped into our internal resources in the best ways possible, and we've leaned heavily on our vendor partners — and honestly, it's all worked quite well. At the end of the day, it all comes down to execution.

S. Weyant: Absolutely. My in-house team isn't very large, and I view our vendor partner, Scientific Games, as a critical extension of that team. Their support and expertise are essential to our success.

G. Corbin: Exactly. Our vendor partners bring tremendous resources and experience. Stephanie, are we reaching the point where promotional strategies and communications are truly personalized — down to the individual player?

S. Weyant: Not quite. As Rob said, CRM today still relies on segmenting players into groups with similar behaviors. We're getting better at creating more tightly defined profiles — segmenting by lifecycle stages

like newly registered, registered but inactive, active players we want to retain, and lapsed players we need to reactivate.

It's not one-to-one personalization yet, but smarter segmentation makes the experience feel more relevant to each player. CRM tools help identify behavior patterns — who's at risk of churn, who's likely to respond to a reactivation offer — so we can tailor messaging and promotions accordingly.

Beyond offers, we're building perceived personalization through small touches: greeting players by name when they log in, highlighting their favorite games, showing jackpots and balances, and making Netflix-style recommendations like, "Since you played this, you might like that."

These experiences create a sense of individual attention — even if it's based on segments that are not truly individual profiles.

G. Corbin: Shannon, you mentioned that even lotteries without iLottery should invest in KYC and CRM. How should they get started?

S. DeHaven: The consumer marketplace is far too evolved for a consumer-facing operator to not have a CRM. Consumers are much more sophisticated and have come to expect the same level of CRM-based service as they receive from Amazon and Netflix. They expect a high degree of more personalized experiences that resonate with where they are in the consumer journey.

It's all about Knowing Your Customer and you need a Customer Relationship Management piece to accomplish that. The first step is building a player database. Use second-chance draws, loyalty programs, players clubs — anything that gets retail players to share data and interact with you online. Retail is still the face of lottery to the players even for iLottery states. So engaging with that retail player is not only where we all started, it continues to be the primary connection to the lottery player.

In addition, the purpose of KYC and CRM is not just about increasing sales. It's about responsible gaming and building the ongoing interactive relationship that will sustain our industry going forward. A direct connection lets us offer tools and insights that help players stay safe, have fun, and stick with lottery instead migrating to other gaming options.

Every lottery's starting point is different, but one part of the strategy is the same: start now. Build a plan. Grow your capabilities over time. Modular IT platforms make it easier than ever to invest in stages — adding value one smart step at a time.

G. Corbin: Player acquisition and retention are at the heart of any successful iLottery program. Amy, can you walk us through the key strategies being used to bring players in — and keep them engaged?

A. Warner: Absolutely. But first, I want to echo something Shannon mentioned about responsible gaming. KYC is only possible when you have a direct digital connection with the player. At retail, the relationship is anonymous — you don't know how often someone plays or whether they're staying within budget. But once a player registers online, they become a known customer, and that opens the door to personalized communication, safeguards, and responsible gaming tools.

We often talk about loyalty and acquisition in terms of driving sales — and they do. But just as importantly, they allow us to build an interactive relationship that supports responsible play. The very first step in acquisition is registration, and that step is also what enables meaningful responsible gaming interventions.

Now, back to your question, Gretchen — how do we acquire and retain players? Many lotteries have had success using digital engagement tools like second-chance promotions and loyalty programs. But there are broader strategies too.

For example, in Maryland, players can sign up for a monthly e-newsletter. Using CRM, we identified over 1,000 people who subscribed to the newsletter but hadn't registered for the loyalty program. With targeted outreach, we converted many of those subscribers — and they went on to enter over 40,000 tickets. Using our CRM system, we can identify players who already show an interest in the lottery. This insight allows us to give them the final nudge they need to participate.

In Delaware, the Lottery collected contact info at live events. By flagging those individuals in the CRM system, we were able to guide them through the registration journey and turn passive interest into active engagement.

Targeted digital marketing is also proving

effective. In Arkansas, which has one of the longest-running loyalty programs in the country, we used lookalike modeling on platforms like Meta to find potential players who resembled our current audience. That campaign led to a 4% bump in registrations — which is significant in a mature market.

And then there's affiliate marketing. In Pennsylvania, for example, we work with retail partners and approved vendors to deliver exclusive offers. When jackpots rise, we've seen a 7% increase in first-time depositors through that affiliate channel.

The key is to use every touchpoint — email, events, CRM, digital marketing, affiliates — to meet players where they are and guide them toward deeper engagement. It's not just about driving transactions; it's about building a long-term, responsible relationship with the player.

G. Corbin: We all want retail to grow alongside iLottery — not be cannibalized by it. Stephanie, thinking back on your iLottery launch, what are two or three things you underestimated at the time but now recognize as absolutely critical?

S. Weyant: First and foremost — talk to other lotteries already in the iLottery space. When we launched, there were only three: Michigan, Kentucky, and Georgia. Now there are a dozen, each with different models, lessons learned, and best practices — and that collective knowledge is incredibly valuable.

Also, lean heavily on your technology partners. They've supported multiple launches under all kinds of circumstances and can guide you through the process. Just look at how quickly and effectively states like Virginia, North Carolina, and Kansas have launched — they're clearly applying everything learned from earlier implementations. This is a big undertaking, so don't hesitate to ask for help — from peers, vendors, or anyone who's been through it. The shared wisdom in this industry is one of its greatest strengths.

G. Corbin: Final question for this incredible panel — and we'll start with you, Durba. Looking three years ahead, what do you think we'll see in iLottery, and what would you like it to look like?

D. S. Roy: Three years is a long time in this space — just look at how far we've come in the last three. As Srimi observed in his

keynote, we're now building specialized applications powered by AI that are transforming how we capture, organize, and analyze data. This isn't theoretical — it's happening right now, and consumers are learning to expect this level of intelligence across all digital experiences.

Other industries — insurance, retail, e-commerce — are already using AI to enhance risk modeling, KYC, and CRM. The beauty is, we don't have to build it all from scratch. We can adopt proven best practices, be smart fast-followers, and apply them to our space. But we can't afford to wait — casinos, sportsbooks, and iGaming platforms are already investing heavily to raise the bar in personalization and player engagement.

Another shift we're seeing is that lotteries want to own the entire consumer journey — not by writing code themselves, but by focusing on the competencies that deliver strategic value. The enterprise does want to control the architecture as that is how you identify where automation drives ROI, where to innovate, and where outsourcing makes sense. That kind of smart, integrated strategy is where iLottery is headed — and it's coming fast.

R. Wesley: It's now clear that meeting modern consumer expectations requires advanced technology. It is exciting to see how the industry has started to adopt a mind-set and culture that supports a long-term sustainable growth strategy.

S. DeHaven: I couldn't agree more. We are not seeing a dramatic overnight shift, but the evolution is well underway — and it's gaining momentum. It was a huge deal when the Michigan Lottery hit 30% of online sales being on the mobile. Now, ten years later and it is 97% mobile.

This shift has major implications for platform design. We need platforms that can keep pace. They'll need to deliver even faster speed to market, because when states ask for revenue, they want it yesterday, not next year. That's where modular architecture becomes essential. It lets us move quickly, scale efficiently, and integrate new components — whether it's payment options, marketing tools, or AI powered personalization engines and segmentation — without a complete overhaul.

In short, our platforms must evolve in real time, adapting to player behavior, market

demands, and emerging technologies. We're not just building for today — we're building for what's next.

G. Corbin: One of my big takeaways from this discussion is the idea of the platform not just as a static system — but as an evolving framework, one whose purpose and components grow over time. Stephanie?

S. Weyant: Absolutely. If we think in terms of that evolving framework, I hope the next three years bring the full breakdown of any remaining silos between iLottery and retail. Whether it's payments, gameplay, or CRM, players should experience one seamless, friction-free journey — just like the Starbucks app example Mike Cardell mentioned earlier.

The data is clear: players who engage both online and at retail are more valuable. They're more engaged and more satisfied. So we have to put the player at the center, invest in the right technology, and make it easy for them to enjoy the full lottery experience — wherever they choose to play.

G. Corbin: Thank you, Stephanie. Amy — wrap this up.

A. Warner: I completely agree. Just three years ago, cloud and AI weren't even part of our everyday iLottery conversations. Now they're front and center. CRM and predictive analytics are evolving fast, and all of these capabilities need to be integrated into a true omnichannel player experience.

Think of the entire ecosystem — from digital wallet to marketing — dynamically configuring itself around the player. Their needs and expectations are evolving too. Let's just make sure we connect with them on their terms and exceed their expectations.

G. Corbin: Thank you, Amy — and thank you to all our panelists.

This conversation reminds me that it really does take a village. The progress we've made in iLottery — and the potential still ahead — comes from this collaborative effort between lotteries and vendor partners. Whether you're already deep into iLottery or just beginning to explore it, today's discussion shows how important it is that we keep working together to deliver the best for our players, our retailers, and our beneficiaries.

So please join me in giving this exceptional panel a huge round of applause — thank you all! ■

Awareness started to grow—and so did appreciation for the Lottery’s mission.

It sounds like once a few people stepped up, and then others saw the benefit—getting exposure for their programs, joining something meaningful—and that created a kind of positive feedback loop.

H. Shergill Chima: Exactly. Once people saw the first wave of stories, it clicked: “Oh, this isn’t just marketing—it’s a platform to connect with our own audience.” Now, when we attend educational conferences, people are coming up to us and saying, “Hey, my program was funded by the Lottery!” It inspires others to ask how they can get involved, too.

We want to cast the net as wide as possible and include everyone touched by Lottery funding. The more voices, the better.

I just reviewed a stack of mission-focused content for approval – 30 slides covering six different programs. Some of them I didn’t even know we supported. One, for example, was a fire-fighting academy at Glendale Community College. I had no idea we were involved, and it was such a great reminder: our work really does make a difference in communities across California. And when we get to connect with the students, instructors, and local champions behind those programs, it invigorates our own team’s sense of purpose.

This kind of outreach costs a lot less than traditional paid advertising. Isn’t it also more effective, since it’s real people telling real stories?

H. Shergill Chima: Absolutely. These aren’t actors reading lines—they’re educators, students, and community members sharing how Lottery funding impacts their lives. It’s genuine, and I think people feel that. It cuts through the noise in a way conventional advertising just can’t.

And what about your political stakeholders? Do they understand and support what you’re doing?

H. Shergill Chima: They’ve got a lot on their plates and the Lottery isn’t usually top-of-mind. That’s why we’re making a concerted effort to be proactive. At the very least, we want them to know we’re here, we’re transparent, and we’re a resource whenever they need us.

Our Chief Deputy, Florence Bernal, and I

"The most powerful storytellers aren’t marketers—they’re the teachers and students whose lives are changed."

have been taking that further by reaching out and setting up introductory meetings and offering briefings on the Lottery— a Lottery 101 if you will. We want to talk with legislators about our mission, our sales, and the programs we support. We want them to know we’re an open book and we want their feedback. Our headquarters is just a short distance from the Capitol, so we invite them to come over, tour the facility, meet our team, and see firsthand what we do and how we do it.

It’s all about building relationships now, so when issues come up in the future, we’re not strangers. They’ll know who we are, what we are trying to accomplish at the Lottery, and they’ll feel comfortable reaching out. Legislators get information from a lot of sources—media, colleagues, constituents. We just want to make sure we’re one of those sources—and one they can count on.

Prior to joining the Lottery, you were an attorney at the Department of Transportation. That doesn’t sound like the kind of role that brings a lot of political visibility.

H. Shergill Chima: Exactly. I had no political experience. I’ve just worked my way up over the years. Nobody really knew who I was, so I felt it was important to make the rounds at the Capitol. Let them get to know me. Talk about my background, why I’m passionate about the Lottery, and what I believe we can accomplish with their support. I’d like to think that kind of outreach makes them more comfortable picking up the phone and calling me directly when they have questions.

So not a “keep your head down and stay off the radar” approach?

H. Shergill Chima: Not at all. And it’s definitely not something I do alone. I have an amazing executive team, and my Chief Deputy, Florence Bernal, spent years working in the legislature—she really knows that world. She and the rest of the team have been instrumental in helping

me navigate it all, because like I said, this isn’t the background I come from. So yes, stepping into this role has been a big learning curve. But I have a team I trust completely, and that trust goes a long way. I know they have my back—just like they had Alva’s before me. That kind of loyalty and expertise is incredibly reassuring. Plus, they’re all at the top of their game in their respective areas, which makes my job, honestly, kind of exhilarating.

Do you see the Lottery as being in competition with tribal gaming, or do players tend to stay in their own lanes when it comes to games of chance?

H. Shergill Chima: I don’t see tribal gaming as a direct competitor—but that doesn’t mean we’re not all vying for the same players and the same discretionary dollars. That said, our strategic planning doesn’t focus on outmaneuvering others in the games-of-chance space. We’re not trying to win a turf war—we’re just trying to build the best possible experience for our players.

That means focusing on product quality, accessibility, brand clarity, and great advertising. We aim to meet people where they are, surprise them with fun promotions, and keep them engaged. We’re expanding our retail footprint, exploring non-traditional point-of-sale opportunities, and reaching out to new types of retail partners. For example, Gelson’s is a high-end grocery store in Southern California that is trying a new concept called Recharge by Gelsons. They have partnered with Rove to create a concept that combines EV charging with a premium convenience store. They have a lounge for customers to relax in as well as shop while they wait for the charging to complete. You can buy snacks and coffee and now you can buy lottery tickets there as well. Retail is evolving and creating opportunities for us to increase visibility for lottery.

But at the core, it’s about the games—creating new, fun experiences and managing our portfolio in a way that connects with as many different play styles and preferences as possible.

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The AI Mirage: Why Smarter Doesn't Always Mean Easier in the Lottery Industry

By Adam Barry, Chief of Staff, INTRALOT, Inc.

Another AI story. Another industry article. Another promise that machines will revolutionize the way we work.

But here's the thing: artificial intelligence isn't making life easier. It's making it different. That subtle distinction might be the most important takeaway for anyone in the lottery business trying to make sense of the AI gold rush.

For years, our industry has navigated a slow but steady evolution from gut-based decisions to data-backed strategies. What began as instinct-driven marketing matured into business intelligence. Customer segments were mapped and tested in a structured, measurable way. Then came the flood of machine learning with its promise of hyper-personalized experiences and real-time optimization. That was only achievable if you could afford the data scientists and infrastructure to make it work.

Now, many lotteries are leaping over that middle step and diving straight into AI. On paper, it sounds efficient. You get faster analysis, automated insights, and predictive models. But in practice, it is a much messier knot to untangle. AI doesn't remove complexity, it simply redistributes it. The data is bigger. The models are smarter. But the challenges are more opaque.

At Intralot, we've seen both sides. We've invested in a proprietary AI tool called Nous.ai, trained exclusively on lottery-specific data. General-purpose models, while convenient, often miss the nuances. Using Nous.ai, we condensed a thousand-person segmentation study, and work that would've traditionally taken weeks was completed in just hours. We validated it against real participant behavior almost instantly. That's the magic. Real-time insights at scale. But the cost was a significant upfront investment in time, talent, and infrastructure. It's undoubtedly a long game.

What AI gives in volume, it often lacks in clarity. We now face the paradox of choice. Instead of choosing between three products, we are choosing between hundreds. The real question becomes whether our organizations can keep up. Most legacy structures were not built for this kind of velocity. Creative teams, operations, and compliance are all suddenly expected to operate in a test-and-learn culture. That is the kind of environment AI thrives in. Making this shift is difficult for an industry rooted in risk mitigation.

There is also the broader ecosystem to consider. The same algorithms that can personalize content and optimize spend can also be misused. Bad actors are already exploring ways



intralot

to exploit AI in gaming. This is why responsible gaming must evolve just as fast. Thankfully, AI is well-suited to that challenge. It can monitor player patterns, identify outliers, and flag early signs of problem behavior. This is one of the most promising frontiers for ethical AI application.

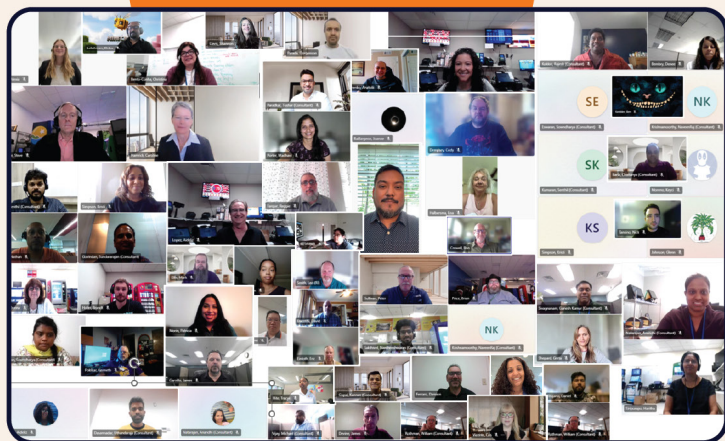
So, where does that leave us? Somewhere between cautious optimism and strategic skepticism. AI is not a shortcut. It is not a plug-and-play miracle. It is a fundamental shift in how we collect, interpret, and act on information. This requires rethinking everything from tech stacks to team structures to how we define success.

It's tempting to imagine a future where AI runs seamlessly in the background. We might think it can crunch data while we sip coffee on the beach, but that is a fantasy. The more realistic picture is AI as a powerful partner. It demands a lot from us even as it delivers.

AI might not hand us easy answers, but it's giving us a whole new way to play the game. ■

Running the Wave

IGT Lottery – now known as BRIGHTSTAR – helped 26 lotteries cross the finish line for the launch of the recent Mega Millions™ game change. **Victoria Catt, Brightstar Vice President Solutions Delivery**, reflects on her team's coordinated approach.



IGT lottery is now
BRIGHTSTAR™

Pictured: Some members of Brightstar's 200+ strong customer delivery team for the Mega Millions game change.

Delivery teams are central to the success of any system implementation. But handling one for multiple customers ahead of a multijurisdictional game change must be another order of complexity. How did your team approach it?

Victoria Catt: Given that we were coordinating efforts among 26 customer delivery teams, the analogy that comes to mind is “The Wave” – that incredible crowd phenomenon where stadiums or arenas erupt with fans standing and raising their arms in a ripple-like motion. It creates a visual effect that travels through the crowd, symbolizing unity and togetherness. We have our own

version of The Wave. For us, it's about working and communicating in unison and overcoming barriers to achieve a shared goal – in this case, a major national game change.

Many lotteries and vendor partners were involved in different aspects of the Mega Millions™ launch, and as they can probably attest from their own experiences, this wasn't just any project.

For us, the project involved the contributions of hundreds of people based on the many facets of the project scope. It also required a high level of precision, communication, and expertise. One of the things I'm most proud of is how we demonstrated our approach to collaboration. From the beginning, it was about more



Victoria Catt

Brightstar Vice President
Solutions Delivery

than delivering software and meeting deadlines. It was about ensuring that every milestone was executed as promised on behalf of our customers.

Can you elaborate further on the scope and complexity?

To give just a few examples: Our scope included host systems, retailer applications, self-service, hardware, play slips, digital media, mobile apps, iLottery and more. Our business analysts created the detailed software specifications documenting the system and game changes. Software developers designed and developed code in support of the changes, followed by stringent testing to ensure readiness for implementation. Our Integration engineers supported installations across the U.S. And members of our Project Management teams ensured meticulous attention to project planning.

Can you break down the timeline of how the work unfolded prior to the launch on April 5th?

Victoria Catt: The delivery program officially kicked off in November 2023, when we issued our letter of commitment to customers. At that stage, we defined strict milestones, keeping a tight focus on what was needed to support customers' success. Our goal was to lay the groundwork through collaboration, trust-building, and clear communication.

May of 2024 was a critical moment when the final game rules were approved by the Mega Millions group. We created a foundational team of our most experienced people, who consid-

ered the various system versions and customer rules, and built the plans for each customer project kick off.

This baseline team developed the initial game specification and how we would manage every detail of the delivery. For example: How will we handle multi-draw? What does the new ticket look like with a multiplier now included? How does the reporting need to change? And other questions that were critical to outline for consistency across 26 states. These experts have a combined tenure with the company that adds up to centuries of experience. They have worked on most – if not all – of the lottery systems and fully understand not just the software but the industry as a whole.

We also needed to update systems for the new game in the iLottery channel for four of the jurisdictions. This work encompassed five iLottery wagering apps, six convenience apps, and coordination with more than a dozen third parties.

Establishing the baseline team optimized the use of our experts across the 26 delivery teams and, going into the customer acceptance testing phase, we had a defined commitment to high-quality software deliveries that exceeded the lotteries' and players' expectations.

Execution mode began in September 2024, with each delivery team fully staffed and moving forward with precision under the formal structure we'd established. Customer engagement and change management were

priorities. We had representatives participating in key customer committees such as Technology and In-Lane to offer guidance and support, and to share questions and answers across the delivery teams. Change control was also paramount, with every code or requirement change sent through the baseline team to be vetted, designed, and distributed.

March 2025 marked the customer acceptance testing phase (or CAT), when the software was installed for customers' final checks and verifications in a controlled, production-like environment. It was our ultimate dress rehearsal for the launch, during which cross-functional teams held daily triage meetings, tracked any defects, changes, or questions, and ensured they were acted upon quickly.

How did you prepare for the go-live phase?

Victoria Catt: The go-live planning began in parallel with the CAT to ensure that war rooms and support plans were established to accomplish a final check of certifications and other obligations. We designed the war rooms to facilitate rapid decision-making, problem-solving and communication, and reduce risk for this challenging implementation.

Over several days during the week before go-live, we completed terminal updates for all 26 customers, downloading the software to more than 400,000 devices across the U.S. We tracked each jurisdiction closely, adjusting the download rates for

Preparing for The Wave

Mega Millions™ Systems Change Timeline



seamless network performance without disrupting customers' ongoing operations. In the final days, we ran triple checks and verifications of the changes and discussed all aspects among the teams to make sure nothing was overlooked.

Then it was showtime?

Go Live

April 4-5

- **April 4 morning ET**
showtime
- **April 4, 7 p.m.**
roll-out begins
- **April 4, 11 p.m.**
final draw old game
- **April 5, 1:20 a.m.**
installations underway
across the U.S.
- **April 5, 1:58 a.m.**
first site goes live
- **April 5, 5:00 a.m.**
7 jurisdictions live
- **April 5, 8:00 a.m.**
22 jurisdictions live
- **April 5, 10:00 a.m.**
All 26 systems across the
U.S. were fully operational,
delivering the new Mega
Millions gaming experience
to players

Yes! April 4 started as a normal day for many of us, perhaps a little earlier than usual from the mix of excitement and nervous energy, knowing it would be a long night ahead.

By 7 p.m., when the rollout began, each of our 26 customer delivery teams – representing over 200 people – was connected through chat communications and a central mega-bridge to log key milestones and status updates, and to collect and document everything into our overall tracking.

First up was the final draw on the old software. Until this point, players could purchase tickets only for this last draw on the old game. After that, we disabled wagering for the game so that our nightly processing and installations could begin.

By 1:20 a.m., installations were underway across customer systems, ushered along by our delivery teams working seamlessly to accommodate each of our customers' unique maintenance start times, when sales are disabled according to local rules.

Over the next 10 hours, the wave of work took place across the U.S. as systems were remotely updated with the new software and sales were reenabled. Our first site went live at 1:58 a.m., kicking off a ripple of excitement across the teams. By sunrise, we had crossed major milestones, celebrating small victories in real time.

By 8 a.m. on April 5, we had 22 jurisdictions up and running with live sales. By 10 a.m., we marked an incredible achievement as all 26 systems across the U.S. were fully operational, delivering a powerful new gaming experience to players.

For some of us, the morning even included very early trips to stores to wait for a player

to come in and purchase the new Mega Millions game, to verify that all the other functionality at retail was performing as designed.

While we were all very tired, we were also incredibly proud of what we had accomplished together. We finished our night shifts and hoped to get a few hours' sleep, with a last check that our phones would ring loud enough to wake us, just in case we needed to bounce back into action.

What lessons can be learned from such a project?

Victoria Catt: The Mega Millions game change wasn't just a technical milestone. It was really a testament to the power of coordinated teamwork, strategic foresight, and rigorous quality control. Success came from everyone, across teams and hierarchies, aligning in that "Wave" to achieve a shared goal.

Structured processes and strict change controls ensured consistency and minimized errors in this large-scale project. Another lesson has to do with adaptability. Circumstances and customer requirements can shift rapidly. Staying agile while remaining disciplined was key.

And finally, celebrating the wins as each go-live was accomplished helped us keep the momentum strong and the teams motivated.

Any closing thoughts?

Victoria Catt: Projects like these reaffirm why Brightstar is a trusted global lottery solutions leader. While the work itself was challenging, it was also exhilarating and meaningful for us.

Standing back and witnessing the "Wave" we created within our teams was unforgettable. It reinforced my belief in the power of togetherness and innovation to keep moving the lottery industry forward. ■



BRIGHTSTAR

What are your main priorities for the next three years? What's getting the most attention?

H. Shergill Chima: While we're not currently authorized to sell online, there's still a lot of room to innovate. Some of our ideas are still under wraps while we develop them further—but the goal is always the same: drive growth, increase engagement, and maximize funding for public education.

Like many lotteries, we're continuing to lean into Scratchers®. They've been fantastic for us—consistent, popular, and a strong performer even when the big national jackpot games aren't hitting record highs.

We've also evolved our messaging. Instead of focusing just on the thrill of winning, we've shifted to highlight the fun of playing. It's about the experience—whether that's sharing a game with friends or co-workers, giving Scratchers as gifts, or just enjoying a moment of play during the day. A campaign line we started back in September 2021 still anchors a lot of what we do: "A little play can make your day." It's working so well that we continue to use it. Today, more than half of California adults have played Scratchers in the past year, and in a typical month 40% of Californians play Scratchers. That's powerful reach—and a testament to the fact that when we focus on joy, not just jackpots, people respond. Further testament is the research tracking studies, which we do continuously, and which clearly show a positive response to our advertisements based on fun.

Where do things stand with credit cards, e-wallets, and other cashless options?

H. Shergill Chima: Surprisingly, given how highly regulated we are, the California Lottery Act is actually silent on payment methods. So, it's entirely up to individual retailers whether they accept credit cards, e-wallets, or other cashless options. Our Lottery Ticket Vending Machines are currently cash-only and don't give change. But just last month, we got approval to pilot a cashless payment option on those machines. We'll be starting with debit cards only and rolling out a small test with about 100 retailers.

Like everything we do, this is research driven. We'll track what works and what

doesn't and start refining even while the pilot is underway. It's a continuous cycle: test, measure, tweak, repeat. We're laser-focused on making sure every dollar we spend returns maximum value for public education.

In addition, we received the green light to explore methods for processing in-lane ticket-purchases, so that's in the works now too. Yes, there's a lot happening, but we move carefully and deliberately. Some might call us conservative or risk-averse—we call it smart business. We take the time to plan, reduce risk, do the research, and invest the state's resources wisely.

You've got eight draw games. That seems like a lot.

H. Shergill Chima: It probably goes back to California so populous. Draw-games need to have a minimum volume of play to be profitable, right? California has the liquidity, the number of players who can spend money on the games, to support more draw games than would be practical in a smaller state. So yes, we offer more draw games because we can, and because it allows us to reach a broader range of player preferences. And it's working—each of our draw games is seeing steady growth. We're constantly evolving the promotional messaging, too, based on fresh research and changing tastes.

Take SuperLotto Plus®, for example—it's still hugely popular. But we're also seeing strong performance in our smaller daily and weekly games, which have a totally different player vibe. And we've been experimenting too. One of the newer efforts that paid off big was a cross-promotion between Scratchers and Hot Spot®. With the Hot Spot Scratchers game, players can win a \$5 Quick Pick entry into our Hot Spot draw-game. That drew attention to both game categories and brought in new energy.

At the end of the day, it's about offering variety—more ways to play, more reasons to engage.

Is increasing draw-games as a percentage of your product mix a priority?

H. Shergill Chima: They're important, but draw games make up only about 12% of our total sales. It's really the Scratchers that drive our business.

Of course, the big national jackpots always grab headlines, bring in new players, and bring a big bump in sales. But we've reached a point where most players don't really perk up until the jackpot hits \$700 or \$800 million. A recent exception to that is the launch of the new Mega Millions® game, which brought a real spike in engagement—maybe because it was fresh and different. I'm confident, though, that the change enhances the game, improves our product differentiation and mix, and so has real staying power.

And beyond the game itself, it was just such a great experience to be part of that national rollout. Directors from across the U.S. came together to make it happen. It was also a terrific way for me to get to know the Mega Millions consortium of directors, which has been fantastic as they are such a warm and welcoming group. And I appreciate their willingness to share their insights and experience to help me power through issues that may be new to me but not new to them.

Is the California Lottery app where you'd like it to be at this stage of development?

H. Shergill Chima: Yes, I'd say we're in a really good place. Our app is frequently ranked among the Top 100 entertainment apps in the App Store, boasts a 4.8 rating with over 180,000 reviews, and has more than six million subscribers. The "check-a-ticket" feature is our most popular, and we average over 1,500 downloads each day. Users engage with the app for various reasons. Additionally, we can send push notifications to stay directly connected with our players. Of course, there's always room for improvement. We are actively exploring new technologies to keep the app user-friendly and efficient. Currently, we are focusing on upgrading our second-chance platform, which we see as a significant opportunity for engagement. Overall, the app has performed exceptionally well, and our goal is to continue building on that momentum.

Powerball and Mega Millions winners hale from California because there are so many more players in your state. What do you do to leverage the bump in visibility, prolong the excitement?

H. Shergill Chima: We try to maximize the emotional impact of in-state winners

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by tying every big win back to its core mission: supporting public education. Instead of focusing solely on jackpot dreams, press releases highlight not just the winner but also how the game's revenue benefits local schools—with specific figures and even a searchable database on our website where players can see exactly how much funding their district has received. This messaging strategy, reinforced by proactive media outreach, helps Californians feel that even if they don't win the jackpot, their participation still contributes to something meaningful—making schools and communities the real winners.

In conclusion, what do you see as the biggest threats and opportunities on the horizon?

H. Shergill Chima: The biggest threat when I came on board was public misunderstanding—mainly the perception that Lottery funds just went into the general fund. We've worked hard to change that narrative and protect the integrity of the program, including cracking down on illegal courier activity and educating retailers about the consequences. On the opportunity side, California's scale creates incredible potential, and now—with leadership

stability for the first time in years—we're finally in a place to pursue real innovation. For me, this work is personal: my parents immigrated from India, became farm workers, and put five daughters through college. Supporting public education through the Lottery feels like giving back to them. I see the impact in local schools, I hear the stories, and it reminds me daily that this mission matters. After nearly seven years, I truly believe the California Lottery is hitting its stride—and I'd be honored to keep building on that momentum for years to come. ■

Accounting for Future Growth The Modern CFO: From Analyst to Strategic Ally — continued from page 12

incremental sales gains didn't appear to justify the incremental costs. But then we realized we were missing a different kind of impact. These games were bringing in new players, some of whom go on to play other games and end up converting from a non or infrequent player to a casual or even frequent player. That is a measurable impact, but we did not know where to look at first.

That's when we adjusted our lens. The cost of acquiring new players is high, and the payoff isn't in a short-term sales spike — it's in long-term player value. If we don't invest in acquisition tools like licensed games, the opportunity cost is steep when you compare it to what it would take to get those new players through other means.

gives us far better tools to measure the impact of our outreach efforts. We can track click-throughs, follow the player's journey, and see exactly how our messaging performs in real time — and how every piece of our digital presence either pulls players in or pushes them away. That kind of visibility just doesn't exist in the retail world, where play is anonymous.

So now we're focused on bridging that gap. We're taking what we've learned from iLottery — those sharp, data-driven insights — and looking for ways to apply them at retail. The goal is to better understand our retail players' behavior the way we do with our digital players.

to their initiatives. Maggie has an incredible talent for helping teams translate vision into financial terms — so success can be measured clearly, and the benchmarks and timelines are well-defined.

We want all of our VPs to take a multi-disciplinary approach, but it's especially important that the CFO can guide others through the financial lens of the business. That's where Maggie shines. As a lawyer, I don't naturally think in those terms — and that's exactly why we need a culture where that kind of financial fluency is supported and expected. And while I can advocate for that environment, it's Maggie who brings it to life.

She's earned the respect of her peers not just because of her expertise, but because she truly listens. People go to her for input because she genuinely wants to understand their goals — and then she stretches to help them get there. She doesn't just explain the numbers, she teaches them, in whatever way someone needs to truly understand. And then, just as importantly, she inspires people to think creatively about how to move forward in a fiscally responsible way.

Everyone knows I expect proposals to be built on a foundation of financial viability, and Maggie is both the sounding board and the steward of that standard. The beauty is that our team welcomes her guidance — because they trust her, they see the value, and they know that working within her framework is the surest path to getting a green light for their ideas.

“She doesn't just explain the numbers, she inspires people to think creatively about how to move forward in a fiscally responsible way.” — Mary Harville

Similarly, in the online world, it all starts with player registration. Retention is also key, but nothing happens until someone signs up. That shift in mindset — toward expanding the player base — has become central to how we think about growth. Because again, it's about building for the future, not just spiking this quarter's sales. I should point out that the digital world

That's why we're leaning hard into digital. A growing share of our investment is going toward building out our digital capabilities and data analytics. It's where we can truly measure, learn, and refine.

M. Harville: I think it's crucial that every department applies the CFO's framework

Coming from a sales background, I recall being told that every dollar saved has a 100% margin because it drops straight to the bottom line. That makes it hard to justify expenditures.

M. Garrison: Exactly. It's really a shift in mindset. We talked about the CFO being viewed as the person who says "no" to spending. And yes, I take my fiduciary responsibilities very seriously. But I also take our growth objectives seriously — and growth requires smart, strategic investment. If we're confident in the ROI, sometimes it even makes sense to go over budget.

Mary has championed a truly collaborative, cross-functional approach. We work as a unified team, focused on long-term revenue growth that benefits the public and the good causes we serve. As CFO, I have to be just as committed to fueling that growth as my colleagues are to ensuring their proposals stand up to financial scrutiny.

M. Harville: That balance has come into sharp focus during this year's budget cycle. Maggie has really led the way in helping us take a 360-degree view and making sure each department aligns their plans not only with the financial framework, but with the needs and expectations of operations, logistics, Responsible Gaming, branding, and all enterprise-wide considerations.

Take our investment in digital signage. It's a significant expense, but one that Maggie and I support because we're convinced it's essential. Lottery has to be visible — especially at that "moment of truth" when a shopper is heading toward the checkout. Maggie helped the team cut through the noise — everything from macroeconomic headwinds to growing competition from sports betting and charitable gaming — and zero in on what matters: ROI.

And yes, Maggie had us jump through plenty of CFO hoops to justify the spend. But there's two things about that: first, that's exactly what responsible stewardship demands. And second, the due diligence process gave us additional insights that enhanced the execution of the project and the results it is producing. Maggie doesn't just challenge her colleagues with tough questions, she partners with them to find the answers.

To what extent are we competing with other gaming categories like sports betting — and how much do players consider prize-payout percentages when deciding where to spend their money?

M. Harville: We are at least competing indirectly with other gaming options, including sports wagering, and prize-payout is certainly important to the players.. That's such a rich area for discussion. There's no simple formula for determining whether the boost in sales will generate enough net revenue to outweigh the reduced margin that comes with higher payouts. When I stepped into this role, there was one major lever left to pull on the internet side: raise the prize payout. So that's what we did—we increased the prize-payout percentage across the board to 85%. Maggie, can you walk us through the thinking behind that move?

M. Garrison: Sure. As Mary said, it's a bit of a strategic puzzle. You can run tests and try to gauge how much the consumer responds to higher payouts — but there's a limit to how much of that you can truly model.

And here's the catch: once you raise the payout, you're essentially making a permanent move. Players may not obsess over exact percentages, but they do notice when the prize experience feels less generous. And once they've tasted that higher payout, there's really no going back. So the decision to raise payouts isn't just financial — it's also behavioral and brand-defining.

Beyond fine-tuning prize-payouts, we're also grappling with the rising costs of selling the online games. For example, bringing in a third-party content provider for iLottery adds another layer of expense. Licensing branded games? More cost. So the overall cost of doing business — just to offer the same category of products — is climbing fast.

And, to Mary's point, yes, prize payout is a lever. But it's also by far our largest expense. And once we pull that lever, margins shrink — leaving even less room to absorb the added costs of things like licensed properties, new content, platform fees, and more. And it's not just about covering the cost — it has to generate net new income. Otherwise, it's simply not worth it.

For example, we tested a payout increase on some \$10 scratch tickets. Ours were slightly below other states at that price point, so we nudged it up and it didn't really move the needle. So we hit pause. We will test, analyze, and then be willing to not move forward when the data doesn't justify it. That's why we approach prize-payout changes with caution. Before touching payout percentages, we want to pull every other lever to make the games more attractive — design, branding, promotions — everything that might draw in new players without resorting to eroding our margin.

M. Harville: And Maggie's exactly right—the cost structure is stacking up. Between platform maintenance, third-party content, and licensed property fees, we're piling on expenses. Sales would need to grow significantly just to cover those new layers of cost, let alone drive profit. And as Maggie points out, we're not looking to break even—we're trying to generate real, sustainable increases in net revenues. That's why Maggie is in every meeting. We lean on her so much because financial discipline is what keeps all this from turning into a cost spiral. Every big idea has to clear the hurdle of fiscal viability—and Maggie's the one making sure we don't lose sight of that.

M. Garrison: And just to bring it back to where we started — because I think it's really important — Mary talked about getting the team together for our weekly meetings. That's not just a meeting; it's a mindset. Her approach is, "I want to hear from everyone involved."

She clears the runway so that I'm not seen as stepping out of my lane when I ask for more due diligence. It's already understood because Mary set the tone for rigorous discussion and open feedback to be the norm. Everyone has the green light to surface issues, assess ideas, challenge assumptions, and work together to build stronger proposals and action-plans.

That culture has made all the difference. There's no defensiveness anymore. People aren't resistant to being challenged—they expect it. And that makes it easier for all of us to operate this way: collaboratively, transparently, and with a shared commitment to getting it right. ■



PULSE of the Industry

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

NORTH AMERICAN NEWS

IGT Lottery Becomes Brightstar Lottery



With the sale of its Gaming and Digital business now complete, International Game Technology (IGT) is ushering in a new era under a new name: **Brightstar Lottery**. The rebranded company now stands as a focused, standalone lottery powerhouse—one that aims to shape the future of the global games-of-chance industry through innovation, trust, and a legacy of leadership.

The move follows IGT's \$4 billion sale of its Gaming & Digital division to a holding company owned by funds managed by affiliates of Apollo Global Management, Inc. (NYSE: APO). As of July 2, Brightstar will begin trading on the New York Stock Exchange under its new ticker symbol **BRSI**. The company's CUSIP will remain the same, and no action is required from shareholders.

Brightstar will continue to operate under the legal name "International Game Technology PLC" until its official name change is registered in the UK—expected shortly after the transaction closes. Meanwhile, the Apollo-backed entity, which is also acquiring gaming technology provider Everi Holdings (NYSE: EVRI), will retain rights to the "IGT" brand and name going forward.

"The sale positions Brightstar for an exciting future," said **Marco Sala**, Executive Chair of Brightstar. "We've balanced the use of proceeds to reduce debt, return capital to shareholders, and fund future growth—reinforcing our commitment to creating long-term value."

A New Chapter for a Legacy Leader

With nearly five decades of experience, Brightstar serves almost 90 government-run lotteries across six continents. It is the primary

technology partner to 26 of the 46 U.S. lottery jurisdictions and supports seven of the ten largest lotteries worldwide. The company's comprehensive portfolio includes instant ticket printing, retail and digital lottery systems, lottery operations, and award-winning game design.

"Brightstar reflects both where we've been and where we're going," said **Vince Sadusky**, CEO of Brightstar. "We're building on a foundation of reliability and innovation to help lotteries thrive in a dynamic landscape of digital transformation, evolving player expectations, and increasing competition."

The rebranding signals more than a name change. The name **Brightstar** was chosen to evoke the company's role as a guiding light for customers, players, and communities—emphasizing a mission driven by purpose, progress, and partnership. It positions Brightstar as a dedicated global lottery partner at a time when the industry is rapidly modernizing.

"We see this as a launch point," Sadusky added. "Brightstar will continue to lead responsibly, help lotteries adapt, and ensure our solutions reflect the needs of today's players—and tomorrow's."

Capital Strategy: Returns and Resilience

The transaction generated **\$4 billion in net cash proceeds**, which Brightstar is deploying in a multi-pronged capital strategy focused on financial stability, shareholder value, and long-term investment.

- **\$2.0 billion** will be used to reduce near-term debt, including the redemption of senior secured U.S. dollar and Euro notes due in 2026, as well as the prepayment of term loan and revolving credit facilities maturing in 2027.
- **\$1.1 billion** will be returned to shareholders. This includes a **\$3.00 per share special dividend**, payable July 29 to shareholders of record as of July 14, and a newly authorized **\$500 million share repurchase program** over two years.
- **\$500 million** will be directed toward upcoming payments for the Italy Lotto license.
- The remaining **\$400 million** will support general corporate purposes, including strategic investments.

Brightstar aims to maintain a target net debt

leverage ratio of approximately 3.0x adjusted EBITDA. Pro forma for the transaction, including expected closing costs and license payments, the company estimates leverage at 3.5x as of March 31, 2025.

A Focused, Future-Ready Business

By shedding its Gaming & Digital unit, Brightstar becomes one of the few truly "pure play" global lottery companies. That singular focus, executives say, allows for deeper investment in player-centric innovation, regulatory alignment, and digital enablement.

The company remains committed to providing secure, scalable, and forward-compatible systems and games—while also helping its customers modernize distribution, personalize player experiences, and maintain the public trust that underpins the lottery model.

"Our customers operate in complex environments where technology, regulation, and entertainment intersect," said Sala. "We help them navigate that complexity with solutions built for transparency, engagement, and long-term sustainability."

In addition to its lottery operations, Brightstar will continue developing data-driven insights, retail optimization tools, and omni-channel delivery systems that support its clients' evolving business needs.

Global Reach, Local Impact

Brightstar employs approximately **6,000 people worldwide**, with a strong local presence in every region it serves. Its mission, the company says, is rooted not only in commercial success but also in social benefit—supporting the public programs and good causes funded by lotteries around the world.

"This is a business with heart," said Sadusky. "Every time someone plays a game, they're contributing to something bigger—whether it's education, health care, or community development. That's a responsibility we take seriously."

Brightstar enters this next phase with the confidence that comes from decades of leadership—and the agility to adapt as the industry evolves.

For more information, visit www.brightstarlottery.com or follow Brightstar on LinkedIn.

HAZEN'S HOLOGRAPHY

HELPED BOOST MASSACHUSETTS LOTTERY HOLIDAY SALES

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

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



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.

For US Dollars, visit:
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For Euros, visit:
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Intralot to Acquire Bally's International Interactive Division in €2.7 Billion Deal

intralot

In a bold move to reshape the global gaming landscape, **Intralot S.A.** (ATSE: INLOT) announced it will acquire **Bally's International Interactive** business in a deal valued at **€2.7 billion**. The agreement positions Intralot as a global leader in both lottery and digital gaming, with operations spanning Europe, North America, and key regulated markets around the world.

The deal, approved by both companies' boards, combines Bally's highly regarded digital gaming capabilities with Intralot's long-standing expertise in lottery systems and services. It represents a strategic shift for both companies, providing Intralot with significant scale and Bally's with a strong return and renewed focus.

Deal Structure and Financing

Bally's will receive a mix of **€1.53 billion in cash and €1.14 billion in newly issued Intralot shares** (approximately 874 million shares at €1.30 each). The acquisition will result in Bally's becoming the **majority shareholder** of Intralot.

To fund the transaction, Intralot has secured commitments from a consortium of banks including Citigroup Bank, Deutsche Bank, Goldman Sachs, and Jefferies for up to **€1.6 billion** in debt financing. Intralot also plans to raise an additional **€400 million** through a public equity offering on the Athens Stock Exchange, pending regulatory and shareholder approval.

As part of the transaction, Bally's will use proceeds to repay secured debt and fund future growth, including the development of its **Chicago casino project**.

A Global Gaming Powerhouse

Once completed—expected in **Q4 2025**—the combined company will be one of the largest by market capitalization on the Athens Stock Exchange. The new entity will have **€1.1 billion in annual revenue**, a strong EBITDA margin of 38% (pre-synergies), and recurring free cash flow conversion exceeding 90%.

The deal brings together two highly complementary businesses. Intralot, known for its robust B2B lottery operations and government partnerships, will gain a major B2C presence through Bally's established position in online gaming—particularly in the **UK**, one of the world's most competitive markets.

"This is a transformative moment," said **Robeson Reeves**, CEO of Bally's. "Combining Bally's digital strength with Intralot's lottery expertise creates a unique platform for innovation and growth."

A Strategic Win for Both Sides

For Intralot, the acquisition dramatically expands its footprint and revenue streams while enhancing its ability to serve a wide range of customers across B2B and B2C channels. For Bally's, the transaction monetizes a major business unit at an attractive valuation and secures a strategic stake in a company poised for global growth.

"We're building something bigger than either company could achieve alone," said **Nikolaos Nikolakopoulos**, CEO of Intralot. "This positions us as a top-tier global provider across both gaming and lottery verticals."

Intralot will retain its listing on the **Athens Stock Exchange**, with Bally's holding a majority equity stake and Intralot founder **Sokratis Kokkalis** maintaining a significant ownership position.

"This is a proud day for Intralot and for Greece," Kokkalis said. "We're creating a large-cap Greek company with global reach, setting the stage for international investment and long-term growth."

Technology and Growth Synergies

The combined entity will benefit from a powerful blend of technology platforms. Intralot's **LotosX and PlayerX systems** will be integrated with Bally's **Vitruvian analytics platform**, enhancing marketing automation, loyalty programs, and real-time customer engagement.

The strategic fit also opens new revenue opportunities in high-growth sectors such as **charity lotteries** in the UK and U.S., **cross-selling** across customer bases, and entry into new B2C gaming markets. The group's combined strengths are expected to deliver short-term cost synergies and long-term expansion opportunities.

Market Potential

Together, the companies will address a projected **\$187 billion global market** by 2029, with annual growth rates of **14% in iGaming and 5% in lottery**. Intralot brings €1.4 billion in contracted lottery revenue through 2029, backed by an 89% renewal rate and long-term contract durations averaging 16 years.

"The scale and diversification we're gaining give us a strong foundation to capture a growing market," Nikolakopoulos noted.

Management and Governance

Following the transaction, Robeson Reeves is expected to take over as CEO of Intralot. Nikolakopoulos will serve as **President and CEO of the Lotteries division**, and **Chrysostomos Sfatos** will assume the role of **CFO**.

Intralot's board will expand to 11 members, a majority of whom will be independent. Directors will include Reeves, Nikolakopoulos, Kokkalis, and **Soohyung Kim**, Chairman of Bally's board and Vice Chairman of Intralot's board.

Looking Ahead

Both companies see the transaction as a launching pad for global leadership. Long-term

agreements will ensure continued access to shared intellectual property, technology platforms, and support services.

"This is a statement of intent," said Kim. "We're establishing a true global champion in gaming and lottery—anchored in Europe, powered by world-class technology, and positioned to lead."

Pending regulatory approvals and shareholder consents, the deal is on track to close by the end of 2025. Until then, both companies will continue operating independently while preparing for integration.

RFI: Illinois Lottery for PMA, iLottery, Central Gaming System and Instant Ticket Gaming Services

The Illinois Department of the Lottery has published a series of Requests for Information (RFIs) to gather market insights and inform the development of an upcoming Request for Proposal (RFP).

Responses Due: August 10, 2025, at 1:00 PM CT

Gaming Laboratories International (GLI®) Named "Best Testing Laboratory in the Baltics 2025" and "Best Testing Laboratory in the Nordics 2025" in the Baltic & Scandinavia Gaming (BSG) Awards 2025

GLI®

Scientific Games Builds on Digital Lottery Momentum with Key Executive Hires

SG

SCIENTIFIC GAMES

Keshav Pitani joins Scientific Games as Senior Vice President, Digital Games, bringing extensive experience in content, product development and innovation. He previously served for seven years as Senior Director of Product Development for Bally Technologies until its acquisition by Scientific Games Corporation in 2014.

Laura Higgins has been named Vice President, Customer Success & Strategy for the Company's global digital team. She brings more than 20 years of experience in e-commerce, general management, strategy, product, marketing and finance from leading companies such as Procter & Gamble, Shutterfly, Albertsons and Gartner.

New Hampshire casinos can install unlimited VLTs after governor signs gambling expansion into law

Arizona Lottery Awards Pollard Banknote Three-Year Contract Extension For Warehousing And Distribution

House committee advances bill to save, reform Texas Lottery



A House committee on Tuesday advanced legislation that preserves the embattled Texas Lottery but abolishes the commission that oversees it.

Under the bill the state would move oversight and control of the games' management to the Texas Department of Licensing and Regulation and a new lottery advisory committee.

Two Ex-Lottery.com Executives Plead Guilty to Securities Fraud

Sentencing before Judge Alvin K. Hellers set for November. Two former Lottery.com Inc. executives have pleaded guilty to securities fraud charges in connection with a scheme to fraudulently inflate the financial results of a company that promoted itself as the lottery equivalent of Uber or Doordash.

Ryan Dickinson, the company's former chief financial officer, pleaded guilty Thursday in the US District Court for the Southern District of New York to one count of conspiracy to commit securities fraud, to make false and misleading statements in proxy statements, and to make false filings to the US Securities and Exchange Commission.

He also pleaded guilty to one count of securities fraud, one count of making false SEC filings, and one count of improperly influencing the conduct of audits.

Former chief revenue officer Matthew Clemenson pleaded guilty to the same charges, minus the count for influencing the conduct of audits.

The pleas are part of a case that federal prosecutors filed in February against the ex-CEO of the blank-check company that acquired Lottery.com to launch it into the public markets. That indictment accuses Vadim

Komissarov of defrauding investors in Trident Acquisitions Corp. by reporting fake revenues about Lottery.com and selling off his shares before the market found out.

Ohio bill proposes to legalise online gambling and ban sweepstakes

Legality In Doubt, Sweepstakes Casinos Could Be Targeted By State Attorneys General

With only seven U.S. states offering real-money online casino gaming (also known as "iGaming"), sweepstakes casinos have emerged to fill the void. Readily available on major app stores for download from anywhere in the U.S., these unregulated platforms — which originated offshore but have since steadily migrated onshore (with many of the major operators headquartered in the United States) — offer real money casino-style gambling (such as slots, roulette, blackjack, poker, and even sports betting) under the guise of a "sweepstakes" promotion (albeit, one which is perpetually run). This nascent industry has grown at an astonishing rate — with more than one million U.S.-based players — and this year expects to see \$11.4 billion in player purchases and at least \$4 billion in net revenue.

While these platforms claim to offer a "sweepstakes" like those occasionally offered by Publisher's Clearinghouse and McDonald's, they bear no similarity to those promotions. Rather than a limited-time offer intended to promote a separate, standalone product, these platforms continuously offer real money casino-style games of chance. The only product offered are casino games — there is no separate line of business being promoted. The purported "sweepstakes" aspect is no more than a sleight of hand — customers purportedly pay for one type of token to participate in the games ("Gold Coins," which allow you to play the games for no real-world prizes) and are issued a "free" bonus allotment of "Sweeps Coins," which allow you to participate in the same games for the opportunity to win a prize. The number of Sweeps Coins a purchaser receives is generally equivalent on a 1:1 basis to the number of dollars they spend to obtain them.

As detailed previously in Forbes, every relevant judicial decision (at least 15 by my count) which addresses a 'casino-style' sweepstakes game that awards users entries to play real money games of chance in an amount commensurate with dollars spent was found to be illegal gambling — even though free entries were also available without a product purchase.

Despite their dubious legality, online sweepstakes casinos have continued to operate unimpeded in the United States. Efforts to rein in these unregulated platforms — which skirt state licensing requirements, offer no player protections, and siphon revenues from state governments — have largely been relegated to private class action lawsuits from aggrieved

customers and the occasional cease-and-desist notice from a state regulatory agency.

Pennsylvania lawmakers clash over skill game tax rates ahead of budget deadline

Pennsylvania lawmakers remain divided over how to regulate and tax skill games, with competing proposals stalling progress as a key budget deadline looms.

Sen. Chris Gebhard introduced legislation last month proposing a 35% tax on skill games. He said the figure is a compromise between Gov. Josh Shapiro's proposed 52% rate and Sen. Gene Yaw's 16% alternative. Slot machines in casinos are taxed at 54%. Shapiro included the 52% rate in his 2025 budget proposal. Yaw, whose bill was introduced in April, argues a lower rate will support small businesses and local groups that depend on skill game revenue.

Connecticut Senate approves sweepstakes ban, sends bill to house

Montana officially enacts nation's first sweepstakes ban

Gov. Greg Gianforte signed the legislation into law this week after SB 555 passed both chambers of the legislature in April. The ban will go into effect on Oct. 1 of this year. The legislation amends the state's existing gaming laws to stipulate that the term internet gambling now includes "online casinos, by whatever name known, which constitute internet gambling and therefore are prohibited. This includes but is not limited to any platform, website, or application that knowingly transmits or receives gambling information, allows consumers to place a bet or wager using any form of currency, and makes payouts of any form of currency," the text reads.

The "any form of currency" terminology is key, as it encompasses the dual-currency system used by most sweepstakes operators. Via that approach, users are given a free daily allowance of virtual coins but can buy more of that in-game currency to use. When they buy those coins, they also get an allotment of a second currency that can be used to play games and earn more of that second currency that can be cashed out for real money.

Anyone who knowingly violates the new law will be charged with a felony and could be imprisoned for up to 10 years.

It is not entirely clear from the bill exactly which operators will be impacted by the legislation, which many argue extend beyond the most popular sweepstakes companies.

New York Attorney General orders online sweepstakes casinos to cease and desist

New York Attorney General Letitia James today announced that her office has stopped online sweepstakes casinos operating in New York. The Office of the Attorney General (OAG), working with the New York State Gaming Commission, identified 26 online platforms offering players slots, table games, and sports betting using virtual coins that could be exchanged for cash and prizes. New York law prohibits online platforms from offering gambling that involves risking something of value, including virtual coins that can be redeemed for cash or prizes.

Online sweepstakes casinos are not subject to audits and other regulatory oversight by the state to ensure that games are not rigged, putting New Yorkers at risk. Attorney General James sent cease and desist letters to the operators of these platforms, demanding that they stop all prohibited gambling activity in the state, and as a result, all 26 platforms are ending the sale of sweepstakes coins in New York.

"Online sweepstakes casinos are illegal, dangerous, and can seriously ruin people's finances," said Attorney General James. "I thank the New York State Gaming Commission and Senator Addabbo for partnering with my office on this issue to protect New Yorkers."

"These so-called 'sweepstakes' games are unscrupulous, insecure, and unlawful," said New York State Gaming Commission Chairman Brian O'Dwyer. "I have been very vocal about the need to crack down on these operations, and I am thrilled that Attorney General James has taken this significant step to eradicate the illegal gambling market. We encourage those of age who wish to gamble to do so with legal operators."

"At a time when illegal gambling, underage participation, and identity theft are soaring, it is deeply concerning that prohibited, unregulated, and unenforceable gambling entities are providing easy access to illegal gaming sites and obtaining personal information of unsuspecting New Yorkers," said Senator Joseph P. Addabbo, Jr. "These so-called sweepstakes casinos not only put individuals at risk of fraud and financial exploitation, but they also create dangerous pathways for gambling addiction, especially among minors. This is not about taking away anyone's livelihood, it's about protecting New Yorkers and working toward a safer, regulated online gaming environment for age-appropriate individuals. I commend Attorney General James and her office for their dedication towards protecting our residents and for recognizing the urgent risks posed by these illegal platforms."

"As Chair of the Assembly's Standing Committee on Racing and Wagering, I and my committee are deeply concerned about the prevalence of sweepstakes games, where players can redeem coins for money," said Assemblywoman Carrie Woerner. "These online sweepstakes games can serve as the on-ramp to problem gambling for teenagers, particularly. I am grateful for the work of Attorney General James and her staff for shutting down 26 of these games."

Sweepstakes casinos allow users to play

traditional casino games, including slot machines, blackjack, and sports betting, using virtual sweepstakes coins that can be redeemed for cash or prizes, such as Amazon gift cards. Players typically purchase these virtual sweepstakes coins as part of a package with other virtual currency. Under New York law, betting cash-redeemable virtual coins on games of chance constitutes gambling, regardless of how the casino operator characterizes how players can obtain the virtual coins.

Placing a bet at a sweepstakes casino is risky because sweepstakes casinos are not subject to audits and other regulatory oversight by the state. Without oversight, players have no way of knowing whether a sweepstakes casino's games are rigged, whether it will be able to cover a winning bet, or whether it complies with the many other consumer protection measures required of legal, licensed casinos under New York law. Attorney General James warns New York consumers to steer clear of sweepstakes casinos.

New York Senate approves bill targeting online sweepstakes casinos, now heads to Assembly

Mary Neubauer, Iowa Lottery, to retire in June after 26 years of service

Iowa Lottery CEO Matt Strawn noted during the Iowa Lottery's recent annual meeting, the notion of "leaving a legacy of service" was a constant theme throughout the day. There is no question regarding the significant impact and legacy of Mary Neubauer's dedication and contributions to the Iowa Lottery, the State of Iowa, and all those great causes over the years that have benefitted from her service. Our team and the Lottery is stronger because of her service. Thank you, Mary, for being a trusted and valued colleague to us all."



Matt Strawn, Terry Rich, Mary Neubauer, Ken Brickman, Dr. Ed Stanek, Larry Loss)

Massachusetts Lottery introduces \$50 scratch-off ticket with \$25 million top prize

Manitoba judge sides with lottery coalition against offshore gaming firm

A local judge has ruled in favour of Manitoba Liquor & Lotteries (MBLL), the lottery and gaming operator of the Canadian province of Manitoba, in its legal action against gaming firm Bodog. A complaint was filed by the MBLL on behalf of the Canadian Lottery Coalition (CLC), an organisation representing the MBLL, Loto-Quebec, the British Columbia Lottery Corporation (BCLC), Lotteries and Gaming Saskatchewan (LGS) and the Atlantic Lottery Corporation (ALC). The organisation was founded in 2022 with the stated goal of combating illegal gambling.

The monopolies held by Canada's various crown corporations are strong, though as Ontario showed they are not guaranteed to last forever. Alberta seems to be on the cusp of launching a regulated market like Ontario, with the iGaming Alberta Act having passed the third reading of the provincial legislature early this month.

Ontario to Crack Down on Illegal Gaming Websites

There's a new focus on enforcement against grey market players in Ontario, listening to comments made this week by industry leaders like Doug Downey, Attorney General of Ontario, and Alcohol and Gaming Commission of Ontario (AGCO) Chair Dave Forestell. When we launched the market in April of 2022 about 70% of players were in the grey or unregulated market. I don't use that term anymore. I say now it's the illegal market." Ontario market still has 16%-17% of residents using unregulated gaming sites.

Maine House of Representatives approves online casino bill with tribal exclusivity

Maine House of Representatives has approved a bill that would allow the state's four federally recognised tribes to offer online casino games.

New Jersey Lottery Proposes Amendments to Rules Governing Courier Services

The New Jersey Lottery has announced a Notice of Proposal to amend rules governing the regulation of registered courier services. The proposed amendments, filed with the New Jersey Office of Administrative Law and published in the New Jersey Register and distributed to media outlets that cover the state, are part of the Lottery Division's continuing efforts to modernize operational requirements while maintaining the integrity and reputation of the Lottery. Provisions related to couriers include revisions to insurance and indemnification requirements, modified processes for financial transactions and ticket redemption, and updated audit and reporting obligations. Additionally, the amendments simplify obligations for affiliate agents, allowing separate remittances of proceeds and commissions.

The proposal would allow courier services to operate more efficiently, reduce administrative burdens while better reflecting the current technological and economic landscape.

The Illinois Lottery sends congratulations to Director Harold Mays on his nomination as a 2025 Chicago Defender Man of Excellence.



Iowa Lottery - It's A Throwback For Our 40th Anniversary



Forty years after we did it the first time, the Iowa Lottery is inviting you again to Scratch, Match & Win! The lottery is turning 40 this year. And to celebrate the moment, a throwback version of our very first game has just arrived in stores.

JOB: DEPUTY DIRECTOR OF MARYLAND LOTTERY AND GAMING CONTROL AGENCY

JOB: North Carolina Education Lottery - Director of Licensing and Compliance- Raleigh

IGT and Atlantic Lottery Sign Eight-Year Video Lottery Central System Technology Agreement

Aristocrat Interactive and Inspired Entertainment Introduce First-Ever Virtual Sports iLottery Games with the Virginia Lottery Through an Agreement with NeoPollard Interactive



Splashdot Loyalty Solutions has been selected by the Multi-State Lottery Association (MUSL) to implement the organization's first national unified Customer Relationship Management (CRM) system.

WORLD NEWS

South African Court Forces Minister to Name New Lottery Operator by May 28

Statistics on gambling participation – Year 2 (2024), wave 4: Official statistics Findings from the Gambling Survey for Great Britain: Statistics on gambling participation.

Malta hit with infringement proceedings as ECJ issues Opinion

The European Commission has launched infringement proceedings against Malta for allegedly breaching an EU regulation when it amended the Gaming Act to prevent the enforcement in Malta of foreign court rulings against Maltese gaming companies.

Malta was given time to address the Commission's concerns before the case can proceed further. If Malta fails to adequately respond, the Commission may decide to bring the case before the European Court of Justice. In the formal letter sent to the Maltese government, the EC said that Malta has failed to comply with EU regulation by imposing its courts an obligation to refuse recognition and enforcement of judgments issued by courts.

The EC added that Malta is discouraging foreign litigants from pursuing legal action in Maltese courts against Maltese gaming companies. "The Commission considers that the Maltese legislation, by effectively shielding the online gaming sector from cross-border litigation, undermines the principle of mutual trust in the administration of justice within the Union," the EC said.

The Maltese government has insisted that the law does not establish new or separate grounds for refusing the enforcement of judgments beyond those set in EU regulation. It said it will provide a formal response to the Letter of Formal Notice within the stipulated two-month timeframe.

The Malta Gaming Authority also defended the law, arguing that it is in line with EU

regulations and the principles set out by the European Court of Justice. It does not impose a blanket ban on enforcing European judgments against Maltese-licensed gaming companies, nor does it shield them from legal action in other EU courts.

In 2023, an Austrian law firm and a German lawyer filed a complaint with the Commission, accusing the Maltese government of undermining the rule of law in Europe. Nationalist MEP Peter Agius expressed concerns about the Commission's infringement action, saying in a post on X that Malta needed to align with EU law as soon as possible. Prime Minister Robert Abela had defended the law when he met Austrian Chancellor Karl Nehammer.

Earlier this year, two landmark rulings by the Maltese courts declared that Austrian courts cannot compel Malta-based gaming operators to compensate Austrian gamblers for their losses, even when Austrian courts had ordered the refunds. Agius also asked the EC to address the "jungle" of third-party litigation funding (TPLF) that is funding legal action over gambling losses, with the aim of enforcing foreign judgments in Malta. TPLF is when outside investors cover the legal costs of a case in exchange for a share of any winnings.

The MGA had previously accused German and Austrian law firms of "very aggressive advertising" to encourage customers of Maltese gaming companies who may have lost money to seek legal aid.

Scientific Games Granted License from UAE's General Commercial Gaming Regulatory Authority

Scientific Games is licensed by the General Commercial Gaming Regulatory Authority as a Gaming-Related Vendor for the supply of lottery products and services in the United Arab Emirates. The GCGRA is the federal executive agency responsible for regulating and overseeing all commercial gaming in the United Arab Emirates to ensure fairness and transparency.

Bulgaria proposes new restrictions for online gambling

Swedish government plans to expand gambling credit ban

Dutch gambling regulator outlines new "Regulator 2.0" approach

The Dutch gambling regulator Kansspelautoriteit (KSA) has pledged to adopt a new Regulator 2.0' approach to its duties. Speaking at the Gaming in Holland conference in Amsterdam, Renske Fikkers, the head of

the KSA's regulatory department, said the regulator was moving to a more open and flexible structure and increase communication with operators. This includes communicating by name and attempts to engage with operators to find solutions to problems.

Fikkers said: "We want to get rid of the image of the unreachable, rigid regulator exclusively focused on infringements and fines, and move more and more towards an open and flexible organisation that finds creative solutions to difficult problems. The conversations we have with you are part of that, as is the recently started communicating by name. The parties that may have received less desirable attention in that context have all been very cooperative and see the added value of the process. For example, a warning to one party now sets an example for the rest."

The Betting and Gaming Council (BGC), European Casino Association (ECA) and the American Gaming Association (AGA) came together this week to share ideas about better tackling the unregulated market.

The Tuesday June 10 roundtable in Berlin, Germany, part of the International Association of Gaming Advisors (IAGA), was the result of a Memorandum of Understanding signed by the three trade associations last October. The CEOs of the BGC, ECA and AGA all spoke after opening remarks from Keith Bristow, the director general of the UK National Crime Agency and chair of the UK's Gambling Anti-Money Laundering Group (GAMLG).

BGC CEO Grainne Hurst said: "The growing, unsafe, illegal gambling black market poses a shared challenge to all our members, and their millions of customers. These illegal operators do not pay tax, do not support sport and don't care about player protection measures. Instead, they target those vulnerable to harm, hurt the economy and threaten regulated businesses. These criminal organisations don't recognise the rules, or international borders, so it was vital we joined today alongside a host of international regulators and representatives from the relevant law enforcement agencies, to share knowledge and understanding of the threat we all face. I hope this event will pave the way to further collaborative efforts against the unregulated illegal black market, as we continue working hard to ensure our sector stays crime free."

WLA and EL Seminar: Stockholm seminar examined tech and trends driving sports betting worldwide

The three-day WLA and European Lotteries Sports Betting Seminar in Stockholm, Sweden,

delved into trends in betting offers, how to revitalize sports betting with new technology, and the duty of care of the regulated sports betting industry.

Moderated by Luca Esposito, WLA Executive Director, and Alvis Angelini, European Lotteries, Senior Policy Officer and Sport Secretary, the Seminar was attended by over 100 participants from all five WLA global regions.

Global experts offered valuable insights into the regulated lottery and sports betting world, highlighted successful tools and strategies for enhancing player safety and experience, as well as ways to tackle illegal gaming and combat sports competition manipulation.

New Zealand invests NZ\$81 million to tackle gambling harm

EQL Games partners The UAE Lottery



Another South Africa lottery bidder seeks rights in Court

Loterie Romande 2024 Results Exceptional support of 258.2 million francs to support social action, sport, culture and the environment Swiss lottery revenue boosted by online play in 2024

Jyri Lassi appointed Veikkaus' new General Counsel

Tabcorp fined \$2.6 million for illegal VIP marketing messages

Zeal names Dr. Stefan Tweraser as new CEO



Dr Tweraser will join the company as Management Board member on 25 August 2025 to ensure a smooth succession of Dr Helmut Becker as CEO. He will join the company as a Management Board member

on 25 August 2025. Dr Stefan Tweraser most recently served as Chief Executive Officer of Rocket Factory Augsburg AG and brings extensive leadership experience from international companies in the digital, technology, and consulting industries, including at Google, Telekom Austria and McKinsey. He succeeds Dr Helmut Becker, who had decided in March 2025 not to extend his contract and to pursue his own entrepreneurial activities in the future. Dr Becker will resign from his office on 14 September 2025 but will remain available to the company as a consultant for the remainder of his contract until the end of January 2026.

China Lottery sales jump 20% in May

RFP: TECHNICAL AUDIT OF THE GAMES OPERATING SYSTEM OF SOCIETE DE GESTION DE LA LOTERIE NATIONALE- MOROCCO

UAE Lottery continues development with WLA membership

CASINOS AND SPORT BETTING NEWS

Michigan iGaming revenue breaks new record at \$301.4 million in May

Digital platforms outpace retail casinos
Michigan iGaming revenue breaks new record at \$301.4 million in May. The record \$301.4 million in gross receipts, collected from online casino gaming and sports betting activity, surpassed the previous high of \$260.5 million in March by 15.8%, according to figures released by the Michigan Gaming Control Board (MGCB). Compared to May 2024, total gross receipts rose 26%, while the increase over April 2025 stood at 21.6%. Adjusted gross receipts—net of promotional spending—totaled \$271.8 million, up 31.4% year-over-year and 4.6% from the previous month.

iGaming generates majority of revenue.

The Rise of Online Casinos: How Different States Are Handling Legislation

Online gambling continues to evolve across the United States, with online casinos gaining mainstream attention. The digital gaming industry is shifting due to changing regulations, emerging technologies, and a growing comfort with online gaming

experiences. Only a handful of states have legalized real-money online casino gambling, but that number may soon grow.

Several states are actively considering new legislation or revisiting previous efforts to allow online casinos. Before we dive into the up-and-coming contenders, take note of the “Magnificent Seven” states where online casinos are legal and operational:

Connecticut – Legal and live since October 19, 2021
 Delaware – Legal since 2012
 Michigan – Legal and live since January 22, 2021

New Jersey – Sites for online Casino in NJ have been legal and regulated since November 2013, offering licensed real-money gaming online

Pennsylvania – Legal since October 26, 2017, with online platforms launching in July 2019
 West Virginia – Legal and live since July 15, 2020

Rhode Island – Legal as of June 2023, with the first platform launching in March 2024

These states serve as models for others considering legalization. With structured oversight, responsible gambling protocols, and secure platforms, they have helped normalize the idea that online casinos can operate in a well-regulated environment.

Delaware online gaming revenue rises 115.8% YoY in May

Nevada board gives initial approval to IGT-Everi megadeal

Final regulatory approval is expected to be considered by the Nevada Gaming Commission on June 26. Apollo officials said final approval from the last regulator, the Pennsylvania Gaming Control Board, also is scheduled June 26 and the deal is expected to close July 1. Apollo is backing the deal with the resources of \$20 billion in committed funds. Apollo managing member Daniel Cohen explained details of the transaction in a 90-minute presentation.

The last Nevada Gaming Control Board meeting under Chairman Kirk Hendrick’s tenure opened on Wednesday with a complex and lengthy regulatory review – and initial approval – of a corporate merger that could reshape the gaming supplier landscape.

Apollo is merging IGT’s gaming business with Everi’s gaming and financial technology business. The new entity will be taken private while retaining the IGT name. IGT’s sizeable lottery business is being spun off into its own publicly traded company under a different brand.

IGT, one of the most storied brands in gaming, has seen two formidable competitors emerge over the years in Aristocrat and Light & Wonder. Aristocrat, by most accounts, has

long held the top spot and L&W has been on a multi-year hot streak since divesting its own lottery and sports betting divisions. IGT could be considered third among them, with a widening gap.

Cohen acknowledged this on Wednesday, saying that the combined business “has a margin profile that is significantly lower than our largest peers, which, you obviously know, are Light & Wonder and Aristocrat”. He said Apollo will “look to close that gap under our ownership”.

On Monday, Fitch Ratings maintained Everi’s “BB-” long-term default rating and said it expects the new entity to perform well. Additionally, the agency said that the combined slot machine base of nearly 70,000 units would already eclipse both Aristocrat and L&W.

The merger, Fitch said, “should enable more cross-selling opportunities between the two entities”.

FanDuel, Kalshi Reportedly Discuss Partnership



FANDUEL

America’s leading sports betting operator is exploring a dive into the world of prediction market outcomes. Kalshi is a federally regulated prediction market platform that lets users trade contracts on the outcomes of real-world events—like elections, weather, or sports—much like a financial exchange. Unlike sportsbooks, Kalshi is overseen by the Commodity Futures Trading Commission (CFTC) and operates nationwide, including in states where sports betting is illegal. Users buy “yes” or “no” contracts based on whether an event will occur, but the platform doesn’t offer traditional bets like point spreads or player props. Kalshi’s legal status and unique structure have drawn interest from companies like FanDuel, which is exploring a potential partnership.

Inspired Entertainment launches first branded hybrid dealer roulette game



INSPIRED

Delta’s Billion Dollar Bet: Airline Surveys Passengers About Bringing Sports Gambling Onboard

Nevada passes bill to handcuff unauthorized gambling operators

Both chambers of the Nevada legislature have now passed a bill that would equip the state with the means to further target and act against unapproved gambling operators.

New Jersey bill seeks to expand casino gaming beyond Atlantic City

A New Jersey state senator has introduced a bill that would allow casino gaming at two major racetracks outside of Atlantic City,

Report: Japanese Gamblers Risked \$45 Billion on Illegal Online Casino Sites in 2024

Gambling in Japan remains limited to the state-run lottery, the sports lottery, and parimutuel wagering on horse racing and motorsports. That will change in the coming years when MGM Resorts opens MGM Osaka, Japan’s first regulated brick-and-mortar casino. Japan’s limited gambling market hasn’t prevented millions of Japanese people from gambling unlawfully. A new report from Japan’s Council of Sports Ecosystem Promotion suggests that people in Japan bet 6.45 trillion yen (US\$45 billion) on illegal, unregulated gambling websites in 2024.

Unlike in most legal sports betting markets where private operators run the industry, Japan’s national government possesses a monopoly on sports gambling through its sports lottery. The Sports Promotion Lottery, or “toto,” raises money for the Sports Promotion Fund. The government-run sports lottery, however, limits how much a bettor can risk and therefore win/lose.

That’s caused many millions of Japanese to take their action to offshore sportsbook platforms and apps where better odds, larger bets, and more promotions are offered.

Apollo’s \$6.3 billion acquisition brings IGT back to Las Vegas in major gaming industry merger

Eight casino bidders race to meet deadline in high-stakes New York license contest

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

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

Lotteries Reshaping the Games-of-Chance Industry

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