

WLA MAGAZINE

No. 60 / SPRING 2023



INSIGHTS

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the fight against
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achieves success
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times



Positive growth of customer-focused lotteries



Luca Esposito
WLA Executive Director

The lotteries began 2023 on a positive note, at the flagship WLA and EL Marketing Seminar, held in London, in February. Some 200 marketing professionals gathered from around the world to share their experiences of the past few years, and take stock of the latest marketing trends and opportunities for lotteries in turbulent times – the Seminar’s theme.

Having lived through the global health crisis, followed by the situation in Ukraine, we were once again reminded of the Seminar’s theme, when the devastating earthquake struck Turkey two days before the event. Our thoughts and prayers are with the people who now face the great challenge of rebuilding their lives.

The topics of technology and digitalization recurred throughout the presentations, which described the different ways in which the lotteries have managed operations during COVID-19. For most, this meant accelerating online activities, and adapting operations and communications with employees and customers.

In addition to handling the various lockdown restrictions, massive change occurred as global populations reassessed how they live, work and play. Lottery marketing experts have closely followed these trends and evolving consumer habits, and adjusted their offerings to suit customer needs. On this point, customer-centric strategies were mentioned several times and the extra mile many lotteries went, to support populations, in addition to carrying out normal operations.

It was inspirational to learn that we work to raise funds to support good causes around the world, and many also volunteer to help immediate and broader communities, in times of crisis.

In this issue, we hear from lotteries in Austria, Brazil, China, Morocco, Singapore and the US, about their unique market needs, the creative ways they have overcome limitations, and some progressive uses of social media platforms to reach new customers and the successful outcomes, as a result of all their actions.

For instance, by understanding the economic issues that concern and shape their customer choices, Austria’s OLG developed well-suited gaming options. Brazil’s Loterias CAIXA successfully delivered on the roll out of diverse online platforms to cater to a highly digitalized

country. The China Sports Lottery ran fun video challenges on social media to entice different generations to keep playing. Singapore Pools increased brand loyalty with its free training sessions for the older generations to help them navigate the digital daily life, while in the US, new opportunities were found to develop advertising partnerships with non-lottery brands, and the unique Multi-State Lottery Association.

La Marocaine des Jeux et des Sports (MDJS), discussed another important factor that was responsible for driving digital acceleration in Morocco. The sharp growth of online illegal betting operators compelled MDJS to step up its offer, enhance its platform infrastructure and diversify communication across all channels, in a bid to entice players back to a legal, fun and above all safe playing environment.

Our industry has learned many lessons and adapted rapidly and effectively to make great strides forward in the most challenging of times. We are already building on these, knowing that this vital ability to adapt quickly is what will ensure our survival, but we cannot rest on our laurels. Our world continues to evolve and there is much to do, if we are to remain relevant.

During the Seminar, we were reminded of this by speaker Jenk Oz. The seventeen-year-old Gen Z entrepreneur talked about his generation – the fastest growing across all cohorts – as it enters the workforce. His parting words were that we must mix old and new approaches and create an omnichannel experience in retail and online, where both worlds are in sync, and complement each other.

For its part, WLA continues to support its members in the achievement of their goals, by sharing knowledge and providing useful guidance in the areas of security and responsible gaming certification, as well as for responsible sports betting marketing and advertising.

WLA also collaborates closely with the United Lotteries for the Integrity in Sport (ULIS). In my other role as ULIS General Secretary, I look forward to the next phase of the rebranding, growing our global network and optimizing our products and services as we strive to fight illegal sports betting in order to maintain sports integrity.

I hope you enjoy the global perspectives and success stories in this issue.

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INTERVIEW

Technology, trends and opportunities for lotteries

WLA President, Rebecca Paul

In recent years, global events, rapid digitalization and diverse technologies have greatly shaped the habits and preferences of lottery customers. To retain and grow our player base, it is imperative that we evolve to appeal to these changing expectations and stay closely aligned with new opportunities.

In this issue, we hear from some lotteries who have closely followed these trends and adapted their strategies to provide and promote enhanced, tailored products and services in an entertaining and responsible manner.

Lotteries must continue to offer innovative and entertaining products and services that consider customer preferences and meet their needs. How are technologies helping to achieve this?

Digital technology has truly impacted the entire entertainment industry and taken expectations to an entirely new level. The ways we are able to access and experience music, games, film and more are vastly different than just a few years ago. Key factors for a growing number of consumers are convenience, visual appeal and a cutting-edge experience.

"The ways we are able to access and experience music, games, film and more are vastly different than just a few years ago."

Fortunately, for the most part, our industry hasn't been left out of this realm, and we are developing mechanisms to keep up where they are allowed by law. The number of lotteries offering an online experience continues to grow – allowing customers the chance to purchase tickets and creatively play and win games from their mobile devices, computers or even a smart television. It's estimated that in 2023, the number of global smart phone users hit more than 6.9 billion – roughly 86.29 percent of the world's population. This simply reinforces the demand that we connect via this mechanism at a minimum to attract and retain a solid player base.

And while we harness new technologies, it's important that we delve deeply into understanding how we market our traditional products as well. February's WLA/EL Marketing Seminar in London was a refreshing, informative opportunity to do just that, and it was a pleasure to attend. Just one point highlighted was that too often we use the quality of reasoning to judge the

quality of a decision. Keynote speaker Rory Sutherland, Vice Chairman of Ogilvy, described studies that looked at how to change customer behavior without actually changing anything physically – that success can be about perception alone. The takeaway is to emphasize what you know and continue to explore what you don't.

When it comes to promoting products and services, what are some important points to consider as the lotteries and sports betting operators navigate the vast world of digital marketing?

First and foremost, it's our obligation to raise awareness about our products in a socially responsible manner, which is just one of the ways we differentiate ourselves from illegal and unauthorized lottery and betting organizations. Providing safe and responsible gaming begins with how we position our products. WLA has worked hard to provide guidance in this area, and there are marketing best practices available on our website.



It's our obligation to raise awareness about our products in a socially responsible manner, which is just one of the ways we differentiate ourselves from illegal and unauthorized lottery and betting organizations.

"Be agile, fast, efficient and flexible. Keep products creative, fresh and attractive. Listen to players and retailers, but be proactive with your expertise."

Referring again to the dynamic WLA/EL Marketing Seminar in February, we heard about how the challenges of the past three years have also provided opportunities. Digital platforms exploded during the pandemic, and even though lotteries differ in many ways, one panel there pointed out key marketing takeaways for all: be agile, fast, efficient and flexible. Keep products creative, fresh and attractive. Listen to players and retailers, but be proactive with your expertise. Understand the trends that are driving consumers and strategize accordingly.

According to the Bank of America, Generation Z (born between 1996 and 2016) is predicted to become the "most disruptive generation ever." It is the first born into an online world to enter the workforce. As lotteries grow their customer base, how can they attract this key demographic with its unique beliefs, behavior and transformational consumer trends?

Those who attended the Marketing Seminar in London were fortunate to hear from Jenk Oz, the teen-age founder and CEO of Thred Media. This entrepreneur shared his knowledge about how lotteries can better understand Gen Z beliefs, behavior and transformational consumer trends. Mr. Oz explained that Gen Z, which the Bank of America describes as having the fastest growing economic power of any other generational cohort, has been shaped by five main events: Smartphones, financial crisis, a decade of social activism, a pandemic, and now war.

His advice? Understand what drives the people who we would like to become players. This is a generation that is realistic and practical. Deliver transparent, authentic and genuine messages because this group truly cares about the world. Create a storyline and communicate progress. Mix retail and digital approaches with an omnichannel experience that embodies the past, present and future.

During the recent WLA/EL Marketing Seminar, one panel found similar lessons learned across several global regions. In the panel you moderated that gave views from the US, what were some of the aspects unique to the US market?

One of WLA's many strengths is bringing together regions from around the globe to learn from one another. At the Marketing Seminar, we discussed the collaboration in the U.S.

on national branding opportunities through multi-jurisdictional game platforms. An example is the Multi-State Lottery Association (MUSL), the organization that oversees several multi-jurisdictional games including Powerball. The group has initiated a variety of Powerball national marketing activities, such as partnering with *Dick Clark's New Year's Rockin' Eve* annual holiday television event to host a special Powerball million-dollar drawing during the broadcast.

"One of WLA's many strengths is bringing together regions from around the globe to learn from one another."

Another Powerball partnership has recently been announced, this time with the National Association for Stock Car Auto Racing (NASCAR). To kick off the new partnership and the 2023 NASCAR season, the two entities will create a season-long promotion that will culminate with one lottery player winning US 1 million in a special drawing broadcast live from NASCAR Championship Weekend.

Partnerships such as these build excitement, create memorable moments, attract a wide demographic and help build the game's brand, which has a huge impact.

During the March 2023 Responsible Gaming Seminar held in Brazil, what were some of the key takeaways from the panel discussion on *Responsible Gaming Certification: evolution, advantages and future?*

This insightful event was a valuable opportunity for collaboration, and I thank CIBELAE, WLA and Loterias CAIXA for making it possible. This particular panel reinforced the importance of our industry's commitment to fostering responsible gaming (RG), as well as the WLA's role in assisting members through its RG Certification program. It's inherent upon us to raise dollars for good causes in a socially responsible manner, and it's always beneficial to hear about the experiences and best practices of lotteries around the globe. It's clear that the Certification program has made an impact on participants, who credit its rigor and framework as instrumental in implementing change. And change can be seen in the form of strengthened RG programs – both external and internal – based on the WLA principles. It's vital for us to remember to include all stakeholders in our programs, and that our business

partners are eager to join the commitment to RG. Together, we will continue to make a true difference in the drive to promote and set the stage for responsible play.

In 2016, you founded the global CSR initiative program – *Women in Lottery Leadership (WILL)* – to drive high-performance business growth through the advancement of women into greater leadership positions. How are *WILL* activities evolving in the region of Latin America?

It was a pleasure to visit with colleagues in Brazil and learn from others about their experience with *WILL* as the program continues to gain momentum. Esmeralda Britton,

President and CEO at Junta de Protección Social, and Latin America representative of *WILL*, gave us an informative overview of activities in her region. These included participation in the III Women's Meeting in San Martín de los Andes (Neuquén, Argentina); the creation of a WhatsApp digital chat group with more than 100 members for women in the region; participation in the Provincial Institute of Games of Chance of Neuquén (IJAN), Argentina, for International Women's Day, and participation in a webinar organized by *WILL* Latin America and CIBELAE. These are just a few examples of the creative ways members are working toward the ultimate goal of advancing women into greater leadership positions in our industry.

"It's inherent upon us to raise dollars for good causes in a socially responsible manner, and it's always beneficial to hear about the experiences and best practices of lotteries around the globe."





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Stepping up the fight against illegal betting in Morocco

Betting revenues have increased in Morocco as they have done around the world over the past decade. Equally, the number of illegal operators has also grown. Using different means to win their customers, some actively recruit through agents on the ground, and have even launched ad campaigns in major cities for key events, such as the 2020 World Cup.

La Marocaine des Jeux et des Sports (MDJS) is a state lottery offering betting on all sports competitions, including virtual, with the exception of horse and greyhound racing, throughout Morocco. It has seen an average annual growth rate of 18 percent since 2010. Over 1,300 retailers distribute products and share MDJS values of ensuring integrity, and providing secure, responsible gaming experiences for customers.

In addition to this, MDJS supports the National Sports Development Fund of Morocco, which subsidizes sports federations, high-level athletes representing Morocco, as well as financing different sports infrastructure.

During the WLA and EL Marketing Seminar held in February in London, UK, with the theme *Lotteries in turbulent times: Opportunities in time of crisis*, Khalid Naili, Special Advisor to the General Manager of MDJS, discussed how digital opportunities taken in the market to combat illegal betting operations, have also advanced the development of omnichannel.

Combatting illegal betting

As part of efforts to combat illicit betting operations, MDJS developed a new betting website and mobile application, launched in September,

2022. Its initial offerings comprise COTE&SPORT and COTE&SPORT 3D games – representing 86% of the bets. It plans to add CHRONO, TIFO and TOTOFOOT in 2023 and beyond.

“There are many benefits to using the new gaming platform. We’ve improved the offer with more betting options, sports, live matches and the introduction to COTE&SPORT 3D with a variety of games and bonus programs. There’s better infrastructure and a smoother registration process, as well as a new means of payment,” said Naili.

In addition to increasing the number of its registered customers and improving their gaming experience, MDJS also aims to make it more inclusive. It is working to broaden access to the new platform of the unbanked, as well as entice players away from illegal sites and get them to register on its safer, superior platform.



Strong clear campaign

To achieve its goals, MDJS rolled out a communication campaign with three key messages:

- **Mobility** – play anytime, anywhere, online
- **Discovery of new options** – promoting the new games and betting offers
- **Security** – play with a safe, secure account for payments and collecting winnings

The ad campaigns were run in seven cities on billboards and buildings, through 79 ad placements across six papers, on 21 websites (generalist, sports, Web TV), social media: Facebook and Instagram, printed

A2 posters, and shown on POS/iFlex screens.

It seems that these efforts paid off. At the end of 2022, MDJS saw an increase in sales, subscriptions, active players and activations.

Looking ahead

The work to combat illegal betting in Morocco is ongoing and includes involving more institutional third parties by sending letters to them to raise awareness of the situation; continuing to improve MDJS offers and services, as well as organizing educational seminars on the topic.

This year will be one of transition as MDJS prepares for the move in 2024, to a new operator that is fully briefed



on illegal betting issues, and willing to engage together with MDJS to fight it.

Additionally, the ratification of the Macolin Convention in Morocco will have an impact on the role MDJS plays in the future national platform and preparations are underway to best achieve this mission.



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How the China Sports Lottery innovates on social media

With the mission to raise funds for charity nationwide, and to contribute to public welfare and sports undertakings, the Chinese Sports Lottery aims to achieve its goals in a responsible, reliable manner to improve peoples' lives.

During the WLA and EL Marketing Seminar held in February in London, UK, with the theme *Lotteries in turbulent times: Opportunities in time of crisis*, Yang Yang, head of the China Sports Lottery Public Relations Department, talked about the work done to connect sports with customers in a rational way, using social media.

A climate of overall steady growth

The whole China Lottery market has seen a largely steady sales growth rate, with the exception of 2019 and 2020. Turnover reached USD 62 billion in 2022. China Sports Lottery has three main lottery game products: the Lotto number game, the sports betting (which consists of fixed odds and pari mutual), and instant win scratch cards with a turnover close to USD 40 billion in 2022.

Key factors impacting the market

Sports development has been part of the China National Agenda, which emphasizes among other points, promoting the all-round development of mass sports and competitive sports, and building a country that is strong in sports. Opportunities for further development have come with successful events, such as the Beijing Winter Olympics.

After living through the global pandemic, it is not surprising that there has also been a greater awareness of general public fitness and participation in sports activities in the post-COVID era.

Digital technologies are also changing the marketing landscape. Yang noted that it has been reported that the share of Internet advertising in China

has reached 56%, while mobile social users have reached 1.156 billion. Social advertising has continued to increase over the past four years, and accounted for 25 percent of the Internet media market share in 2021.

Implementing innovative ways to market products

Taking these trends into consideration, the China Sports Lottery adopted a couple of innovative marketing practices to help shape its future development. These involved:

- Creating trending topics for people to share
- Developing eye-catching content to raise interest
- Being applicable, to help people remember the core message

It used these practices to convey its core marketing messages that the China Sports Lottery is relevant to customers, in a fun and responsible way.

Staying relevant

To stay relevant, it used new media platforms to reach consumers and highlight its brand image as a supporter of national fitness. It created a trending topic around offline and online fitness interaction, allowing consumers to experience the joy and beauty of sport in all its aspects, associated with the China Sports Lottery, to assist public welfare events.

Yang gave several examples, including the launch of over 1300 community fitness games across 23 provinces to physically promote sports to the public, and using Tik Tok as a way to interact with consumers on general fitness, it set up video challenges, which received 750 million views.

Making it fun

The China Sports Lottery leveraged social events, for example the World

Cup, and created eye-catching interactive content for social media to draw the consumers' attention and make it fun for those participating in the sports activities.

Yang described the football commentary fast-talk challenge, where famous football hosts and key opinion leaders were invited to lead the challenge on TikTok. The celebrities interacted virtually in the video, which also included different cultural themes, such as rapping and Chinese cross-talk to bring different cultures to the sports event.

Being responsible

A core value of the China Sports Lottery is to offer products, services and gaming environments in a responsible manner. The World Cup event provided a great opportunity to promote itself as a responsible lottery with positive values, that offers guidance for rational lottery buying behavior.

To achieve this, Yang gave the example of the Sports Betting in China Blue Book, published with the goal

of highlighting the open, transparent and sports-oriented characteristics of the China Sports Lottery business. It also aimed to help the general public better understand the positive value of sports betting while rectifying potential misperceptions.

The China Sports Lottery joined forces with key opinion leaders from the sports world to co-create content for sports media platforms and educate the public with stories about its work and activities.

Finally, another very innovative way it leveraged the World Cup as a platform to allow consumers to learn about the brand culture, philosophy and products, was to offer the one-day outlet manager experience, where those participating were able to live and see a lot of the day-to-day running of the China Sports Lottery outlets.





I Building trust in times of crisis

Building trust is about being consistent in normal and unusual times and staying true to your vision and mission. This is how Singapore Pools traversed the global pandemic and emerged with record breaking revenues, and importantly, having done the right thing by its customers.

During the WLA and EL Marketing Seminar held in London, UK in February, with the theme *Lotteries in turbulent times: Opportunities in time of crisis*, Boon Khai Tay, Chief Risk and Compliance of Singapore Pools (Private) Ltd., explained the approach they took to stay true to their mission during the most challenging of times.

Setting the Singapore scene

Singapore has a population of under six million, one legal lottery and sports betting operator – Singapore Pools – with a customer base of about one and a half million and an annual collection of around USD 7.5 billion. It offers lotto games, 4-digit lottery game, horse wagering, sports betting, and a sweepstakes game.

It takes different measures to ensure responsible gaming, such as, not allowing betting for under-18s, not accepting credit card payments, providing safe play reminders, providing possibility to set betting limits and to self-exclude from online channels.

After prize payouts and operating expenses, almost 30% of the revenue

goes towards benefiting the community through the taxes and surpluses funding worthy causes in social service, community development, sports, arts, education, and health.

Living under COVID-19

With over two million reported cases, Singapore went into lockdown and closed all non-essential businesses and services. Between April 2020 and August 2021 there were almost 100 lockdown days, which necessitated remote working, home-based schooling, restrictions on gatherings and the possibility to use take-out food services only.

There has been global debate on whether gambling is an essential service. Some may argue it is, given the many good causes supported by the revenues it raises. The Singapore authorities declared that integrated resorts, lottery, sports betting and horse racing were all non-essential services. As a result, all Singapore Pools outlets were closed, and online services ceased during the lockdowns.

When outlets could be visited again, the Singapore Pools voluntarily reduced the

Jackpot amount – allowing it to snowball up to two instead of four draws – to reduce crowds at outlets to stop the spread of COVID-19. This voluntary action led to a significant loss in revenue.

Rethinking the approach

The vision of Singapore Pools is to be a world-class socially responsible gaming company trusted by customers and valued by the community. The mission is to provide safe and trusted betting to counter illegal gambling and use the funds to support our community.

“In order to stay the course in times of crisis, we decided to do three things: exercise greater care for staff and customers, support our community in the fight against COVID-19, and accelerate our business transformation,” said Tay.

Fighting COVID-19

Outlets were converted into collection points for COVID-19 supplies. Singapore Pools volunteers worked with the Temasek Foundation and distributed supplies to more than 17,500 households.

Extra funding was given to support vulnerable individuals and families; improve seniors' physical well-being and keep community care partner centers clean; social service agencies for related COVID-19 supplies and services, and to provide support to frontline healthcare workers.

Providing charities with IT support

"We stepped up our IT support to charities with the iShinecloud, which aims to provide simple, affordable solutions that can be tailored to specific needs of charities, such as accounting, volunteer management, donor management and more. As of March 2022, we've onboarded 56 charities and over 2,300 users," Tay noted.

This support of IT infrastructure and resources helps to improve productivity, efficiency and governance, especially for remote working.

Retraining seniors

As more daily services became available online during the pandemic, it was important to ensure that everyone could access them.

"We partnered with the Organisation of Senior Volunteers RSVP Singapore, to provide a center for seniors to learn digital literacy skills in a safe environment, at their own pace and be able to use them in daily life, for instance to buy groceries."

Accelerating business transformation

Once retail outlets reopened Singapore Pools provided customers with in-store assistants to help with queries regarding player accounts and digital services. During the pandemic, they also made sure distancing rules were being followed.

Moving forward on a positive note

The past few years have proved challenging and forced the lotteries to rethink their strategies. Despite the challenges during COVID-19, the approach taken by Singapore Pools to put its customers and safety first has paid off.

Tay concluded by noting the following: "In 2022, our revenue recovered to pre-pandemic levels driven mainly by

the online segment. This is in line with global gaming trends and our push to accelerate our digital products which is consistent with our mission to combat the illegal market. But more important was the recognition we received from the charities we worked with throughout the pandemic for the greater good of the Singapore people."



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Austrian Lotteries achieves success during turbulent times

Living its responsibility towards society and the environment and committed to doing good while maintaining high standards as a gaming operator, Austrian Lotteries (OLG) ensures sustainable growth through the development of attractive, inclusive and responsible products for its different audiences, that are in line with the UN Global Compact and Environmental, Social and Governance criteria.

It has also achieved the highest industry standards of certification to the WLA Security Control Standard Level 2, and WLA Responsible Gaming Level 4.

As an organization, OLG prides itself on promoting talent within an open culture of innovation and empowerment, which offers employees equal opportunities in a modern, inclusive work environment.

Attending the WLA and EL Marketing Seminar held in London this February, Erwin van Lambaart, Director General of the Austrian Lotteries, presented the work, experiences and challenges faced over the past few years and the opportunities OLG has seized, as it emerges into the post-pandemic era.

A customer-centric approach

Van Lambaart explained that the customer lies at the heart of the OLG corporate strategy, which aims to ensure responsible playing, while providing entertaining products and services. Customer focus is particularly important during turbulent times. OLG takes on board customer feedback and uses innovative technologies to tailor customer preferences, to enhance their experiences, which also improves its overall productivity and efficiency.

Advancing digitalization

The global pandemic accelerated the process of digitalization, spurring on

the development of touch-free products to reduce the spread of the virus.

Before May 2020 it was only possible to top up the wallet of the point of sale (PoS) app, when physically at the point of sale. In response to customer feedback, the online payment feature was added rapidly to the app. The PoS app provides the simplest way for our users to play without visiting a store.

Van Lambaart noted some of the actions taken, such as dedicated campaigns encouraged more online playing, a safer option during the pandemic, and further support was given to the older target group, through increased customer service resources, to help with the customer account registration process.

Managing retail challenges

During the pandemic lockdowns there was some uncertainty as to whether tobacconists, the main retailer group, would have to close. In 2020, two different lockdowns lasted 67 days, and in 2021, a total of 46 on two separate occasions.

Fortunately for OLG, key Industries were identified by the government as: tobacconists, food retailers, petrol

stations, post offices, banks and news agents, with the result that only 6% of gaming retailers were not included in this category.

Point of sales restrictions

Safety restrictions put in place allowed one person per 10 m², and led to a reduction of foot traffic in shops, while tobacconists became a social meeting point. Like many places around the world, consumer behavior changed overnight. Shortened office hours and remote working led to a shift in sales to lunchtime rather than the previous morning and evening times. Sales increased in rural areas; however, they could not be generated in the city and shopping centers.

Some products suffered more than others, such as the Brieflos instant tickets, which were displayed behind plastic barriers put up to stop the spread of COVID.

Equally, the sales force quickly adapted communication methods when in some cases, such as the post office, physical visits were prohibited.

Successful activities raise sales

Despite the global health crisis, in 2020, van Lambaart highlighted key initiatives implemented by OLG, which led to an increase in overall sales. For instance, new screens were installed in 700 PoS; 1900 outlets received an eye-catching instant ticket card dispenser, while in 2021, the retail network expanded by 10 percent, adding 530 *Just Instant* points of sale.

Recognizing and acting on post-pandemic trends

As the world moves into the post-pandemic era, economic pressures continue to shape consumer behavior and spending, while issues, such

as the situation in the Ukraine and climate change create uncertainty for the future. The past three years have resulted in a greater awareness of mental health and well-being, and for many it has been a time to rethink priorities in life.

The Ukraine crisis, in particular, brought enormous challenges for everybody, especially the people of Ukraine. Therefore, Austrian Lotteries donated 800,000 euros, of which a certain amount was taken from each lottery tip from several draws. The Austrian government then doubled the amount, so 1.6 million euros went directly to the Ukraine.

Van Lambaart cited some of the trends observed, such as the concept of living for the moment rather than planning for the future. In the case of the lotteries, this could mean rethinking how draw-based games can play into the idea of nowness. After several years of benefitting from a more balanced work/life approach, there is an opportunity for lotteries to leverage products that offer customers some fun and escapism in life.

Continuing on this theme, to attract a new segment of customers, and to enable customers to share their fun and entertainment when using lottery products, the lotteries could use the willingness for more inexpensive self-rewards to upsell in the existing customer base, for example, by offering a higher number of tips, or a higher priced instant product. Van Lambaart gave the example of the launch of a portfolio of Christmas EUR 20 premium instant tickets, during challenging times, which nonetheless resulted in a 26.5 percent increase in sales in 2021, compared to the previous year.

Ending on a high note

During the World Lottery Summit (WLS) 2022, held in Vancouver, Canada, the



WLA Advertising Awards category for Best Product Advertising went to OLG for its 'Valet' EuroMillionen brand advertising. Valet went on to win the overall award for the 'Best of the Best' advertising, beating the NASPL winner entry from the Texas Lottery Commission.

Congratulations go to the successful marketing team that developed the ad, including Clemens Schilhart, Stefanie Sulzer, Elisabeth Römer-Russwurm, Margit Brendel and Michael Rittmannsberger.





Loterias CAIXA 60 anos.
Números que contam histórias
e dão sorte para o Brasil.



Rebeca Andrade
Integrante da Seleção Brasileira de Conjuntos de Ginástica Rítmica é mais uma atleta que conta com os repasses das Loterias CAIXA.



The innovative transformation of Brazil's CAIXA Lottery

The Loterias CAIXA aims to invest in social actions for the social development of Brazil. The idea is to bring social value to everyone by supporting diverse socially inclusive initiatives. Priding itself on operating with transparency and efficiency, it also ensures responsible, secure gaming environments, having achieved WLA level 3 Responsible Gaming certification and Level 2 certification to the WLA Security Control Standard.

A large part of its proceeds supports organizations and projects in the federal government's priority areas of education, sports, health, culture, security, and social security. It is the nation's largest supporter of sports, and the sponsorships it has developed, have enabled athletes to reach their goals of winning medals at global events, including the Olympics and the Pan American Games.

Adopting a new approach

In 2022, Loterias CAIXA celebrated its 60th anniversary in a year that saw record sales, and the distribution of the equivalent of USD 2,1 billion of funds to good causes. Nonetheless, the Brazilian lottery market has faced challenges, like many countries around the world, with the global pandemic, and the situation of its evolving regulations.

Against this backdrop, Edilson Carrogi, Vice President, Caixa

Econômica Federal, Brazil, presented the new strategy Loterias CAIXA adopted, to successfully grow and transform itself, during the WLA and EL Marketing Seminar, held in London, UK, in February, with the theme *Lotteries in turbulent times: Opportunities in time of crisis*. This involved focusing on the following three categories:

Product innovation

As part of continued omnichannel development, new products were launched to attract new audiences, such as +Milionária – with 11 different games in its portfolio – which enable players to place all types of bets in retail outlets across the nation, on the Loterias CAIXA portal and its app. Towards the end of 2022, QR codes were introduced in replacement of the bar code on all Loterias CAIXA receipts to reduce the number of paper slips and facilitate replaying the

same numbers by scanning the code and check winnings.

Marketing

The lottery invested in new marketing channels, including: creating its own videos, for instance to promote the fund raising work and good causes that benefit from its funds; and to reach mass audiences, asking them to imagine if they were to win the lotto. It has also developed podcasts of lotto draws and paid for advertising on TV, radio, social media, mobile and Internet.

Brand reinforcement has come through relationships with influencers, mentions in cultural and entertainment productions, word of mouth and social media organically, reviews, and sponsorship deals.

A significant development in sports sponsorship, is the inclusion of the Mega-Sena brand, (Brazil's largest

lotto draw) alongside the Brazilian flag, on the national athletics team's new uniform, which was debuted at the Oregon Athletics World Cup, in 2022.

Customer experience

With a focus on improving the customer experience, Loterias CAIXA launched its online portal in 2018 (11 million users). A year later, it launched an app for iOS (2,3 million downloads), and in 2020, an app for Android (6,2 million downloads). Android is the operating system used across 86 percent of Brazilian devices, and Loterias CAIXA was the fourth country to be authorized to offer a lottery app in the Play Store, which has achieved the important goal of democratizing access.

As players leave data and traces of their activity, this is being used to develop an omnichannel approach. Carrogi stressed how important it is to collect, analyze, manage and monitor business data to improve products, services and deliver what customers want.

To this point, he provided some insightful information on player profiles. Since 2014, the gender balance has remained

almost equal. Statistics for 2014 show the most popular player age groups as 35-49, 25-34 and 18-24 respectively. Eight years on, the statistics provided show the most active age group is 55+, and also give a breakdown of the use of retail and digital platforms. Retail is more popular in the older age groups of 35-44, 45-54 and 55+, whereas the 18-24 and 25-34 groups prefer the digital option by far.

Innovation brings success

Carrogi concluded on a positive note with the results of the new approach. He noted that over the past five years, the roll out of platforms, products and marketing campaigns in diverse channels has paid off. Whereas sales only grew 2.2 percent between 2014 to 2018 from USD 2,6 to USD 2,7, between 2018 and 2022, they grew from USD 2,7 billion to USD 4,5 billion, a total of 27.7 percent real growth.





IGT's OMNIA™ solution supports lotteries by enabling greater Playability, Visibility, Versatility, and Reliability.



Maximizing Playability

Consumers' expectations are shaped by the ease and seamlessness of their interactions with leading consumer packaged goods and media brands. They want personalization. They want the ability to purchase the same product online or in-store. They like being addressed by name and receiving content recommendations based on their purchase history.

IGT's OMNIA™ solution was designed to support lotteries in providing the experience consumers expect – one that's convenient, enjoyable, and consistent, however a player engages with lottery.

Players face frustration and confusion when their interactions with the lottery don't align with the level of convenience, consistency, and choice they enjoy elsewhere as consumers.

They might find, for example, that a lottery game they played at a local convenience store has different rules, odds, and prizes when they play online – despite having the same title and branding. When lotteries can remove these kinds of discrepancies and roadblocks, they begin to maximize what IGT calls “playability.”

Playability means providing **consistent and seamless play** across channels. For draw-based games, it means **offering players the same game, the same experience, the same payout and prize pool** across sales channels, supporting the experience players expect. This also increases lottery transparency and prevents player confusion.

Maximizing playability includes enabling consumers to **use a greater variety of payment options** across all retail devices and to **apply lottery promotions in any sales channel**, whether they buy the game on their mobile or at retail.

Player-Centric by Design

IGT invested in the development of its new OMNIA™ solution to support lotteries in opening up this whole new dimension of player **satisfaction and engagement**. And OMNIA™ provides **both the retail and online player data** that make it possible.

“We looked at the lottery experience from the player's perspective,” said **Jay Gendron, IGT Chief Operating Officer Global Lottery**. “OMNIA™ brings together our high-performing and reliable retail and digital platforms, which have a modular, open architecture. This native retail/digital integration makes OMNIA™ the industry's first turnkey,

truly omnichannel solution. As well as enabling seamless player engagement across channels, it gives lotteries the power and the tools to capture previously anonymous retail-player transactions. This includes purchases of physical scratch tickets, which are associated with the player's profile through OMNIA's new basket functionality in the retailer terminal or self-service unit.”

Lotteries can harness the cross-channel player data to offer exciting new games, enhancements, and promotions that are **tailored to delight individual players** – similar to the recommendation engines that power popular media-streaming services.



HOW OMNIA™ MAXIMIZES PLAYABILITY

- Enables convenient, frictionless player experiences so players can engage how, where, and when they want
- Provides data, insights, and tools that support the creation of new games, enhancements, promotions, and other ways to drive play
- Allows lotteries to offer a single game playable across multiple sales channels—supporting consistent player experiences while eliminating the need to manage separate prize pools and promotion modules
- Increases engagement and play-time with innovative new games from the industry's most extensive game library

And, in markets that have not yet bridged the retail and digital channels, OMNIA™ can enable what IGT calls **Connected Play** – allowing players to begin their journey in one channel and complete it in another, if desired, creating a seamless experience.

When players lightly register through a simple process, IGT’s Connected Play solution not only digitalizes the in-store player journey, it also provides digital convenience features both inside and outside the store.

Right from a Lottery’s app, players can decide whether they prefer paper playslips or digital playslips, whether they should get a paper ticket or a digital ticket. They can decide if they prefer to be paid out in cash or to their eWallet, and they can opt in or out of personalized messaging or Positive Play messaging.

And because OMNIA™ delivers data on each player action, it offers lotteries the advantage of new insights via **advanced analytics and AI** that can be used to strengthen player relationships and increase engagement: for example, with offers of new, exciting games and promotions that are timely and relevant for each individual player, based on the data and insights.

Raising Your Game

OMNIA™’s native integration of the retail and digital channels is central to playability because it **enables the same draw game at the core, regardless of which channel it’s offered in.**

This is an industry first. In a typical non-integrated environment, a lottery’s supplier partner will build a game such as Keno for retail and a completely different version of the game for digital. The games might have the same odds, but they will not have the same results. For instance, a player’s numbers might win at retail, but the player will find that a different set of numbers won online.



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

By contrast, for every quick draw or Fast Play game in market where IGT powers the iLottery and retail solution, **every game can be offered as the same game.** And when a player buys it at retail, it’s the same numbers, same drawings, and same prize structure that they play online, on their mobile, or in a social space.

IGT’s hit draw game **Cash Pop™** is an example of a popular title that supports a consistent experience. “Running these games across retail and digital channels is key to an omnichannel experience because it enables players to experience the games consistently and allows the lottery to upgrade game mechanics, such as prize table modifications and draw-day changes, faster and more consistently,” said **Sarah Walker, IGT Senior Director Draw-Based Game Portfolio Optimization.** “We can program the game one time and make it available in any channel. If we make a game change or run a promotion, it can be done simultaneously because it is made available via the platforms.”

To realize the benefits of a multichannel strategy, lotteries can also leverage

instant games and themes by having scratch tickets printed to launch at similar times. This allows lotteries to capitalize on the synergies of branding, promotions, and marketing. Lotteries can also offer linked games that feature a pooled, progressive jackpot across multiple similarly themed games.

IGT is uniquely positioned with retail, casino, and iLottery games to let each jurisdiction drive what is launched across all channels, based on data and player preferences. A subset of games in IGT’s digital portfolio works well as retail scratch games. And popular IGT retail games, such as those based on licensed properties, can be converted to digital games.

OMNIA™ supports lotteries by enabling greater Playability, Visibility, Versatility, and Reliability. For more on Visibility, read a previous WLA article [“Using 360° Data to Unlock Player-Centric Opportunities.”](#) Contact your IGT representative to determine your path to OMNIA™.

	OMNIA™	Non-Integrated Retail & iLottery System
Same game offered at retail and digitally	✓	✗
One promotion across both channels	✓	✗
Single liability pool for game mgmt., accounting	✓	✗
Integrated reporting	✓	✗
Integrated analytics: easily compare what combination of wager types are being played at retail and online	✓	✗



Players can experience IGT’s Cash Pop™ draw game the same way across multiple sales channels, supporting a consistent experience. The game continues to attract new fans with its easy-to-understand, strategic gameplay.



From Europe to the U.S. and Canada – Introducing Dimension Games

The next phase of Scientific Games' global instant scratch game manufacturing expansion is officially live. The industry-first, lottery instant scratch game printing technology debuted at the company's Leeds, UK facility to serve European lotteries. Now, it has launched at the company's global headquarters in Atlanta.

The new technology is producing *Dimension* products featuring a 3D holographic-like effect for North American lotteries with the Colorado Lottery, New Mexico Lottery and South Carolina Education Lottery set to offer the first *Dimension* games in the U.S. to players this spring and summer.

"Scientific Games continues to lead the way in specialty and HD digital printing

technology to innovate new games for today's players," said John Schulz, President of Americas and Global Instant Products for Scientific Games. "We're advancing game innovation through our long-term technology expansion plan so our customers can offer their players the most exciting scratch play experiences in the industry and drive sustainable revenues for lottery good cause funding."

Record-breaking Launch

In Poland, Totalizator Sportowy – one of the top 20 performing instant game lotteries in Europe – was one of the first lotteries in the world to offer players *Dimension* games with *BIG 777* launching at PLN 10. Supported by an ad campaign, launch day was the second highest in the Lottery's history at approximately 1.6 million PLN. The first week of sales turned out to be record-breaking for the Lottery in this price category, reaching nearly 6.49 million PLN.

"The new *Dimension* product resulted in a record month of sales in August. After such positive feedback from players, we've introduced another five games with this 3D effect: *BOOM 777*, *CZARNA PERŁA*, *PREMIA 777*, *EXTRA 777*, and *PERŁY RUBINY*," said Katarzyna Woźnica – Borkowska, Instant Tickets Manager for Totalizator Sportowy. "The 3D effect is ideal to use in scratchcards, especially with the theme and graphics that refers to pearls. The spherical 3D effect perfectly enhances the depth and makes the scratchcard incredibly attractive for players. It brings the game to a whole different level from a marketing point of view."



Dimension games are coming to U.S. lotteries, with three lotteries already set to launch games this spring and summer



3D *Dimension* games have been well-received by players in Poland, including Totalizator Sportowy's pearl-themed and mainstay 777 games

The 777 family of *Dimension* scratch-cards is a mainstay in Totalizator Sportowy's game portfolio. Every year the Lottery introduces a version with a refreshed name and color variety.

Investing in Game Innovation

The company's global teams adopt trends from inside and outside the industry, exploring what's next, using analytics, and testing new products with player research groups to produce strategically enhanced games.

"Our UK manufacturing facility has a long history of designing and building, in-plant machine capabilities to enable ongoing product R&D and automation of processes. In recent years, this includes the development of the first *Sparkle* press in conjunction with a third-party partner and subsequently the development of the *Dimension* concept which brought to market a brand new 3D dimensional product for our customers' game portfolios," said Mark Scholey, VP of Global Manufacturing for Scientific Games.

Inspired by the latest trends in printing for higher-end consumer packaged goods, the *Dimension* production technology was first developed by innovation teams at Scientific Games' UK facility. The *Dimension* technology produces holographic-like patterns on instant scratch games, including the popular *Cracked Ice* and *Stella* (stars). A Scientific Games exclusive, Spheric Lens is the newest three-dimensional

pattern that creates depth and movement at different angle refractions with spherical circles that simultaneously appear above and below the game graphics. Additional patterns are currently under development.

Following the company's player research and testing, cross-continental innovation teams, including game designers, printing technologists, product managers and market analysts, worked to perfect *Dimension* product samples.

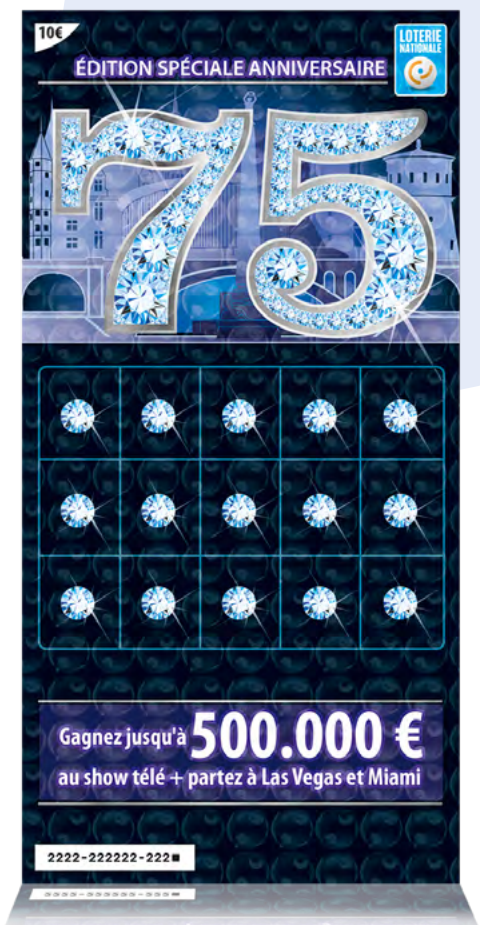
In Europe, games featuring *Dimension* have varied across price points., while in the U.S. initial interest from lotteries has been for USD 10 and higher price point games, as well as families of games, holiday and special occasion games.

Beyond Special

With its 75th anniversary approaching, another top 20 performing instant game lottery in Europe chose to celebrate the special occasion with a *Dimension* product.

"We were happy with this ticket because we wanted this special effect to differentiate the product from our range and make it a little more 'premium'. This idea was a success for the 75th Anniversary of the Lottery in Luxembourg," said Xavier Feller, Head of Marketing Communication, for Loterie Nationale Luxembourg.

Loterie Nationale Luxembourg celebrated its 75th Anniversary with a *Dimension* game



SAZKA's Goldfish family in Czech Republic was among the first *Dimension* games in Europe



In the Czech Republic, SAZKA is also among the first to launch *Dimension* games with a lucky *GOLDFISH* family. The Lottery is ranked among the top 20 performing instant game lotteries in Europe.

“Thanks to the 3D effect, the goldfish appear to be swimming underwater. This family of base games looked fantastic and it is another creative example of the successful use of *Dimension* in the product portfolio,” explained Scholey.

Expanding Product Possibilities

As consumers return to their retail shopping habits in the post-pandemic world, physical instant scratch games remain the biggest revenue driver for lotteries around the world. Representing more than 34% of revenues, instant games are a USD 118.7 billion business and growing. From 2020 to 2021, retail sales in the product category grew 16% globally.

“We are using the science inside our data analytics to meet lotteries’ needs with new products that keep players excited and engaged. Our game

design, manufacturing and customer teams are continuously collaborating with product innovation teams – including across the continents,” said Schulz. “Our teams have samples of new products like *Dimension* and because the innovation is data-driven, there is great interest from product managers to see what’s new for 2023 and beyond.”

In the U.S., the South Carolina Education Lottery is among the first lotteries planning a *Dimension* game launch.

“We were drawn to this innovative print feature because of the subtle, but eye-catching layer of dimension it gives to tickets, as well as the variety of designs it offers. We chose the *Spheric Lens* design for our \$1,000,000 *Riches* game to give it a classic, royal feel,” said Carolina Hinson, Product Manager for the South Carolina Education Lottery. “Our \$10, \$1,000,000 top prize games are some of our most popular, and we wanted to make sure we offered a ticket that would stand out in our dispensers – the 3D effect of *Dimension* does just that! We are confident that our players will be drawn to this ticket design. We look forward

to utilizing even more of the *Dimension* designs on future games.”

In recent years, Scientific Games has invested tens of millions of dollars in instant scratch game production technology at its five instant game production facilities around the world, most recently increasing global capacity by 20% with the new press in Leeds, UK. The company’s annual production capacity is more than 53 billion instant scratch tickets.

Scientific Games is the world’s largest creator, manager and producer of instant scratch games, with products representing 70% of global retail sales. The company currently supplies 130 lotteries in 50 countries with digital and retail games, technologies, analytics and services.

Source: Worldwide lotteries ranked by 2021 instant game per capita sales and 2021 worldwide lottery sales, La Fleur’s 2022 World Lottery Almanac.

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The Science Inside the Scratch



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Industry's
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library with
100+ BRANDS

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unique games
designed annually

PAYOUT
optimization tools

Scientific Games is the partner of choice for 18 of the 20 top-performing instant game lotteries in the world.*



*Based on weekly per capita sales
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Convenience & Technology:

How Lotteries are Adapting to the Evolving Needs of Retailers and Consumers

The needs of consumers have always been a driving force of retail industry innovation. While online shopping had grown in popularity prior to 2020, the COVID-19 pandemic catapulted retailers and consumers into a new retail reality, with many businesses scrambling to get their products online and into the hands of consumers quickly. From same day pick-up to the ultra-convenient “instant grocers”, the demand for ease and convenience has persisted even as we’ve made our way back to shopping in-store. In fact, 41% of consumers surveyed in a 2022 UK study said that they were willing to pay more for a product if they could purchase it quickly and conveniently. “Frictionless retail” is an emerging trend that shoppers appear ready to embrace.

The retail lessons here for lottery are apparent. By positioning products conveniently at retail—and leveraging the latest in technology to do so—lotteries can significantly improve the in-store

purchase experience for consumers and drive revenues for worthy causes. For example, it’s not uncommon for shoppers to queue up twice (once at the checkout, and then again at the customer service desk) if they’d like to purchase a lottery ticket in addition to their regular basket of goods, creating more friction in the overall retail experience. In-lane solutions specifically created to meet the exact needs of our industry address these issues handily.

Pollard Banknote’s revolutionary **easyVEND™** in-lane ticket vending solution combines innovative technology and security with an eye-catching merchandising display, ensuring that



easyVEND™
In-Lane ITVM
RETAILER UNIT

the purchase of lottery tickets in a multi-lane retail environment is easy and convenient. With **easyVEND™**, traditional lottery tickets are purchased securely with a shopper’s other items, eliminating the need to visit another store register. **easyVEND™** is expected to make its highly anticipated industry debut when the Texas Lottery launches it in retailers later this year.

One size doesn’t fit all, however. Lotteries need to leverage a variety of solutions to ensure they cater to increasingly diverse purchase preferences at retail. **scanACTIV Instants™** combines innovative technology and security with the fun and familiarity of instant tickets to create an unprecedented new lottery product that is conveniently merchandised unsecured in-lane, alongside gift cards and impulse purchase items, as well as throughout the store. Via Pollard Banknote’s In-Lane Activation Platform™ (ILAP), the game’s



pre-activated outcome is assigned to the game card following the purchase scan. Players then scratch the game card to reveal a QR code to access a digital game on a mobile device. The player returns to retail with a redemption barcode to claim any winnings, creating a full circle process that begins and ends at retail.

Arizona Lottery's scanACTIV Instants™ product line—marketed as Scratch & Scan™—launched last fall with four game cards based on popular titles from its Scratchers™ ticket portfolio. The game cards are now available at over 730 grocery and convenience stores, and are positioned in-lane as well as at various locations throughout the store and conveniently purchased at the checkout.

While 68% of consumers still want to shop inside grocery stores for items such as produce, meat, and bakery, others are increasingly opting for online shopping, click-and-collect, and other means that keep them from ever entering a store. While this is a new challenge for some grocery retailers, it's a reality that gas station convenience stores accepted long

ago. Less than half of fuel customers enter a convenience store while using pay-at-the-pump, so motivating an in-store visit is a top priority. Lotteries need their products to stand out and entice potential shoppers to enter the store, and the highly successful **Digital Menu Board (DMB)** does just that.

DMB

Digital Menu Board

Combining the best features of on-counter merchandisers with the latest digital technology, this next-generation point-of-sale display, developed by Pollard Banknote's retail experts at Schafer Retail Solutions +, prominently showcases lottery tickets

and products with engaging graphics and video. It's convenient, highly visible digital format helps encourage

impulse purchases and quicker decision making. After several successful pilot programs, a number of lotteries, including those in Colorado and Kentucky, have made DMBs a retail best practice and a permanent fixture throughout their networks.

Entering new, non-traditional retail locations is proving to be another fruitful way to drive sales growth. Ohio Lottery partnered with Schafer Retail Solutions + in 2020 to deploy **Select 4™** to bars, restaurants, and pharmacies. The Select 4™ instant ticket dispenser



takes the best features of an Instant Ticket Vending Machine (ITVM) and reduces its size, creating a product that facilitates sales of a lottery's instant tickets in previously unavailable retail environments.

Select 4™ has exceeded expectations since its introduction, generating USD 7.154 million in sales revenue for the Ohio Lottery—a brand new revenue stream generated by retailers that didn't have the ability to sell instant tickets prior to the introduction of Select 4™. With 478 units currently deployed throughout the state, and a goal of 1,200 units by 2025, player feedback has been overwhelmingly positive, with comments on the ease of use and overall simplicity of the product.

Making lottery products easily available for purchase in a variety of locations fosters the frictionless and enjoyable shopping experience that today's consumer is seeking. As pioneering lotteries are demonstrating, by harnessing the power of innovative new solutions designed for a multitude of retail locations, including multi- and in-lane environments and non-traditional retailers, network expansion has never been easier — or more rewarding.



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Retail Excellence.
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The WLA Magazine is published by:

The World Lottery Association
Avenue de Provence 14
Case postale 6744
1002 Lausanne
Switzerland
www.world-lotteries.org

Editor:

Antoinette Price,
Communications Coordinator

Layout:

Shine Communication,
Lausanne, Switzerland

The views expressed in the WLA magazine are those of the authors and do not necessarily reflect the views of the World Lottery Association.