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MARCH/APRIL 2024

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MATT STRAWN

Chief Executive Officer,
Iowa Lottery

ALSO INCLUDING INTERVIEWS WITH ...

- + **Jay Gendron**
Chief Operating Officer Global Lottery, IGT
- + **Stephanie Weyant**
Deputy Executive Director Marketing &
Products, Pennsylvania Lottery
- + **And Corporate Profiles of the Leaders
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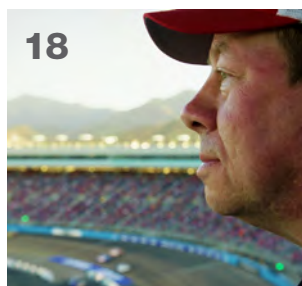
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From the Publisher

2024 began with the event we have attended for 15 years now: the **EL/WLA Marketing Seminar** in early February. Always a great event and this year better than ever with a theme “The Future of Digital Marketing”. The presentations were all about what is happening right now, how the race to the future is already well into its fifth or tenth lap and the case studies for its impacts are being shared now. Digital Marketing and AI are being applied right now to transform the way consumer-facing brands connect with their customers, the way promotions and advertising strategy as well as the content itself is created, and is penetrating every aspect of the way business is conducted and value is added. There is also the largest games-of-chance trade show in the world held during the same week: ICE Totally Gaming. Having been in London for the past 15 years, both ICE and the WLA/EL Marketing Seminar are moving to Barcelona next year, end of January in 2025.

See page 58 for a brief write-up on the EL/WLA Marketing Seminar, and look for articles on some of the most impactful presentations to appear in our next issue, which ties in with **EL Industry Days Salzburg** being held in June. Susan and I hope to see you all there!

For those of you who are reading this issue in Fort Lauderdale on March 12, 13, or 14, Welcome to PGRI Smart-Tech! Thank you for being here and best wishes for having a wonderful conference experience.

What a uniquely fun and fascinating set of interviews we are featuring this month. **Matt Strawn** shares a personal journey that has reshaped his views on leadership and what it means to connect with people as we move into the middle of the 21st century. I’m not sure which came first – my request to Matt for an interview or my request to lead a session on Leading with

Gratitude at our Florida conference. Ditto with our **Stephanie Weyant** interview. A discussion in London about our conference theme The Player Journey Runs Through Digital Lottery led to both a wonderful interview that dives into the most forward-leaning issues and opportunities we are facing, and also a session that focuses on this topic at our conference. Thank you, Matt and Stephanie for sharing, and for the thoughtful vision for how the world is truly changing for the better in this post-pandemic era.

IGT has multiple features in this issue. They all reflect the positive, optimistic vision expressed by Matt and Stephanie. We so appreciate the research into consumer trends and insights from the Foresight Factory that IGT shares with our readers periodically. And **Jay Gendron** gives us the “heard-on-the-street” insights of someone who knows first-hand why we should be optimistic about the future of lottery. We all know that many of the issues we face are universal. The importance of RG, the role of lottery as service to society and good causes, the need to compete in a more crowded games-of-chance market-place, changing consumer lifestyles and shopping behavior and playing preferences, etc. Jay’s global perspective helps us better see the inter-relatedness of things, how we can learn from the way trends and market dynamics are evolving in other parts of the world. We all know there are differences between markets, regulatory and political environments, legacy gaming cultures and player behavior, etc. How much more productive, though, to look at and learn from the commonalities shared by operators all over the world.

The value and insights of **Scientific Games** editorials is based on their global footprint, hands-on engagement with all aspects of lottery distribution, retailing,

game development, marketing, promotion - and their 50 years of experience. Congratulations for your Silver Anniversary. Let’s Celebrate! Their article this month explains how retailing trends provide lots of headroom for Team Lottery to improve sales by maintaining relevance at retail as well as increasing access and purchasing options for the consumer.

Other great features include **Tennessee Education Lottery’s** celebration of 20 years of service to public education, to the people of Tennessee, and to continual sales increases that fund the good causes supported by Lottery.

What a wonderful follow-up article to the amazing **MUSL collaboration with NASCAR**. And what a unique thrill it is for fans to get right into the middle of the action of their favorite sport. And what a thrill it is for Team Lottery to leverage the value of its lottery brands to connect with the huge audiences that affiliate with uber-consumer-brands like NASCAR.

And thank you to **Simon Jaworski** for launching a new PGRI column on consumer research and trends, and applying these insights to games-of-chance and lottery. Simon has contributed many fabulous articles over the years and we welcome this new addition to appear in every issue. He converts speculation and guesswork into evidence-and-survey-based data about how and why player behavior is evolving the way it is.

Best wishes going forward for a fabulous 2024!

Paul Jason, Publisher
Public Gaming International Magazine



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Leading *with* Gratitude

Matt Strawn

Chief Executive Officer, Iowa Lottery



PGRI INTRODUCTION: There's good news and there's great news. The good news is the Iowa Lottery is continuing its winning streak, piling further increases in sales on top of the high benchmarks set by its record-breaking FY 2023 which closed June 30. Iowa Lottery sales increased to \$481.5 million, an 11.3 percent rise from the previous year's total of \$432.7 million. Lottery proceeds to good causes increased to \$108.2 million, up 10.5 percent from the previous year.

The great news is that Matt Strawn is more energized than ever. Diagnosed with cancer in January 2023, Matt underwent intensive treatment and is now happy to have a new lease on life. Recent tests reveal the cancer to be in complete remission. These are exciting times for Matt, for the industry which benefits from his service, and for his family and many friends who are thankful for the grace of God and for Matt's fortitude in the face of adversity.

Matt Strawn is an Iowa native, business entrepreneur, and lawyer whose career in public service and

private enterprise includes serving as a senior congressional advisor, leading a minor league professional sports franchise that he helped bring to Des Moines, and co-founding a highly successful public affairs firm. Matt has served as the chief executive officer of the Iowa Lottery since 2019, is on the executive committee of MUSL (Multi-State Lottery Association), and chairs the MUSL Audit Committee.

Onward and upward to converting life experiences and adversity into insight. One of the most popular Harvard Business Review features of 2023 adds a new audience to the traditional "B2C" (business to consumer) and "B2B" (business to business) models. That's "B2H": business to humans. It's all about connecting with people and inspiring them to action. The B2H approach breaks down silos and the distinctions between internal and external messaging to tap into the universal principles that motivate all of us to care. That's what drives performance and results. And that's what Matt's story is about.

Paul Jason: Let's start with the great news that the cancer you were diagnosed with last year is in complete remission. How has that whole experience reshaped your attitude toward life?

Matt Strawn: My story starts with gratitude, quite frankly. You won't find a more grateful guy walking the streets of Des Moines, Iowa. I'm grateful to be cancer-free and my amazing medical team

for guiding me through this journey. But I couldn't do it alone. I'm grateful for my deeply-supportive family and friends. Outside of those close networks, I'm thankful for Governor Reynolds, my team at the Iowa Lottery, and the Department of Revenue who gave me the professional flexibility and personal support to overcome this disease.

One of the most overwhelming sources of

support came from the lottery community, to include close friends in the industry, fellow directors, and individuals I'd barely or never met before. It's a testament to the character and empathy of the people in our industry.

It's wonderful to hear about that support. And I believe you're also grateful for the impact that your decision to go public with your diagnosis has had?

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M. Strawn: Absolutely, and I respect that anyone in this situation has to make the best decision for themselves and their family. My family and I decided to be open about my diagnosis because it has raised awareness about the importance of getting screenings. Like I told my team and I'll tell anyone reading this, if you're over age 45, please get your health screenings scheduled now.

You mention discussing your diagnosis with your team. Have those experiences impacted how you think about leadership?

M. Strawn: Being transparent about my diagnosis reinforced an important component about leadership: It's okay to be human and show vulnerability. Actually, it's more than okay, it's transformative. By showing that vulnerability, I connected on a different, deeper level with my team. And that connectivity is something everyone craves; people want to be seen and feel that they matter. The whole experience made me realize gratitude was the thread that had really defined my leadership philosophy at the Lottery, which brought me to the whole idea of "leading with gratitude."

at the Lottery has a major impact on people's lives. I shared that message at a public board meeting because I want to infuse this concept of leading with gratitude throughout our entire organization by creating a sense of connection and appreciation.

That story makes me think of Simon Sinek's "find your why." Does that idea resonate with you?

M. Strawn: Yes, I'm a big believer in knowing your why in terms of understanding what motivates you as a leader. But it's equally important to clearly communicate that why so it acts as your organization's North Star. When I hosted my first big annual team meeting, I held it away from Lottery HQ and at a venue in the shadow of Iowa's golden dome State Capitol. This was intentional, as I wanted every Lottery colleague to see that dome as they arrived at the meeting. I did that because that dome is a reminder and a symbol the why: We do what we do to serve the people of Iowa.

Now, five years later, my team knows by heart my refrain from that morning: "We are not a lottery, we are not the lottery, we are the Iowa Lottery." The Iowa

cate the how. That's where leading with gratitude comes in. It's about appreciating your people, your mission, your stakeholders, and the opportunity to serve.

And how can you put those things into practice?

M. Strawn: First, you've got to make sure everybody gets a turn at bat, which means everyone has a voice in the conversation. That doesn't mean that everyone gets everything they want, but it does mean they have an opportunity for input, are invested in the process and have a stake in the outcome. In Iowa, we have been very intentional about broadening the voices around the table by bringing people in at the earliest stages of our business planning processes. That also makes us much more efficient in our decision-making — no Iowa Lottery projects get blown up on the last mile because a colleague wasn't kept in the loop.

We've extended this philosophy to our supplier and marketing partner relationships. We don't view them as merely providing a commodity or service, but rather as an integrated partner. Our gratitude-based approach is that we appreciate their contributions to our shared success and include them where appropriate in our business planning meetings.

It seems like gratitude creates operational benefits by involving a wider circle of expertise. Can it also help navigate the tensions potentially associated with giving more people a say?

M. Strawn: Yes, gratitude helps to lower the silos and lessen the turf wars. It stops people putting their arms around their territory in efforts to keep others out. In our philosophy, everybody has an opportunity to contribute.

Leading with gratitude also diffuses tension with our retail partners. The Iowa Lottery is successful because of our strong relationships with 2,500 retail licensees. Get any grouping of that size, and you know there is also potential for disputes over issues including sales commission levels, bonus structures, and merchandizing space.

Now, take the approach of leading with gratitude. We first show respect to our retail partners. Our senior leaders attend

It's about appreciating your people, your mission, your stakeholders, and the opportunity to serve.

I'm fascinated by that idea. Could you share more about how you put it into practice?

M. Strawn: Well, let me start with an example from the Iowa Lottery December board meeting. The meeting always starts with my CEO report, which is normally operationally driven. But last December, days after returning from my medical absence, I started by sharing a message from an Iowa Lottery player whose child had a terminal disorder.

She had won an experiential prize and was writing to express her deep gratitude for an experience that otherwise would have been unavailable to her and her spouse. Sharing and prioritizing messages like that sets a tone of gratefulness and reminds us that what we do every day

modifier matters because it drives why we conduct ourselves with operational integrity and why we work to maximize revenue for the multiple great causes that the Lottery supports.

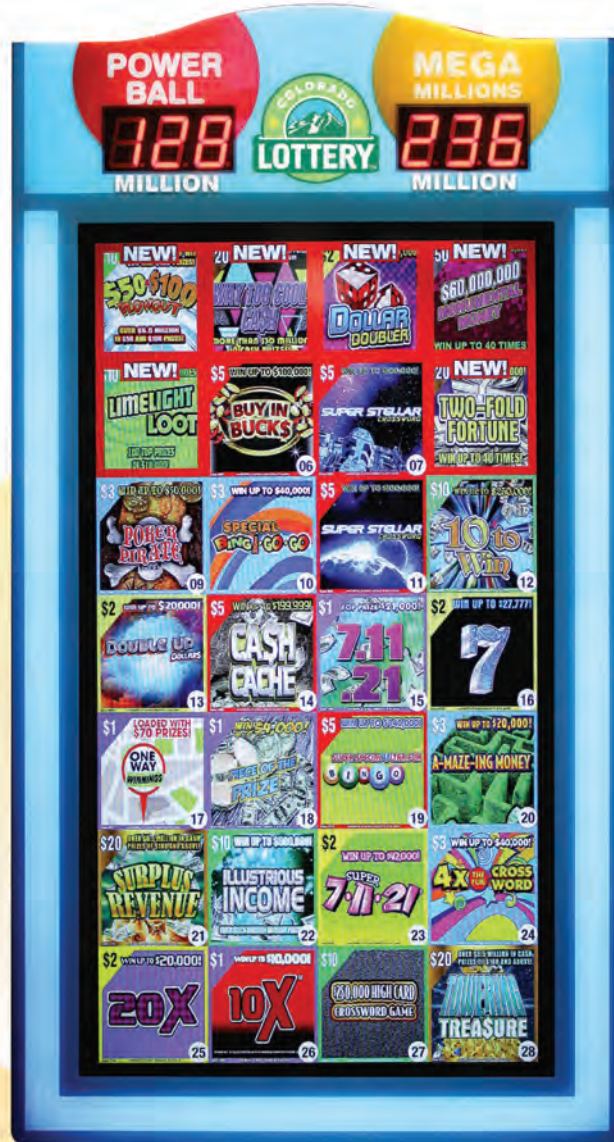
And what's the connection between finding your why, communicating that why, and leading with gratitude?

M. Strawn: It reminds me of Theodore Roosevelt's line, "Voters don't care what you know until they know that you care." That same principle applies to leading an organization. Knowing and communicating your why starts to demonstrate you care, but it's not the whole journey. Leading with gratitude is a more actionable extension of Sinek's principles because once you've communicated your why, the logical next step is to communi-

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THE MORE COMPLEX THINGS BECOME, THE MORE VITAL IT IS TO FOCUS ON THE PLAYER

Stephanie Weyant

*Deputy Executive Director, Marketing & Products,
Pennsylvania Lottery*

PGRI INTRODUCTION: Stephanie has served the Commonwealth of Pennsylvania for 24 years in various communications and marketing roles. She was previously the spokesperson for PA Lottery and its first deputy director of digital marketing. She served in the PA legislature as the communications director of the House Appropriations Committee, before returning to Lottery in 2016 as deputy executive director. Stephanie was the executive lead on the successful launch of Pennsylvania's iLottery program in 2018. Stephanie's perspective on digital lottery and iLottery is informed by this much broader charter to integrate all aspects of the business to coalesce around the player. Stephanie holds a degree in communications from Pennsylvania State University.

Paul Jason: You are best known for your leadership role in the development of iLottery. But you are also responsible for marketing and product development for traditional lottery, and for all channels of distribution. Can you tell us a little about how you've balanced those different aspects of your role?

Stephanie Weyant: My team has grown and works on all aspects of lottery, both retail and online, from the games to marketing, research and digital. That integrated approach reflects the reality that

you won't hear customers talk about traditional lottery versus online lottery - they just play the lottery. Our goal is to create a seamless, friction-free player journey that respects the players' point of view. That collaborative approach has really helped to break down the silos that can separate organizational departments.

I guess lotteries with separate iLottery divisions would argue that approach enables this new initiative to flourish without being constrained by the legacy ideas of traditional lottery?

S. Weyant: Each model has pros and cons, and what works best for a given lottery depends on factors such as their starting point, culture, structure, and the flexibility they have with hiring new staff. The integrated model works best for us. Also, we did not have much choice, as our launch schedule for iLottery was so tight that we didn't have time to hire staff and create a new division. We launched with our existing team, who was excited that Lottery finally got approval to sell online. We drew upon the expertise of our vendor partners Scientific Games, IWG and experienced colleagues, such as the Michigan Lottery.

Integration enables us to look at our product and marketing plans holistically and we can easily do cross-product-line launches and cross-promotions between retail and online. Our goal is to be one Pennsylvania Lottery and not be siloed between traditional and online because our players expect everything to be integrated and seamless.



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Until recently, the players of different games seemed to stay in their own lanes: lottery players didn't typically go to casinos and vice versa. But now casinos are so accessible everywhere, and sports betting has introduced a new category, so should we think of ourselves as competing head-to-head with other gambling options?

S. Weyant: Lotteries generally have a broader player base than other forms of gambling. Most people have played the lottery at one time or another because it's easy, fun, and offers a wide range of games. And when the jackpots get big, they bring in infrequent players who don't normally play the lottery. The big jackpots drive the whole FOMO (fear of missing out) syndrome, resulting in a very broad player base and an almost universal awareness of lottery. That's very powerful, and I don't think that necessarily applies to other forms of gambling – except maybe betting on the Super Bowl.

To address your real question, though, I think lotteries should look for opportunities to collaborate. Pennsylvania law requires casinos to be lottery retailers, and they have turned out to be some of our best retailers. For example, one casino buys Scratch-Off tickets to give to their loyalty club members as rewards. I think there is huge potential to build mutually beneficial bridges with other gaming categories, even in the online space.

where and when the customer wants to engage. But it is also a mission to think like our customers so that their perspectives drive everything we do.

Can you give us some examples of how starting from the players' perspective is creating a seamless experience for your customers in Pennsylvania?

S. Weyant: Currently, although we sell Powerball® online, our Second-Chance Drawings are only for people who played at retail. But from the player's perspective, it shouldn't matter if you buy your Powerball ticket at retail or online, you should be able to enter that ticket into the same Second-Chance Drawing. We are working to enable all Powerball tickets, wherever they are purchased, to be entered into the same Second-Chance Drawing.

Another innovation we expect to launch in Q4 is the Lottery Wallet, which will offer mobile cashing of retail tickets and be fully connected with iLottery, further improving player convenience.

Are you also trying to create familiar images, protocols, or processes across different consumer-facing media like self-service terminals, point-of-sale displays, Mobile and desktop lottery interfaces to generate familiarity and make playing easier?

S. Weyant: Yes, that's partly why we do so many cross-product line game launches. We'll take a licensed property or a theme and run it across different product lines to

and valuable than players that just shop at retail or just online.

Data also shows that, on average, retail sales accelerate faster in states that have iLottery than in states that don't. That may seem counter-intuitive, but enabling players to engage with lottery wherever and whenever they want improves their experience and ends up benefiting everyone, including land-based retailers.

Why do you think that is?

S. Weyant: I think when you have a new online player, they've probably walked past the lottery signs and displays in retail stores for years without really noticing them. But after they've bought online, they're more likely to notice the lottery displays whenever they're in the store, making them more likely to buy a ticket there too.

And we've used some simple strategies to help strengthen the connections between playing online and spending at retail, like having online coupons that can be redeemed in stores, and they have the highest redemption rates of all of our coupons. And the great thing about couponing is we know where those coupons are redeemed. So, we can provide our sales team and retailers with information to say, "Here are how many online players we drove into your store."

Pennsylvania is probably the US's most competitive gambling markets, but despite that, you keep growing. What does that growth say about the potential for different forms of gaming to coexist?

S. Weyant: We operate in a market saturated with gambling options. There are 21 online operators in Pennsylvania, that offer higher payouts than the Lottery, which affects our per capita performance numbers. Our market share of online gambling in Pennsylvania is only 1.4%, but we generate 8% of the net revenues that are turned over to the Commonwealth. So, we are overperforming in profit. And we do keep growing, in double-digits this year, despite the ever-increasing competition.

So, when people ask me whether iLottery can co-exist with online gaming, the answer is "absolutely." Since inception, iLottery in Pennsylvania alone has generated \$400 million in profit to support senior programs.

Our goal is to create a seamless, friction-free player journey that respects the players' point of view.

We used to say "multi-channel." Now we say "omni-channel." Is there a difference beyond just the number of channels?

S. Weyant: I think there is a difference. When you start with the customer at the center, you break down the organizational silos that obstruct the genuine connection we want with our players. Maybe we should call it "omnipresent" as the goal is to shape our presence to align with how the customer thinks, behaves, and wants to engage with the lottery. Omni-channel does mean making products available

spread familiarity and recognition. When we launch a licensed property, players will see it at retail with bonus codes to try the online version.

So, cross-promotions and the retail game-playing experience gives the player a reason to try the online experience?

S. Weyant: Exactly. A goal of our marketing strategy is to take people from online to retail, retail to online, and back again because data shows that omni-channel players are more engaged, loyal,

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2024 NASCAR POWERBALL PLAYOFF LAUNCHES DURING *DAYTONA 500*

Powerball® has jumped back into the fast lane with NASCAR®. For the second racing season, Powerball will captivate audiences as the *Official Lottery Game of NASCAR*. The partnership between the super brands, first announced last year, has already spurred an entertainment synergy and the successful rollout of a new national Powerball promotion in 2023 called the *NASCAR Powerball Playoff*.

Back for its second installment this year, the NASCAR Powerball Playoff will, again, culminate with four lottery players winning a VIP trip for two to NASCAR Championship Weekend™ in Phoenix, Nov. 8-10, and a 1 in 4 chance to win \$1 million during a drawing televised live from the NASCAR Cup Series Championship Race™ on Sunday, Nov. 10.

The Powerball promotion launched nationally this past February, with the premiere of a new 30-second commercial during the *NASCAR Cup Series DAYTONA 500* on FOX.



\$1 million drawing at 2023 NASCAR Championship Weekend

The new TV spot showcases the exhilaration and emotion that unfolded at last year's NASCAR Championship Weekend™, when Stephanie Walker, of West Point, MS, was declared the promotion's \$1 million winner during a drawing held in Victory Lane.

"This year, we're able to utilize footage taken of our players from the first

NASCAR Championship Weekend and the \$1 million drawing in Victory Lane to showcase the raw emotions and reactions of the players involved. This valuable footage also allowed us to reignite this promotion," said Drew Svitko, Powerball Product Group Chair and Pennsylvania Lottery Executive Director. "We're excited to offer our players this once-in-a-lifetime

opportunity to experience NASCAR Championship Weekend first-hand, in addition to the chance of becoming a millionaire on the spot!"

Twenty-five lotteries will participate in this year's promotion, with the Idaho Lottery and Maryland Lottery joining the lineup for the first time.

The Powerball promotion will begin at the state level with lotteries activating in-state contests and second-chance drawings throughout the spring and summer to form a national pool of entrants. At the end of the NASCAR regular season, 16 semi-finalists will be drawn from the national pool to advance to the Powerball Playoff drawings, beginning in September.

The Powerball Playoff drawings are a series of elimination drawings that mirror the elimination rounds of the NASCAR Playoffs™. As the playoff field of drivers is reduced, Powerball will reduce its playoff field

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RACE TO \$1 MILLION

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EXAMINING THE GAME PLAYING AND SOCIAL TRENDS OF AMERICANS

Simon Jaworski, Founder & CEO, Lotto Research

35% of 18-34 year old Americans have never bought a Powerball ticket. That's even with a \$2bn Powerball jackpot less than 16 months ago. Yet more than 50% of the same age group has placed at least one bet on sports in their lifetime.

In fact, past year sports betting among the youngest age group is now at 37%, just 3% points behind their annual play of Mega Millions. This is just one of the major trends happening within the 47 Lottery jurisdictions in the United States of America right now of which the data is based.

TikTokToe. The future players have very strong App-etites.

If you think these 18-34 year-olds are too busy watching YouTube videos and Instagram Reels...then you would be correct. Instagram is now this youngest group's second most popular social media app, with more than 72% using it frequently, closely behind the 76% using YouTube. According to my teenage boys Ethan and Ashton, Insta "Reels" is where it's at. TikTok comes in a strong 4th place at just short of three out of five

youngsters in the Millennial/Gen Z crossover age group, a little behind Facebook still at 67% (which is still where a majority of 35-54 year-olds spend their time).

However, the endless time spent staring at their devices doesn't preclude the 18-34 year-olds from actively gaming on their iPhones and Androids. Au contraire, 32% claim to have played some type of Lottery game online since early 2023, whilst 31% has gambled online (with Casino style game) in the past year, significantly higher than the 35-54 year old age group (who are still at impressive 29%).

Fantasy sports still remain prominent in the portfolios of the younger gamer, with almost a third having played in at least one league annually, whether it be Fantasy Football, Baseball or even Basketball (and a note to you dear reader, I play them all!).

Not everyone has Very Little Tolerance for those 'games of skill'

This is not to say that other forms of gaming and gambling that entail

the player actually leaving their house, bedroom or even basement, aren't thriving. 13% of Americans have played standalone Video Lottery Terminals (VLTs) in the past year, while 18% claim to have played a Video terminal/Skill

LOTTO RESEARCH



machine, which are one of the many banes of existence for the Lottery industry. Both these skew slightly younger, but 24% of that all important 35-54 year-old age group has also chanced their arm at the "skill" machines.

Casino visits are also getting back close to pre-COVID levels, which saw past year visits as low as in the early 20% range in 2021, and are now above 38%, driven primarily by both 35-54 year olds (44%) and the Hispanic population (46%).

Eyes down for a full house in the Bingo renaissance.

The biggest discrepancy in terms of the gender breakouts is the 37% of women who have played Bingo in the past year, significantly higher (some 9% points) than their male counterparts. Contrary to the Bingo in what my mother would classify as "the good old days", Bingo has become a young person's game, with almost half of all 18-34 Americans to have played some form of it in the past year.

Bingo is also a fond past time of African Americans (41%) and



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Hispanics (46%). Cheektowaga, New York, with one bingo hall for every 6,800 residents, is believed to have the highest concentration of bingo halls in the United States, but with a proliferation of online Bingo derivatives, plus the likes of Keno and Quick Draw (Bingo in disguise), the popularity of the fast paced numbers draw game seems only likely to increase.

And if you aren't aware of the British bingo phenomenon of calling out catchy phrases with the Bingo numbers, we'll leave "Two fat ladies, 88", "Kelly's eye, number 1" and "Two little ducks, 22" for a conversation over a nice pot of tea, or a pint of Boddingtons, at the next PGRI conference in Fort Lauderdale.

Instants, scratching that itch every week.

Weekly scratch play still leads the gaming industry with 18% of Americans having bought in the past week, driven by 35-54 year-olds (21%), and even split between male and female players (both just over 18%), and even those 55+ are still heavily involved at a 16% purchase clip.

Insert somewhere around here
Image_Jaworski_Article_3

Monthly spend on scratch is around

\$35 a month, although the youngest group (18-34 year-olds) spend the highest average amount among the demographic breaks at \$63, almost double the average level.

Hey big spenders...

Casino play has the highest average spend of all the regular gambling types in the USA, and it is driven by the oldest age group (averaging \$200 a month), and the Asian/Pacific Islanders at \$246 per month. It also skews higher income with those earning more than \$100k per year spending just over \$204 on their trips to play craps and roulette.

Mega Millions and Powerball spend averages around \$33-\$34 dollars per month, definitely on the lower end,

but this accounts for a lot of the older crowd who are spending around \$22 per game (so basically with 8 Mega draws a month, and 12 Powerball draws, somewhere around the minimum \$2 per play per draw).

Meanwhile, at the higher end, both Online Gambling and Sports Betting average more than \$90 per month per player, driven by younger players and also Asians.

Stream a little stream of you

57% of Americans now stream their televisual entertainment in 2024, with Cable usage now down to 39% and declining. Netflix is still the market leader in terms of streaming services at 64% (79% among 18-34 year olds), with Amazon Prime at 59% and Hulu at 46% (Hulu again skews younger with 64% of 18-34 year olds subscribing).

So what does this all mean?

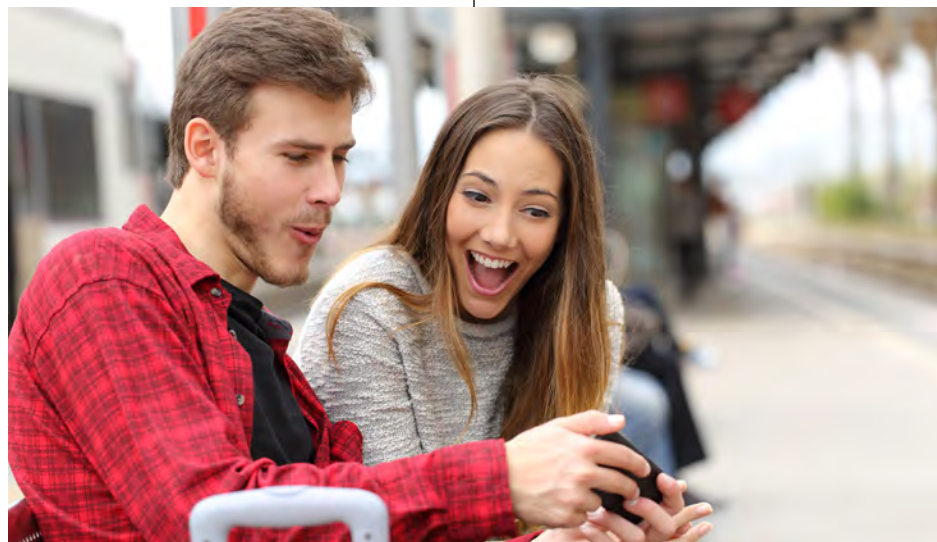
Americans are spending more time on their smart phones (4 ½ hours every single day on average) than ever, screen time is paramount and it is only going to increase, so the fight for their time and money is well and truly on.

Incidentally, the Florida Lottery has 110,000 Instagram followers...
#lotteryleader

Trust me, I'm a researcher. ■

*Simon Jaworski, Founder & CEO,
Lotto Research*

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(609) 558-1019



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2024 Retail Opportunities

Responding to Trends and Ensuring Relevance with Lottery Retailers

It's no secret in our industry that the lottery category lags behind other consumer products when it comes to how games are accessed and purchased at retail.

Despite \$348 billion in annual retail sales globally, conversations at industry conferences seem stuck on replay. Every year, the same challenges are rehashed on panels, commiserated during coffee breaks and debated at after-hours gatherings. Meanwhile, time ticks by with minimal movement on adapting to consumer trends which are racing forward faster than ever.

With the bulk of lottery revenue currently generated at retail, what's really happening out there? Are lotteries and their partners working with current retailers in ways that will keep their products relevant in changing retail environments, the new generation of consumers – and the next generation of players? Are they growing consumer touchpoints by onboarding non-traditional retailers?

But there's an elephant in the room...most government lotteries are unable to invest significantly in the technology needed to modernize their business. More than ever, their technology partner's ability to support rapid and cost-effective migration to new retail technologies is the difference between good performance and great performance. And that adds up to multi-millions of dollars.

While the holiday season was still strong despite the economy and low but slowly rising consumer confidence, it's important for lotteries to identify and focus on retail opportunities in 2024. To do this means getting inside the minds of the retail community to understand the trends they see on their horizon and align lottery efforts for maximum results.

New & Redesigned Stores

The National Retail Federation predicts that the average U.S. store size will continue to shrink. With shoppers' waning attraction to mega-sized stores, smaller-footprint stores will continue trending, putting counter and display space at an even greater premium.

New and redesigned stores are playing a significant role in optimizing the customer experience. And shopper expectations are high. Retailers are balancing the in-store experience with the transaction, which translates to purchases and loyalty.

Convenience stores are redesigning and re-engineering how and where merchandise is displayed – including lottery scratch games. With retailers welcoming more technology into their stores, new tech-driven layouts are designed to offer convenience and a seamless path to purchase.

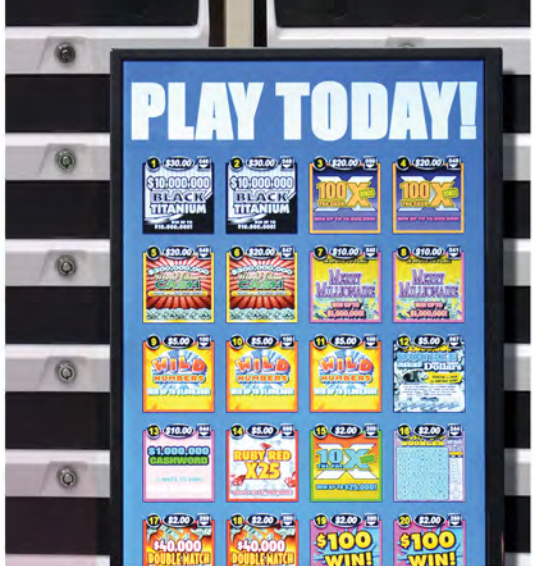
"Both retailers and players require real-time information to achieve that frictionless shopping experience," said **Michael Martin, VP of Retail Solutions for Scientific Games**. "We recommend SCiQ digital menu boards to streamline and modernize space in the store and engage both retailers and players with dynamic real-time information such as new games, next available ticket number and key promotions."

Progressive Grocer reported that while Gen Z may be leading the way, shoppers across demographic groups appreciate the convenience of self-checkout. A survey of 4,000 shoppers in the U.S. and UK found that two-thirds of survey respondents said they would choose retailers that offer self-scanning at checkout.

Why the gravitation to frictionless buying? Speed. More than a third – 34% – of those polled also noted they don't like to stand in line for regular checkout and 33% said that they appreciate less interaction with people. Not the best stats for clerk checkout, particularly during a Powerball run.

And with the shortage of retail workers not predicted to let up in 2024, self-service is here to stay. And that means both self-checkout and self-service vending machines.

"Consumers aren't willing to tolerate an inconvenient purchase experience. We've got to meet them where they are with cashless sales at both self-service and self-checkout with proven solutions to sell lottery products, or risk losing players," said **Joe Fulton, Director of Payments and Commerce for Scientific Games**.



AI is Everywhere

The ChatGPT app is officially the fastest-growing app in history, gaining an estimated 100 million users in two months – growth that took Instagram two and a half years and Facebook four and a half years to reach.

Along with consumers, retailers are using AI and investing in it to improve in-store efficiencies and processes. The National Retail Federation believes AI has sparked a transformation of retail and it's driving changes to the customer experience.

The NRF shared a new study conducted by IHL Group revealing that retailers that have already embraced artificial intelligence and machine learning technologies are achieving 2.3 times growth in sales and 2.5 times growth in profits for the year 2023 when compared with their competitors. And the trend is projected to continue in 2024.

From the retailer's point of view, AI helps them make faster, more accurate decisions when it comes to inventory management. They're also using it to follow shopper trends and tweak store layouts based on traffic patterns captured from in-store camera data.

"AI has supercharged our *PlayCentral Powered by SCiQ* lottery vending machines. Imagine personalized game suggestions and machine-based learning for inventory delivery so the retailer never runs out of product," said **Steve Beason, President of Digital and Sports Betting for Scientific Games**. "AI can even predict maintenance issues and prevent fraud. By making *PlayCentral* smarter, engaging and trustworthy, you'll sell more games and keep customers coming back."

One major benefit of AI is it's helping retailers shape the customer's journey and create a more personalized experience.

Personal Connections

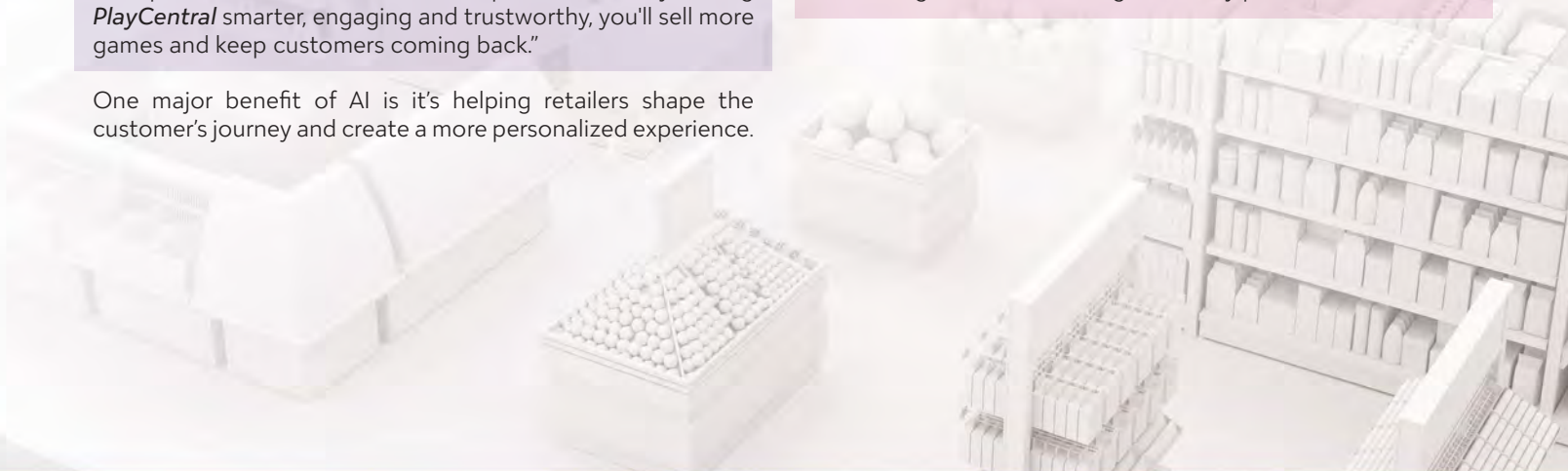
Everyone knows that communications from retailers are getting more personal and more real-time. According to NRF, stores are investing in tech to deliver personalization and optimization, blurring physical and digital with apps that provide a personal shopping experience.

Customers might engage with a brand online, and then visit the physical store to check it out in person. In some cases, retailers might recognize a customer as soon as they click on their website or enter a physical store. All confirming that one channel can influence another channel.

Interestingly, *Forbes* shared research that 91% of shoppers want texts from brands they like – and there's a whopping 98-99% open rate.

Recommendations based on browser history should be optimized to increase loyalty. Targeted communications rather than general marketing messages help retailers connect to loyal customers and keep them engaged.

"Creating a unified customer view that incorporates all player touchpoints across all channels and product verticals continues to become more critically important, and that's exactly what CRM programs deliver," said **Merv Huber, VP of Digital Growth for Scientific Games**. "Players demand consistently personalized engagement, not just in the marketing messages they receive but also in the experience they receive while interacting with retail and digital lottery products."





Social Commerce

Consumers are being entertained and shopping on social media. They're exploring, making decisions and purchasing all on the same social media platform.

A recent *Forbes* article indicated that social commerce is expected to grow 28% annually. *Forbes* predicts that 2024 will not be about paid advertising, as much as authentic moments the customer wants to see, which end in a "commerce moment". In fact, 98% of customers surveyed by Influencer Marketing Hub plan to use social purchasing at least once this year, up from 68% last year.

"The traditional shopper journey was disrupted years ago by consumers moving between retail and online for many kinds of purchases. U.S. lotteries are still in the infancy stage of maximizing that journey, yet now face the added complexity of social commerce. The ability for consumers to seamlessly purchase, in-the-moment, from a brand touted by influencers they trust, is here to stay. Lotteries need to harness this power," said **Jennifer Welshons, Chief Marketing Officer for Scientific Games.**

Retailers have the opportunity to partner with social media content creators – like the lottery – or create content themselves. For states where iLottery is permitted, opportunities for social media collaboration with retailers offer revenue opportunities. Where games are not yet sold online, retailer collaborations on social media provide additional reach for brand visibility.

Sustainability Skepticism

With the majority of consumers considering sustainability when they shop, it's top of mind for retailers. Many have incorporated sustainability into their daily operations. In 2024, *Forbes* believes they'll go deeper with their supply chain and manufacturers to keep their green commitments.

Forbes predicts that 2024 will bring "green fatigue", with skeptical consumers calling out brands who claim to be green but aren't showing them "real actions" – what they're doing beyond harming the planet. They want to know that the companies they purchase from are working on climate solutions and restoring damage already done.

"We aren't just talking the talk, we're taking real steps to incorporate sustainable practices within our operations and entire value chain to minimize our impact on the environment," said **Andrew Jackson, VP of Environment, Social and Governance for Scientific Games.** "This means retailers can rest assured that when their customers scratch an instant game from Scientific Games, it has been produced sustainably."

And like all sustainability efforts, communication is key. This means listening to what consumers want and demonstrating a commitment to continuous improvement beyond basic measures.

Lotteries' continued success at retail will come as a direct result of aligning their advancements with those that the retailers themselves are already experiencing. Change is never easy but will certainly make for more interesting – and productive – industry conversations.

Susan Reda. "7 Retail Industry Predictions for 2024", National Retail Federation, January 3, 2024, <https://nrf.com/blog/7-retail-industry-predictions-2024>

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Catherine Erdly, "Four Major Trends That Will Shape Retail in 2024", *Forbes*, January 26, 2024, <https://www.forbes.com/sites/catherineerdly/2024/01/26/four-major-trends-that-will-shape-retail-in-2024/?sh=7c61901b64a5>

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20 Years of Winning for Education—and So Much More

The Tennessee Education Lottery Corporation Reaches a Major Milestone in Marking its 20th Anniversary



The Tennessee Education Lottery's (TEL) impact on education in the Volunteer State has been nothing short of phenomenal. Just consider: The number of Lottery-funded scholarships and grants could fill the University of Tennessee's 101,915-seat Neyland Stadium in Knoxville to capacity for each year since the TEL's launch 20 years ago—in other words, more than two million such awards. Even from Day One of ticket sales on January 20, 2004, the Lottery exceeded expectations, having started three weeks earlier than anticipated and netting an additional \$30 million for education programs such as scholarships and grants to higher education institutions and enriching after-school programs for those attending K-12 schools.

"The primary vision behind the Lottery was that it would help keep the best and brightest minds in the state and assist those who otherwise might not be able to

afford a higher education," says industry veteran Rebecca Paul, President and CEO, who lead the launch of the TEL as well as that of the Florida and Georgia lotteries.

"College graduates tend to reside in the area in which they graduated, and the goal was to keep that talented workforce in the state. At the same time, we provide a source of entertainment, prizes for lucky winners, commissions for our retailers and so much more."

The numbers are impressive—more than \$7.2 billion raised for education in 20 years—but that's just the tip of the iceberg in describing what the TEL has meant for Tennesseans.

Success for Students

What started with five Lottery-funded programs in the fall of 2004 has blossomed into the 15 programs of today.



College sporting events are a prime opportunity for raising awareness about the funding raised by the Lottery. Here, Rebecca and a Board member present a ceremonial check at the University of Tennessee to symbolize the Lottery's milestone of crossing \$1 Billion raised for education in 2007.

This expansion is solely based on the heady success of the TEL, which has grown gross revenues an average of 5.2% annually since its first full fiscal year. Ongoing surpluses have given the state's legislature the ability to analyze and expand the programs, which now fund educational

awards from HOPE Scholarships to Tennessee Promise, which can provide a tuition-free two-year program at a community college. There are also awards for those with intellectual disabilities, veterans, and non-traditional students aged 25 or older. There's even an energy-efficient schools initiative that has disbursed more than \$102.5 million in energy efficient grants and loans to public K-12 schools.

"Everyone who is part of the TEL's 175-plus dynamic team is proud of the work we do and



TEL employees join in marking milestones, such as when the Lottery crossed over \$2 billion raised for education.



the difference we've made," says Ms. Paul. "Some TEL staff members volunteer to be mentors to students who are pursuing a Tennessee Promise scholarship, and we also created the TEL Career Closet to allow employees to donate gently used business attire to college students to help them prepare for a professional career. We are truly committed to our mission of supporting education in a variety of ways." The Lottery frequently hears from beneficiaries and shares some of these stories ("TEL Your Story") on its website to spread the message that dreams can become reality. "The HOPE Scholarship has given me the opportunity to pursue my dreams, plus I have the chance to inspire others to attend college," shared a political science major at Fisk University in Nashville. There's an eagerness to tell such stories: The TEL heard from a large group of award recipients during a recent outreach campaign. These beneficiaries represented both students and graduates, the latter having secured positions in areas such as healthcare, diesel mechanics, human resources, education, advertising, administration, insurance, sales and marketing. Others shared that they were

continuing their education by pursuing an advanced degree.

"We also run beneficiary advertisements to raise awareness about the opportunities the TEL allows for, offer gratitude for those who support the Lottery, and congratulate those who have earned an award," says Ms. Paul. Such was the case with the 20th anniversary, which was a fitting springboard to mark the more than two million Lottery-funded scholarships and grants awarded to Tennessee students during that time.

Another creative and unique educational initiative is the TEL's own Wanda Young Wilson Internship Program, which provides professional training and entry-level work experience to students attending the state's Historically Black Colleges and Universities. The summer program has been operating since the first year of the TEL's launch and was named after the Lottery's former general counsel and chief of staff, who has since retired.

Others Win, Too

Educational beneficiaries and their families aren't the only folks who win with the TEL. Players have won nearly \$20 billion in prizes from a wide variety of instant and draw-style games, and retailers have earned nearly \$2 billion in commis-

sions. Stories from prize winners run the gamut. From a lucky morning stop for a biscuit or gasoline to elated co-workers who play together and can't wait to share their prize, excitement fills the Lottery's four claim centers daily. And that's in addition to the fun atmosphere games and winners bring to the network of more than 5,000 retailer locations statewide. "Winners tell us they will pay off mortgages, donate to charitable organizations, make home improvements, save for the future, help family and make other purchases. Not only are they benefitting, but so too is Tennessee's economy," Ms. Paul notes. The Lottery also assists several State agencies by withholding any state-owed debts such as child support from Lottery winners of \$600 or more and remitting those funds to these agencies. By the end of Fiscal Year 2023, more than \$6.2 million had been returned to the State.

Dedicated to Corporate Social Responsibility

There's even more to know about the value the TEL brings, as the organization is committed to a variety of Corporate Social Responsibility programs (CSR). Impact areas include responsible gaming (RG), community engagement, diversity and

Continued on page 56



Winners, winners and more winners!

A Global View on Lottery Growth Opportunities

Jay Gendron, IGT Chief Operating Officer Global Lottery



PGRI INTRODUCTION: Since December 2017, Jay Gendron has been the Chief Operating Officer of Global Lottery at International Game Technology (IGT), ensuring that IGT's resources, products, and services support the diverse and unique needs of Lottery customers around the world, excluding Italy. His role includes leadership of lottery operations and customer relationships, instant ticket printing, and global field operations.

In October 2015, Jay was inducted into the Lottery Industry Hall of Fame at the North American Association of State and Provincial Lotteries (NASPL) Annual Conference in Dallas, Texas.

Since joining IGT in March 1995, Jay has held various positions in Government Relations, Lottery, and Video Lottery sales. Prior to stepping into the position of COO, he served as Senior Vice President, North America Lottery, from 2014 until 2017. These positions of increasing responsibility over his 29-year career provide Jay an incomparable understanding of lottery operations to better serve the company's worldwide customer base.

Jay is a member of IGT's Global Diversity, Equity, and Inclusion (DEI) Council, and the co-executive sponsor of ACE, one of seven Employee Impact Groups at IGT. ACE stands for Advancing Cultural Education, whose primary purpose is advancing people of African descent through recruitment, professional development, and networking within the company and the gaming industry.



Jay recently shared his thoughts on lottery opportunities for the year ahead and other current topics:

Paul Jason: Your role expanded six years ago from managing sales and operations in North America to managing them worldwide. What have you observed about the industry during this time?

Jay Gendron: Europe is far more advanced in the interactive space and cloud computing. The lotteries face similar challenges to those in the U.S. with illegal lotteries, plus they are facing an increase in commercial operators especially in the digital space, as well as challenges due to restrictions on consumer advertising and the continued challenge of "How do we continue to grow responsibly in an ever-changing gaming environment?"

Since Covid and the significant growth in the digital space, the priority for lotteries is to know their customers and provide appropriate content that competes with the aggressive commercial operators and retains the core of responsible gaming.

International customers also realize that retail remains important, and they need to strike the delicate balance of building their digital sales while maintaining their strong retail sales, which they are accomplishing with innovative omnichannel offerings.

What opportunities do you see in the field today?

Jay Gendron: From a global and holistic viewpoint, I see the opportunity to accelerate growth and technology innovation via advances like the cloud. Other highly regulated private and public entities — as well as government services — have migrated to the cloud to enhance security, improve scalability when demand requires it, and ensure that they always have the latest and greatest software updates available. Lotteries also need to be prepared and positioned to do the same.

We're taking a multi-phased approach: Where cloud makes sense, we're moving those applications to the cloud right now. For instance, wherever we anticipate a dynamic demand, where we don't control the volume of the activity that will occur, that's a priority for cloud. If you think about the retail network, for instance, the number of retailer touchpoints is fixed. That's a lower priority for coming onto the cloud than, say, a player-facing website. On a jackpot night, suddenly a large volume of players wants to check their numbers to see if they won. Accordingly, our approach is that all internet-facing applications will be the first wave to migrate to the cloud — and, in that respect, IGT is cloud-ready now. IGT's Remote Game Server (RGS) for eInstant content — our fastest growing cloud product — is live in the cloud for our U.S. customers in Georgia, Kentucky, and Rhode Island, and internationally in Belgium, Italy, Lithuania, Norway, and Poland.

With regard to iLottery, we have already migrated to the cloud all our eInstants content and digital draw game management. Our digital-lottery platform has already been deployed with Switzerland's Loterie Romande and Poland's Totalizator Sportowy.

In the next wave to the cloud we migrated

IGT's "wizards" — Learning Wizard, Retailer Wizard, Sales Wizard, and Performance Wizard, IGT's data and analytics platform — and AnyWhere, our API gateway. Having completed this work, we are now moving to migrating the lottery central system and applications. It will be truly groundbreaking when we get our core software operations in the cloud. We're not there yet, but we are moving toward that horizon.

As in other industries, lotteries are highly concerned about cybersecurity and want to protect against hackers gaining access to their systems. How does IGT approach security?

Jay Gendron: When a cybersecurity attack happens to one lottery, others are rightly concerned. Cybersecurity is something we take very seriously. We monitor closely what happens in our industry, and especially with our customers. Any attack has the potential for similar impact on our operations. As a result, we monitor published security incidents, the root causes if they are made known, and intelligence we can gather from the dark web regarding that or related attacks. Using that information, we can ensure that the controls we have in place, whether technology or process, will successfully mitigate any potential for that event to occur for us. In general, information security controls are put in place to minimize the effect of any successful attack.

Understanding that no company can prevent an attack, especially given the ever-evolving threat landscape, IGT places a great emphasis on early detection, alerting, and response. This positions the company to act with speed to contain and mitigate any potential adverse impact, should an attack occur. Layered security with automation is key to this strategy, and having the people in place to use that telemetry effectively is of paramount importance to the company.

What's your point of view on growth in the instants category, particularly in the U.S.?

Jay Gendron: The industry has seen unprecedented growth particularly with instants and multistate games in recent years, even during Covid, when people not only continued to play, but lottery also attracted new players and player demographics. The importance of the digital channel also came into focus as a frontline for attracting and communicating with players, even for lotteries that can't offer sales in that channel.

The resulting record-setting growth has reset the bar higher — and, as often happens, the industry's success also presents a challenge: continued sustainable growth.

I think many lotteries still have opportunity to diversify their price point mix — by this, I don't necessarily mean increase their price points, but optimize the mix. For lotteries that offer iLottery, there's a chance to cross-promote and offer omnichannel content and games across retail and digital channels to continue to expand and diversify the player base.

Some lotteries still have opportunities to expand distribution — whether through self-service or by engaging with those corporate chain retailers who are increasingly innovating within the lottery category. Walmart is a prime example — IGT started working with Walmart more than a decade ago with one pilot in Florida, and that partnership and relationship has not only grown, but has seen Walmart bring its own point of view to the category — in how they use data to automate different aspects of the business to improve execution, reduce labor hours, and improve overall performance. We're proud to have been a catalyst, working with that team in its efforts to advance the industry in collaboration with U.S. lottery partners.

We recognize that staying at the forefront is possible because we're able to work with forward-looking customers with whom we can innovate. We continue to develop and introduce new ways to advance in-lane sales, and we are engaged in multiple pilots with retailers in Texas, which we think have great potential for adoption by others. We also maintain our commitment to and involvement in advancing the NASPL API, and as that technology progresses we have complementary solutions that can enhance and improve the experience for players and retailers, such as our LotteryLink in-lane solution, which we previewed at the most recent NASPL conference. LotteryLink enables retailers to sell lottery games on their point-of-sale device without the need for programming.

Do you see similar opportunities on the traditional draw-based game side?

Jay Gendron: We're excited about the Mega Millions game change to \$5 in April 2025, as it will have an embedded multiplier feature and higher jackpots. We've seen this strategy work very well with in-state Lotto games in Colorado, Florida, Indiana, and

New Jersey, and are looking forward to seeing it on the national level.

With regard to the multistate games, including Cash 4 Life and Lucky for Life, what strikes me is the importance of having a plan and continuing to introduce new games and enhancements, work that IGT has been involved in. Going back to about 2010, almost every year there's been a multistate innovation of one kind or another. The industry has benefitted in recent years from great jackpots and momentum, but we can't rely on that, and it's great to see that there's renewed discussion and innovation. We encourage more discussion and collaboration to enable innovations to be planned over several years in advance, so lotteries can know and integrate with other game and/or portfolio changes.

We are supportive of the discussions around merging the two games Lucky for Life and Cash 4 Life into one larger national product with increased brand awareness and a \$1 million per year for life top prize to advertise. This opportunity could lead the way to additional states launching the successful Doubler add-on to the new combined game, which has proven to be a solid performer in the New Jersey market on Cash 4 Life. There is also a current opportunity for more lotteries to add Double Play as an add-on option to Powerball. Currently, 22 jurisdictions offer the Double Play option on Powerball, with an average play-through of 15.3%. We look forward to more discussions with both groups to move that initiative forward.

And, as lotteries are looking to plan the Mega Millions change, they're also looking at other portfolio changes that are jurisdiction specific. What are their other windows? IGT's Cash Pop draw-based game, which has been a breakout success, fits into this category. Cash Pop continues to have successful roll-outs, with the most recent being in Washington state in October 2023. The next IGT customer launch is scheduled

for Michigan in April 2024, and we are very excited about the licensing of Cash Pop to the Maryland lottery with a launch planned for May 2024. With the multistate game changes not slated until 2025, we're happy to work with customers and non-customers to help facilitate 2024 launches.

How else is IGT demonstrating its commitment to customers through technology innovation?

Jay Gendron: In the past year or so, we've introduced the industry to OMNIA™, IGT's holistic, end-to-end omnichannel solution. It comprises all the products and solutions a lottery needs to operate in an omnichannel, player-centric way, and is not only comprehensive but highly configurable to suit individual lottery and player needs as they evolve. And, for lotteries that are not regulated to sell online, the Connected Play functionality within OMNIA modernizes the retail environment with convenient, digitalized player journeys, bringing the in-store experience in step with contemporary consumer expectations and paving the way for the time when a lottery can offer online sales.

Omnichannel games and play is a hot topic – lotteries who can do so want to offer the same games to players via any device or channel. We're supplying lotteries with the opportunity to offer the fun of players' favorite games in store and via digital channels with a variety of omnichannel games – and IGT was recognized in February this year with the IGA Lottery Product of the Year Award for our omnichannel game portfolio.

Customers are embracing these new possibilities and technologies. I mentioned Poland earlier as the first in Europe to deploy iLottery in the cloud. We've also supported Totalizator Sportowy in launching the first Fast Play games in Europe and have been working with them on another groundbreaking omnichannel deployment that we presented at the EL/WLA marketing seminar.

Beyond this, we recognized several years ago that the system for producing instants was ripe for reimagining and introduced two instants category-changing innova-

tions: Infinity Instants™ games and IGT's patented, blockchain-enabled NextGen Security process — a new and superior game-programming platform and security process that can and is being used for any instant game, not just Infinity games. Now, with the combined capabilities of our NextGen game-programming platform and Infinity Instants digital printing platform, we can provide players with new, highly engaging play mechanics that can't be replicated with traditional printing technologies. With these new capabilities, we're starting to introduce into the market all-new game mechanics, such as Linked Wins for Infinity Instants.

Another recent, successful launch demonstrating how these combined technologies give us new means to innovate is the 12-scene game, Ghostbusters™ with Infinity Instants, developed by IGT specifically for the Michigan Lottery.

And, as discussed, the coming year will see further expansion of our Cash Pop draw-based game and more new product and game launches to keep driving the lottery category forward.

The result of IGT's investments over recent years is that we have been able to add value for lottery customers and players with entirely new propositions. We're proud of these advances and excited to bring to market new innovations that make more possible for customers, players, and the industry. ■



their big events, our emerging leaders join theirs on development programs, and we strive to understand issues from their perspective.

Forming these connections has also helped them appreciate Lottery's value proposition as a way of generating foot traffic and in-store incremental income. We've seen retailers' attitudes change on the acceptance of self-service vending kiosks while still leaving tickets on the counter. We've seen greater acceptance for testing digital display boards. And, we've been able to do customized retailer-specific prize promotions.

You can see the approach of leading with gratitude has been successful with our retail partners because sales figures don't lie, and our partners are on track for another record for commission in fiscal year 2024.

Have any other factors helped to drive that success with retailers?

M. Strawn: An outstanding factor has been becoming a significantly more data-driven organization, especially because we've equipped our field reps and regional sales managers with actionable data that helps to manage pushback. For example, over 80% of Iowa Lottery retailers took our \$50 scratch ticket at launch, which I believe was an industry high at the time. That happened, in part, because we had the data to show them this model would perform the best.

But even the best data is useless if you've not built trust. Without demonstrating respect for your partners' issues, you won't even get an opportunity to share your insights and numbers. It's about understanding how we can both meet our objectives together.

Exactly. But what about within your own organization, how does leading with gratitude help to build trust there?

M. Strawn: When I joined the Iowa Lottery, I was fortunate to come into a high-performing organization with a tremendously dedicated group of Iowans who were setting records every year. I came from outside of lottery world, however, so I had to build trust. Meanwhile, we faced external challenges related to the rise of sports betting and a challenging economic

When you enlist the action-focused power of enthusiasm, with the often unexpected, yet powerful impact of gratitude, everything is possible. Who doesn't love that?

environment. We had to think about how to evolve. Aspects of that evolution were not without some initial internal skepticism, such as whether our retailers would accept more self-service machines and whether player demand existed for a \$50 scratch ticket. There were also hesitations around bringing lottery to Walmart stores in our market.

I started from a position of gratitude and appreciation for those in-house lottery experts, and with that, we developed trust. At that point, they were prepared to look at other states' data and industry research and say, "Okay, let's give this new approach a try." When that worked on one new initiative, it became, "Okay, let's try another one." The foundation for all of that was gratitude.

Like every industry, lottery faces challenges in retaining talent. Can leading with gratitude help to address that?

M. Strawn: Yes, it can be a vital part of an organization's toolkit. It's a philosophy that works for both your seasoned staff who deserve to be respected and for your younger staff who want to know the organization's values and feel personally seen and heard.

Leading with gratitude also means being prepared to share more and democratize information across the organization, which helps inspire and empower your team. And I'm proud to say that my team's performance metrics demonstrate how they are responding to this approach by generating record sales that support good causes.

Absolutely, you had a record-breaking FY 2023, and I believe you're on course to beat that?

M. Strawn: From FY 2022 to 2023, sales were up 11.3%, and I'm proud we're continuing on a growth trajectory. For the

first six months of this fiscal year, we're up 5.5% year over year, so we're even ahead of last year's growth. Instantos are up a little over 9% year over year. And even in the Lotto category, we're still about 1.5% ahead of last year. Adding the Powerball double play has helped incrementally lift sales.

Has anything else contributed to your great results?

M. Strawn: There's a continuing evolution of the Lottery's product portfolio. We recently completed a comprehensive third-party study of our entire product portfolio and prize structure value proposition. That data will drive where we're going when it comes to the future optimal mix of all our products.

We continue to see maturation in other sales areas. We're now in year two in 51 Walmart Supercenters but we're already seeing tremendous growth. During the next two years, we will again nearly double the footprint of self-serve vending kiosks in our marketplace, particularly in the convenience store space. I am hopeful, by Q2 of 2024, we will go to market with Abacus-system-enabled Powerball and Mega Millions tickets sold in-lane in at Iowa grocery stores.

And how did you respond to the introduction of sports betting in Iowa?

M. Strawn: We made a philosophical shift in our marketing by pivoting to experiential prizes with an Iowa tie. We significantly invested in relationships with the Iowa State Fair, in-state collegiate sports, and major concert or entertainment venues. Effectively, if there is a major cultural event happening in Iowa, your Lottery is going to give you a VIP experience that money can't buy and no one else can deliver. That has really enhanced our value proposition vis-à-vis other options in the state's crowded gaming market.

Continued on page 39

Where Do Consumer Trend Lines Point in 2024?

It's hard to believe that a little more than a year ago most of the world had never heard of an AI tool called "Chat GPT" — let alone been inundated with commentary and predictions about the much wider realm of generative artificial intelligence. Yet, in less than a week, this one tool went from zero to 1 million users and dominated tech headlines throughout 2023.

That explosion of attention, seemingly out of nowhere, is just another example of how head-spinningly fast changes in the technology landscape can be, impacting consumers and, often by extension, the lottery business.

Looking ahead to spot such seismic changes on the horizon is one of the reasons why IGT continues to invest in consumer trend research, partnering with globally recognized firms such as UK-based Foresight Factory to regularly publish Special Reports such as 2024's "5 Future Forward Trends Driving Lottery Growth."

Observed **Michelle Carney, IGT Vice President Global Lottery Marketing**, "Not only do many of the learnings help to shape IGT's product plans, sharing them externally is in line with our longstanding commitment to support responsible growth for customers and the industry. Hopefully these efforts provide some ideas for lotteries' consideration or serve as a heads-up on shifts that many of us have no way of detecting from our everyday lines of sight."

5 Future Forward Trends Driving Lottery Growth

A 2024 Special Report



In fact, last year's Trend Report did discuss the larger topic of AI: Both how it can be used by lotteries as a decision-making tool, and also why lotteries need to overcome the legacy challenges that do not allow for an aggregated, single-player view — which can enable them to use AI in a responsible manner to tailor specific games, promotions, and featured content to individual players. Fast-forward one year, and the industry's discussions around AI —

prompted largely by that headline-grabbing tool — are now commonplace.

"Trends don't come out of nowhere, yet even when there's a hint or a collective sense of what the important trends might be, our aim with the Report is to help think through the ramifications specifically for lotteries and lottery consumers," noted Carney. "How will our industry uniquely be affected? And what might the opportunities be that IGT can support our customers in pursuing? We offer the Report to help shine a spotlight on the narrower aspects or points of evolution that might present new ideas for lotteries to take action."

What's Trending for 2024?

"In the current Report for 2024, two of the five trends focus on how consumer behavior and sentiment lines up to their affiliation with brands such as lottery. And how

— given AI's potential for more useful data and player customization — do people want to play, versus how they play currently," said Carney.

Read further for more about those two trends, and visit [IGT.com/2024Trends](https://www.igt.com/2024Trends) to download the full 2024 Trend Report.

Trend 1: Controlled Connectivity

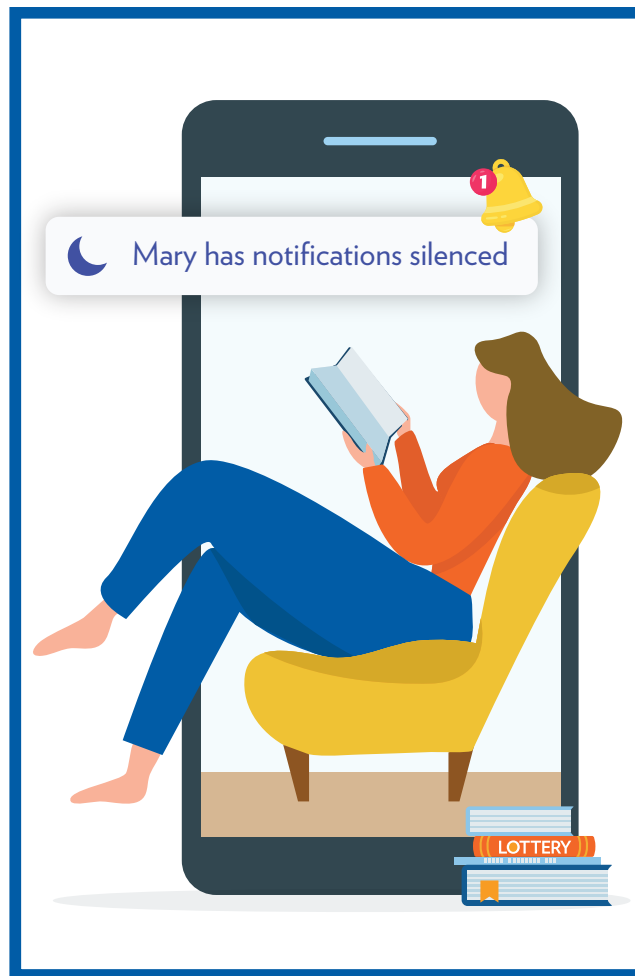
Our homes are a bustling hub of technology – smart TVs, laptops, game consoles, and more – and we are virtually always accompanied by our best digital friend, the smartphone. These devices aren't just passive tools, they engage and interact with us through suggestions and recommendations.

New devices – from smart thermostats to wearables to voice assistants – create myriad possibilities for consumers. They sync up with our appliances, vehicles, and everyday items, adding to the ever-expanding Internet of Things.

In this digital world, consumers – and lottery players – find themselves walking a fine line between fascination and frustration, being surrounded by an array of gadgets but not wanting to turn them off completely. Instead of throwing their cell phones out the window, users reduce notifications and screen time. During those moments of digital respite, consumers are drawn to technology that harmoniously integrates into their lives, instead of clamoring for attention.

Where information overload is the norm, the tasks facing brands surround timing and delivery. The future can hold a promising solution, with location-based data sharing and wearables that can understand when a consumer is in the ideal mindset (or physical place) for marketing communications. Even more so, these messages will be less generic and more bespoke, tailored specifically to the player.

The key takeaway is to try and avoid bombardment of players with an avalanche of notifications, while still providing the messages that truly matter – addressing the most salient, engaging, and appealing aspects of your lottery's offerings.



58.6% of weekly lottery players said they receive too many messages and notifications via their cell phones at unwanted times, up from 51.3% in 2020.

Source: Foresight Factory | Base: 32,437 online respondents aged 18+, Global 24 Country Average, March 2023

What are companies doing?

In January 2023, Instagram announced the launch of Quiet Mode, a setting for users to minimize notifications and take time for themselves.

Consumers can customize their Quiet Mode hours so that the feature is turned on at night, while studying, during school, work, or another time of their choosing. While anyone can use Quiet Mode, Instagram will actively prompt younger users to do so once they have spent a certain amount of time on the platform late at night. Once the mode is enabled, the user won't receive any notifications, and their status will change, sending an autoreply to anyone trying to contact them. Instagram is hoping to appeal to Gen Z consumers who want to be able to better moderate their social media usage.

What is IGT doing?

In October, IGT enhanced its iLottery CRM tools via a new partnership with Xtremepush that enables IGT customers to leverage real-time data and AI to deliver hyper-personalized omnichannel experiences, among many other features. These industry-leading CRM tools provide benefits to lotteries including improved player data reporting and tracking, intelligent delivery using AI, and upgraded methods of communication.

Even for lotteries without an iLottery offering, these CRM tools may be used with Connected Play, IGT's retail-to-digital bridge, through a convenience app.



Trend 2: Stakeholder Customer

The era of passive consumption is over. Empowered consumers expect a more reciprocal relationship with the companies they do business with. Many are open to being treated like peers and collaborators or consulted as stakeholders, with the power to co-create and ultimately determine commercial offerings for themselves.

In effect, they are no longer consumers but prosumers: a prospective consumer involved with the design, manufacture, or development of a product. Consumers have been given a voice – and they want their feedback to be taken seriously. Channels, including social media and review platforms, amplify the voices of everyday people. Brands can more easily follow consumer conversations and spot emerging needs, but they also should confront comments about their actions. There is an expectation among consumers that feedback – whether about brand offerings, tone, or behavior – should be respected, and that they be treated as prosumers in influencing future improvements in a brand's products or services. Meanwhile, individuals are increasingly able to directly finance their favorite campaigns, projects, and products

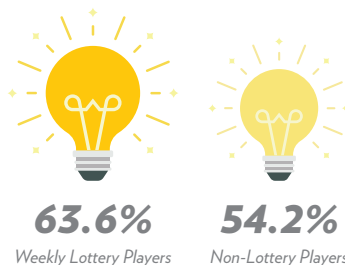
into being, via crowdfunding platforms and follower-funded content models.

With this trend in mind, lotteries are tasked with having in-depth conversations and research with players, involving them in the development of new games, tailored prize offerings, or engaging with players through digital feedback integration. Some of these options can be presented with convenience in mind, via a lottery's app.

What are companies doing?

Convié, which launched on social media in November 2022, is a beauty brand that invites customers to become members who will contribute to the product development process. Interested consumers submit an application that asks them their level of skincare and beauty knowledge, types of products they like, their usual skincare routine, trends they're interested in, and more. If accepted, members receive an invitation to co-create specific products or lines based on expressed interests and areas of expertise. When chosen, members receive samples from Convié to test and review. The brand also engages the community on social media to vote on product aspects, such as packaging and design.

Co-founders Christina Harrell and Isabelle Salas said: "We want to work with talented and like-minded micro-influencers who wouldn't have the opportunities or volumes to pursue this kind of endeavor themselves."



***I would like it if my favorite brands asked
for my ideas for new products.***

Source: Foresight Factory | Base: 32437 online respondents aged 18+,
Global 24 Country Average, March 2023

What are lotteries doing?

Over the past 10 years, Northstar New Jersey (NSNJ), which provides sales and marketing services for the New Jersey Lottery, has managed Game Changers – a group of thousands of dedicated and engaged lottery players – to answer questions pertaining to features and symbols of instant tickets, draw games, and promotional activities that the Lottery engages in.

A wildly popular instant game in 2023, "The Jersey Debate", which is a breakfast meat naming point of contention in the Garden State, had a number of ticket options during the exploratory and development stage of the ticket-creation process. NSNJ turned to Game Changers to get real-time feedback on some of the elements of the game, having the design narrowed down and selected directly by players.



What is IGT doing?

IGT conducts research studies across the globe with both players and retailers. The company's goals include understanding and benchmarking the success of its products and services in the field, studying retail execution and player habits, and conducting research to inform product and portfolio optimization.

IGT also test concepts and new games as part of these studies and commissions

original Thought Leadership research to inform the industry.

In the 12 months ending December 2023, IGT conducted 420 qualitative and quantitative studies in more than 660 markets, with over 300,000 individuals participating. These research studies are at the core of how the company presents its current and future offerings on both a local and global scale.

New Research Methodologies

Just as consumer trends change and evolve, so do research methodologies. IGT has stayed at the forefront in adapting its approach and matching the goals of the research to the best newly available methodologies.

Observed **Gerard Caro, IGT Senior Director Global Marketing Insights**, “In recent years we have moved to fewer in-person focus groups and more online. We’ve shared with the industry our increasing use of vox pops and mobile video testimonials, which can capture in-the-moment impressions and reactions through the players’ lens. This methodology also enables greater reach and variety of interviewees and has yielded some uniquely rich insights that weren’t possible with previous methodologies.”

The realm of AI also has its unique uses in research: “We now include AI techniques for survey development and to analyze and aggregate open-ended verbatims into meaningful insights,” Caro noted.




“These advances in IGT research will help us and our customers to stay ahead of the curve on consumer behaviors and sentiments that impact lottery,” said Michelle Carney. Expect to learn more about the advances in IGT research in the year ahead. ■

To download the full Report, “5 Future Forward Trends Driving Lottery Growth,” visit [IGT.com/2024Trends](https://www.igt.com/2024Trends).



2023 IGT Marketing Insights Footprint

Research Studies During 12 Months Ending December 31, 2023

	North America	International	Total
 Studies	279	141	420
 Markets/Cities	472	190	662
 Sample (Players & Retailers)	202,573	98,188	300,761



Do you think that there is more we can do now to get retail to support iLottery?

S. Weyant: Maybe it's too much to ask the retailer groups to support iLottery, but I think the goal should be to at least get them to not oppose it. Retailers have a lot of lobbying influence. When we launched, we had limited industry data available, but we knew that iLottery would help grow retail sales, not hurt it. Lotteries today have even more data and studies available to disprove the myth that iLottery hurts retail sales.

In Pennsylvania, our retailer groups wanted an increase in their commission, so we used that as an opportunity to create a Retailer Incentive Program where we said, "Okay, we're not just going to give you an increase in commission because that's not going to generate more lottery sales and profit, but we will structure a program to give you an opportunity to earn more commission, if you meet or exceed your sales goals." The retailer incentive was part of the deal and allowed retailers make more money, and defuse their opposition to iLottery.

We also encouraged retailers to trust that we had no intent to hurt retail lottery sales. After all, retail still generates the vast majority of our sales and profits. Another factor was the human factor, and our District Sales Representatives worrying about losing their jobs if retail sales declined, which couldn't have been further from our intentions. We've invested heavily in retail and expanded our sales force.

How might state lotteries advocate for themselves against the influence of sports betting and iCasino operators who are opposed to iLottery?

S. Weyant: Any jurisdiction that hears of an interest in the state legislature for regulating online gambling, especially online casino gambling, should raise their hand and say, "Don't forget about lottery." That's how it happened in Pennsylvania. When the casinos started pushing for iGaming, that gave us the opportunity to push to include iLottery. We defended ourselves, with the result being that both iGaming and iLottery were authorized at the same time.

Another advantage of iLottery is that players have to register to play online,

Our goal is to be one Pennsylvania Lottery and not be siloed between traditional and online because our players expect everything to be integrated and seamless.

which brings a lot of benefits. In Europe, we've seen that there's an emphasis on player registration even though a surprisingly large number of their players don't even play online. Should lotteries in the US that don't sell online also be trying to get more players to register?

S. Weyant: Absolutely, it is a huge benefit for lotteries to turn the anonymous play of retail into an engaged and interactive relationship that begins with registration. It forms the basis for a player-centric relationship. Even if you're not selling online, you want to know who your players are, and what they're playing so you can communicate directly with them and send them better, more customized promotions using a CRM program, and promote responsible gaming much more effectively.

The increased focus on KYC and CRM brings with it a rise in customized advertising, which seems to raise questions about customer confidentiality. But isn't the modern consumer becoming more comfortable with personalized messaging?

S. Weyant: Yes, I think so. I think it's become an expectation, and some consumers are annoyed if you serve them an ad that's not of interest to them. We also send more customized offers and promotions to different customer segments, and we test different ones to see what's more effective, and those are all things you can do in the digital space if you have a CRM platform that supports that. At the same time, there is an expectation that we will protect and secure their personal data.

Lottery has always worked to get infrequent players to play more often. Do you have any insights on how to do that?

S. Weyant: That is a particularly big issue when we get the high jackpots and see an influx of new players. First, we try to

engage them with Draw Games, through promotions or subscriptions. Then, we try to cross-promote other products that they might enjoy. For example, if they came in for Powerball, maybe a natural progression would be to a licensed property game with a progressive jackpot. Another thing we do during the big jackpot runs is rearrange our virtual lobby, i.e., the games you see when you land on our app or the site, so that new players who are there for Powerball will see other games around it that might attract their attention.

How does portfolio management differ in the online space versus the retail environment?

S. Weyant: Online portfolio management is quite different from retail games because we have basically unlimited bin space online, which raises the question of when to terminate the games. We only close them if they become outdated, and we've closed very few. We've launched over 200 games, and out of those, we still have around 175 games right now. So, the question becomes how to organize them so you don't overwhelm players with too many choices. We are also looking at how we can improve game categorization and offer more niche games to appeal to all of the different types of online players.

And what about launch cycles online?

S. Weyant: Online games are launched more frequently than retail games. The best practice is a new online game launch at least every two weeks. And we've tested different days of the week, double launches, and multiple games in the week. The objective is to maximize sales and not cannibalize other game launches because that's wasted resources for us and our partners. We're still testing, learning and launching at least three to four games a month, trying to identify that sweet spot to maximize sales.

And iLottery platform providers, in your case Scientific Games, are typically trying to make it cost-effective, fast, and easy to implement third-party content?

S. Weyant: That's the goal with Scientific Games, they're calling it the content hub. It's an aggregator tool, like a library, and it's my understanding that it will be easier and more efficient for third parties to integrate and deliver content to us.

With iLottery in general, the accepted practice is to have access to a lot of third-party games. There are all these international studios that we're soon going to have access to through Scientific Games' content hub, sort of like "Netflix

of iLottery" as Pat McHugh (CEO of Scientific Games) called it in your recent interview with him.

Are there any ways in which your experience in the online world has changed or informed what you do in the offline world?

S. Weyant: We've done Second-Chance Drawings for decades, but previously we only had limited data. However, now we can take that data and integrate it into the iLottery CRM, which gives us this view of retail players that we never had before.

And those insights drive decisions about how best to spend your advertising budgets?

S. Weyant: Yes. In traditional in advertising, we have standard metrics such as reach, frequency, and awareness, but we never really knew that this advertising had driven this player to buy this game. With online sales and digital advertising, you can see a true return on ad investment.

It seems like iLottery just takes you in a whole new direction in terms of your relationship with your players, your retailers, your plans, strategies, and marketing, and just about everything?

S. Weyant: Absolutely. iLottery is a game changer! ■

Leading with Gratitude — continued from page 33

Iowa also has lots of casinos. Should the lottery industry see itself in head-to-head competition with these other forms of gaming?

M. Strawn: I don't know from a philosophical standpoint if other game categories should be viewed as head-to-head competitors. Rather, it is important to take a holistic view of what is happening across your entire entertainment marketplace, of which other forms of gaming are just one component. However, we do need to position the lottery as part of the broader

marketplace conversation when it comes to discretionary entertainment options because if we don't, our mandate to responsibly maximize a sustainable source of revenue for causes like the Iowa Veteran's Trust Fund becomes significantly compromised.

My team and I have a fiduciary responsibility to the State of Iowa to ensure the lottery remains in that conversation. And, we've made some very strategic and intentional decisions to do that by enhancing the value proposition of our game portfolio and

offering experiential prizes that really only Iowa Lottery can provide.

So it seems you might say that your response to the industry's challenges generally is characterized by gratitude and enthusiasm instead of assuming an unresourceful negative attitude?

M. Strawn: Paul, that is an excellent way to frame up our entire discussion. When you enlist the action-focused power of enthusiasm, with the often unexpected, yet powerful impact of gratitude, everything is possible. Who doesn't love that? ■



Houston, have you seen the latest issue of Public Gaming Magazine?

LONDON CALLING: GREETINGS FROM THE 2024 MARKETING SEMINAR



IGT joined other digital, advertising, marketing, product, and brand professionals recently at the Shaw Theater at London's Pullman Hotel to experience two days of compelling panels and presentations at the 2024 Marketing Seminar, presented by the European Lotteries (EL) and World Lottery Association (WLA).

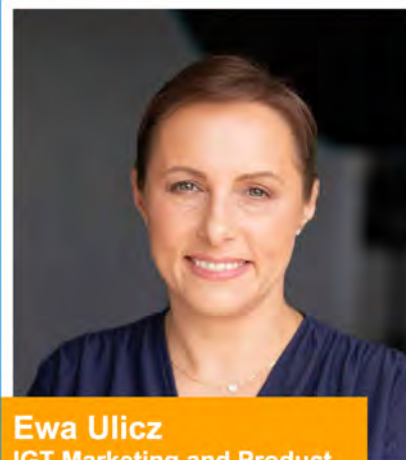
The 2024 edition of the seminar explored the fundamentals of digital marketing, its significance in today's lottery world, and the key strategies that drive its success. It was a doubly exciting time to be in London, as the seminar coincided with the ICE conference – in fact, the final visit of the ICE event to London, prior to kicking off a new ICE residency in Barcelona in 2025.

BRICKS TO CLICKS

On February 5, Day One of the EL/WLA Seminar, IGT's Ewa Ulicz, Marketing and Product Development Director, and Sebastian Meitz, iLottery Account Development Director, delivered an engaging presentation about IGT's impact, titled "From Bricks to Clicks and Back in Totalizator Sportowy's Omnichannel Mastery." Ulicz noted that she was "excited to share how our customer Totalizator Sportowy embraced IGT's omnichannel concept, putting players in Poland at the center of a digitalized retail experience."

Growing Opportunity

The team described how Totalizator Sportowy met the challenge of developing its iLottery offerings in 2019 and 2020, when sales were primarily made up of digital draw-based games. They shared how Totalizator Sportowy enhanced its number of active players, grew digital draw-based game sales, and significantly increased revenue overall by adding elnstants into the mix in late 2020, leading to impressive, consistent growth from 2021 into 2022. In 2023, IGT and Totalizator Sportowy strategized to design an omnichannel campaign to further engage players and grow sales.



Ewa Ulicz
IGT Marketing and Product
Development Director



Sebastian Meitz
IGT iLottery Account
Development Director

Maximizing Holiday Magic

Scratch-off lottery games are very popular during the holidays, when gift-givers responsibly provide them to adult recipients as presents. As Meitz noted, "Creating a retail and digital campaign around this festive season made perfect sense to accomplish the Lottery's goals."

Basing the 2023 campaign on one of the elnstant holiday games in IGT's portfolio, IGT professionals localized the language and currency to create Kasa od Mikołaja, and designed a companion scratch ticket in time for the holiday season.

To increase online play, a QR code was printed on all scratch tickets, and on selected Lotto and Eurojackpot tickets at retail on launch day and over the holiday period. When they scanned the QR code, players were taken to a branded landing page explaining the game.

Results: More Sales, More Players, More Fun

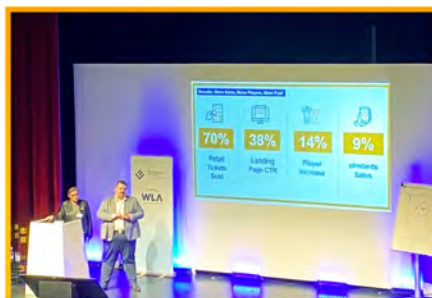
Kasa od Mikołaja created impressive results for Totalizator Sportowy. Sales of the Kasa od Mikołaja elnstant exceeded by 9% the sales of the elnstant holding the previous record, making it the absolute best seller IGT ever launched in Poland. There was an exciting 14% increase in player growth during the holiday offering. And 70% of the printed 4.5 million Kasa od Mikołaja scratch tickets were sold within the first 30 days after launch, making Kasa od Mikołaja one of Totalizator Sportowy's fastest selling scratch tickets ever.

POSITIVE PARTNERSHIP

Lottery Popularity Zooms with Żabka

At the EL/WLA Seminar, the team also shared another impressive recent initiative, which saw Totalizator Sportowy partner with Poland's Żabka retail chain, increasing the number of locations offering the Lottery's products by a significant 30%. This mutually

By converging the retail and digital channels, IGT's groundbreaking OMNIA™ solution collects previously unattainable data to better understand and analyze player behavior, dramatically improving a lottery's ability to launch, market, and enhance games to meet player preferences.



beneficial partnership helped drive players to Żabka locations while expanding the Lottery's consumer base.

Rewarding Retail

Significant online promotion was done on the Żabka website and social media to spread awareness of the lottery offerings. Appealing merchandising and digital signage in Żabka locations responsibly reinforced the full, welcoming Totalizator Sportowy product portfolio available to a new generation of players.

Playability by Design

The team demonstrated how IGT helped generate insights for Totalizator Sportowy that resulted in the deployment of inventive solutions such as Kasa od Mikołaja and

the Żabka partnership. Applying learnings derived from IGT, Totalizator Sportowy enhanced its engaging game content and now offers more ways to play, appealing to today's digital natives.

IGT helps lotteries such as Totalizator Sportowy build awareness, ensure lottery integrity — with new levels of responsible gaming and player protection protocols — and enable players to play where, how, and when they want, for both retail and digital solutions.

IGT's OMNIA Solution

Players expect a convenient and seamless journey no matter where or when they play. IGT's OMNIA™ solution enables lotteries to deliver multichannel and omnichannel experiences, providing the tools and data to support the creation of new games, enhancements, and promotions that will excite players. ■



of semi-finalists eligible to win the \$1 million grand prize. Through a series of elimination drawings, the field of semi-finalists will be reduced from 16 to 12 to 8 to 4 – with the remaining four finalists winning a VIP trip for two to the NASCAR Championship Weekend™ at Phoenix Raceway and entry into the \$1 million drawing in Victory Lane.

To support the season-long promotion, Powerball has embarked on another



robust national advertising campaign that includes broadcast inventory across FOX, NBC, USA, and Motor Racing Network, as well as digital advertising flights across NASCAR-owned sites and social media channels. The results of each Powerball Playoff drawing will also be made public during in-race announcements on NBC and USA networks. To share the promotion's storyline with audiences, Powerball will once again turn to its participating lotteries.

"Several lotteries will have footprints and players events at NASCAR races throughout the 2024 season, including the Tennessee Lottery, which will be the presenting sponsor of the NASCAR Xfinity Series



Panoramic views from Ally Curve, a luxury hospitality club



Players experience the speed of a pace car ride

Tennessee Lottery 250 at the Nashville Superspeedway on June 29," said Rebecca Paul, MUSL Marketing and Promotions Committee Chair and Tennessee Lottery President and CEO.

"As we develop our national media plan, we will continue to look for ways to integrate the Powerball brand, our lottery members, and the incredible work they do to raise funds for good causes into the race broadcasts."

Entry periods for the promotion have already kicked off with the Iowa

Lottery launching on February 27, followed by the Delaware Lottery on March 4. Other participating lotteries include Colorado, Florida, Hoosier, Idaho, Kansas, Kentucky, Louisiana, Maine, Maryland, Minnesota, Mississippi, Nebraska, New Mexico, New York, North Carolina, North Dakota, Oklahoma, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee and West Virginia.

The NASCAR Powerball Playoff will be set for playoff action pre-Fall 2024. Look for the Round of 16 announcement on September 1 during the NASCAR Cup Series Cook Out Southern 500 at Darlington Raceway in Darlington, SC. You can follow the promotion all season long by heading to the Powerball Playoff accounts on Facebook and Instagram. ■



\$1 million drawing at 2023 NASCAR Championship Weekend

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

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

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

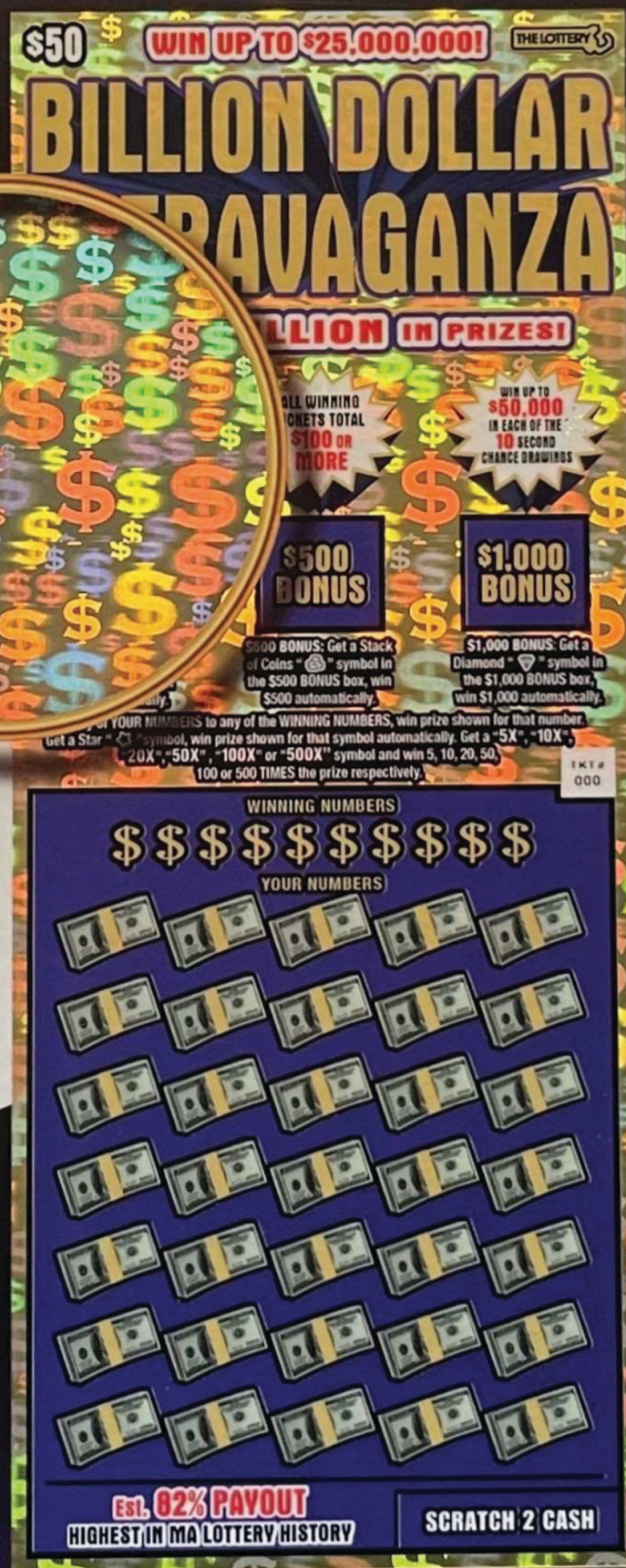
When compared with plain board games, Hazen's recyclable holographic games will consistently generate higher lottery sales and profits due to their increased visibility and superior performance.



*U.S. jurisdictions in the past 5 years

Call for information:
BOB HAZEN AT 413-538-8204 or
SCOTT DEVENS AT 201-327-4414.

See reverse side for additional information.



HIGH VALUE GAMES ARE A PERFECT USE FOR HOLOGRAPHY

Using holography with higher value instant games will quickly boost your lottery's profits. That's because the cost of the holography will be fully paid for with less than a 2% increase in sales.

According to data compiled by Scientific Games, holographic games have outperformed non-holographic games by 13.1% in U.S. jurisdictions in the past 5 years. Additionally, a quantitative test that isolated holography as the only key variable found that the holographic game outperformed the plain board game by 79%.

For details, visit: www.holographyx.com/TN



Check out Hazen's PROFIT CALCULATOR to see exactly how much you can grow your lottery's bottom line. Just enter your ticket's size, price, payout percentage, and quantity for your holographic game and you'll instantly see a custom profit chart created for you.

For US Dollars, visit:
www.holographyx.com/profit

For Euros, visit:
www.holographyx.com/EUprofit



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Email: reh@hazen.com
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The Hazen Profit Calculator for iPads is now available at the App Store:

<http://bit.ly/HazenProfitCalculator>



Helping Lotteries Globally Generate Revenue and Thrive

A Chat with IGT's Karri Paavilainen



Karri Paavilainen, Vice President,
IGT Products and Services

Lotteries are more receptive than ever to new ways of engaging with lottery products. IGT applies its lens as an operator and supplier to provide customers with a full spectrum of solutions, accelerating retail and digital innovation.

Karri Paavilainen, IGT Vice President iLottery Products and Services, is a familiar face at industry events as a subject matter expert, speaker, and participant in roundtable discussions, recognized for his expertise in lottery digital transformation and outstanding customer relationship management. He is described as an excellent thinker, respected by customers and colleagues, with the ability to generate consensus and a dedication to leading by example. Known for his precision and meticulous organizational skills, Karri has established a strong record of collaborating with lotteries to develop the digital channel, resulting in double-digit growth across IGT's iLottery customers.

Here, Karri shares news about his latest role at IGT, and describes how lottery continues to evolve to meet today's customer needs.

For those who might not yet know you, can you please share a little about your background and how you came to be at IGT?

Currently as a Vice President at IGT, I am responsible for products, platforms, and services for our core iLottery offering. My prior responsibility was focused on leading Player Marketing Services, delivering B-to-C marketing as a service to our customers. I have now been with IGT for a decade. Prior to joining IGT, I worked with Veikkaus, the Finnish national lottery and sports betting operator, for eight years.

What are you rolling up your sleeves to tackle this year?

I will continue collaborating closely with IGT's customers to understand how we could better create solutions to fulfill evolving operator and player needs, including my now expanded scope of accountability for platforms and products alongside services.

Which approach do you employ to achieve your goals?

Achieving successful solutions in today's marketplace requires collaboration across a diverse base of contributors. Creating alignment through a shared goal is a key factor in successful operator-vendor relationships. To me, it's necessary to number one, crystallize market need; two, envision a solution to fulfill the need elegantly; and three, gain alignment across the organization and work together to produce a desired, impactful product.

Is there a current theme in the lottery industry that may not have been central when you originally entered the business?

iLottery used to be a separate isolated sales channel. Thinking has been now converging more toward viewing digital as a platform to serve and manage player relationships across retail and digital channels. Instead of the mindset of channel competition, digital lottery enhances the relevance of overall lottery brands and expands consumers' access to lottery products; usage is not confined to a specific time or place. We have so far only scratched the surface in our thinking about how we can build stronger player relationships by employing technological advances to provide highly personalized digital product and service experiences.

You have been advancing with this industry for more than 18 years. What keeps you going every day?

First and foremost, this is a continuously evolving industry, and I enjoy being part of a team resolving challenges related to that transformation. Second, I consider it meaningful that lotteries generate funding for good causes. This thinking was set deeply in me during my years with Veikkaus, the Finnish national lottery. It was very tangible how the work we did contributed to culture and sports. This is a unique industry, and while IGT helps lotteries to grow, we are also their

partners assisting to contribute for good causes. And third, lottery is very much a consumer business. Understanding how the end users — the players — are behaving, and how we can create services and content that resonate with them, is a great challenge to work on, and deliver against.



"Understanding how players are behaving, and how we can create services and content that resonate with them, is a great challenge to work on, and deliver against," says Paavilainen.

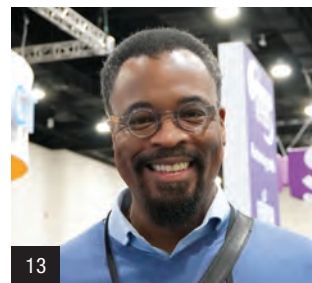
Can you share one of the distinct ways that IGT brings value?

IGT is in a unique position to be working with so many lotteries around the world. This provides us with the opportunity to create a vast and deep foundation of knowledge. Our close relationships with a wide base of lotteries help us appreciate market needs internationally. Our global network of people connections is invaluable. We have worldwide learnings we can share with lotteries everywhere. We are at retail; we are digital; we understand lotteries and their players across platforms. IGT has great customers. We're proud to have developed solutions that help them responsibly generate revenue and thrive. I'm excited about what's to come as we continue to develop products, platforms, and services to meet the evolving needs of customers and their players. ■

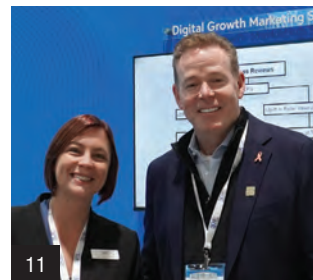


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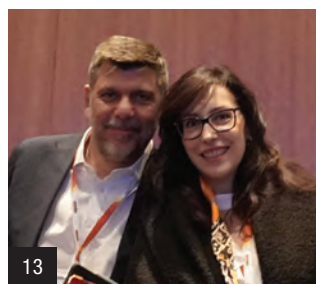
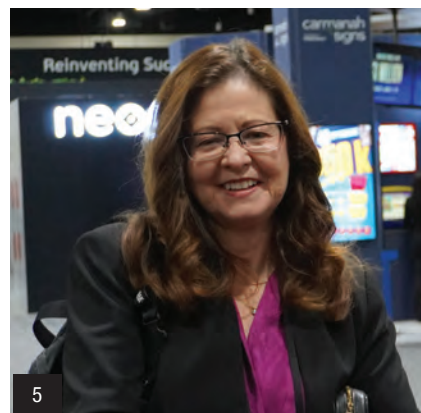
The North American Association of State & Provincial Lotteries (NASPL) Conference in Milwaukee, WI



1. Callum Mulvihill, Cindy Polzin, Younes El Mechrafi, Andreas Kotter 2. Wendy Montgomery, Michelle Carney, May Scheve, Rebecca Paul, Jeanna King, Jennifer Welshons, Jennifer Westbury 3. Sean Athey, Charlie McIntyre, KJ Cleland 4. Younes El Mechrafi and Cindy Polzin 5. Simon Jaworski 6. Matt Pratap, Helena Szrek Pereira, Steve Beason, Merv Huber 7. PGRI Lottery Hall of Famers 8. Susan Jason, Wendy Montgomery and Michelle Carney 9. Rob Wesley, Victor Marmorstein, Sidney Sabbag, Ashley Bloor, Rachel Verslues, Chris Shaban 10. Chip Wilkerson and Nat Worley 11. Jeff Anderson and Julin Shaw 12. Angela Wong 13. Harold Mays 14. Konstantinos Farris



1. Amy Bergette and Steve Beason 2. Fivi Rondiri, Jeff Schweig, KJ Cleland, Charlie McIntyre 3. Amy Drooker and Mary Harville 4. John Pollard, May Scheve, Doug Pollard 5. Carolyn Cabell and David Barden 6. Andreas Kotter and Rebecca Paul 7. Lianne Paturel, Callum Mulvihill, Chris Shaban 8. Jim Acton and Jay Finks 9. Brad Cummings, Joni Hovi, Johanna Kozul 10. Richard Bateson 11. Lori Szymanski and Pat McHugh 12. Jim Kamm and Brian Rockey 13. Jennifer Welshons, Paul Jason, Keith Cash 14. Herat Suratwala, Meghan Kiss, Cherie Norman, Charlie Scanella, Jim Schultz



1. Wendy Montgomery, Jay Gendron, Kim Houston 2. Jermel Carr, Rose Hudson, Nikos Nikolakopoulos 3. Matthew, Amy Morin, Cleo, Joe Lapinski
4. Nadene Beyerbach and Brian Rockey 5. Mary Harville 6. Nikos Nikolakopoulos and Richard Wheeler 8. Miriam Lindhorst 9. Rose Hudson and Rebecca Swindle
10. Wendy Montgomery, Gretchen Corbin, Michelle Carney 11. KJ Cleland and Stephanie Weyant 12. Sarah Taylor and Stuart Godfree
13. Nikos Nikolakopoulos and Chryssa Amanatidou 14. Keith Cash, Michelle Carney, Jay Gendron, Larry King



1. Chris Shaban, Michelle Gillcrist, Rebecca Paul 2. Drew Svitko and KJ Cleland 3. John Martin and Eric Grubbs 4. Jeanna King and Jennifer Welshons
5. Johanna Kozul, Joni Hovi, Timo Kiiskinen 6. Cindy Polzin and Gretchen Corbin 7. Carrie Stroud and Melissa Pursley 8. Jackie Walker and Don Silberstein
9. Jennifer Westbury and Tom Seaver 10. Derek Levesque, Jesse Saccoccio, Karri Paavilainen 11. Doug and John Pollard 12. Gary Grief and Ryan Mindell
13. Jermel Carr, Andrea Williams, Nikos Nikolokopoulos, Richard Bateson 14. Jay Gendron and Mark Michalko

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SPOTLIGHT ON THE LEADERS OF THE GOVERNMENT-GAMING INDUSTRY

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

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INTERNATIONAL GAME TECHNOLOGY PLC (IGT)

North America Lottery Headquarters:

10 Memorial Boulevard Providence, RI 02903

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

www.IGT.com

A global leader in lottery and gaming, IGT is uniquely positioned to deliver unrivaled gaming experiences that engage players and drive growth.

To support player-driven innovation and growth for our customers, we leverage a substantial investment in player insights, a wealth of premium content, operator experience, and leading-edge technology. Our Global Lottery, Global Gaming, and PlayDigital organizations respectively support four key business segments:

Lottery – IGT's pioneering and award-winning solutions encompass all aspects of the lottery business, including iLottery. We're the trusted source of fully integrated product roadmaps and advanced solutions to accelerate the convergence of retail and digital. We continually refine and optimize our systems and tailor game content to help our customers strengthen their relationships with their players.

Gaming – We deliver dynamic games, systems, gaming machines and other growth-driving innovations to gaming venues around the world. IGT's distinctive systems solutions give operators the control and flexibility they need to optimize their gaming floors, offer cashless gaming, and manage robust loyalty programs.

Digital – IGT PlayDigital is dedicated to delivering growth-driving solutions that advance the global iGaming sector. From game aggregation, content and systems technologies to player engagement tools, our iGaming portfolio is integrated, modular, and flexible.

Sports Betting – The IGT PlaySports™ solutions can meet the needs of any sports betting operator. The award-winning platform is versatile, and annually processes billions of dollars in wagers through retail, mobile, and self-service technology.

IGT's global sustainability initiatives are encompassed within Sustainable Play™, which celebrates our dedication to our people and planet as we deliver innovation and excellence that is "Ahead of the Game." IGT's commitment to responsible gaming is woven into the fabric of everything we do. The Company maintains responsible gaming certifications for all four of its product segments – lottery (including iLottery), gaming, digital, and betting – through both the Global Gambling Guidance Group and World Lottery Association.

As a member of the United Nations Global Compact, IGT aligns its strategies with 10 universal principles related to human rights, labor, the environment, and anti-corruption. We also support the United Nations' Sustainable Development Goals (SDGs).

IGT creates a fair and inclusive culture that values unity, diversity, and belonging in our people, players, customers, and communities. Earning a top score in the 2023 Disability Equality Index, IGT was named a "Best Place to Work for Disability Inclusion." We received a top score on the Human Rights Campaign Foundation's 2023-2024 Corporate Equality Index, earning us the "Equity 100 Award: Leader in LGBTQ+ Workplace Inclusion" designation. IGT was also recognized by the All-In Diversity Project as a top-ranking gaming supplier in the 2023 All-Index™ report.



INTRALOT

11360 Technology Circle | Duluth, GA 30097

Phone (678) 473-7200

www.intralot.us

INTRALOT is a publicly listed company established in 1992. It operates in 39 regulated jurisdictions, with a turnover of €0.4 billion and a global workforce of approximately 1,707 employees in 2022. As a technology-driven corporation, INTRALOT serves as a private partner for the public sector, enabling lottery and gaming operators to establish a responsible gaming environment and contribute to good causes in their local communities. INTRALOT's strategy, 'Driving Lottery Digital Transformation', focuses on modernizing lotteries with innovative solutions and secure systems. The company

develops next-gen products for omnichannel player experiences, aligning with global gaming trends and enhancing operator efficiency for responsible entertainment.

INTRALOT fulfills its promise to employees and customers to advance the lottery industry by deploying sustainable practices and standards within its operations that benefit its key stakeholders and communities. As a member of UNGC, INTRALOT supports the Ten Principles in human rights, labor, environment & anti-corruption. In addition, the Company has been awarded with the certificate "WLA RG Framework for Associate Members" endorsing our responsible gaming program for consumer protection and the promotion of positive play.

Our USA subsidiary, INTRALOT, Inc., employs approximately 600 employees, with 16 contracts: three sports betting, in 11 jurisdictions providing online systems and services, warehousing and distribution of instant tickets, and VLT/COAM monitoring. INTRALOT, Inc. contracts with lotteries in Arkansas, DC, Georgia, Idaho, Illinois, Louisiana, Montana, New Hampshire, New Mexico, Ohio, and Wyoming.



Pollard Banknote Limited

www.pollardbanknote.com

Pollard Banknote delivers a full suite of industry-leading print, retail, and digital products and services to lotteries worldwide. As the lottery partner of choice, we empower our clients by delivering strategic recommendations and innovative tools that support responsible growth and increase proceeds for good causes.

Our expert team of lottery specialists focuses on three key dimensions for success: **outstanding games** that excite loyal players and attract new ones, **retail excellence** through effective in-store strategies and retail network expansion, and **digital innovation** that enables a fully integrated experience. Our unwavering commitment to innovation across these areas has resulted in exponential growth and a global family of companies spanning 16 locations, with over 2,000 employees collaborating across seven countries.

Pollard Banknote supports our clients' business objectives with compre-

hensive marketing strategies and related services that drive lottery performance by creating engaging player experiences, while our revenue-driving games push the boundaries with captivating designs, unique playstyles, and exciting licensed brands that maximize entertainment value.

Our retail products include best-in-class in-lane solutions and instant ticket merchandising, dispensing, and POS display options from our Schafer Retail Solutions + portfolio. With responsible gaming at the core, Pollard Digital Solutions encompasses an extensive range of world-class digital products spanning mobile application development; Space Between™ games; player engagement, including 2nd chance and loyalty platforms; iLottery; and other lottery-specific systems and services. The brand also offers a full suite of lottery management and optimization tools, including warehousing and distribution platforms and services. Our Pollard Charitable Games Group provides pull-tab tickets, bingo paper, ticket vending machines, and electronic games and devices to charitable and other gaming markets in North America.

With a range of innovative solutions and products supported by unparalleled expertise and experience covering all aspects of lottery, Pollard Banknote continues to be the premier partner for lotteries worldwide and a driving force in the industry.



Scientific Games

www.scientificgames.com

Fifty years of relentless innovation. Legendary performance. And unwavering security. All built on a foundation of trusted partnerships.

Headquartered in Atlanta, USA, Scientific Games is a global leader in retail and digital products, technology and services that drive profits for government-sponsored lottery and sports betting programs. With 130

lottery customers in 50 countries, we responsibly propel the industry ever forward and elevate play every day.

From enterprise gaming platforms to exciting entertainment experiences and trailblazing retail and digital solutions, we care about the details that drive profits for lottery beneficiary programs.

Our worldwide team of 3,500 employees on five continents know what people like to play today. And with the power of our data analytics, we can predict what they'll want to play tomorrow. We're always thinking about the player experience. Because it's not just a game. It's an instant of optimistic fun.

Scientific Games is the world's largest creator, producer and manager of lottery instant games and a leading provider of lottery technology. We are the partner of choice for the growing iLottery and lottery sports

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betting markets. We're connecting retail and digital experiences. And when it comes to digital, trust is everything.

The lottery experience is always one of excitement. It's why we're endlessly innovating, always evolving and firmly committed to responsible gaming. So that the future of lottery funding shines bright.

It's a future of stability and inspiration. The strength of security paired with the thrill of the new – all backed by science. It's the future of Scientific Games. Since 1973, we're the driver of today's favorite lottery games and most advanced technologies, and sustainability for tomorrow.

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

- Retail Instant, Draw and FastPlay Games
- Digital and iLottery Games
- 2nd Chance Games and Promotions
- Winners Events
- Licensed Brands
- Player Loyalty Programs
- Mobile Apps
- CRM
- Enterprise Gaming Platforms
- Sports Betting
- Retail Solutions
- Payment Solutions
- Consumer Analytics and Insights
- Business and Retailer Intelligence
- Managed Services

★ PLATINUM INDUSTRY LEADERS ★

ABACUS Solutions International Group

In-lane Solutions for Innovators
www.lotteryeverywhere.com



Abacus believes the future of lottery lies in integrating into the existing retailer infrastructures by providing secure systems that enables all parties to work together and create mutual growth.

Our mission is to inspire and empower the growth of lottery through innovation by unlocking the potential of new retail sales channels. We have an ethos built around thinking differently and improving the customer experience.

Abacus works on building long term relationships with all parties by working together developing new and innovative solutions. By using cutting edge technology, created by forward thinking industry experts, the Abacus

platform enables lotteries and retailers to respond to an ever-changing consumer market with speed, agility, reliability and integrity.

Our service offering (through a retail omni-channel experience) includes:

- Lottery draw game sales
- Enquiry and validation of all games
- Sports betting
- e-Commerce
- Instant ticket sales
- Abacus Digital
- Retailer loyalty solutions
- Follow-on promotions
- Second chance draws

We also offer a feature rich Management Portal that gives full control of the integrated point of sale environment including the following features - configuration and control down to lane level, a full reporting capability across all platforms and channels, full fault diagnosis, and the monitoring of all systems.

www.Allwyn-NorthAmerica.com

Allwyn North America is a full service lottery operator, supplier and business partner to North American lotteries.

We make play better for all with innovative lottery technology and services, engaging content, and tried-and-tested playbooks that responsibly grow lotteries' playerbase, revenue and returns to good causes over time.

Our local team of 100 experienced lottery professionals are deeply familiar with all aspects of a lottery's operations, and we call Chicago, Illinois home. Globally, we're connected to over 6,000 employees in six different markets across North America and Europe, and our lottery operations and



technology supports over 130 million players and generates more than \$4.4 billion in annual gaming revenue.

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

Inspired Entertainment
inseinc.com



Engaging the next generation of Lottery Players

Inspired offers an expanding portfolio of content, technology, hardware and services for regulated gaming, betting, lottery, social and leisure operators across land-based and mobile channels around the world. The Company's Gaming, Virtual Sports, Interactive and Leisure products deliver winning entertainment that appeals to a wide variety of players, creating new opportunities for operators to grow their revenue. The Company operates in approximately 35 jurisdictions worldwide, supplying gaming systems with associated terminals and

content for approximately 50,000 gaming machines; Virtual Sports products through more than 32,000 retail venues and online; interactive games for 170+ websites; and a variety of amusement entertainment solutions with a total installed base of more than 16,000 gaming terminals. As a large gaming provider, Inspired produces machines that deliver a winning combination of innovative technology, hardware, content and services. Inspired's proven online and mobile interactive slots and lottery products are currently some of the highest-performing games. And Inspired is the creator and best-in-class producer of award-winning Virtual Sports that are popular with players around the globe.

Instant Win Gaming (IWG)
www.instantwingaming.com



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

Each year, IWG develops more than 300 new InstantGames for its global base of lottery customers. Its games consistently perform at the highest level, engaging and retaining players while driving superior

sales results. It has the knowledge to deliver winning game portfolios, and the experience to make them grow.

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

Jackpocket
www.jackpocket.com



Jackpocket is a technology company helping to modernize and grow state lotteries. Our mission is to create a more convenient, fun, and responsible way to take part in the lottery. A no-cost, no-integration, turnkey platform, Jackpocket offers a secure way to order official state lottery tickets, including Powerball, Mega Millions, and more. By helping today's players participate in the lottery from the convenience of their smartphones, Jackpocket helps state lotteries drive incremental revenue to fund essential programs. Users can order tickets, check lottery results, join lottery pools, and turn on Smart Order so they never miss a drawing. Jackpocket was the first lottery courier to receive iCAP responsible gambling certification for best practices in player protection. As the first registered lottery courier service in New Jersey and in New York, the company also became the first lottery courier to be formally licensed in a U.S. jurisdiction.

Features:

- **Ticket Orders:** Age-verified and geo-located customers use

Jackpocket's secure platform to place orders for official state lottery games.

- **Ticket Scanning:** Jackpocket's proprietary ticket-scanning technology allows users to view a scan of their lottery ticket right in the app. They also receive a confirmation email with their ticket serial number.
- **Lottery Pools:** Users can create Private Pools with friends and family or join Jackpocket's Public Pools for Powerball and Mega Millions with other users in their state.
- **Smart Order:** Users can set up automatic orders with Quick Picks or their favorite numbers, so they never miss a drawing.
- **Responsible Gaming:** Consumer protection features such as daily deposit and spend limits, self-exclusion, and in-app access to problem gambling resources promote responsible play.

Lottery customers: Arizona, Arkansas, Colorado, Idaho, Massachusetts, Minnesota, Montana, Nebraska, New Hampshire, New Jersey, New Mexico, New York, Ohio, Oregon, Puerto Rico, Texas, Washington D.C., West Virginia

★ PLATINUM INDUSTRY LEADERS ★

NEOGAMES

www.neogames.com

neogames

NeoGames (NASDAQ: NGMS) was born digital. Founded in 2005, the company was the first supplier in the world to focus solely on iLottery.

A global leader of iLottery solutions and services for national and state-regulated lotteries, NeoGames' mission is "to be the long-term partner of choice for lotteries throughout their interactive journey," mirroring the company's successful history of building thriving partnerships with its lottery customers across the world.

NeoGames Studio, the company's in-house game studio, has been supplying its market-leading instant titles to lotteries around the world for almost 20 years, with more than 250 games created since its inception. The studio's innovative games have won multiple prestigious industry awards.

NeoGames is part of the NeoGames Group, a global iGaming powerhouse with more than 1,100 employees spread across eight countries.

The group has more than 200 partners in four continents. NeoGames' recognizes the evolving needs of lotteries globally, and in 2022, strategically acquired Aspire Global and its subsidiaries--Pariplay, Wizard Games, and BtoBet--empowering them with the ability to provide the broadest set of solutions across iLottery, sports betting, and iGaming. More recently, the success of the NeoGames Group paved the way for one of the most significant acquisitions in global gaming vendor history with Aristocrat's announcement in May 2023 of a definitive agreement to acquire

NeoGames; expected to be completed in 2024. Aristocrat is a globally known and respected gaming and technology company that is known for the highest industry investments in research and development, which will further accelerate the vast investments that NeoGames has made in bringing exciting innovation and content to iLottery players.

NeoGames is proud to currently power the best performing (per capita) iLottery programs in the U.S. with its platform, CRM technology, and games content, through its North American joint venture, NeoPollard Interactive.

★ GOLD INDUSTRY LEADERS ★

Adesso

www.adesso.de

adesso

adesso is the leading IT provider in Europe and focuses on the core business processes of companies and public businesses such as lotteries by providing both consultancy and customized software development.

For over 20 years, adesso has been a strong partner of lottery operators worldwide. Many state-licensed lotteries rely on our proven and innovative software. Our convincing consulting services complete adesso's competence.

- **adesso lottery tablet**

The adesso lottery tablet solution is the world's first lottery terminal based on conventional consumer hardware. The terminal is ready to use at short notice, offers significant cost advantages, and is already being used successfully at retailers.

With the support of a proven artificial intelligence (AI), it offers incomparable recognition quality.

- **LotteryForce**

The modernized iLottery platform, LotteryForce offers a wide range of proven security features. It combines all the knowledge of consumer-centric appearance from all industries, such as retail or mobile commerce. As a cloud-based, modular solution, LotteryForce is scalable and runs on a hyper-converged infrastructure.

- **Lottery Consulting**

adesso supports lottery companies and lottery operators/organizers on a national and international basis when it comes to a consistent alignment of strategy, organization, procurement and other processes and infrastructure with customers' needs and challenges of digitalization.

Atlas Experiences

55 Park Square Ct. Suite 207
Roswell, GA 30075

www.atlasexperiences.com

Year of inception: 2019



Contact: Derek Gwaltney, Founder & CEO, dg@atlasexperiences.com

Atlas Experiences continues to be a pioneering force in the realm of lottery promotions, renowned for its commitment to delivering unforgettable experiences that resonate long after the event concludes. With a focus on innovation, customization, and seamless execution, Atlas remains the go-to partner for lotteries seeking to engage their players in meaningful ways.

Our expertise lies in designing and executing second-chance lottery promotions and we understand that every client has unique needs and objectives. That's why we tailor our services to align with lottery specific goals, budget, and audience demographics, delivering custom solutions that resonate with players. Each program is meticulously tailored to assist lotteries in driving player engagement while simultaneously attracting new players.

Services Offered:

Promotional Program Creation and Enhancements

- Promotional Prize Creation and Project Management
- Custom Live Game Show Development and Production
- Multi-State Linked Promotions
- Licensed Properties

- Talent Sourcing
- Private Concert Production

Marketing & Strategic Support Services

- Microsite Design
- Point of Sale Design and Production
- Custom TV and Radio Assets
- Social Media Content Services
- Custom Merchandise Pricing
- Augmented Reality Solutions
- Winner Awareness and Event Videos

Event Execution

- Event Design, Logistics and Execution
- Hotel and Venue Sourcing
- Winner Travel Coordination
- On-Site Event Management and Logistics
- Videography and Photography

Winner and Guest Services

- Registration Microsite
- Communications - Email, Phone, Text, and Standard Mail
- Turnkey Prize Fulfillment - Cash, Activities, and more.

EQL Games

<https://www.eqlgames.com/>

Not a Typical Aggregator

EQL Games believes the lottery industry should be a marketplace of ever-evolving content and technology innovation.

Supported by our modernized tech stack, EQL Games lives this vision by delivering disruptive, first-to-market products - both as an original game studio and as a third-party content aggregator. In 2023 EQL Games will be introducing new digital lottery content on multiple digital lottery platforms to help realize this vision.

We enable lotteries to add new and innovative content across both retail and digital channels and thanks to the start of a new partnership, we can now offer Team USA and Olympics content for all products, including scratch tickets. Our first-of-its-kind content aggregator enables EQL Games to deliver innovative content from multiple studios spanning draw, keno, and instant products without the potential headache and inefficiencies of dealing with multiple studios who do not understand the market. Inversely, we enable studios to offer content in a market they could not have entered otherwise.



EQL Games has four key business segments:

EQL Aggregation

Technology platform enabling access to a wide variety of game content – both originals and 3rd party – with a single integration and allowing speed to market

EQL Technology

Flexible, scalable configuration-based game engine and management platform powered by GLI-certified RNG and built on a platform that scales with demand

EQL Originals

Unique game content created in-house by EQL Games - live sports, TV shows and traditional draw games

EQL Licensing

Suite of best-in-class brands delivering compelling and experiential content including NBA, MLB, NHL, NASCAR and Team USA

The EQL Approach to everything we deliver - True Agility. As a third-party, it is our responsibility to make adding our products as seamless as possible. That philosophy is clear in everything we do.

**Carmanah Signs, a Division of
STRATACACHE**
www.carmanahsigns.com



Carmanah Signs is the Lottery & Gaming Division of STRATACACHE, the world's leading provider of intelligent digital signage and in-store marketing technology. Providing **best in class retail signage to 55+ lotteries** on four continents, Carmanah has **over 220,000 networked sign installations** at retailers worldwide.

The company offers products designed to engage players at retail, including digital sign **content management software, media**

player and display hardware, all-in-one interactive tablets, and jackpot and gaming signs.

Carmanah also offers a complete suite of services to help lotteries build and operate effective digital communication platforms, including **network hosting, network monitoring, content creation and scheduling, and specialized field services.**

The Carmanah team is made up of **retail technology experts** and **customer experience strategists** with **deep roots in lottery.** Carmanah is your partner in transforming lottery at retail to deliver exceptional player experiences – growing sales and **responsibly raising funds for beneficiaries.**

Fennica Gaming
Fennicagaming.com



At Fennica Gaming, we believe success is built on putting the players first and treating customers as friends. Combined with our world-class gaming solution that spans three continents, we offer not just games, but an entire Gaming Ecosystem to meet your unique needs. This Ecosystem is the fusion of a high-end gaming solution, invaluable input from our customers, and the decades-long operator experience of our parent company, Veikkaus.

At Fennica Gaming, it all begins with our commitment to the players – their enjoyment, excitement, security, and well-being. Satisfied players

keep our customers ahead of the game, and the key to that is providing attractive and rewarding game experiences in a safe, responsible setting. Our legacy of experience and expertise serves as a strong base, helping our customers reach new heights.

Our world-class elnstants are designed especially for mobile environments and are winning the hearts of players across three continents. We've been creating these games since 2004 and have developed them based on player feedback.

Technological mastery and purposeful innovation keep our collaboration on the cutting edge. A culture of trust, cooperation, and tireless development ensures a lasting, mutually prosperous relationship.

Success, for us, is built by putting the player first.

SCA Promotions
scapromotions.com/lottery
Our risk, Your reward



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

Featured Solutions Include:

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

Our team of promotion experts, actuaries, and lottery veterans offer a unique skillset that assists lotteries, their agencies, and service providers with maximizing player engagement, sales, and contributions to good causes. We also provide the unique benefit of mitigating financial risk through risk transfer agreements.

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

Headquartered in Dallas, TX---Phone: 214-860-3752
<https://scapromotions.com/lottery-solutions/>

Jackie Walker Director, Business Development
jackie.walker@scapromo.com (214)507-866

Donald Silberstein Client and Partner Solutions Lead
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SCA Our Risk. Your Reward.



The TEL's Wanda Wilson Internship Program has been a fixture at the TEL since its first year of operations.



The Board of Directors help lead the way to success

inclusion, sustainability and, as previously noted, the economy. The Lottery publishes a CSR Report on its website to share details about such initiatives.

“Not only are we raising funds for education, but we are doing so in a socially responsible manner,” says Ms. Paul. For example, the Lottery has achieved the highest level of Responsible Gaming Certification from the World Lottery Association (WLA), as well the highest level of RG Verification from the North

American Association of State and Provincial Lotteries (NASPL) and the National Council on Problem Gambling (NCPG). “We’re proud of these achievements, and we are consistently analyzing our RG program to continuously improve,” says Ms. Paul. “By sharing RG best practices with other lotteries across the globe, we learn from each other and strengthen our industry as a whole.”

Ms. Paul, current President of WLA, was a former Chair of its CSR Committee, and her Executive Vice President of Advertising and Marketing is currently the North American representative serving on the WLA’s CSR Committee’s Expert Working Group. The TEL also maintains an RG Committee, made up of additional TEL senior professionals who represent a broad spectrum of expertise to implement and maintain the Lottery’s wide-reaching RG program.

Teamwork a Hallmark of Success

And this group effort doesn’t stop there. “Everyone plays a vital role in the success we’ve achieved,” Ms. Paul likes to point out. This is clear from a recent visit to the Lottery on its 20th anniversary, where all hands were on deck in various capacities to mark the occasion. “The 20-year milestone is a terrific time to recognize the benefits we have brought to the state and to spotlight our incredible team, including our dedicated Board of Directors.” The staff is impressive for its talent and hard work, but also for its makeup, which represents 53% women and 45% minority. Another key to the TEL’s success, says Ms. Paul, is that it is designed by statute to operate as a Corporation and is not a state agency. “This allows for a nimbleness that has made a meaningful difference in the way we are able to perform.”

The stellar performance from the past 20 years was an obvious theme during the variety of anniversary activities, which included annual compliance training, sales team training, refreshments, retrospective presentations, and an off-site reception. The TEL also launched a group of specially themed instant games based on the ever-popular Jumbo Bucks. “As we enter the next decade, we’re dedicated to making sure the years ahead prove just as fun for our players, as productive for the good causes we serve and as enriching for our team,” says Ms. Paul. “I’m proud to be part of this journey.” ■



The TEL team joined in the fun of the launch of Lotto America in 2017



The Lottery’s Executive Team help lead the way to success



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.

Suzanna Shkreli appointed new Michigan Lottery Commissioner

MUSL - Expression of Interest



We are interested in connecting with industries that want to form a strong partnership with Powerball, such as multi-media producers and outlets, professional sports organizations, retailers, service providers, manufacturers, and established technology companies.

RFP: MUSL Customer Relationship Management System - Proposals to the RFP are Due on JULY 26, 2024

IGT Delivers Enhanced Solutions to Virginia Lottery



IGT Supply Contract for UK National Lottery Operations Extended

Online iLottery drives German Lottery sales to €8.2 BILLION

Turning an average of at least three people per week into happy new millionaires: This is what the 16 state lottery companies in the German Lotto and Toto Block (DLTB) achieved in 2023. In total, around €8.2 billion was spent on state-authorized lotteries in Germany in 2023. This means an increase in use of around 2.9% compared to the previous year.

Scientific Games and Allwyn Move Bold Plans Forward for UK National Lottery



"We commend Allwyn on its vision for growing The National Lottery and substantially increasing returns to National Lottery-funded projects as a result. We've long-awaited this moment, made possible through a close, working partnership. Together, we've proven our ability to navigate challenges necessary to begin delivering sustainable and responsible growth to the UK National Lottery on time and across channels," said Michael Conforti, President of International and Strategic Accounts for Scientific Games. "With more technology and products being deployed over the course of the license, this is going to be a very exciting time for The National Lottery, its retailers, players and beneficiaries."

"Our ambition is to offer more games, attract more players, inject more entertainment, create more winners and raise even more money for National Lottery-funded projects. Powering that ambition is a significant investment in our technology and operations as we modernize to secure The National Lottery's future sustainability," said Andria Vidler, CEO for Allwyn UK.

DraftKings Inc. announces that it has reached an agreement to acquire Jackpocket

The agreement to acquire Jackpocket, the leading lottery concierge service app in the United States, for approximately \$750 million, with approximately 55 percent of the consideration payable in cash and approximately 45 percent of the consideration payable in the Company's Class A common stock.

Jackpocket is the leading provider of digital lottery services in the U.S. with proprietary and highly-scalable technology, a strong brand, and an outstanding founder-led management team. The Proposed Transaction will enable DraftKings to access and grow into the massive U.S. lottery industry, but more importantly strengthen its position in Sportsbook and iGaming through

higher customer lifetime value – based on demonstrated cross-sell capabilities – and an enhanced customer acquisition engine.

"We are very excited to enter the rapidly growing U.S. digital lottery vertical with our acquisition of Jackpocket," said Jason Robins, Co-founder and CEO of DraftKings. "This transaction will create significant value for DraftKings not only by giving our customers another differentiated product to enjoy but also by improving our overall marketing efficiency similar to how our daily fantasy sports database created an advantage for DraftKings in OSB and iGaming."

"Together with DraftKings, we will be able to bring tremendous value to our customer base as we advance our mission to create a more convenient, fun, and responsible way to take part in the lottery," said Peter Sullivan, CEO of Jackpocket. "DraftKings' broad footprint and exceptional mobile products present an opportunity to meaningfully expand the digital lottery vertical, and we could not be more excited to come together with DraftKings."

The Proposed Transaction is subject to the receipt of required regulatory approvals and other customary closing conditions and is expected to close by the second half of 2024.

New York contributes over 37% of all US sports betting tax

New York has generated more than 37% of the total tax revenue across all betting in the United States, according to a government department study.

FDJ Announces the Opening of Its Public Purchase Offer on Kindred

La Française des Jeux (FDJ), proposed a public cash offer for online gambling company Kindred in a deal worth \$2.67 billion. The Board of Directors of Kindred unanimously recommended that the Company's shareholders accept the offer from the French Lottery operator FDJ. Kindred's shareholders, Corvex Management LP, Premier Investissement SAS, Eminence Capital, Veralda Investment and Nordea, representing in aggregate approximately 27.9 percent of the outstanding Shares in Kindred, have irrevocably undertaken to accept

the Offer. The Offer price of SEK 130 in cash per SDR represents a premium of approximately 24.4 percent compared to the closing share price of SEK 104.50 of Kindred's Shares on Nasdaq Stockholm on 19 January 2024.

The completion of the tender offer remains subject to regulatory authorisations and to FDJ's acquisition of at least 90% of Kindred's capital. Stéphane Pallez, Chairwoman and CEO of FDJ Group, said: "I am pleased to announce today the proposed acquisition of Kindred. Fully aligned with our strategy, it will give the Group a diversified and balanced profile, based on several pillars: the monopoly activities, mainly the lottery, on our French historical market and, since November, in Ireland, with the acquisition of the Irish lottery operator PLI; and online sports betting and gaming activities open to competition in Europe. In this market, Kindred is one of the leading operators, combining strong brands, best-in-class technology platforms, an attractive growth profile and a committed approach to responsible gaming. Given their respective histories, strategic strengths and core values, FDJ and Kindred are highly complementary, and I will be delighted to welcome Kindred's management team and many talented individuals into the combined Group following this transaction. The combination will result in a stronger strategic positioning and significant value creation for the benefit of our shareholders and broader stakeholders."

Danish Land-Based Betting Decline Coincides with New Regulatory Measure

\$7B wagered in first year of Ohio sports gambling, almost tripling estimates

Ohio's casinos, racinos break revenue record for 10th time in 11 years

Thai Government plans digital shift for lottery sales

Barcelona confirmed as the host city for ICE Totally Gaming Show, the largest in the world, for end of January of 2025

EL Members contributed 22 billion euros back to Society in 2022

Announcing EL Industry Days 2024 Salzburg June 16-19

The European Lottery Association (EL), along with EL partners Scientific Games, IGT and NeoGames and hosts Austrian Lotteries, invite you to join them for the 10th edition of the EL Industry Days in Salzburg (Austria). For more information on this and other EL events, visit EL website at european-lotteries.org



**THE EUROPEAN
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FOR THE BENEFIT OF SOCIETY

The fundamentals of Digital Marketing: Key learnings from 2024 EL/WLA Marketing Seminar

From a 'future ready mindset' to the use of AI for a new marketing campaign and from virtual influencers and communities to meaningful best practices in digitalising the lotteries player services. The 2024 EL/WLA Marketing seminar brought this altogether.

Digital marketing, also known as online marketing or internet marketing, has revolutionised the way businesses connect with their audience and promote their products and services. This is no different for national lotteries.

ENGAGING CUSTOMERS WITH POWERFUL CONTENT

Allister Frost, Microsoft's first ever Head of Digital Marketing Strategy and the creator of '5 steps to success in a world of change', showed in his opening keynote how to follow and react positively to change. He emphasised to have a 'future ready mindset' to cope with the fast changing digital opportunities.

Jennifer Quigley-Jones, CEO and Founder of Influencer Marketing agency Digital Voices, showcased in her keynote the importance of harnessing the power of creators to engage communities and make content that customers want to watch, not ads they

THE USE OF GENERATIVE AI

The growing importance of the use of generative AI in the lottery sector, especially where it concerns the various marketing activities is one of the most important learnings from this year's marketing seminar. As presented by the Belgian National Lottery with their recent Euro-Dreams campaign, generative AI can help with the creation of marketing campaigns. Several other examples showed that AI is key in bringing data together to understand the needs and desires of players even better than before. It helps to create an individual approach, as well as protecting players and helping them to enjoy the games in full.

THE FUTURE OF DIGITAL MARKETING

Inspiring digital projects were described by the Hungarian National Lottery, The Finnish National Lottery and the Romanian National Lottery. All new technologies should also be used to set the player at the centre of all activities, rethink and focus on the real need of traditional marketing, where shooting an expensive TV commercial abroad was questioned against all digital opportunities that marketers have today.

From the various contributions of the partners of EL and WLA, it became clear that they are all focused on helping their clients with the best digital solutions, online as well as "omnichannel". Neogames, IGT, Scientific Games, Intralot and Pollard Banknote Limited gave inspiring insights into their approach towards the digital opportunities.

An out-of-the-box presentation was given by the Polish National Lottery, explaining the use of digital opportunities in onboarding programmes for new and existing employees. A digital world helps employees to learn and understand on the various projects and aspects of the whole organisation.

A CEO panel with US based lotteries, moderated by WLA president Rebecca Paul, gave insights in the US market and its fast developing digital world as well as brick and mortar environments. Well know brands and events are more and more incorporated in the multijurisdictional games, attracting a large and growing player base.

Looking ahead!

This year's edition of the EL/WLA Marketing seminar was hosted just ahead of ICE London, the leading global gaming and gambling event to service the whole industry. Looking ahead, the 2025 edition of the Seminar will follow in the footsteps of ICE, taking place in the vibrant city of Barcelona. Note the dates in your digital diary already (22-24 January 2025). We look forward to seeing you there!

Visit the EL website:
european-lotteries.org

View this article at
<https://www.european-lotteries.org/news/fundamentals-digital-marketing-key-learnings-2024-marketing-seminar>

Creating Positive Social Impact Together

10th EL Industry Days 2024

Salzburg, Austria | 17–19 June



Organized by



THE EUROPEAN
LOTTERIES
FOR THE BENEFIT OF SOCIETY

Hosted by



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LOTTERIEN

EL Level 1 partners



IGT



SCIENTIFIC GAMES

EL Level 2 partner

neogames®

The European Lotteries (EL) is gearing up for another exciting year ahead. As EL's strategy is all about creating a positive social impact together, what better way to celebrate this, than at the **10th edition of the EL Industry Days!**

Over two decades the EL Industry Days have been organised and during this time a lot has changed. From the first edition held in Granada to this year's edition, one thing remains the same: the mission of EL and its Members to create legal, responsible games for public good and to benefit society.

Taking place in **Salzburg, Austria from 17–19 June** – not only the birth place of Mozart but also the backdrop for the world famous Sound of Music – the Industry Days will highlight what positive social impact is and showcase and discuss important results and best practices.

Together with the EL Partners and Austria Lotteries as our host, we are building a programme that will give you

concrete insights into the theme and inspiration for you to take home.

As always, there will be excellent opportunities to meet and exchange and enjoy some of the best highlights of Salzburg.

Registration is now open! Visit the EL website for all information about the Industry Days, updates and how to register: <https://www.european-lotteries.org/events/el-industry-days-2024-salzburg>

The Industry Days will take place at the Salzburg Congress Centre.

The EL General Assembly will take place on Monday 17 June in the afternoon, ahead of the Industry Days.



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#1

Lottery-Partner Responsible Gaming Program with Science-based Tools

We were one of the first companies to receive Responsible Gaming Supplier global certification from the World Lottery Association. And our innovation for responsible gaming continues. It's why we developed *Healthy Play*, the only program offering science-based tools to help lotteries increase literacy about their games, odds of winning and how to keep play healthy...which support their own RG certifications and initiatives.

*THIS IS THE
Science Inside*



ScientificGames.com

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