

# PGRI PUBLIC GAMING

NOVEMBER/DECEMBER 2022

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

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## ON SHAPING THE FUTURE OF LOTTERY IN AUSTRALIA

**Sue van der Merwe**

*Managing Director and Chief Executive Officer,  
The Lottery Corporation*

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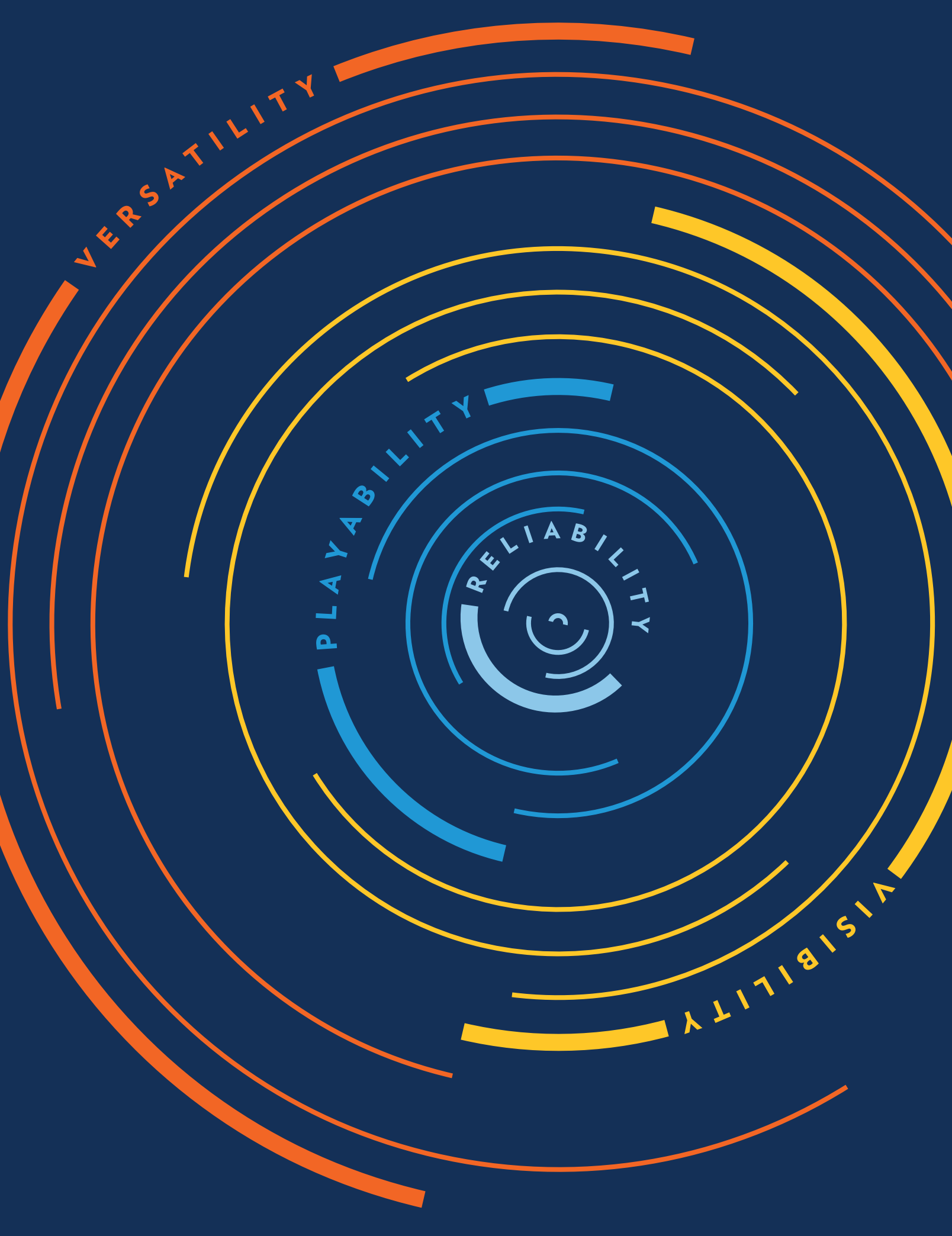


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# From the Publisher

The World Lottery Summit Vancouver was quite the reunion of lottery leaders from all over the world. We will include in-depth reviews of the keynote speeches in the January issue of PGRI Magazine. For now, we want to congratulate **Rebecca Paul** for her re-election to president of the World Lottery Association; and **Lynne Roiter** for her being honored with the Guy Simonis Lifetime Achievement award; and Teams **WLA**, **NASPL**, and **BCLC** for producing a fabulous event. While the biannual WLS event is the big kahuna of the industry, the associations produce a whole host of educational seminars throughout the year. Visit their websites to learn more about them and hopefully plan to attend the ones most relevant to you.

- [world-lotteries.org](http://world-lotteries.org)
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- [european-lotteries.org](http://european-lotteries.org)
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Sadly, **Guy Simonis** passed away on October 6, less than two weeks prior to the WLS Vancouver. One of his very closest friends over the past 45 years is Michelle Carinci. I asked Michelle to share some of her Guy-experiences and she graciously agreed. His is indeed a very storied past and Michelle captures not just the events and anecdotes that inform our appreciation for what makes him so special – she conveys the sense of genuine love for this man with the outsized personality whose mere presence as well as bold leadership reshaped this industry.

I was introduced to Guy in 2006 by my father-in-law Duane Burke. (Duane started PGRI in 1973 and his relationship with Guy went almost as far back as Michelle's.) Guy became a close friend and confidante. We shared a world-view and approach to business that was disinclined to "play-it-safe" and avoid controversy. Susan and I wanted to make a difference, to be a positive and proactive advocate for the government-lottery industry. Guy



**Guy Simonis and Paul Jason**

helped us avoid miss-steps in those early stages when you "don't know what you don't know". One minor example: I was so pleased and proud when talk-show host **Dr. Phil McGraw** invited me to join him for a segment on lottery. That was very shortly after Susan and I took the reins of PGRI in 2006. Guy was adamant that I not do it, explaining that Dr. Phil was not interested in promoting good-will towards lottery, but about creating sensationalism, and that would come at the expense of myself and the industry. Thankfully, my time to crash-and-burn was postponed for the time being. But still, Guy was all about addressing the issues in a bold, straightforward way. And as you'll see in the articles about Guy, he was quite instrumental in much of the recent history of lotteries in general, and especially in forging a global community of operators and technology partners with a shared interest in the success of government lottery and gaming to support good causes.

On the subject of tackling tricky issues in a bold, straightforward way – I want to thank **Rebecca Paul** and panelists for what many have commented was a most interesting discussion. The goal of building the most productive and effective RFP and creating alignment of purpose and execution between lottery operator and technology partner is rich with headroom to improve.

Some of the obstacles are systemic and resistant to change (state procurement policy, for example). Others can be difficult to discuss in general, and even more so in a public forum as they involve the application of financial levers and incentives to drive action.

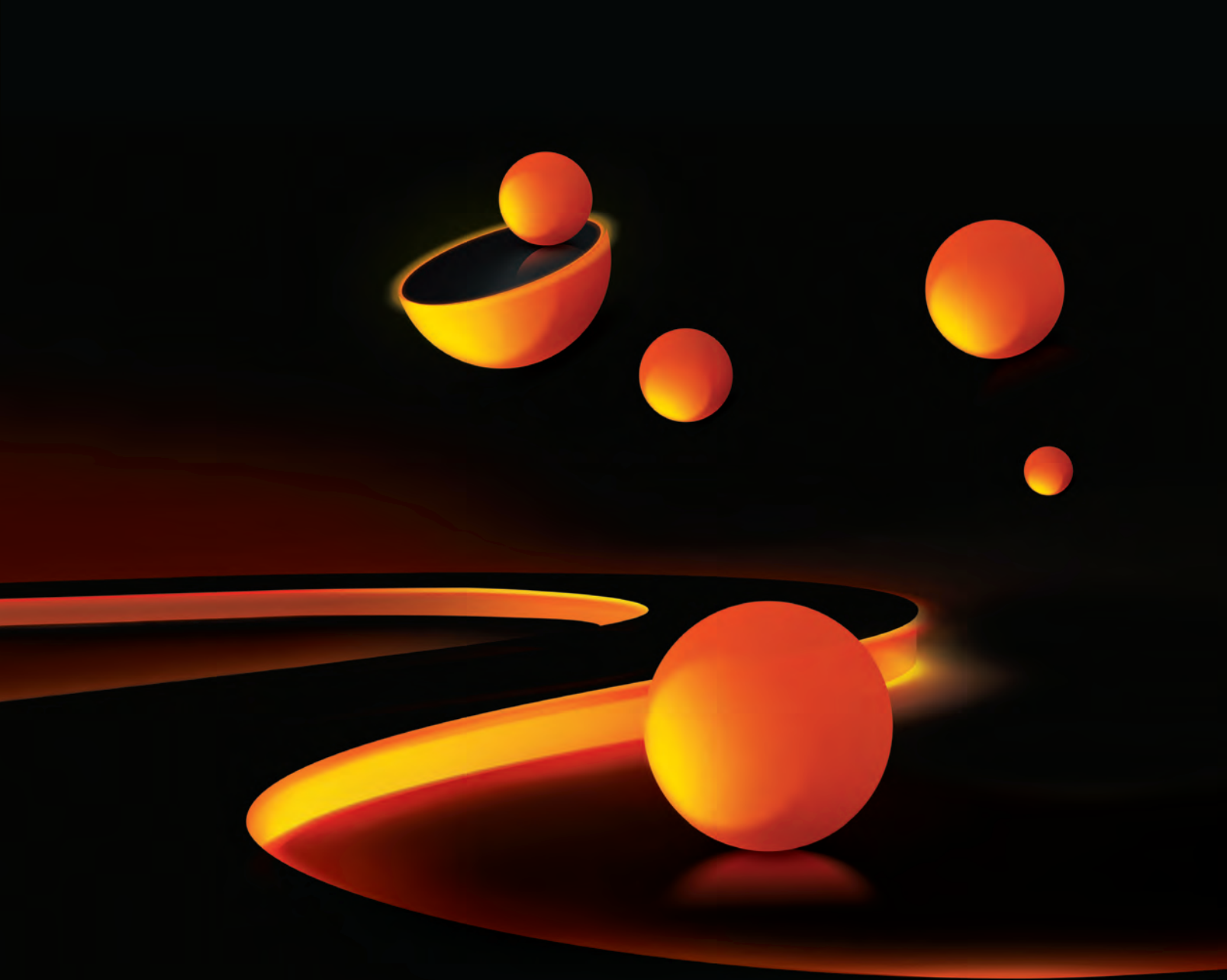
I respectfully submit that in spite of these concerns, it is important not only to talk about these issues, but to do so in a public forum, to engage everyone in the process of thinking about how to work together for optimal impact, productivity, and outcomes. We can all be a part of the solution, part of the process of forging pathways towards even better collaboration. Key to that, though, is understanding why things happen the way they do, why people behave the way they behave, what drives private enterprise to invest in innovation, what constraints govern the decisions and actions of state lotteries, etc. Of course, there are many obstacles, some of which can't be overcome. But as this panel discussion reveals, there are in fact things that can be done to improve the effectiveness of the collaboration between state lottery operators and their technology partners. We just need to clarify our shared interests, and focus on creating mutually agreeable pathways towards achieving those.

Next up is the **EL/WLA Marketing Seminar** and ICE Gaming Show in London February 7-10 (see article on page 31) and then **PGRI Smart-Tech Florida** March 28-30. Specific venue TBD.

And a special thanks to all of our editorial contributors and advertisers! I appreciate our partnership, the leadership you provide this industry, and the brain-trust you share with our readership.

Paul Jason, Publisher  
Public Gaming International Magazine





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# Shaping the Future of Lottery in Australia



**Sue van der Merwe**  
*Managing Director and Chief Executive Officer, The Lottery Corporation*

**PGRI INTRODUCTION:** As the driving force behind Australia’s leading lottery and Keno games and one of the best-performing lottery businesses in the world, **The Lottery Corporation** operates a diversified and balanced portfolio of high-profile brands under exclusive and/or long-term licenses and approvals, bringing Australia’s largest lottery games to more than 8 million active customers.

The successful demerger of the Lotteries and Keno business from the Tabcorp Group on 1 June 2022 enabled the creation of The Lottery Corporation as a standalone entity listed on the Australian Securities Exchange. It was a watershed moment for a business that dates back to 1881 when George Adams organized the first Tattersall’s public sweep on horse racing’s Sydney Cup. The Lottery Corporation’s story spans more than 140 years, with brands that are entrenched in the hearts and minds of Australians and today is one of the highest performing lotteries globally and the leader in the Australian lotteries and keno market.

Its business is one of significant scale and reach with the equivalent of 46% of the Australian adult population purchasing a lottery ticket in the past year, an extensive retail footprint of more than 7,200 outlets comprising one of Australia’s largest retail franchise networks, 4.1 million active registered lottery customers and high performing digital channels. The Lottery Corporation has a proud history of delivering life-changing wins to its customers and making a meaningful difference in Australian communities.

We are very pleased to bring to you this discussion with Sue van der Merwe, CEO of The Lottery Corporation. Sue, who also chairs the Asia Pacific Lottery Association, shares her views on the industry, The Lottery Corporation’s future, the role that lotteries play in the community, and balancing the needs of The Lottery Corporation’s stakeholders.



that, the lotteries business that we run was part of the Tatts Group. A Tabcorp-Tatts Group merger in late 2017 brought together six complimentary businesses to create three businesses under the Tabcorp brand – Lotteries and Keno was the largest business contributing 56% of FY21 revenues. I was Managing Director of the Lotteries and Keno business, which we’ve now demerged from Tabcorp.

**What was the rationale behind the demerger?**

**Sue van der Merwe:** The decision to pursue the demerger followed a strategic review by the Board which considered a number of potential alternatives to maximize shareholder value.

From a leadership point of view, it’s allowed us to solely focus on lotteries and Keno, whereas within the Tabcorp Group the focus was shared with the wagering and gaming businesses. I’m excited to have assembled an experienced, passionate and talented leadership team to drive our performance.

**Paul Jason:** Thanks very much for joining us in what must be a crazy busy time for you, Sue.

**Sue van der Merwe:** It’s a pleasure Paul, always happy to speak with you and to share insights with the lotteries community. It’s an exciting time for us at The Lottery Corpora-

tion having only begun life as a standalone ASX-listed company on June 1, albeit we’ve been operating lotteries in Australia in one form or another for more than 100 years.

**Your business was previously part of the Tabcorp Group?**

**Sue van der Merwe:** Yes, that’s right. Before

Having access to new and different investor categories was another element of the rationale. There are some investors, for example, that don't want to own shares in a gaming business but were comfortable with investing in lotteries and Keno. It's also allowed shareholders to value our lotteries and Keno business on a standalone basis.

**How did the demerger process go? I would think there are lots of challenging operational, distributional and logistical issues that a large-scale de-coupling like this must entail.**

**Sue van der Merwe:** The plan to demerge was first announced in July 2021. Within roughly 11 months, we obtained all the necessary approvals and shareholder support, along with conducting the extensive preparation for separation. It was complex and there was a lot of heavy lifting by our people. It's a credit to all involved that we were able to meet the June 1 timetable while dealing with the impact of the pandemic and maintaining momentum in the business.

**Tell us about the scale of the business now.**

**Sue van der Merwe:** We're now an ASX50

**“The equivalent of 46% of the adult population bought one of our products in the past 12 months. That's 8.3 million customers, and just under half of those are registered to our database.”**

company with a market capitalisation of more than A\$9.5bn at the current share price. We operate a complex multi-jurisdictional business across seven of the eight Australian jurisdictions, under varying forms of legal arrangements. To that end we have multiple stakeholders across the various state governments, retailer bodies, responsible gambling groups and the like.

On the Lotteries side we operate a balanced portfolio of 10 popular games sold through retail and digital channels. Our lottery retail model is a franchise and accordingly we operate one of Australia's largest franchise networks. On the Keno side, the game is distributed via licensed venues (pubs and clubs) and online in those jurisdictions where this is permitted.

To give you an idea of the prominence of our brands and products, the equivalent of

46% of the adult population bought one of our products in the past 12 months. That's 8.3 million customers, and just under half of those are registered to our database.

We have around 750 employees, including a large technology team as we operate our own technology system.

**How is the new company going?**

**Sue van der Merwe:** We have started with momentum and we've just delivered a strong result in the past financial year, coming off strong performance in 2020 and 2021 when we saw increased purchase of lottery products during the onset of COVID.

Our revenues grew more than 9%, and we had an increase of almost 12% in EBITDA on a comparable basis in FY22 – by comparable, we mean the reported results, which were affected by the demerger, have been

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adjusted to allow for a more representative view of performance.

Our team is engaged and passionate about the future of our business. We put a lot of effort into “Day 1”, personally welcoming the team and signifying a new beginning, changing the branding through our offices, creating an energy and drive. Since then, we’ve been collaborating with the team to define our culture and ways of working.

#### What were some other highlights of the past 12 months?

**Sue van der Merwe:** One of the aspects of our performance I was really pleased with was to see the strength across our game portfolio. We actively manage our overall portfolio for growth by having games that appeal to different player motivations.

In FY22, Powerball returned to a higher level of jackpot activity. At the same time our Saturday Lotto game and Set for Life held up well, demonstrating the success of previous changes we’d made to those games. We also continued to innovate and optimize the portfolio introducing a game change to Oz Lotto, which, along with Powerball, forms our jackpot games segment.[

The change to the game matrix, launched in May, was designed to deliver bigger jackpots and reinforce Oz Lotto’s strategic position in the jackpot segment of the game portfolio.

## “We are very focused on data-driven, personalized marketing so we can offer the right products to our customers at the right time without serving offers that don’t align with their preferences.”

It’s been well received by players. Oz Lotto is our third-biggest contributor to digital sales and one of the main acquisition games in our portfolio.

Our focus on digital, both from a marketing point of view and as a distribution channel, continues to deliver benefits. Digital sales grew 26% in FY22 and our active registered customer number grew by 330,000 customers. Pleasingly our retail channel was resilient, with retail revenue also growing.

And on Keno, we secured a new 20-year license in the state of Victoria on a non-exclusive basis, and that runs through to 2042 and now allows for digital sales.

#### What’s ahead?

**Sue van der Merwe:** Significant themes for us this year will include embedding our own

company culture, enhancing our commitment to community and continuing to innovate with our product portfolio and optimize our distribution channels.

Taking retailer store syndicates online is an exciting initiative which delivers another element to our omni-channel strategy to align the retail and digital experience. Store syndicates, where we bring a group of people to purchase game entries together, are important to our retailers. This will make it easier for customers to discover and join syndicates wherever they are playing.

With Keno, we’ll seek to leverage the digital element to the new Victorian license, and offer enhanced features and offers on the app for customers playing in venues.

We’ll continue to evolve our diverse retail network and work with our retailers to drive growth in their stores.

#### How does de-coupling lottery from the other gaming sectors add value to your players?

**Sue van der Merwe:** We’ve always been customer-led and had a deeply ingrained customer focus in our business. As an example, we are very focused on data-driven, personalized marketing so we can offer the right products to our customers at the right time without serving offers that don’t align with their preferences.

Being a separate company now, we are able

to fully control how we prioritize initiatives and allocate our resources, which is a benefit.

### How does the demerger enhance your relationship with political stakeholders and the beneficiaries of lottery funding?

**Sue van der Merwe:** Again, I think it is about focus. Both these areas are highly important to the future of our business in different ways. As I mentioned earlier, we're licensed in seven jurisdictions in Australia (all states and territories excluding Western Australia) and it's important that we work effectively with all governments.

The demerger helps simplify working with government as the range of licenses, products and issues is narrower than when we were part of a bigger group, and of course retaining strong and productive relationships with governments that license us is very important to us.

### What is the scale of the funds generated by the Lottery Corporation that go to the governments?

**Sue van der Merwe:** In FY22, our operations generated A\$1.7bn for communities through taxes paid to governments. We also

generated more than A\$500m in commissions for our retail partners, many of which are small businesses. We also paid out more than A\$4.9bn in prizes to customers.

### How does the demerger enhance your ability to serve and support your channel partners, mainly retailers?

**Sue van der Merwe:** We did a lot of very valuable work with our retailers when we were part of the Tabcorp Group. This included working with retail stakeholders to develop a model that saw them share in revenue from digital sales, and benefit from this transition to digital that we see occurring across a range of areas. We're very conscious of the importance of the retail channel. It gives us prominence and visibility and helps promote our products. And it remains our largest channel.

The omni-channel model we've developed is very much about allowing customers to buy entries when, how and where they like. In many cases a customer will buy across a range of channels depending on their activities.

I think that as a separately listed company, it gives us an even greater ability to retain that focus on our more than 7,000 retail

outlets. As an example, we now have a Chief Channel Officer (Antony Moore) on our Executive Leadership Team. That's important in terms of ensuring we support our channel partners and manage our network effectively.

### What will The Lottery Corporation do going forward that would likely not have been done before?

**Sue van der Merwe:** We have much work to do in terms of bedding in the demerger and standing up our own operations in those areas where we are still on shared systems operating under transition service agreements.

We've just launched our strategy, vision and purpose. Our vision is to be the world's best lottery operator, and our purpose is to create positive impacts.

In terms of new opportunities, we've said that we are interested in opportunities relating to new licenses, or enhancements to our existing licenses, but they have to stack up against our criteria.

### How are consumers in Australia responding to the new environment of higher inflation and interest rates?

*Continued on page 37*



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# Creating Alignment of Mission, Purpose, and Action

**T**he effective collaboration between Lottery Operator and its commercial/technology partners is essential to successful long-term growth and service to good causes. How can Lottery Operator and technology partners forge the kind of relationship that drives short-term focus and results but is also flexible to support ongoing investment in innovation and integration of new technologies, and positions the Lottery for long-term success? What are progressive lotteries and their commercial/technology partners doing on an ongoing basis to promote alignment of purpose, maximize the productivity and effectiveness of their collaboration, and facilitate the integration of third-party suppliers?

Moderator: **Rebecca Paul**, President and Chief Executive Officer, Tennessee Education Lottery Corporation; President of the World Lottery Association (WLA)

Panelists:

**Jay Gendron**, Chief Operating Officer Global Lottery, IGT

**John Schulz**, President, Americas and Global Instant Products, Scientific Games

**Matt Strawn**, President and Chief Executive Officer, Iowa Lottery

**Lorne Weil**, Executive Chairman, Inspired Entertainment

**Jennifer Westbury**, Executive Vice President, Sales & Customer Development, Pollard Banknote

**Rebecca Paul:** I am a big believer in building a mutually supportive partnership with the people I do business with because that is the more productive and effective way to optimize performance and results. I stretch to forge win-win solutions because that is the best long-term strategy to maximize the funds we transfer to good causes. We think of vendors as true partners in the mission to accomplish ambitious goals for the benefit of all lottery stakeholders. When Paul first talked to me about doing this panel, he thought the discussion should be about RFP's, and how RFP's might be constructed to drive the most collaborative partnership. I explained that my experience is that partnerships are driven by the right attitude, not by what is stipulated in the contract. The spirit of trust and ongoing communication needed for effective partnership can't be effectively dictated by an RFP. Without the right attitude, you will never ever have a productive partnership regardless of what the RFP says. Those are a few of my thoughts. Let's ask our panelists what they think. Since John and I started in the same year, 1985, and John was mentored by one of my mentors, Dave Bausch, and he happens to be sitting next to me here, let's start with John. You launched Scientific Games' first Cooperative Services Partnership in New York in 1985. Take us back to the brainstorming sessions of the time. How did you come up with that plan?

**John Schulz:** Wow. A lot has happened since then. Back in 1985 it was called Shared Risk before the name changed to Cooperative Services. And that name aptly

described the program. As extraordinary as it may sound now, the New York Lottery was going to end their instant game program. Sales were about \$57 million a year. They said that draw-based games drove a majority of the sales and paper tickets had low sales and were very time intensive to administer. So they called Scientific Games and advised us that they want to cancel their orders and not sell any more scratch games. Our CEOs at the time, Dan Bower and John Koza knew we had to come up with a solution quickly. The solution was to create a shared-risk arrangement that would essentially enable the New York Lottery to offload some of the cost of managing certain components of the instant game program. At the time, pay out was 40%, and they had 19 different distributors that got paid a commission for every book of tickets that they sold. Tickets were Cash On Delivery and took about three or four weeks to get to retailers. We hired mathematicians, who are called data scientists today, logistics experts and others to help us re-assess business practices and processes, pricing and product management strategy, order fulfillment and retail support methods. We looked at this as an opportunity to redesign our whole approach to partnership.

At the same time, we terminated the contracts with 19 local distributors and installed a nationwide courier service. We built an inside sales operation, which was a staff comprised of small teams dedicated to handling almost all aspects of the product from design and promotion to fulfillment to

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retailer recruitment and support functions. And that was the first Shared Risk program. During the first stage of this program, the New York Lottery's instant game sales grew from \$57 million to almost \$500 million in an eight-year period. The instants category was producing about \$225 million of profit for the New York Lottery. I look at this successful collaboration between the New York Lottery and Scientific Games as formative for us, shaping our instant game management approach in the Scientific Games Enhanced Partnership and our culture in ways that continue today.

**R. Paul:** Lorne, when you took the reins at Scientific Games in 2002, Shared-Risk had evolved into Cooperative Services and became a big part of the portfolio. How did you make it better? What would you do differently? **L. Weil:** At that point, it was evolving incrementally. The foundation had been laid. The method of working hand-in-glove with the lottery was running smoothly. I encouraged the teams to continue to evolve it, to enhance the effectiveness and productivity of what was being done, and to find new and better ways to nurture collaboration. Jim Kennedy always had his five-most-important-things we needed to do or improve upon. It was a matter of identifying those things and executing the plans to make them happen. One top-of-mind initiative, for instance, was to steadily increase the price-points of the games. Of course, objectives like this need to be developed in collaboration with the lottery. And what may seem to be obvious to us years later, like that increasing price-points is a predictable way to increase revenues and profits, is rarely so obvious in the beginning. We may propose strategies and initiatives, but it is up to the lottery to decide how, or even whether, we proceed. As you point out, Rebecca, the relationship depends on trust and mutual support. The technology partner needs to earn the trust of the client, the lottery. The lottery does expect us to provide the data and evidence to support our recommendations; and then to test new ideas before investing resources. Over time, we learn to pool our brain-trusts and work together to produce the outcomes that are best for all lottery stakeholders.

**R. Paul:** And you bought MDI a couple years later, in 2005?

**L. Weil:** We wanted ways to add value to the product to justify the increase in price. Licensed properties became a very effective tool to do that. Branding lottery products with their favorite sports team, or cartoon

character, or popular consumer brand, added that value, attracting players to pay a little more to play the games that captured their imagination. While what we did was not revolutionary, I would say it could not have been done without the mutual respect and trust we constantly worked hard to earn from the lottery leadership of Georgia, where Rebecca was CEO, and progressive lotteries like Florida, Pennsylvania and others to lead the way.

**R. Paul:** Over to you, Jay. We have been discussing some of the growth-drivers for the instants products category. What can we do to increase the growth of the draw-based games category?

**Jay Gendron:** Enabling both Mega Millions and Powerball to be sold in all states was a big step. Increasing the price of the Powerball ticket to \$2 was another big boost to the sales of draw-based games. The next step may be to continue the price-point evolution just as was done in the instants product space. For example, we know that the Mega Millions group has been exploring the option of increasing the price to \$5. Based on historical precedent and market research, we believe that gaining consensus and approval on a \$5 game would further increase sales and revenue in the draw game category. It would have the added benefit of further differentiating the two big national games. I do think it benefits all of us if we have Powerball and Mega Millions complement each other. But this is another case where lotteries have to work with each other and work with vendors in a spirit of trust to implement strategies where the outcome is not certain. We can trot out the data, the facts, and evidence to support a proposition that increasing the price will increase sales and transfers to lottery beneficiaries. But in the end, we need to trust that we are all pulling in the same direction and have each other's interests at heart. Keno and CashPop have also been very successful in the jurisdictions where they are implemented. So there is a lot of potential for more product expansion, differentiation, and optimization to drive incremental increases in sales and, ultimately, revenue for lottery beneficiaries.

**R. Paul:** Jennifer, what do you think makes a good partnership?

**Jennifer Westbury:** At Pollard Banknote, we take an expansive view towards partnerships and how they can be nurtured and developed to drive performance and results. Each lottery has its own unique sets of sales and marketing agendas, political and regulatory environments, organizational structures

and cultures, and overall business objectives. We think creatively when designing an approach that optimizes the ability of all the component parts of the relationship to work together effectively. We have lots of different kinds of partnerships, and in the end, each one is special in its own way. Sitting next to me is Matt Strawn. Our partnership with the Iowa Lottery goes back to when we first started printing instant games in Iowa. Two major production facilities in the state of Iowa create significant employment for Iowans.

Our partnership with the Iowa Lottery is considerably different from the partnership we have with the Texas Lottery where Gary (Grief) and Ryan (Mindell) have long espoused a philosophy of working with multiple vendors. Their latest RFP is a great example of how lotteries are thinking out-of-the-box and challenging their partners to create new kinds of solutions and partnership models.

And Gregg Edgar in Arizona has a different view of what he wants the partnership with Pollard Banknote to accomplish. We not only provide instant tickets, Pollard Banknote provides the Arizona Lottery's Players Club player engagement solution. We implemented warehousing and distribution three years ago and managed the process with performance improvements through the disruptions of COVID. And of course, in addition to the longstanding instant ticket work and the manufacturing facility we operate in Michigan, we partnered with the Michigan Lottery on their journey in digital, beginning with some Space Between products like their Crossword apps, through to the launch of iLottery. What started as a partnership based on technology, products, and marketing evolved into assisting with governmental and regulatory affairs.

Pollard Banknote then participated with the New Hampshire Lottery in challenging the U.S. Department of Justice to clarify its position on iLottery. The US DoJ proceeded to overturn their unfavorable ruling to acknowledge that authority to decide regulatory policy relating to online gambling and iLottery resides with the states, just as it always had with traditional casino gambling and lottery. So, we think of ourselves not just as technology partners. Pollard Banknote is dedicated to using our skill-sets and resources in whatever ways can serve the interests of our clients, the industry in general, and the mission to generate funds for good causes.

*Continued on page 38*





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## LOTTO AMERICA REACHES NEW HEIGHTS

*\$1 draw game achieves record jackpot after introducing additional draw night*

A smaller multi-jurisdictional draw game created quite the buzz this past fall when its advertised jackpot eclipsed the starting jackpots for both Powerball® and Mega Millions®. Lotto America® surpassed its previous jackpot record of \$22.82 million last September, before closing out the month of October with a jackpot above \$29 million. Product Group leaders credit the addition of a third weekly drawing for taking the game's jackpot growth to new heights.

Lotto America first launched in 2017 with 13 participating lotteries: Delaware, Idaho, Iowa, Kansas, Maine, Minnesota, Montana, New Mexico, North Dakota, Oklahoma, South Dakota, Tennessee, and West

Virginia. Initially, drawings were performed every Wednesday and Saturday after the winning Powerball numbers were drawn. The game has a simple premise – players pick five red ball numbers from 1 to 52 and one blue Star Ball number from 1 to 10. Players win a prize by matching one of the 9 ways to win.

The \$1 draw game quickly filled a niche in product portfolios as its debut happened just weeks after Mega Millions increased its base ticket price from \$1 to \$2. Since then, Lotto America has gained a loyal player base with its \$1 ticket price and improved jackpot odds (1 in 25.9 million), compared to the larger national games (Powerball 1 in 292.2 million, Mega Millions 1 in 302.5 million).

“Lotto America really does have a loyal following, especially in Minnesota,” said Adam Prock, Lotto America Product Group Chair and Minnesota Lottery Executive Director. “But like other rolling jackpot games, Lotto America faced jackpot stagnation challenges. With a \$2 million starting jackpot, it could be weeks before the jackpot reached an enticing level that attracted occasional players off the sidelines.”



Following the demonstrated benefits of adding a Monday drawing to the Powerball game, the Lotto America Product Group moved to expand the number of drawings to three nights a week: Monday, Wednesday, and Saturday, with the first Monday drawing taking effect on July 18, 2022. The result has been dynamic, week-over-week jackpot growth that has sent the grand prize into record territory.

Weekly sales for the 52 weeks preceding the change averaged approximately \$920,000. For the thirteen weeks immediately following the introduction of the Monday drawing, weekly sales averaged \$1,521,000 – a 65% increase. The average advertised jackpot for the period after the addition of the Monday draw has been larger than the period preceding the change, likely accounting for some portion of the sales increase.

To isolate the impact of the additional drawing, weeks with similar advertised jackpot amounts were compared. The period since the launch of the Monday draw (7/18/22 – 10/8/22) was compared to similar jackpot cycles. The first cycle being right after the game was introduced in 2017 (Cycle A, 12/27/17 – 3/10/18) and a second cycle from 2019 (Cycle B, 3/23/19 – 7/10/19). Weekly sales including the Monday drawing averaged 17.6% greater than Cycle A and 19.2% greater than Cycle B.

“There is no doubt that Lotto America is reaping the same benefits as Powerball from increasing the numbers of drawings from bi-weekly to tri-weekly,” said J. Bret Toyne, MUSL Executive Director. “Similarly, we are not seeing any evidence that the additional drawing is cannibalizing Lotto America’s multiplier feature.”



**Bret Toyne, MUSL Executive Director**



**Adam Prock, Lotto America Product Group Chair and Minnesota Lottery Executive Director**

*Continued on page 37*

# EXPERIENCE LOTERIA LIKE NEVER BEFORE

Bring Your Game to Life

**\$0** SCIENTIFIC GAMES **HD**

**LOTERIA**  
DON CLEMENTE

**BONUS NIGHT 3D**

▼ **PLAYING BOARD 1**

\$10,000	\$5	\$15	\$25	\$50
\$75	THE ROOSTER	THE UMBRELLA	THE STAR	THE DEER
\$100	THE TREE	THE PITCHER	THE CANOE	THE ROSE
\$250	THE CROWN	THE PARROT	THE HAND	THE BOOT
\$1,000	THE WATERMELON	THE DRUM	THE FROG	THE ARROWS

EACH PLAYING BOARD IS PLAYED SEPARATELY

▼ **PLAYING BOARD 2**

\$10,000	\$10	\$20	\$40	\$75
\$100	THE UMBRELLA	THE PEAR	THE ROOSTER	THE ROSE
\$250	THE WATERMELON	THE STAR	THE WORLD	THE SUN
\$500	THE BELL	THE PITCHER	THE DEER	THE TREE
\$1,000	THE FLOWERPOT	THE MERMAID	THE FROG	THE MUSICIAN

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Details matter. Our research platform helps you align your marketing strategy for the core components of instant games, create a cohesive performance-driven digital program, and better understand today's players.



**Gem | Intelligence**  
Manage your retailer relationships like a boss with a suite of cloud-based software that keeps you connected and improves retail performance and operational efficiencies.



**Sparkle Select**  
Add some wow to any scratch game with a *Strategic Product Enhancement* proven to impact sales – and unlimited creative options in 10 colors and 15 patterns, that's 150 different combinations!

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Deliver more fun at every price point. There's a game for everyone in our high-performing families of games like our Multiplier families.



**Scientific Games Enhanced Partnership**

Five of the top six lotteries in the world participate in our performance-driving SGE-P program which manages all aspects of the instant product portfolio. SGE-P is driving 40% higher instant game sales than non-SGE-P lotteries.\*



**Get In On the Action**

Lotteries around the world trust Scientific Games with their sports betting solution, including one of the largest state-sponsored sports betting market in the world.



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The intelligent ecosystem of SCiQ comes to award-winning player self-service technology, integrating directly with your retailers' POS systems.



**iDecide**

Introducing iDecide, a revolutionary new game enhancement that gives your instant scratch game players the option to continue their play experience via a mobile app — and potentially expand their winnings by advancing through levels in a digital game.



**Instant Games**

Take a look at our portfolio of 100+ digital games from the industry's most innovative instant game designers, a winning combination of exciting play experiences created at our digital game studios around the world.

# VANCOUVER WELCOMES THE LOTTERY WORLD TO CANADA



## AFTER FOUR-YEAR ABSENCE, WORLD LOTTERY SUMMIT RETURNS TO RAVE REVIEWS

As World Lottery Association President Rebecca Paul closed the festivities at October's World Lottery Seminar in Vancouver, you could almost hear a collective exhale from the hundreds of attendees gathered at the final dinner. It had been an exhilarating four days of meetings, educational sessions, trade show, and a bit of fun in the city. And by all accounts, the event was a rousing success.

Attendees converged on Vancouver from all over the world for the first World Lottery Authority (WLA) meeting since before the COVID-19 pandemic. This was a joint meeting of WLS and NASPL, which resulted in a fabulous attendance and exchange of ideas and lottery content plans.

The conference was held at the Convention Center on the Vancouver waterfront, providing a beautiful vista for the week's gathering. The program included a series of memorable keynote speeches and breakout sessions which focused on important lottery issues. (Executive Summaries to be in the January/February issue of this magazine). One of the highlights of the event was the trade show which featured more than two dozen companies displaying their products and services to attendees. Hospitality events and lunch buffets took place each day as well.

Leading the business agenda was determining the leadership of the World Lottery Association for the next two years. Rebecca Paul has ably steered the group since 2018 and helped the WLA navigate the uncertainty of the COVID-19 pandemic. Acknowledging the importance of Rebecca's leadership, the membership of the WLA voted to re-elect Rebecca as WLA President for another 2-year term.

### Other officers elected were:

Senior Vice President: Andreas Kötter, Westdeutsche Lotterie GmbH & Co. OHG, Germany

Vice President: Younes El Mechrafi, La Marocaine des Jeux et des Sports, Morocco

### Committee members:

Jannie Haek, Loterie Nationale, Belgium

Francesco Parola, IGT, Italy

Nigel Railton, Camelot Group PLC, United Kingdom

Stéphane Pallez, Française des Jeux, France

Dato' Lawrence Lim Swee Lin, Magnum Corporation, Malaysia

Silvio Vivas, Instituto Ayuda Financiera Accion Social, Argentina

Stéphane Pallez took the stage to welcome us to Paris for the next World Lottery Summit in 2024. Other Lottery industry association annual trade-show cum conference events to be held in 2023 include:

**June 4 to 7: EL Congress 2023 in Šibenik (Croatia)**

**Oct. 30 to Nov. 2:**

**NASPL's Annual Conference in Milwaukee, Wisconsin**

## Lynne Roiter honored with the Guy Simonis Lifetime Achievement Award

The WLA introduced the Guy Simonis Lifetime Achievement Award in 2000 to recognize outstanding service and commitment to the lottery industry by an individual. The first recipient of the award was Guy Simonis himself. Guy was a



major force in the industry and its spokesman as president of AILE, then Intertoto, and finally of the WLA.

As a 36-year industry veteran, **Lynne Roiter** helped shape the lottery sector as we know it today. Her career, her achievements, and her dedication to the world lottery community have set a high standard for lottery professionals across the globe.

Lynne Roiter joined Loto-Québec in 1985 as Director of Legal Affairs. With each step in Loto-Québec's evolution, the legal needs of the company increased accordingly. In November 1996, Lynne was named Corporate Secretary and Vice President of Legal Affairs, heading a staff of 13 lawyers. By this time Loto-Québec had grown from a company of 400 people to over 5,000.

Lynne Roiter was appointed President and CEO of Loto-Québec and member of the board in May 2017. With that, Lynne became the first woman to head one of Québec's three main provincial crown corporations. In fact, diversity has played an important role in the



growth of Loto-Québec. When Lynne started with Loto-Québec in 1985, there were only around ten professional women out of the then-400 employees. When she joined the senior management team in 1996 she was the only woman. Today women play an important role in the leadership of the company, with nine out of twelve members of the Board of Directors being women. More importantly, a significant percentage of Loto-Québec's managerial and professional positions are today held by women. The conscious effort to diversify Loto-Québec will be among Lynne Roiter's lasting legacies.

On May 31, 2021, **Lynne Roiter** stepped down from her position as President and CEO of Loto-Québec. Lynne continues to serve as the Secretary General of the World Lottery Association. ■



**PGRI Introduction:** Michelle Carinci has served as the CEO of Lottotech, the operator of the National Lottery of Mauritius, since 2011; and CEO of the Atlantic Lottery in Canada between 2001 and 2011. Michelle started her career almost fifty years ago as one of Guy Simonis' first hires. Guy and Michelle worked together for 25 years and remained close until his passing. I asked Michelle to share with us her memories of Guy as friend, mentor, and industry icon.

## Michelle Carinci: Remembering Guy Simonis ...

### Guy and Michelle

**M**y story with this Guy, evolved over 47 years as an employee, student, mentee, collaborator, colleague and friend.

Guy's achievements and contributions are documented and recognized by the Lottery Industry to which he dedicated his life. When Guy passed, I began to look beyond what he had accomplished and focused on what motivated him. I believe Guy became passionate at a very early stage in his lottery career to create an international lottery community, a global network that connected us all.

An incredibly intelligent man, Guy was the consummate innovator, facilitator, entertainer, teacher and team builder.



He stood on the shoulders of the European lottery experts when he began to develop the lottery business in Manitoba leading to the first multi-jurisdictional lottery in North America, the Western Canada Lottery Foundation. I was one among many who was fortunate to be able to stand on his shoulders throughout my lottery and gaming journey.

### The Team Builder...

In 1975, crammed into a small studio apartment that we called our office in downtown Winnipeg, Guy's four young students, including yours truly, began our journey learning about

games of chance, skill and perceived skill. During this period I was exposed to Guy's natural ability and desire to build and bond high performance teams. He created regular weekend

social events – car rallies in the middle of summer, foot rallies in the middle of winter, annual Jeu de Boules (Bocci) tournaments hosted by the Simonis family at their summer cottage and competitive interdepartmental sporting competitions. These fun filled social and competitive events included our key service providers and respective families. Over the years the lottery team grew as Guy extended invitations to our Interprovincial Lottery Corporation (ILC) colleagues and our NASPL neighbors to the south. Bringing the lottery community together regularly on a social level provided us with the opportunity to become as passionate about playing together as we were working together, ultimately creating a deeper connection and understanding of each other.

Guy expanded his team building and inclusion efforts onto the world stage in 1987 as the first North American lottery to host the international Intertoto conference which was held in Vancouver. He knew Canada facilitated easier



**Guy Simonis and Michelle Carinci**

access for NASPL members to travel as Canada was not considered an exotic destination and complied with the narrow travel restrictions imposed upon NASPL members. It fit into his grand design of creating a global lottery community.

### **More Inclusion and Connecting...**

Guy's passion for inclusion was best illustrated during the opening ceremonies at World Meet '96 in Vancouver. This multi-cultural spectacle featured solo performances from our talented lottery leaders around the globe. Ireland's Ray Bates played the accordion, Cluny McPherson adorned his yellow Sou'wester and introduced the audience to a taste of Newfoundland, singing his homeland song, I's the B'y, Reidar Nordby played what appeared to be the world's smallest harmonica, followed by Matte Ahde playing what appeared to be the world's smallest guitar, Richard Frigen bellowed out (just kidding) a Swedish melody commemorating the merger of the two Swedish lotteries soon to become Svenska Spel, while Tattersall's Peter Gillooley attempted to remember all the words to Waltzing Matilda. Guy closed the performance introducing the NASPL members, accompanied by Jim Kennedy on harmonica in an entertaining rendition of Route 66 which featured a melodic cameo per-

formance from Bonnie Fussell singing Georgia.

Guy loved the limelight. The piano was a means to have that and more.

I believe there was a purpose behind all the singalongs he initiated around the world. Those singalongs created another opportunity to have fun together after a hard days work. I recall one singalong in a dark smoky and very warm bar. Guy was playing the piano and belting out a show tune. We watched in horror as his mane of hair shifted and slipped down one side of his head. Realizing what was happening and

without missing a beat he bent down, appearing to be picking up something off the floor. When he sat back up to the piano we were introduced to the real Guy. The dreaded hair piece was never to be seen again.

### **The Facilitator...**

Guy was an effective facilitator and one with a vision. In addition to putting the "P" in NASPL, he introduced North America to the multi-jurisdiction lottery business model courtesy of his good friend Lothar Lammers (Pete) from the West Deutsch Lottery. West Deutsch was a member of the multi-jurisdiction Lotto block in Germany. Western Canada adopted this business model, the forerunner to the Interprovincial Lottery Corporation (10 Provinces and territories) and the Atlantic Lottery. Today, thanks to Pete and Guy we see many similar models all around the world. One could argue that this business model set the stage for the merger that created the World Lottery Association.

### **The Teacher, the Mentor...**

For years Guy had an idea based on what he called the McDonald's "Hamburger University" for lottery. During a long flight delay in San Francisco airport, he and I brainstormed on how best to approach a lottery version of the "Hamburger University." I shared my recent University experience based





on the case study methodology. Immediately I saw that creative gleam in his eyes. That day we went onto develop the framework for what was to become Erewhon. Guy claimed that Erewhon was nowhere spelled backwards and who was I to correct him? Our mission was to ensure that students of Erewhon would be comfortable debating the issues, free of whatever hat they were wearing, thus the fictitious Erewhon was born. After successfully testing the concept with NASPL directors, the Erewhon lottery education program was formally introduced leaving a lasting impression on participants around the world. Yet another example of inclusion and team building.

And then came ILID, the international lottery industry data base. As an industry we had a wealth of knowledge and as monopolies at the time we were very happy to share everything amongst our lottery community. However, there wasn't a common platform to share the data. With Guy's support, the British Columbia Lottery team became committed to creating a process and platform that could bring all that data together from lotteries around the world, make it easily accessible and easy to customize queries to our respective needs. This perhaps was



**Guy and Jean Marc LaFaille**

our foray into what now is referred to as "big data."

While at times painful, Guy motivated us to think out of the box, dare to dream and be the best we could be. When the Winnipeg based Polard Banknote won the bid to become BCLC's instant game provider, the CEO of BABN, Marshall Pollock's prophetic response was, "I am not as concerned about losing your business as I am about your ability to help create a formidable competitor." The rest is history!

I have funny memories of the early stages of going "online." Guy and GTECH's Pete Morrissey smuggled the first lottery terminal into Canada in the trunk of a car. Guy was determined to evolve the journey from registered tickets, to bearer tickets, to "online".

### **The Mentoring Continues...**

In 1991, Sweden hosted the Intertoto Conference. Sweden's CEO Richard Frigren asked Guy to speak. Guy declined. Instead he proposed yours truly to open the conference with Pete Lammers. While Guy loved the limelight, he was very willing to share it with those he mentored.

Guy continued his mentoring

and commitment to the industry after he retired. Collaborating with Jean Marc LaFaille, they wrote a straight forward book about the basics of lottery and gaming. The books he later published about the development of the industry through his eyes, are more than a diary, they are a labor of love, an effort to ensure those entering the business today could stand on our shoulders as the business evolves in the future.

Guy with Jean March Lafaille

Thanks for the Memories Guy...

A complex, funny, creative, out of the box thinker and risk taker, Guy was a leader who could be infuriating and also endearing. I will be forever grateful for the opportunity to have worked with him and the teams he created. His passion for our industry was infectious. He was driven to bring the lottery community together and to help open doors to the authentic and wonderful friendships we enjoy worldwide.

We stayed in contact regularly. He was always interested in hearing about his friends and colleagues and of course reminiscing. We had a lot to reminisce about.

### **Finally...**

The fact there exists a WLA Guy Simonis Lifetime Achievement Award, says it all. Congratulations to Ms Lynne Roiter, a most deserving recipient of this award in 2022. ■



# 7 Reasons to Embrace E-training

Significant training needs exist for lottery retailers and lottery staff — and the time has never been better to explore state-of-the-art learning management systems.



By Danielle Davis and Mariana Tzitzouris

**T**raditional classrooms are not yet obsolete, but their prevalence is steadily declining with the rise of E-training options. In fact, the demand is booming for the learning management systems (LMS) that deliver E-training.

has offered its members an E-learning platform as a cost-effective way to supply C-store employees with training modules covering everything from responsible sales and compliance to guest service. Grocery retailers now have access to platforms such as the Retailer Learning Institute, serving over 10,000 organizations around the world

**A learning management system (LMS)** is an integrated online software program, which is used to create, deliver, track, and report on courses and educational outcomes.

It can be used not only to support **hybrid and distance learning environments**, but **also traditional, face-to-face instruction**.

The global market for LMS is expected to grow from US \$15.8 billion in 2021 to \$37.9 billion by 2026, a compound annual growth rate of 19.1% for the forecast period.

Notably, more and more of these learning platforms are being deployed in sectors that offer lottery. Since 2015, the National Association of Convenience Stores (NACS)

with more than 175 supermarket-specific courses. And some corporate retailers are already training their employees using learning management systems. For example, the world's largest retailer implemented E-learning in many states during the COVID pandemic, including customer service and lottery training.



Danielle Davis, IGT Director Product Management, Retailer Management & Optimization



Mariana Tzitzouris, IGT Product Marketing Specialist, Retailer Management & Optimization

## Lottery-Specific Needs

It's not surprising, then, that there is growing interest among lottery organizations in E-training, particularly after the pandemic severely curtailed in-person interactions with retailers and sales reps. Training needs across the lottery industry include:

- **New Retailers** – typically delivered via a classroom, requiring retailers to find coverage in their stores and travel to a training location. As well as being less convenient and potentially delaying time to market, travel to classroom training adds to fuel use and emissions connected to travel.
- **New Store Employees** – onboarding that often relies on other store employees or a manager who previously attended classroom training, making the process potentially limited and inconsistent.
- **Responsible Gaming** – includes widespread and varied training needs for both Lottery staff and retailers, typically delivered by the Lottery. Multiple jurisdictions in the United States now require retailers to complete training on Responsible Gaming (RG). With increased attention to RG issues, training needs are likely to increase as well.
- **New Instant and Draw Games, Lottery Operations, Best Practices** – normally rely on sales reps to train retailers. As jurisdictions operate with fewer sales reps, factors like distance and time-constraints present challenges for reps to visit enough retailers to provide adequate training.
- **Sales Reps** – require training for games, onboarding, sales operations/common practices and procedures, leading practices, selling techniques and other skills, equipment or software, and more.

E-learning can also be used effectively to train other Lottery personnel and vendors on various topics as needed, such as new games, promotions and initiatives, and best practices.

## How E-training Can Help

The use of web-based training solutions can support these and other lottery industry needs by enabling all of the following improvements:

1

### Train More Store Employees

– and not just one or two people who represent the store. The retail industry is plagued by low staff retention. According to the U.S. Bureau of Labor Statistics, the average staff turnover rate for the retail trade is more than 60%. E-training alleviates the continual burden on retailers and sales reps to train store employees on lottery by providing immediate, consistent, on-demand training for all store employees. This can help to ensure that training content is communicated and completed to lottery standards by all store employees, not just the select few who attend in-person training.

The same is true when accommodating the unique and often complex needs of corporate key accounts, allowing large numbers of employees to conveniently receive all lottery-related training in one consolidated location.

2

### Onboard New Recruits Faster

– E-learning gets new retailers selling more quickly by providing

immediate, consistent, on-demand training. A hybrid approach that incorporates E-learning as part of the training program gives the retailer options, allowing them to learn at their own pace and revisit training topics as they want for need for enhanced comprehension in addition to classroom training.

3

### Increase the Reach of Ongoing Training

– including new products and other lottery changes, by quickly reaching a wide and geographically dispersed audience. A good E-learning training program offers learners

the freedom to get trained at their own convenience – learners get flexibility in the form of the time, place, pace, or device for the training.

4

### Track Certifications

– such as Responsible Gaming. E-learning systems can automatically track and

notify, simplifying record-keeping and improving efficiency to keep all staff current, rather than requiring operations staff to manually track and manage certifications. E-training also provides retailers with reminders and lotteries with tracking capabilities.

5

### Track Learner Comprehension and Activity

– LMS-generated reports provide the

opportunity for lotteries to track course comprehension and modify training programs to fit the needs of retailers, provide enhanced learning experiences, and boost retailer engagement.

6

### Facilitate Sales Rep Training

– Remote options enable interactive, engaging training on the go or from

home. Learning can be used to complement in-person training, as an additional tool for trainers, or, as in times such as the recent pandemic, when in-person training isn't an option. For example, at the height of the COVID-19 pandemic, sales reps in one U.S. jurisdiction received training via E-learning on the features of Sales Wizard, IGT's salesforce automation tool.

Providing on-demand training options for topics such as best practices and lottery initiatives also enhances sales reps' time in the field without taking away time in the field.

7

### Improve Sustainability

– E-training eliminates printed paper handouts and, by eliminating the need for

participants to commute to training locations, avoids the associated amount of emissions released into the atmosphere.

## Engaging Retail Partners in E-training

IGT Italy has been very successful engaging retailers with E-training on both lottery content and additional topics outside of lottery.

Solely through E-training, they have provided lottery-specific content to more than 50,000 retailers on Responsible Gaming, to about 20,000 retailers on instant (“Scratch and Win”) procedures and obligations, and to approximately 12,000 retailers on new draw-game products, the latter within the span of 20 days. In Italy, where training for new draw game retailers is mandatory for business activation, moving from classroom training to E-training has significantly reduced training times.

And, as the country’s retailers are subject to strict rules limiting how they promote lottery products, IGT Italy provides E-training to retailers on marketing for their store in its entirety. For example, a featured E-training category called “Digital Road” has already provided a network of 8,000 retailers with information on **digital marketing**, on **marketing through Google** — such as the best use of key search terms online — and **how to make a website for their store**, as well as **how to utilize Facebook and Instagram** to promote their store.

Another category of E-training from IGT Italy has provided 16,500 retailers to date with professional training content and tips related to **store development** outside of the lottery category, including **communications**, **product promotion**, **display techniques**, and **customer relationships**.

The high level of interest in these optional training topics has enhanced retailer engagement in E-learning — offering a model that other lotteries may choose to adopt.

## How to Successfully Introduce E-training

Retailers and lottery staff must be made aware of E-training and its myriad benefits in order to encourage trial, acceptance, and repeat usage. To facilitate this:

- Promote retailer awareness through sales reps and during new retailer training, terminal messaging, email blasts, retailer postcards, newsletters, sell-in-sheets, and tip cards.
- Tie to the objectives of corporate accounts with E-training on their specific and often complex forms, processes, and procedures.
- Incentivize via raffles with small prizes for training completion; add to overall incentives program as a deliverable; reward with non-monetary prizes such as promotional merchandise.
- Solicit feedback from sales reps on questions, suggestions, and barriers to log-ins/usage. Engage them on “overcoming objections” exercises and show retailers how easy it is to use. Provide a sell sheet with information on logging in, accessing courses, and retailer benefits.

- Provide valuable content for your retail partners beyond selling lottery (see sidebar, “Engaging Retail Partners in E-training”).

## Choosing Among E-training Options

If the many reasons to consider E-training have piqued your interest, it would be logical to wonder, “What are my options?”

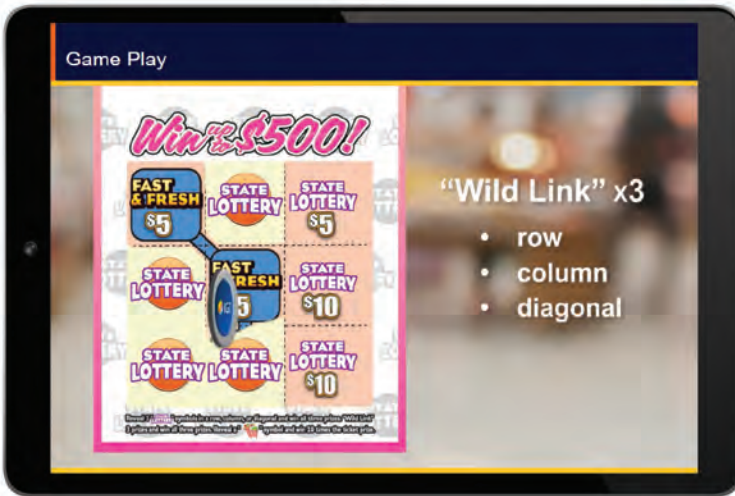
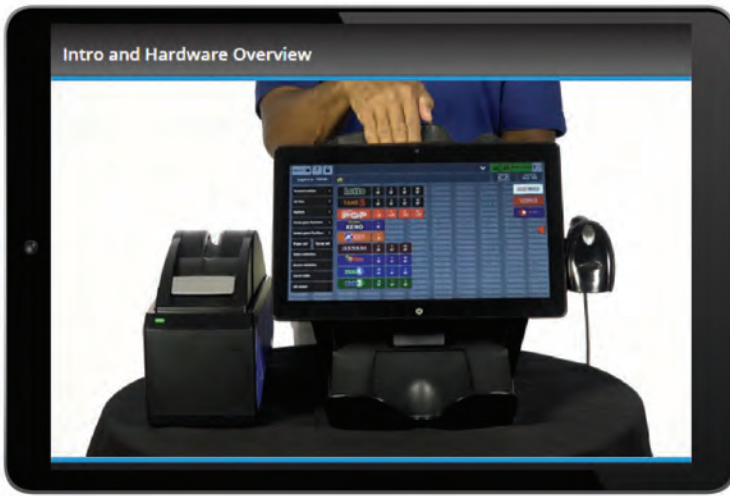
There are many LMS platforms available on the market that lotteries could research, procure, and integrate. This process can be time-consuming, lengthy, and expensive.

Alternatively, lotteries can take advantage of Learning Wizard, a unique tool designed specifically to serve the needs of lottery communities, including retail store managers and clerks, and business users such as lottery staff and sales representatives.

In May 2022, IGT released the newest version of this E-learning management system, Learning Wizard 3.0, a state-of-the-art, cloud-hosted solution delivered as a service (SaaS), avoiding the need for lotteries to install and maintain software. Users simply access the application through their Internet browser.



Learning Wizard applies user-centric design to ensure the application is engaging and easy to use.



IGT's new game courses can train users on game play, sale techniques, and upsell opportunities, and include interactions using the mouse or touch screen of the Learning Wizard user interface to "scratch off" the instant ticket.

## Add IGT-Created Content for Maximum Value

### Hands-On, Realistic Terminal Experience

With IGT's developed content, retailers can simulate real, in-store scenarios by interacting with the display screen to produce wagers, access reports, and perform all other terminal-related tasks, as the screens they see and interact with replicate their terminal touchscreen. Learners have a 360° view of the terminal hardware to get a complete understanding of its form and all its features.

### Optimized Learning Mix

Learning Wizard courses supplement audio and video instruction with hands-on exercises, multiple-choice questions, guided practice, immediate performance feedback, and the ability for users to get help for better understanding and retention.

As soon as a retailer is approved to sell lottery, they can immediately log in to Learning Wizard. The appropriate classes are already assigned to them, eliminating a waiting period to begin learning.

It is also integrated with other IGT applications, including sign-on through IGT's Retailer Wizard interactive website, used by or being installed in more than 15 jurisdictions, increasing efficiencies and ease of use.

Learning Wizard's lottery-specific reports identify areas where learners are having difficulty in order to determine where additional training is needed and to drive continuous content improvement. ■

*To find out more about learning experience platforms and IGT's Learning Wizard E-training solution, please contact [Mariana.Tzitzouris@IGT.com](mailto:Mariana.Tzitzouris@IGT.com) or your IGT representative.*



# Learning Wizard



## Key Benefits

### Lotteries

- Gets new retailers selling more quickly by providing immediate, consistent, on-demand training. Approved retailers can immediately register for classes and begin learning.
- Directly reaches more store employees (not just 1-2 representatives that typically attend classroom training).
- Supports sustainability objectives – E-training reduces energy consumption and fuel emissions.

### Retailers

- Anytime, anywhere learning saves time and effort by eliminating the hassle of scheduling and attending in-person classroom training.
- Onboarding new store employees is quick and easy – especially important with the high turnover rates in the retail industry.
- Chain accounts can receive training courses on their specific, often complex forms, processes, and procedures

## Mary Harville, president and CEO, Kentucky Lottery Corp, selected as one of the 2022 Most Admired CEOs in Louisville



Mary has been selected by Business First newspaper as one of the 2022 Most Admired CEOs in Louisville. In listing the criteria for the award, staff members at Business First wrote, “An outstanding CEO is an innovator, standard-bearer, role model and exceptional leader. Their contributions impact the company they head as well as the community in which they serve. A commitment to financial success, quality, workplace wellness, diversity and philanthropy are hallmarks of an exceptional and admired chief executive”.

As was said in Mary’s nomination, “The mission of the Kentucky Lottery is to fund scholarships for Kentucky college students attending Kentucky schools in the hope that our best and brightest students will stay right here in the Commonwealth to attend college and start their careers. As Kentucky Lottery President and CEO, Mary Harville is a proud Kentuckian who chose that path and is now making a difference in the lives of others. Mary’s unique leadership style of combining collaboration, connection and compassion, brings

our employees, retailers and other stakeholders together to support us in our mission and generate tremendous results”.

Mary’s accomplishment will be featured as part of the Most Admired CEOs and Business Impact Awards dinner scheduled for November 17 in Louisville, and she will also be featured in a special section in the November 18 issue of Business First and on their website.

But that’s not all! As recognition for her outstanding work in the past two years since assuming the top spot, Mary has been given a contract extension by the Kentucky Lottery Corporation board of directors that will see her continue in her role through the end of 2026. This will ensure the lottery industry as well as the citizens of Kentucky benefit from Mary’s strong leadership through KLC’s 2026 Odyssey project – the corporate-wide initiative to prepare for the next generation of lottery systems and services that will need to be operational by June 2026 – and that we will have her at the helm for consistent guidance as we face the challenges ahead. ■

## Mary Harville on KYC’s 2026 Odyssey Project

We at the Kentucky Lottery are excited about our Odyssey 2026 initiative, which includes acquisition of all major lottery specific systems and services: the central gaming system and retailer equipment, iLottery system, instant ticket printing and cooperative services. These critical systems, equipment and services form the bulk of the functional operational model of the KLC.

The Kentucky Lottery was the first lottery in the U.S. to be established as a corporate, quasi-state agency. While still under state oversight, the statutory directive to manage the lottery in an “entrepreneurial” manner has allowed the lottery to take advantage of advancing technology and other opportunities, including the expansion of

vending, the implementation of Keno, predictive ordering for instant tickets, and most importantly, the launch of iLottery in 2016 –now the fastest growing internet lottery in the world. Our overall goal is to continue this trajectory while evolving to meet the demands of a rapidly changing market.

While current systems are still viable, the lottery is pulling out all stops to push ahead with the Odyssey initiative in the most “entrepreneurial” manner possible. This will ensure we don’t miss a beat, and will have in place the next generation of systems that will allow us to be well-positioned, both in the near future and in the years ahead, to generate more revenues than ever before for scholarships for Kentucky college students.

We’ve established a cross-departmental Odyssey 2026 team and within that group, four workgroups have been tasked with conducting detailed analysis of our current processes, documenting the processes and identifying all areas of improvement. We are learning about the retail landscape of the future, what consumers will expect and how they will behave. Wouldn’t we all like to know?! Another team goal is to be thoroughly educated about the universe of available systems and services, as well as innovative solutions under development. We issued an RFI late last year, and the team was



emerged in the comprehensive vendor responses and presentations throughout the summer. The team has also taken advantage of educational opportunities offered through PGRI, LaFleurs, NASPL PDS, and the World Lottery Summit in Vancouver.

Based on what we’ve learned, we are currently engaging in a gap analysis and compiling a listing of requirements. Much of the journey lies ahead, but we are confident we are headed in the right direction and excited about the opportunities that await – not only for the Kentucky Lottery, but for our players, retailers and all of the Kentucky families and universities that depend on our proceeds. ■





THE EUROPEAN  
LOTTERIES  
FOR THE BENEFIT OF SOCIETY



# It's back... The in-person EL/WLA Marketing Seminar 2023!



**A**fter three years, the EL/WLA Marketing Seminar is back in person! Taking place at the Shaw Theatre & Pullman Hotel London from **8-10 February 2023**, this is the chance to reconnect and meet colleagues and friends, old and new!

Focusing on the theme **“Lotteries in turbulent times: Opportunities in time of crisis”**, participants will have the chance to learn about the growing economical, societal, and environmental challenges that the world faces today and how to adapt their marketing strategies, accordingly.

Over the last two years lottery operators have proved their resilience and found innovative solutions to continue providing regulated and responsible services to their players during the pandemic. Today's uncertain economic situation brings other

challenges that lottery operators have to cope with. This includes for example the advertisement bans, changing consumer preferences and trends. It is clear that Lotteries are definitely facing turbulent times. And maybe even more than ever before.

Lotteries need to adapt their marketing strategies and seek new opportunities in time of crisis. How should Lotteries retain the interest of existing players and attract new ones under these uncertain economic developments? What is the new and right marketing mix? What does the future hold further?

Among informative lottery case studies and presentations by EL Level I Partner & WLA Platinum Contributors on innovative marketing strategies and products, several Keynote speakers will share their insights and expertise on the topic, including:

- **Rory Sutherland**, Vice Chairman of Ogilvy & co-founder of a behaviour science practice of psychology graduates who look for ‘unseen opportunities’ in consumer behaviour;
- **Jenk Oz**, a 17-year-old social entrepreneur, public speaker, presenter, DJ and change activist as well as the Founder & CEO of Thred Media, a social enterprise focused on Publishing, Consulting and Production aimed at Generation Z.
- **Liz Jackson**, who after running her own award-winning company, Great Guns Marketing for 17 years, a business which she launched the year she lost her eyesight, is now the Marketing Director for leading business sale advisor BCMS.
- **Gartner Inc**, a technological research and consulting firm, founded by Gideon Gartner, will talk about “Everything Customer” and its view on the evolution of omnichannel during the seminar.

Registration is now open (via the EL website <https://www.european-lotteries.org/events/elwla-marketing-seminar-2023>) to EL and WLA Lottery & Associate Members only. (Non EL/WLA Lottery Members upon approval by the organisations).

Register early to secure your place!

We look forward to welcoming you to London.

The EL/WLA Team ■

# The Science Inside *the Success*



**130**  
lottery customers in  
**50 COUNTRIES**

**5**  
**INSTANT GAME**  
production facilities on  
**4 CONTINENTS**

**3,000+**  
employees

**40+**  
locations  
worldwide

With 70% of global instant scratch game retail sales, 30+ iLottery customers, 40+ systems customers, and partner to the largest government sports betting program in the world, Scientific Games brings 50 years of innovation and experience to responsibly drive lottery performance.





# THE SCIENCE

# Inside

## WHAT'S IN A NAME?

**In the case of Scientific Games, a lot.**

**For almost 50 years, Scientific Games has literally lived up to its iconic name.**

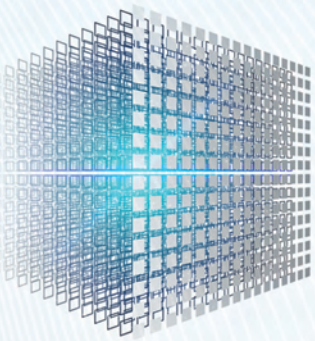


Since its founding in 1973, the company has generated millions of games all backed by science. From cutting edge technical platforms to a deep understanding of consumer behavior, science – real, data-backed science – is at the core of everything the company creates. With its recent return to being a 100% lottery-focused company, that commitment to bringing science-based solutions to the industry is stronger than ever.

The years spent as an integrated gaming company expanded Scientific Games' knowledge base, allowing for a better understanding of the lottery industry's place in the broader gaming and entertainment markets. The company is now charging ahead, focusing its efforts exclusively and entirely on helping its lottery partners achieve their objectives, delivering even greater revenues to the good causes they support.

### **A Scientific Heritage**

So why should a lottery care about the name of one of its partners? Because the company's name embodies its operating philosophy. Its science-based foundation has resulted in a lot of first-to-market innovations that are now lottery industry staples: the first secure instant game (1974), the first touchscreen self-service terminal (1985), the first internet lottery game (2004), and the first credit/debit card solution integrated with a lottery system (2016) just to name a few. One especially important innovation – because it allowed for so many other innovations to follow – was the printing of a unique bar code on every ticket (1988). Embedding data on a ticket via a barcode truly transformed the industry and opened the doors to a number of other important innovations that altered the course of lottery history.



Much like the tip of an iceberg, these solutions were just the visible result, the end product. Below the surface and not always seen, however, was the enormous amount of research, creativity, and science that went into the design and development of these groundbreaking innovations. An important component of this

largely unseen process was the company's early use of business intelligence. Scientific Games pioneered the use of productized business intelligence in the lottery industry when it launched its patented MAP (Marketing-Analysis-Planning) platform more than two decades ago (2001).

Jennifer Welshons, Scientific Games Chief Marketing Officer, was an analyst with Scientific Games at that time and worked with the company's leadership for nearly 18 months to bring MAP 1.0 to market: *"From the very beginning, we have strived as a company to leverage applications from specific parts of our business to enable the business as a whole. In this case, our racing division had a handicapping tool for horse racing and we immediately saw how the underlying structure of that tool could be applied to instant scratch game data."*

That version of MAP 1.0, a secure, interactive database designed to help Scientific Games work with their lottery partners to make the best instant product marketing and planning decisions possible, became the backbone of what today has become a robust portfolio of advanced business intelligence tools.

Welshons is quick to point out, however, that the company was using "business intelligence" before today's wide array of BI platforms was available. "At its heart, business intelligence is simply using data to drive better business decisions. Today's BI platforms have made this easier and more accessible for businesses, but I would say that what Scientific Games did in the late 90s – creating the first State of the States product – was absolutely 'business intelligence.' It was all very manual at first, but once the technology caught up, we were able to pivot all of that manual data analysis to



MAP, which accelerated our ability to derive meaningful, actionable insights that our partners can use to drive their business. Continually tying the data we collect with emerging BI technology – that's our commitment to keeping the science inside."

## Evolving the Science

MAP may have been the company's first formal business intelligence tool, but it certainly hasn't been its last. In fact, MAP served as a catalyst for many of the company's other business intelligence innovations, the most powerful being *Infuse*, the company's current enterprise business intelligence platform. Cameron Garrett, Scientific Games Vice President of Analytics and Insights, describes *Infuse* this way: *"Infuse takes a 360-degree view of our partners' business to include data from games, players, retailers, terminals, and logistics. And Infuse doesn't just look at sales data, but sales data combined with loyalty data, demographic data, data across multiple jurisdictions, and more. Infuse is intuitive and easy-to-use, featuring dashboards and customized analytics that can be deployed immediately to impact sales."*

Scientific Games' history of building its own business intelligence platforms was partly born from the unique nature of the lottery business, making off-the-shelf BI solutions less effective. But that doesn't mean the company has a "not invented here" mentality. As Scientific Games continues to expand its digital and interactive portfolio, it makes sense to partner with companies that have an equal passion for

innovation in this space. Scientific Games is especially excited about its partnership with Optimove, a leader in the Customer Relationship Management (CRM) category and one of the most trusted CRM providers in the gaming and lottery industries.

With Optimove as a partner, Scientific Games provides CRM services to 10 U.S. lotteries with more on the way.

Scientific Games' expanding digital and interactive portfolio of products has also given the company an opportunity to employ a variety of data-driven responsible gaming measures. Many of the company's digital platforms utilize various algorithms to help predict problem gaming behavior which can trigger a variety of optional "guardrails" such as spending limits,

time-played limits, helpline messaging, and more. When partnered with Optimove's responsible gaming predictive algorithm, Scientific Games is able to empower their lottery partners to expand their responsible gaming practices to CRM and identify players that may become at risk in the future.

## Putting Data to Work

Scientific Games understands there is a difference between having lots of data and using that data effectively. The company attributes much of its success to its mantra of putting data in motion rather than leaving it at rest. And one of the many ways Scientific Games puts data in motion is by deriving insights that inform product design and development.

The company's history of building products and solutions backed by science can be seen across every aspect of its business, from the coatings on instant scratch tickets to the advanced systems and hardware that enable the secure ordering, delivery, and sale of those tickets. *OrderCast ML*, the company's instant scratch game predictive order platform and a key component of *Scientific Games Enhanced Partnership (SGEP)* program, is a great example of science-driven product design. *OrderCast ML* uses machine learning to predict the ideal product mix and inventory levels, ensuring that the right games are delivered to the right place at the right time in the right quantities, all but eliminating costly over-stock or out-of-stock situations.

*GameChoice* is another example of a Scientific Games product rooted in science. The recommendation engine delivers specific product suggestions during a player's buying journey on self-service terminals to encourage the trial of other lottery products. The recommendations are driven by a logical analysis of player basket data generated by Infuse, which perfectly illustrates how the company's various platforms all work together to achieve results.

# The Science Inside SG Products

Below are just a few examples of Scientific Games products that rely heavily on the embedded science inside to drive intelligent business decisions:

**SCI TRAK**  
ULTRA

Powered by *OrderCast ML*, enables sales reps to customize orders based on individual retailer preferences

**ORDERCAST**  
ML

Optimized game orders using machine learning

**gem INTELLIGENCE**

Arming sales forces with granular retail data to guide action

**iNFUSE**

Automated, enterprise business intelligence providing end-users with data-driven insights

**MAP**

Scientific Games' original business intelligence tool for game and portfolio analyses

**SCI IQ**

Intelligent game distribution with market basket level data enabling bespoke analyses

**GameChoice**

Smart recommendation engine providing players a modern lottery game buying experience

**DIGITAL MARKETING**  
in partnership with  
**optimove**

Data-driven consumer engagement utilizing multi-variant testing, micro-segmentation, predictive analytics, and AI optimizations

## Qualitative Science

Not all of the science inside the company's innovations are driven by hard, quantitative data. Scientific Games' Consumer Insights Team has a long history of collecting meaningful qualitative information on players. That information is equally rich in its ability to provide insights that can be used to create products and services that enable lotteries to realize their vision and achieve their objectives.

At the foundation of Scientific Games' player research is its *ONE Segmentation*. *ONE* looks beyond the who and the what of player behavior to get to the why – the motivations behind the behavior. Knowing that a certain consumer type buys a certain product (the who and the what) is helpful, but knowing why they purchase that product can be transformative in how a lottery designs and builds future products.

Originally launched in 2014, the company recently completed the next generation of its *ONE*

*Segmentation*. Tim Menzia, Scientific Games' Director of Consumer Insights: "Consumer motivations remain fairly stable over time, but there are countless other factors like technical advancements, changes in

government policy, and, most recently COVID, that can significantly affect consumer behavior. So it's important that we look at our *ONE Segmentation* periodically to ensure that it reflects what is actually happening in the marketplace."

An excellent example of how Scientific Games applies both behavioral and motivational player insights to its product design process is the company's *SCiQ* retail ecosystem. Both *SCiQ Vista* and *SCiQ SlimLine* clearly display the number of the next ticket in the instant scratch game pack so that players can easily see what ticket number they are buying. Jeff Martineck, Scientific Games SVP of Product Innovation: "Years of consumer research and retailer interviews made it clear that

knowing the ticket number was a buying strategy for core players, but a pain point for retailers. Once we understood that, we were sure to 'bake' that learning into our design of *SCiQ*. By clearly displaying the number of the next ticket, *SCiQ* enables players to get the information they want without being a burden to the retailer. It's a win-win. But we had to understand that nuance to make it happen."

## The Science is Here to Stay

Scientific Games has been integrating science into everything it does for almost five decades – it is a part of their DNA. The company was built and named on the premise that science should be at the core of every product it delivers – every ticket, every game, every terminal, every digital solution, every back office system. There is an inherent integrity in designing and building products based on science, an integrity that Scientific Games' lottery partners have come to expect. Creating innovative new products that players want is only a part of the equation. It is also vital that those products be delivered, purchased, and played safely and securely.

And that balance – creating safe and secure products that players want to play – requires real, data-based science.

There is no doubt that Scientific Games' heritage of creating solutions grounded in science has delivered results. The company's lottery partners are some of the highest-performing lotteries in the world and continue, year after year, to deliver increased revenues to the good causes they support.

As Scientific Games enters its 50th year in 2023, lotteries will hear more about why those five decades of the science inside its products and services strikes the right balance between the wisdom of the past and the innovation of the future. ■

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Optimove® is a registered trademark of Mobius Solutions, LTD, © 2022



## “Taking retailer store syndicates online is an exciting initiative which delivers another element to our omni-channel strategy to align the retail and digital experience.”

**Sue van der Merwe:** While Australia has certainly seen inflationary pressure and rates have risen, the scale of increase has not been to the same level we have seen, for example, in the United States or in the UK.

We know lotteries have been resilient through different phases of the economic cycle. And the average ticket purchase with us is about A\$12, so we are at the lower end of the range in terms of discretionary spending.

We said when we delivered our results in August that we’ve been pleased with trading to date in the current financial year (from 1 July 2022). For example, the base (non-jackpot) games in the portfolio have been holding up well, in line with

recent volumes. And we’re pleased at how Keno has rebounded strongly now that we’ve emerged from the era of COVID lockdowns.

We have also just had a A\$160m Powerball jackpot – the largest prize offer in Australian lotteries history, which attracted significant interest and was shared by three winners.

### What are some of your own priorities this year?

**Sue van der Merwe:** This will be the first full financial year of The Lottery Corporation as a standalone company, and we have a lot to do. Among my focuses will be executing our strategy and embedding our culture now that we’ve defined who we

want to be as an organization. I’m proud of the amazing team we have at The Lottery Corporation and I’m energized about what we can create together!

We truly are very fortunate, I believe, to work in this industry and play a role in what lotteries does across the globe in terms of the positive impact it makes. And it’s always so special to catch up with friends and colleagues from around the world and share experiences and insights.

Already this year has involved more travel than the previous two years that’s for sure! We held our Asia Pacific Lottery Association conference in Singapore in September and of course the World Lottery Summit in Vancouver was a great success in terms of sharing insights within the industry.

On a personal front I’m planning a holiday in Italy, which I’m very much looking forward to!

### That’s great Sue, thank you for your time and insights.

**Sue van der Merwe:** It’s a pleasure Paul, thank you for the opportunity. ■

## Lotto America Reaches New Heights continued from page 18

For an additional \$1 per play, players can add the All Star Bonus® multiplier feature to their Lotto America ticket. So far, the Monday drawing hasn’t negatively affected the add-on feature’s participation rates. On average, 26.4% of Lotto America purchasers included the All Star Bonus in Cycle A, compared to 25% in Cycle B. Following the launch of the Monday draw, the All Star Bonus participation rate has increased to 27.3%.

The Monday draw and the All Star Bonus

also seem to appeal to players who frequently engage in the product. As a result, the performance result of the All Star Bonus closely follows the base game results - weekly All Star Bonus sales including the Monday drawing averaged 22.4% greater than Cycle A and 29.6% greater than Cycle B.

“The Monday drawing has been a multi-faceted solution,” Toyne noted. “Lotteries are able to engage their frequent players an extra night, and the additional sales

from the Monday drawing are generating dynamic jackpot growth, which in turn, is attracting more people to the game.”

“The Lotto America Product Group has established a solid draw lineup by having Lotto America and Powerball both offered every Monday, Wednesday, and Saturday,” Prock added. “We’ve seen that a strong jackpot run in one game can cross over and lift the sales of other products. We want to promote that symbiotic relationship between Powerball and Lotto America.” ■

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



**R. Paul:** Matt, as a customer what do you see as a partnership?

**Matt Strawn:** Like most state lotteries, we have healthy partnerships with all three instant ticket manufacturers – IGT, Scientific Games, and Pollard Banknote. Schafer Systems produces, right in western Iowa, some of our merchandising solutions. Our pull-tabs are also printed in Iowa – by Pollard Banknote’s American Games. John and his team (Scientific Games) have not only been a longstanding provider of our instant products but a longtime provider of our central gaming system. And a shout-out to Merv Huber as the Iowa Lottery is next in the queue to integrate the Optimove CRM platform that Scientific Games uses.

The philosophy of the lottery when I came in was one of working closely with our vendor partners; and I have continued to encourage that spirit of collaboration and partnership. Our relatively new leadership team is continuing an evolution from merely utilizing suppliers’ products and services to better leveraging their expertise to the benefit of our State and lottery beneficiaries. Our vendor partners share responsibility for outcomes, and we appreciate that. I believe we can move even further along the path toward integrating vendor input into our business planning decisions, and not limiting it to portfolio management analytics. We have seen how much the vendor community can help in external advocacy efforts, messaging to policy-makers, and helping stakeholders recognize the value lottery brings to our state. I think we all recognize the value that forging productive, collaborative working relationships represents for all lottery stakeholders.

**R. Paul:** It is great to hear that we are all in agreement. So where, then, are the disconnects, the bumps in the road to perfect harmony between technology partner and lottery? Lorne?

**L. Weil:** I have been on both sides of the vendor ecosystem. As CEO of Scientific Games, we were responsible for central systems as well as being a primary supplier of instant tickets. At Inspired Entertainment, we are a third-party vendor who must integrate with the primary suppliers for our product to be a part of the lottery’s portfolio of products. So I do appreciate the challenges that Jay and John face. You run a large, complex enterprise with multiple initiatives vying for focus and resources. Executing third-party integrations consume resources, can be technically complicated, and take time

to implement. Your well-planned roadmap gets interrupted by third-party vendors who want you to integrate a new product or service, and to get it done right away please. You understandably ask – which of my other customers in the queue should I bump in order to prioritize your implementation?

But it is in all of our interests to overcome the obstacles that impede the ability to integrate solutions and products that unlock new revenue-generating possibilities for the benefit of lotteries and the good causes funded by lottery revenues. Part of the answer is for the industry to come together – primary suppliers, third-party vendors, and lotteries – and agree on a set of standard interfaces that facilitate the integrations. It’s vital, really, to enable a faster, more efficient, more cost-effective process to implement new products, and new solutions and services. The industry is being held back by technical issues that are solvable.

**R. Paul:** NASPL has been working on an API which would make it easier for us to plug and play, to integrate new products and solutions.

**L. Weil:** On the face of it, I think an Application Programming Interface (API) solution would be the keys to the kingdom. It would free up all of this time and energy that’s getting ground up trying to fit a square peg into a round hole. Then we would be able to focus our energy and resources on developing the best products and best player experience. To move forward, though, we all need to embrace an ecosystem that supports everyone’s agenda. A mind-set that supports that approach is for all of us to appreciate that the way to get what we want is to help others get what they want.

**J. Gendron:** Lorne is right. One thing I’ve learned through the years is there’s almost no such thing as a seamless integration. But certainly having a common, standard API would go a long way toward enabling third-party integrations to more efficiently connect into the traditional Facilities Management infrastructure.

I would like to take this opportunity to switch over the discussion to the RFP structure, because I do think it’s extremely important. Over the past several years, the duration of contracts in the United States is moving into the 15 to 20-year range. Lotteries want vendors to invest in Research and Development. The vendors want to win states’ business at attractive returns and comply with the rules put forth by the

states. But when the RFP stipulates a 60/40 technical to price ratio, the value of being technically differentiated is rendered less relevant, and it becomes a price bid. The lottery historically has wanted the vendor community to invest in R&D, innovation, and in continuous improvement of technology. We too want to invest in growth, innovation, and technology, and we welcome bids that put more of an emphasis and award value in these areas. Unfortunately, the RFP focus on bottom-line price is effectively discouraging investment. It just does not make sense for the vendor to invest in a technically superior proposal if the award is based on price. That, to answer your original question, Rebecca, is in my opinion the disconnect. And that is unfortunate, because it is more important than ever that your technology partners invest in the future, particularly when the terms of the contract are growing longer. Since costs are such a small percentage of revenues and net funds transferred, your vendor partners should be incentivized to invest in growth. A way to do that is to change that technology/cost ratio from 60/40 to 90/10. That formula still ensures we deliver superior value along with investing in the future of lottery.

All of us in the vendor community want to invest in the technology, products, and services that drive growth. And we can do that within a construct that manages costs and maximizes value to the lottery. Doing that – shifting the focus from minimizing costs over to optimizing results – will be a huge win for state lotteries.

Having said that, I do recognize that some states have procurement procedures that are highly restrictive and require that disproportionate focus on price to the detriment of other considerations like technology, service, investment in R&D and such. I would only observe that is unfortunate because government lotteries generate significant revenues that benefit good causes in their respective jurisdictions, and so it is very much an oversight to focus on costs more than on opportunity and outcomes. Further, I should mention that IGT is privileged to have 25 facilities management contracts in the United States, and each one receives the same level of service and corporate resources from IGT. And they all have access to me. We have the same-store sales group led by Stefano Monterosso, who works with every one of our customers in the U.S. Wendy Montgomery and her team work with NASPL, Mega Millions, MUSL, PGRI, and all the various

industry organizations. Scott Gunn has an extensive government relations infrastructure in the United States, and he makes that available to our customers.

The general nature of a facilities management contract is typically structured such that we can work together to advance our collective interests. Going forward, lotteries should consider whether there is an opportunity to shift more of the focus of the RFP on technology and results that will drive investment and peak performance.

**J. Westbury:** Our belief at Pollard Banknote is that you should expect us to deliver our best products and performance every day regardless of how much work we do with you. I think that when lotteries go to RFP, they should not be thinking about the percentage of work that they're going to award but about the value of the partnership that they're going to get. And so, what does that really mean?

We believe that every game should do really well for you and that we should be measured on the performance of the games or the solutions that we produce for you. I understand and appreciate the lineage of the shared services model and getting paid on a percentage of sales. But that percentage of sales model has some interesting complexities to it. For instance, the printer of the ticket on a percentage of sales model makes more money if there's a big advertising campaign behind it. They also make more money if the ticket is smaller and doesn't have special print features on it. There are different ramifications, pros and cons to different approaches.

We try to work with lotteries on whatever basis they think is best for them. We just recommend exploring the benefits of other models, like paying on a price-per-thousand basis. We believe that each game should stand on its own performance, and we appreciate the opportunity to prove to lotteries that Pollard Banknote is a great partner.

**J. Schulz:** I hope we might follow up on Jay's point about RFP's. The goal is to create an effective commercial alignment, right? Some of the RFP structures have not been updated – they're the same as we saw 25 years ago. A lot has changed since then. For one thing, digital technology has changed the whole complexion of the industry, and the impacts will be even more exciting going forward. So we proposed that lotteries develop an approach to RFPs that enable flexibility for your commercial partners to help you adapt to changing technology and business processes.

Digital is transforming the way every aspect of how the lottery business is conducted. The first panel of this conference talked about the power of Customer Relationship Management which is being unlocked by data analytics and tools that did not exist even a few years ago. RFPs should be designed to support a future that includes technological tools and solutions that may not even be available now. Invite your vendors to propose solutions and tools that will help lotteries meet the needs of a consumer marketplace that is changing as we speak. That is the pathway to sustainable growth, increased revenues, and net funds transferred to good causes.

Instant games are a \$105 billion business globally. Collectively, lotteries pay their vendors around \$1 billion. Where else in the world does a consumer product yield \$105 billion in top-line sales for a cost of \$1 billion? Think about that. Look at the top 10 per-capita-sales lotteries – all 10 have a primary vendor relationship. They're not all with Scientific Games, but it is the strong collaboration of the primary relationship that has proven to make more money for good causes. I share this as a challenge and to spur more discussion.

**J. Westbury:** Inflation has not been a big factor for most of the last few decades. That appears to be changing. Inclusion of a clause that allows prices to adjust based on changes in Consumer Price Index (CPI) and the Producer Price Index (PPI) would enable vendors to bid based on current prices as opposed to factoring in an allowance for the possibility of cost increases. Basing the bid prices on current prices and allowing for increases in the event of changes to PPI would keep bid prices down. This consideration is being done in many jurisdictions outside the U.S. and we hope it may be applied here as well.

**M. Strawn:** I agree with Lorne on the need for a common API to be built into everyone's central gaming system. A frustration on the part of some of my colleagues, though, is the lack of consistency of pricing for third-party integrations. Especially with the long runways we see in these ten, fifteen, and twenty year contracts – we need to leave room for innovation that comes from third-party providers, and logical pricing that enables lotteries to explore the benefits of all varieties of options and solutions available from multiple suppliers.

Speaking for myself, I would welcome

ideas for how lottery and vendor might find more flexible ways to invest in new tools and solutions. The contracts we have spell out terms, conditions, timelines, etc. for everything that is done. But what if we want something that is not explicitly addressed in the contract? I would be open to suggestions for how we might grow the business in ways that require some capital outlays in exchange for growth opportunities that promise to deliver an exponential ROI for my State.

**R. Paul:** What else could we do in an RFP to build the kind of partnership that I think we'd all like to see?

**J. Westbury:** RFPs are hard for lotteries to execute and there may be no easy answer to some of the issues we have been discussing. But in our view, one of the best ways to try and build an RFP that works is to try and engage with all of the vendors equally in advance, allowing us to see the draft RFP document and comment on it. To ask us to submit questions to a purchasing department which then forwards it to a person they think may be able to speak to it is just a clunky process. The back-and-forth can go on for weeks without ever getting clarity on the issue in question. Even in those lotteries which do not have purchasing departments, it would still be helpful to clarify the issues ahead of time. Just inviting feedback from vendors might inform the way lotteries construct the RFP, and articulate what they are trying to accomplish. Or perhaps have an open discussion with the bidders ahead of putting out the final RFP.

Once the RFP is let, some lotteries invite us in to ask questions about it. We then leave the room while they discuss it; and then return and they give us the answers. There are probably lots of different ways to do this. And I don't presume to say what the best way is, or even if there is a best way. I am just proposing that the process be a little more interactive to enable the vendors thoughts to be heard, and for vendor questions to be addressed in an efficient way.

**R. Paul:** This conversation started with me commenting that I believed it is all based on attitude; that you can write anything into RFP's and contracts, but without the right attitude you'll never have a partnership. I hope this conversation today sets a good tone, a good attitude, for all of us to continue the dialogue that leads to the kind of collaborative partnership that maximizes proceeds for good causes and positive outcomes for all lottery stakeholders. ■

# EMPOWERING LOTTERIES WITH PLAYER-FOCUSED SOLUTIONS

**Data Analytics and Digital-In-Retail Player Journeys took center stage for IGT at the World Lottery Summit.**

**W**hen the global lottery community gathered for the World Lottery Summit (WLS) 2022 in October, attendees echoed a common theme – how nice it was to be back together in person attending panel discussions and visiting exhibitors on the trade show floor. IGT's booth buzzed with demonstrations of retail and digital solutions and the debut of its integrated solution **OMNIA™**, the industry's first, truly

player-centric omnichannel system, which facilitates a transformation of the lottery operational model, heralding the future of lottery.

**Jesse Saccoccio, IGT Director iLottery Product Platform**, gave live demonstrations of the new **Connected Play** digital-in-retail player journey, which is powered by OMNIA and utilizes IGT's next-generation mobile app and new camera-based terminal, **Retailer Vue™**.

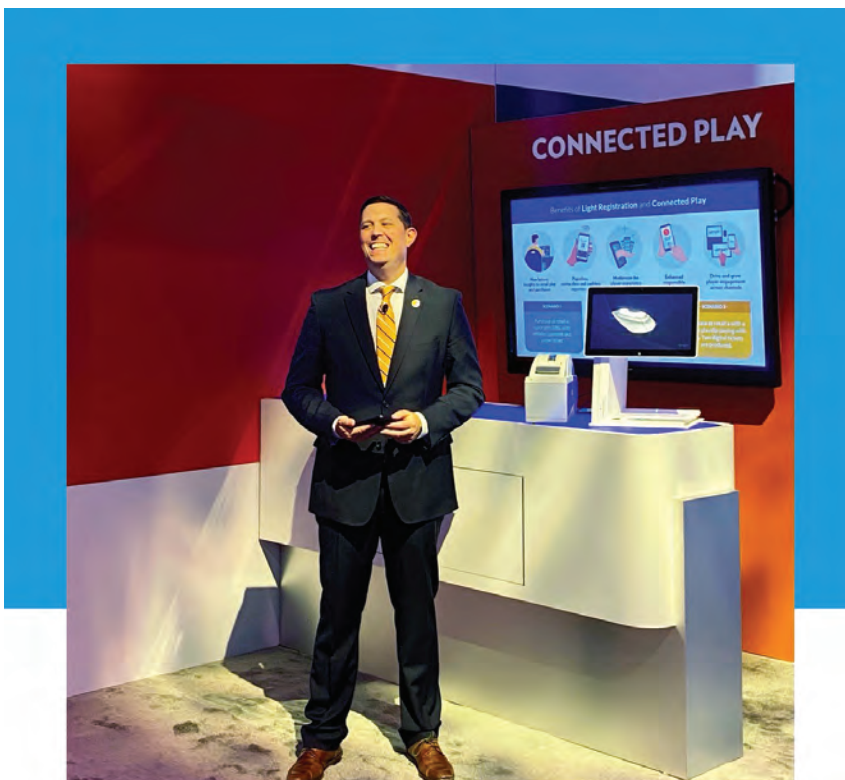


**OMNIA™ is IGT's integrated lottery solution, which converges the retail and digital channels to deliver the industry's first truly player-centric, omnichannel solution.**

Connected Play bridges the digital and retail channels, allowing players to use their mobile phone in retail for new digital experiences such as creating and using a digital playslip, paying with an eWallet, and scanning winning tickets to redeem prizes to the eWallet – all conveniently connected to the player account and its lottery eWallet and player preferences.

“Seeing Connected Play in action, visitors recognized the game-changing convenience of the solution and the flexibility of player and lottery choices when it came to configuring Connected Play for their market,” said Saccoccio. “These experiences will generate new insights on player behavior that escape most lotteries today.”

The new light registration feature within OMNIA™ identifies the previously anonymous retail player and is the foundation of Connected Play. Players create an account with the least possible friction as only minimal information is required (configurable by each lottery). A player profile is then created, and relevant behavioral and transactional data can be recorded and associated with this digital identity. This enables retail player behaviors to be analyzed and unlocks the potential



**At the recent World Lottery Summit, Jesse Saccoccio, IGT Director iLottery Product Platform, demonstrated IGT's new Connected Play digital-in-retail player journeys.**





Alan Mackey, Senior Director Advanced Analytics and AI, explains to WLS attendees how IGT's analytical platform empowers lotteries with a data-driven decision-making process that saves time and staffing costs, improves processes, and maximizes marketing budgets.

for deeper retail player understanding and personalized communications.

## An Industry First for Data-Driven Decision Making

Alan Mackey, IGT Senior Director Advanced Analytics and AI, engaged WLS visitors with a demonstration of IGT's **Player Data Platform (PDP)**, an enterprise-wide, cloud-based data analytics platform built by IGT experts for the lottery industry.

The PDP uses its 360-degree player view, artificial intelligence, and machine learning models to empower lotteries to utilize a data-driven decision-making process. This process saves lotteries time and staffing costs, improves processes, and maximizes marketing budgets to responsibly increase acquisition, retention, and sales.

Today's businesses depend on data. IGT's PDP enables lottery marketing teams to intelligently and responsibly analyze each player's interactions to enhance player engagement. Built by lottery-experienced data scientists, machine-learning engineers and data analysts, the IGT platform ingests

data from multiple sources including a lottery's Player Account Management (PAM) platform, retail system, Remote Game Server (RGS), CRM solutions, and web analytics. Using lottery specific artificial intelligence models, the PDP gives lotteries the tools to more effectively acquire players, segment them to best effect, and transform how they engage with those players.

IGT's Player Data Platform enables lotteries to:

- **Analyze data to gauge player responses to different games**
- **Personalize offers and emails**
- **Optimize paid advertising by automating pay-per-click (PPC) advertising, search engine marketing (SEM), keyword research, SEO and social media marketing (SMM)**
- **Automate repetitive tasks**

The PDP is a cloud-based solution, so it utilizes a serverless architecture, which is much faster to deploy, scalable, and provides faster time to innovation.

The PDP also provides IGT's Marketing Services an industry-leading edge in

supporting lottery customers by providing the toolset to intelligently act upon new data insights to deliver growth. Benefits include:

- **Churn prevention campaigns**
- **Player engagement models**
- **eInstants recommendation engine**
- **Game-performance trends and forecasting**
- **Lifetime value predictions**
- **Bonus offer optimization**

The platform is designed to integrate with the lottery's PAM and CRM systems, arming lottery marketers with predictive tools and models to proactively engage players with relevant messages and optimize marketing spend.

The PDP provides actionable, player-focused insights that drastically change CRM's course of action. Instead of sending a particular player-segment the same offer on the same day at the same time, lotteries can message each player within the player-segment with tailored messages on the day and time when they are most likely to engage. Messages can be hyper-personalized with the right type of offer and imagery that players will find most appealing, such as favorite games or games identified as appealing by the platform recommendation engine.

As Mackey observed, "With the power of our platform lotteries can answer questions they just couldn't answer before. We can provide players with superior player experiences because machine learning can get to that level of player personalization. My goal is to personalize every player interaction. When a player logs on, we can automate processes that will know what to do next, whether that is offer recommended games, show a bonus based on predictive lifetime value, or if they play at retail, promote an offer for an omnichannel game. Both players and lottery customers benefit significantly from our analytics platform." ■

**To learn more about IGT's iLottery solution including Connected Play, mobile app, and Player Data Platform, please contact your Account Manager.**



# SPOTLIGHT ON THE LEADERS OF THE GOVERNMENT-GAMING INDUSTRY

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

## ★ DOUBLE-PLATINUM INDUSTRY LEADERS ★



### 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](http://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 Digital & Betting 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 distinctive game content to help our customers strengthen their relationships with the players they serve.

**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 digital play across the global iGaming sector. From content and systems technologies to critical support services, our iGaming portfolio is integrated, modular, and flexible.

**Sports Betting** – The IGT PlaySports solutions portfolio was created specifically to meet the needs of North American casino and lottery operators. The proven, award-winning platform is versatile, and annually processes billions of dollars in wagers through retail, mobile, and self-service technology.

IGT's commitment to responsible gaming is woven into the fabric of our product development, services, programs, and policies. 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.

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

IGT is dedicated to creating a fair and inclusive culture that values unity, diversity, and belonging in our people, players, customers, and communities. We received a perfect score on the Human Rights Campaign Foundation's 2022 Corporate Equality Index earning us the "Best Place to Work for LGBTQ+ Equality" designation. IGT was also recognized by the All-In Diversity Project as the top-ranking gaming supplier in the 2021 All-Index™ report.



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

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 3,000 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. But the best part? We're just getting started. We are the partner of choice for the growing iLottery and lottery sports betting markets. Because when it comes to digital, trust is everything.

The lottery experience is always one of excitement. But 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. 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



**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.

**ABACUS Solutions International Group**  
**In-lane Solutions for Innovators**  
*www.lotteryeverywhere.com*



Abacus' mission is to ensure our solutions are simple to use and enable consumers to buy lottery everywhere. Our entire ethos is built around thinking differently. The Abacus gateway connects consumers, retailers, vendors and lotteries, bridging the gaps between the different parties for frictionless ticket sales and gameplay. Abacus believes the future of lottery lies in integrating with existing retailer and consumer infrastructures. We enable this by providing a highly secure transaction gateway. Abacus has a strong focus on speed to market, simplicity of implementation, and reducing its customers' overheads, delivering a seamless integrated solution to drive increased sales. Unlike other providers Abacus integrates directly into a retailer's point of sale, giving both the retailer and the lottery full control over the lottery category – down to lane level. Moving to an in-lane solution will help eliminate shrink and reduce retail labor costs; reduce debit and credit costs associated to lottery; print a ticket on a retailer's receipt paper; dispense instant tickets securely through every point of sale; offer digital game play through a mobile or a retailer terminal. Easy, smooth, instant: a virtual terminal in every lane.

So let Abacus show you how we can transform your lottery products into a new category for retailers at all levels of engagement.

Our fully managed service offering includes:

- Lottery In-Lane, Self-Checkout, and Self-Serve
- Instant ticket sales and validation through our gateway
- Ticket by ticket delivery of instants where supported by your CGS
- Sports Betting where supported by your CGS
- Online delivery through e-commerce and mobile (where allowed by State law)
- Abacus games portfolio, including Bill Paid™
- Retailer loyalty solutions, follow-on promotions & second chance draws
- Dedicated management portal: control and monitoring of all services and reporting

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 Chryssa Amanatidou, Group Corporate Affairs Director, INTRALOT  
 Byron Boothe, CEO, INTRALOT, Inc.  
 Year of inception: Greece (Parent Company) 1992; United States 2002  
 Contact: [contact@intralot.com](mailto:contact@intralot.com)

INTRALOT is a leading gaming solutions supplier and operator active in 41 regulated jurisdictions worldwide with a global workforce of 1,800 employees in 2021. INTRALOT introduces business innovation driven by leading edge technologies to drive the lotteries transformation and to support them in raising funds for good causes.

INTRALOT fulfills its promise to customers and communities for sustainable growth by deploying ESG principles and standards within its operations. As a member of UNGC, INTRALOT supports the Ten Principles in human rights, labor, environment & anti-corruption. In addition, it has been awarded with the WLA RG Framework certificate.

USA subsidiary, INTRALOT, Inc., employs approximately 613 employees, with 16 contracts; three sports betting, in 13 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, Massachusetts, Montana, New Hampshire, New Mexico, Ohio, Vermont and Wyoming.

**SCA Promotions**

**Our risk, Your reward**  
[scapromotions.com/lottery](http://scapromotions.com/lottery)



SCA is the promotional risk management leader since 1986, supporting over 130,000 promotional events for the Fortune 500 and the Lottery industry. We provide tailored solution for Lotteries, their agencies, and vendors to drive sales, reduce volatility, and support precise budget forecasting.

Prize Indemnity and Risk Transfer for  
 Player club acquisition & retention promotions  
 Retailer incentive bonus coverage  
 2nd chance promotions and prize coverage  
 Reducing volatility for Lotteries who operate legalized sports betting  
 Higher restart jackpots and faster progression for draw games  
 iLottery player acquisition  
 Our team of account managers, actuaries, and lottery veterans bring together a unique skillset that assists lotteries in maximizing player engagement, sales, and contributions to good causes.

SCA offers a complimentary risk & opportunities analysis for your portfolio of games  
 Contact our Lottery expert, Jackie Walker  
[Jackie.Walker@scapromo.com](mailto:Jackie.Walker@scapromo.com) or (214)860-3752

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

**EQL Games  
 Next Level Lottery  
 Content**



Contact: Brad Cummings  
 CEO [brad@eqlgames.com](mailto:brad@eqlgames.com)

EQL Games has always been a force for innovation in the U.S. lottery industry. We started as the innovator of the first-ever live sports lottery games for U.S. lotteries and have today evolved into a company that offers content for all sectors of the lottery industry.

EQL Games now has content options for every lottery to consider. For retail, we offer draw games, instant tickets, and second chance games. For digital, we have draw, keno, and instant products. And with our first-of-its-kind content aggregator, EQL Games can now bring the best content from iGaming studios to lottery, with games built to follow iLottery regulations.

All of this is powered by our proprietary Remote Gaming Server which has been built to make integrations as easy as possible. Created for quick deployment of new products, a lottery technician can build a new draw game with our back-end options in less than five minutes.

We believe lottery games should be dynamic in play style and easy to integrate with your existing system. If you believe that too, we would love to talk with you.

**Jackpocket**

[www.jackpocket.com](http://www.jackpocket.com)



Jackpocket is a technology company helping to modernize and grow state lotteries. As a no-cost, turnkey platform, Jackpocket is the leading third-party app in the U.S. to provide a secure way to order official state lottery tickets. By helping today's players participate in the lottery, Jackpocket helps state lotteries drive incremental revenue for essential state programs. Players use Jackpocket to order tickets for their favorite games, get automatic winner alerts, join lottery pools, and more. The first third-party lottery service to earn responsible gambling certification from the NCPG, Jackpocket is also the first licensed digital lottery courier in New York and New Jersey.

• **Ticket Orders:** Age-verified and geo-located players place orders for official state lottery games such as Powerball and Mega Millions directly from the app.

- **Ticket Scans:** Jackpocket's proprietary ticket-scanning technology allows players to view a scan of their lottery ticket in the app. They also receive a confirmation email with their ticket serial number.
- **Lottery Pools:** Players can team up with friends and family or join Jackpocket's Powerball and Mega Millions pools.
- **Autoplay:** Players can set up automatic orders to enter drawings using Quick Picks or their own numbers.
- **Responsible Gaming:** Consumer protections such as daily deposit and spend limits, self-exclusion, and in-app access to problem gambling resources and support hotlines promote responsible play.
- **Lottery Customers:** Arkansas, Colorado, Idaho, Minnesota, Montana, New Hampshire, New Jersey, New Mexico, New York, Ohio, Oregon, Texas, Washington D.C and West Virginia.

**NeoPollard Interactive LLC**

920 N. Fairview Avenue  
Lansing, MI 48912

[www.neopollard.com](http://www.neopollard.com)



Powering the most profitable iLottery programs.

Doug Pollard, Co-Chief Executive Officer

Moti Malul, Co-Chief Executive Officer

Year of inception: 2014

Contacts:

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Moti Malul, (734) 353-4275, [moti.malul@neopollard.com](mailto:moti.malul@neopollard.com)

Primary products and services:

NeoPollard Interactive LLC ("NPI") is an award-winning supplier of best-in-class iLottery solutions to the North American lottery market. As the industry's only active provider solely focused on iLottery, NPI serves the largest share of U.S. lotteries selling online and is North America's proven partner of choice to generate incremental revenue for good causes through the online channel. NPI offers cutting-edge technology, its Power Suite of comprehensive iLottery services, and the industry's top performing games, as part of its innovative approach to partnering for iLottery success.

Technology: NPI's iLottery technology is the most market-tested solution delivering secure and reliable solutions for its highly regulated lottery partners. The flexible hub underpinning NPI's iLottery platform, NeoSphere, provides

a centralized PAM to manage a single view of the digital lottery player. NPI additionally provides the industry's only MUSL-certified Interactive Central Gaming System, NeoDraw, a game management platform, NeoPlay, and business intelligence solution, NeoCube.

Power Suite: Specifically catered to the operational and revenue-generating needs of iLottery, NPI's player-centric managed services include:

- **Player Operations** – 24/7/365 Player Support Center, Power Concierge Desk, Regulatory Compliance, Payout and Risk Operations, Claims, Banking and Payments and Gaming System Operations.
- **Ignite Player Marketing** – NPI's in-house iLottery marketing agency focused on Player Insights and Intelligence, Player Acquisition, Player Experience Optimization, Player Rewards, Retention Marketing and Creative Studio.
- **Player Portfolio** – Product Planning and Portfolio Management to attract, retain and engage iLottery players.

**Game Studio:** With over 150+ titles, NPI's in-house studio produces compelling digital game content.

Jointly owned by Pollard Banknote Limited and NeoGames S.A., NPI's exclusive iLottery focus has resulted in the delivery of the ideal business model to drive the most profitable iLottery programs in North America.

**Sightline Payments**

[www.sightlinepayments.com](http://www.sightlinepayments.com)



Sightline Payments is a dynamic FinTech company enabling the next generation of cashless, mobile and omni-channel payments ecosystems for gaming, lottery, sports betting, entertainment and hospitality. From Las Vegas' first completely cashless resort (Resorts World Las Vegas) to a dynamic funding mechanism integrated into numerous sports betting and iLottery platforms (Play+), Sightline continues to responsibly modernize the concept of funds movement in the gaming industry.

As U.S. and Canadian lottery industries evolve, Sightline is partnering with gaming operators and vendors to enhance the versatility of the iGaming payments stack, extend methods and channels of disbursement in claim

centers and retail, and realize the full potential of mobile.

Sightline currently processes more than \$5 billion annually, supports more than 1.5 million accounts, and has 80+ partners across iGaming, sports betting, lottery, and integrated casino resort sectors. Integration at its core, Sightline maintains partnerships with many industry leaders including International Game Technology, Scientific Games, Konami, Aristocrat and several others.

Their executive team brings more than 50 combined years of leadership roles in gaming and in payments. Sightline has been responsible for innovative and award-winning products that have advanced payments in gaming over the last 14 years.

SVP of Business Development; Andrew Crowe  
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**PGRI**  
**LOTTERY EXPO**  
**NYC 2022**

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DOUBLE PLATINIUM INDUSTRY LEADERS



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# PULSE of the Industry

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## NORTH AMERICAN NEWS

### Ticket in California Wins World Record \$2.04 Billion Powerball Jackpot

The Powerball jackpot that eluded players for three months was finally hit on the 41st draw of the jackpot run. Final ticket sales pushed the jackpot beyond its earlier estimate to \$2.04 billion at the time of the drawing, making it the world's largest lottery prize ever won. The lucky ticket holder will have the choice between an annuitized prize of \$2.04 billion or a lump sum payment of \$997.6 million. Both prize options are before taxes. Powerball tickets are \$2 per play. Tickets are sold in 45 states, the District of Columbia, Puerto Rico and the U.S. Virgin Islands. More than half of all proceeds from the sale of a Powerball ticket remain in the jurisdiction where the ticket was sold. Powerball drawings are broadcast live every Monday, Wednesday and Saturday at 10:59 p.m. ET from the Florida Lottery draw studio in Tallahassee. The overall odds of winning a prize are 1 in 24.9. The odds of winning the jackpot are 1 in 292.2 million.

### Lester Elder appointed to be Director of the Missouri Lottery

Lester Elder, a Jefferson City resident and former captain of the Missouri State Highway Patrol, was hired by the lottery commission after a search following the resignation of longtime director May Scheve Reardon in June. Elder has been serving as chief administrator of the Missouri Department of Revenue's Compliance and Investigation Bureau, overseeing criminal and administrative investigations, as well as duties related to budget, legislation and policy development.

### Legal Online Gaming, Sports Betting Launches In Saskatchewan IGT to Advance VLT Central System

### Technology for Loto-Québec as Part of Five-Year Contract Extension

The extension will run through September 2027. Under the terms of the extension, IGT will upgrade Loto-Québec's video lottery central system to the latest version of INTELLIGEN, which includes improved network diagnostics and data analytics. IGT will also be providing operational support of the INTELLIGEN system from their European Operational Center.

### All Aboard! Ticket To Ride™ Joins Pollard Banknote's Licensed Brands Portfolio

Through a partnership with Asmodee Entertainment, the popular board game is now available for use on printed instant tickets, adding to the company's long train of licensed brands.

### Inspired Entertainment, Inc. signs a new five-year contract with Betfred Group, a UK-based bookmaker that owns and operates over 1,400 betting shops in the UK with over 50 years of experience



## INSPIRED

As part of this agreement, Inspired will exclusively provide Betfred with fully integrated managed services for its entire estate of over 5,500 terminals, including installation, remote and field technology support, as well as platform and content deployment. In addition, Betfred has committed to the procurement of 5,000 new Vantage™ server based gaming ready cabinets throughout 2023.

### Scientific Games Vice President of Responsible Gaming Carla Schaefer has been appointed to the National Council on Problem Gambling's Board of Directors



The 36-year lottery industry professional currently leads Scientific Games' global responsible gaming efforts, including the company's Healthy Play program that provides tools to help lotteries to educate their players about the healthy enjoyment of lottery games.

### IN MEMORIAM: Gershon Bernard Collier – Chief Operating Officer of the Missouri State Lottery

### Lottery.com, Inc. appoints new Chairman, Matthew H. McGahan, and additional Board directors

### Massachusetts State Treasurer Deb Goldberg: Lottery overhaul must include online option

State Treasurer Deb Goldberg saw this coming, and now the chickens of legislative inaction have come home to roost. The confluence of raging inflation and impending availability of online sports betting has taken a bite out of lottery sales in this state and around the country. Massachusetts Lottery sales in August decreased by \$35.9 million, 6.4%, compared to August 2021, Interim Executive Director Mark William Bracken recently told the Lottery Commission.

Every product except one ended in the red for the month. Through the first two months of fiscal 2023, Lottery sales tumbled by \$20.3 million, or 1.8%. It's been three years since Goldberg first declared that "if sports betting is available online, the Lottery must be available online also." But while sports betting legislation got to the governor's desk before formal sessions ended Aug. 1, Goldberg's long-requested authorization for online Lottery sales remains on hold. That's because House and Senate Democrats still haven't decided how to proceed with their long-stalled economic development bill. Goldberg pointed out in stark detail why



every effort to ensure the Lottery's viability – including online options – must be made. It's time for the Legislature to get over the governor's end-around of a revenue surplus payback to state taxpayers, and recast an economic development bill that includes online Lottery sales. The state's driving force of unrestricted local aid shouldn't be taking a back seat to any other gaming option.

### Scientific Games names Mona Garland as the company's Chief Human Resources Officer

In the newly expanded role, Garland joins the Scientific Games Executive Team which has continued to evolve after the company's sale to Brookfield Business Partners in April 2022. As CHRO, Garland will lead global people strategy along with employee-focused programs and initiatives, including talent acquisition and retention, learning and development, diversity, equity and inclusion, compensation and benefits, employee engagement, and workplace culture.

### IGT Expands Modernization of Georgia Lottery Corporation Offering with Seven-Year Contract Extension



IGT Global Solutions Corporation will deploy its world-class lottery and iLottery products and technology, enhancing the modernization of the Georgia Lottery's offerings. The contract extension will run through September 2032. As part of the contract extension, IGT will install cashless functionality on more than 10,000 point-of-sale retail terminals, enabling players to purchase lottery with a debit card. Customer-facing ticket scanners will also be implemented on more than 10,000 retail terminals to support player-initiated transactions including QR codes, digital playslips and other digital offers.

IGT will also install more than 4,400 new high-performing Retailer Pro lottery terminals and related equipment in retail locations. In addition, IGT will replace 600 self-service vending machines currently in the field with its GameTouch™ 28 self-service vending machine, a trusted solution for high-volume retailers that provides a dynamic user experience and increased flexibility for players. Additionally, IGT will deliver upgrades to the Georgia Lottery's lottery and iLottery central system. These upgrades would include the ability to migrate components of each system to the cloud. Among many benefits, cloud technology would offer the Georgia Lottery dynamic scalability and a reduced time to market for system enhancements. It also facilitates faster and easier integration of data and insights as a further enrichment to the overall player experience.

### IGT Enhances Player Security in Oregon with Video Lottery Digital Prize Redemption

IGT will provide the Oregon Lottery with IGT's video lottery account-based cashless solutions via its INTELLIGEN™ central system. The Oregon Lottery will enable the account-based cashless technologies on the more than 11,500 video lottery terminals (VLTs) throughout the state.

### IGT Wins 10-Year Scratch Ticket Manufacturing Contract with the Texas Lottery Commission

### ALC and IWG ink omnichannel games partnership

The Atlantic Lottery Corporation collaboration agreement with Instant Win Gaming will allow the latter to develop omnichannel content for the Canadian Crown agency and its many Atlantic players.

### IWG (Instant Win Gaming) Now Live with OLG Ontario



IWG has completed its InstantRGS (remote game server) integration and delivered its first InstantGames to Ontario Lottery and Gaming Corporation (OLG). IWG already holds an established position within Canada, with its games now live across eight provinces in the country, including those managed by Atlantic Lottery Corporation (ALC), British Columbia Lottery Corporation (BCLC) and Loto-Québec.

### Abacus Solutions International announces the consolidating acquisition of the Playport Gaming Systems digital lottery platform, creating an industry-first product suite for lotteries globally



The merging of Abacus' and Playport's technology platforms yields a robust and turnkey digital omni-channel instant-win gaming solution to lotteries around the globe to expand their sales touch points and channels.

### Abacus and Blackhawk Network Announce a Partnership

Abacus Solutions International Group, a global technology provider connecting lottery systems with lottery retailers and Blackhawk Network,

a global branded payments provider, announced a new relationship designed to supply lotteries and lottery retailers with a selection of in-lane solutions that seamlessly integrate with existing retail point-of sale systems.

### Pollard Banknote Awarded Contract for Scratch Ticket Manufacturing And Services By The Texas Lottery



The new contract, which extends the successful and collaborative partnership through 2034. The new contract marks the debut of Pollard Banknote's proprietary easyVEND™ In-Lane ticket vending solution, revolutionizing the way traditional scratch tickets are made available for purchase. By combining innovative technology and security with an eye-catching merchandising display, easyVEND™ allows players to conveniently add traditional scratch tickets to an existing transaction within a multi-lane retail environment.

### NeoPollard Interactive to Deliver Industry-Leading Game Content to the Georgia Lottery



### Illinois gambling revenue hits all-time high in fiscal year 2022 at almost \$1.9 billion

The new record is up by 35.7% from the previous high, set in 2019, when the Prairie State generated \$1.4 billion in gaming revenue. Raking in more than \$833 million, lottery sales generated the most gambling revenue for Illinois from July 2021 to June 2022, according to a report by the Illinois General Assembly's Commission on Government Forecasting and Accountability.

### Kentucky Lottery: Amy Drooker Promoted to VP and Chief Revenue Officer



### Netflix to branch out into online video gaming services

### Leger's Analytics team will derive how the value players get from participating leads to playing behaviors

**such as frequency and spending**

The report includes NFL sports bettors and the current Mega and Powerball jackpot runs.

**EQL Games has signed an agreement with Australian game studio ReelPlay to provide iLottery content to North American lotteries.**

**Gov. Abbott open to expanding gambling options in Texas, spokesperson says**

**Lottery.com Inc. received a notice from The Nasdaq Stock Market LLC stating that the Company is not in compliance with Nasdaq Listing Rules**

**Ralph Lauren launches partnership with Fortnite**

**Flutter Entertainment won a New York arbitration against Rupert Murdoch's FOX Corporation related to the ownership terms and valuation of FanDuel**

**Ontario online gaming transition period ends**

The Alcohol and Gaming Commission of Ontario (AGCO) says that it will now take action against any operators that haven't obtained licences.

**SPORTS BETTING AND CASINO GAMBLING**

**Light & Wonder Names Matt Wilson Chief Executive Officer**

Mr. Wilson has served as interim Chief Executive Officer since August 2022 and previously served as Chief Executive Officer of the Company's Gaming business.

**Nevada gambling revenue tops \$1B for 18th consecutive month in August at \$1.2B**

Nevada collected \$1.2 billion from its casinos in August, a figure 26.7% up from the same month in pre-pandemic 2019. The impressive August results have pushed the year-to-date state revenue 14% ahead of 2021's record performance.

**New York sports betting surpasses \$542m in taxes**

Since early January, when mobile sports wagering became available in New York, the

State has collected \$542m in taxes through the week ending October 30. An additional \$200m in licensing fees has also been collected, generating a total of more than \$740m in revenue, most of it to be used for education.

This far outperforms every other state in the nation, including those that have been accepting mobile sports wagers for several years. Governor Kathy Hochul said: "By bringing sports wagering to New York, we have not only opened the door to responsible entertainment for millions of sports fans, but we have also brought in significant revenue to support schools, as well as youth sports, while implementing important safeguards to help those who need it. I'm proud of the work that has been done to secure our state's top position in mobile sports wagering, and I am excited to continue the trend as we secure hundreds of millions of dollars to support programs that will improve the lives of New Yorkers."

**Virginia sports betting handle reaches \$411.3m in September, up 40 per cent year-on-year.**

**U.S. commercial gaming revenue reached a quarterly record of \$15.17 billion in Q3 2022**

**Maryland Online Sports Betting Launch Expected in December**

**New York Court Rules in Favor of FanDuel in \$1B Founders Suit**

The New York Supreme Court dismissed a \$1 billion suit brought by founders of the gaming company who argued they were not adequately compensated when the sportsbook operator was acquired by Paddy Power Betfair in 2018.

**Sports betting generates nearly \$1.3 million in Kansas' first month of legalization**

**Massachusetts aims to launch sports betting in late January**

**The Alabama Supreme Court unanimously agreed with the Attorney General that casinos are operating illegally and are to be shut down**

**Genting aims to upend Macau casino landscape in bidding war**

**NEW YORK Caesars bid for a Times Square casino rattles Broadway**

As news of the idea for a Caesars Palace Times Square was announced, the Broadway League jumped into the debate, saying they don't see a gambling mecca as a good fit alongside the

dramas and musicals that draw tourists to New York. The Times Square Alliance, the group overseeing the New Year's Eve ball drop, is generating neutral.

**NFT metaverse casino Slotie hit by emergency cease-and-desist in four U.S. states**

Another non-fungible token (NFT) venture is finding itself up against a gauntlet of legal opposition. The metaverse NFT casino business may not be in play for much longer.

**U.S. States experience iGaming upsurge**

Updating its Commercial Gaming Revenue Tracker with data tracked throughout August, the AGA revealed that iGaming GGR generated by operations in Connecticut, Delaware, Michigan, New Jersey, Pennsylvania and West Virginia, increased by 31.9 per cent YoY to \$401.8m, with all iGaming markets experiencing annual growth. Over the tracking period, combined revenue from sports betting up 69.9 per cent YoY, with year-to-date revenue of \$3.97bn, while handle is \$55.76bn, a 86 per cent improvement.

**Twitch tightens gambling regulatory policies as it includes a growing number of gambling websites**

**WORLD NEWS**

**WLA elects new President and Executive Committee**

**Paris to host the next World Lottery Summit in 2024**

**UK's incoming National Lottery operator Allwyn Entertainment is in talks to buy former operator Camelot's UK operations**

The potential deal could be valued by up to 100 million pounds (\$116.10 million). On Sept. 20, Allwyn was awarded the fourth license to operate the National Lottery from February 2024.

**Allwyn companies change their names in connection with rebranding process**

The Allwyn lottery group continues to rename its international entities. Companies in Austria, Cyprus, the Czech Republic, and the United Kingdom will now bear new names. Apart from this, there is no change to the operation or organisation of the companies. The changes come as a part of the group's global rebrand-

ing to a new Allwyn identity. A total of 10 companies are changing their names to align with the global Allwyn brand.

## **Germany: Joint Gaming Authority of the States Calls on Internet Service Providers to Bloc Illegal Gambling Offers from Lottoland**

The GGL, Germany's new gambling regulator, continues its battle against the Lottoland Group, which is not legally licensed to operate in Germany. The GGL has already succeeded in blocking payments to the operator and is now looking to block it from accessing the country's digital space, asking internet service providers (ISPs) to block access to Lottoland Group and its related pages. Lottoland Group and its subsidiaries have been illegally operating in Germany for many years. The GGL finds these offerings particularly dangerous because the consumer mistakenly believes they are legitimate lottery offerings. In reality, Lotteryland and its subsidiaries, which include lottoland.com, lottohelden.de and lottohelden.co, offer betting on the outcomes of lottery games. According to Germany's laws on gambling, such products are prohibited. As a result, it is GGL's job to protect local players from content that might harm them.

## **Scientific Games and Groupe FDJ debut lottery games of the future**

Scientific Games and Groupe FDJ, the operator of France's national lottery La Française des Jeux, unveiled iDecide, a revolutionary lottery game enhancement that gives instant scratch card players the option to continue their play experience with a digital game and potentially expand their winnings. The concept is a first for the global lottery industry.

## **FDJ Gaming Solutions provides its Interactive Factory to Loterie Suisse Romande**

Loterie Romande selected FDJ Gaming Solutions to port all their interactive games and provide exclusive iLottery content through their Interactive Factory platform. FDG Interactive Factory is an open platform, which delivers content as a service, supports multiple lottery game logics, and is already used among others by LEIA, the Lotteries entertainment and innovation alliance created by Norsk Tipping, Svenska Spel, Danske Spil, Veikkaus and FDJ.

## **La Française des Jeux (FDJ) has launched an online poker range**

This new online poker range is part of the Group's strategy to bolster its presence in the French market for online games open to competition.

## **Kindred Gives gives in to Norway's Gaming Regulator, agreeing to**

## **remove all Norway-facing websites, language options, and advertising**

The decision comes as a surprise, as it was only a couple of weeks ago that Kindred reiterated its stance that it would never back down. Kindred contends that its Maltese license allows it to operate anywhere in the EU. So this is a win for "subsidiarity", the notion that each individual EU member state has some authority over gambling regulation and taxation policy within its own borders.

The implications for the entire European gaming industry are profound as the alternative is to potentially greenlight all operators who hold a license somewhere, anywhere, in the EU (like Malta or Gibraltar) to operate online gambling services anywhere and everywhere in the EU.

## **Endeavor Pays \$800M for Sports Betting Firm OpenBet Inc. from Light & Wonder Inc.**

## **Bermuda Getting First Casino After Nine-Year Wait**

## **Illegal lottery activities caused loss of revenue of a total of 1.8 trillion dollars globally in 2022 alone**

## **Australian Gambling company Star Entertainment Group has been fined A\$100 million over failing to prevent money laundering at its casino in Sydney**

In addition to the fine, the group's licence to operate the casino has also been suspended.

## **Cambodia issues new guidelines for licensing and taxation of casino operations**

## **Zimbabwe: Government losing revenue through online gaming**

## **Australia: NSW -Facial Recognition Technology: Coming to gambling areas of all pubs and clubs across the state**

## **French gambling regulator l'Autorité Nationale des Jeux (ANJ) has published new guidelines on the promotion of gambling offers and incentives to consumers**

## **Germany: Federal Fiscal Court rules sales from slot machines are still subject to VAT**

## **Spain's Gambling Ecosystem To Undergo a Shift Following Approval of New Legislation**

The legislation introduces fundamental changes to how gaming operators are required to approach responsible gambling.

## **Stanleybet Malta hit with preventive seizure in Italy**

Stanleybet Malta's activity in Italy have also been stopped, with the decree providing for a temporary ban on exercising and collecting sports bets throughout Italy. The Italian authorities are investigating Stanleybet for offering sports betting and other online gaming without the necessary licence from the country's regulator, and thus illegal on the Italian authority.

## **Australia Communications & Media Authority (ACMA) Blocks 96 Illegal Offshore Gambling Websites**

The focus is on affiliate services that promote and drive traffic to illegal online casinos. These sites often appear as independent reviewers of gambling services. They give direct links to illegal gambling services, regularly receiving a commission for click-throughs.

## **Australian regulator orders audit of bookmakers Sportsbet, Bet365**

## **New Australian privacy laws change marketing approach for lotteries**

## **Australia: NSW government delays bill and avoids cashless gambling card debate**

## **Nigeria: FIRS Introduces Real-time Direct Collection Of Taxes From Online Gaming Transactions**

## **European Commission raises igaming money laundering threat level**

The European Commission has placed online gambling at the highest threat level, while the risk from land-based casinos has fallen.

## **Swedish Government to Introduce Licensing Requirement for Gambling Software Suppliers**

## **German State of Saxony Receives Online Slot License for its Monopoly**

There are now 14 operators that have permission to offer only online slots, with the state of Saxony and its monopoly the latest to receive a license.

# GAME NIGHT

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