



# From Insights to Action: Crafting Digital-First Marketing Strategies

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# Brightstar Global Market Insights Team at a glance

## THREE BUSINESS AREAS:

- Italy
- United States
- International



# 160+

Research Studies  
Delivered in 2025.

25% Focused on  
Innovation



Supporting  
Our Customers  
Worldwide

## FOCUSED ON:

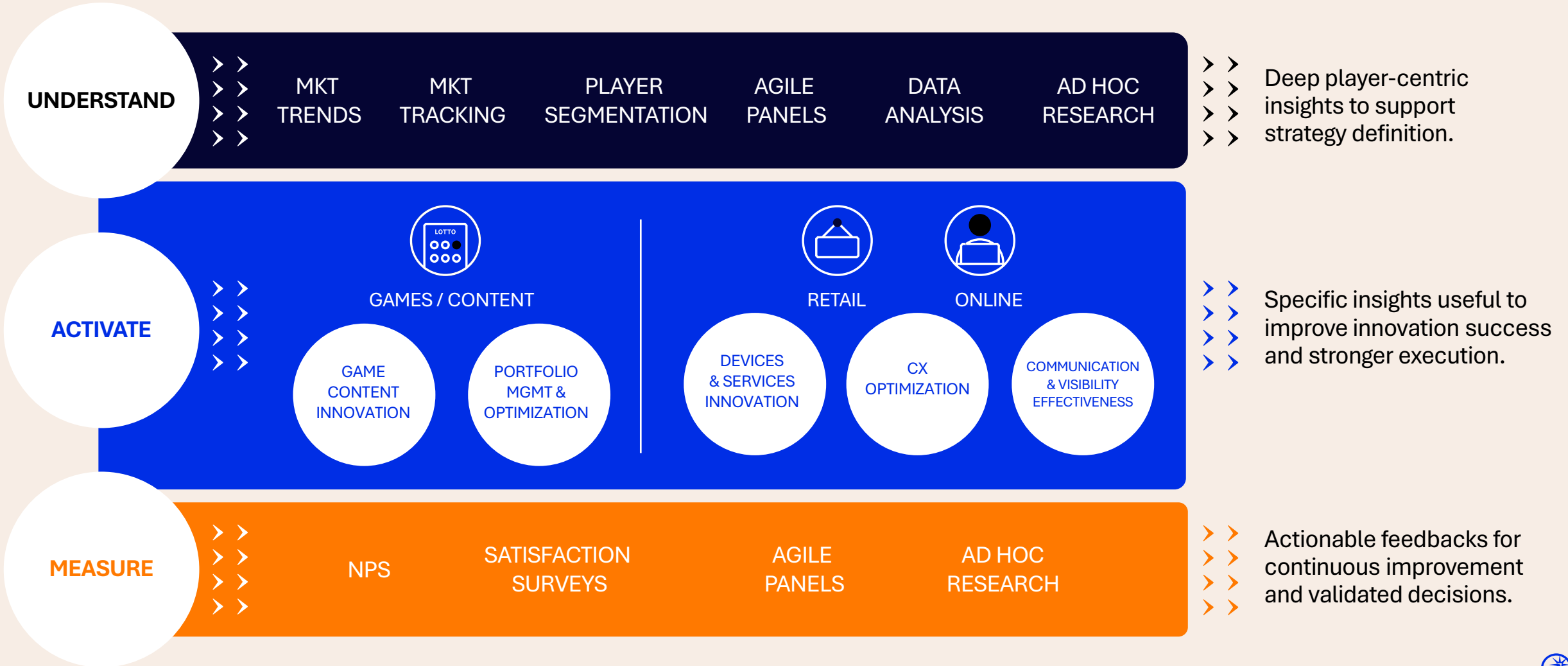
- B2C + B2B  
Markets
- Retail + Online  
Business



# 12

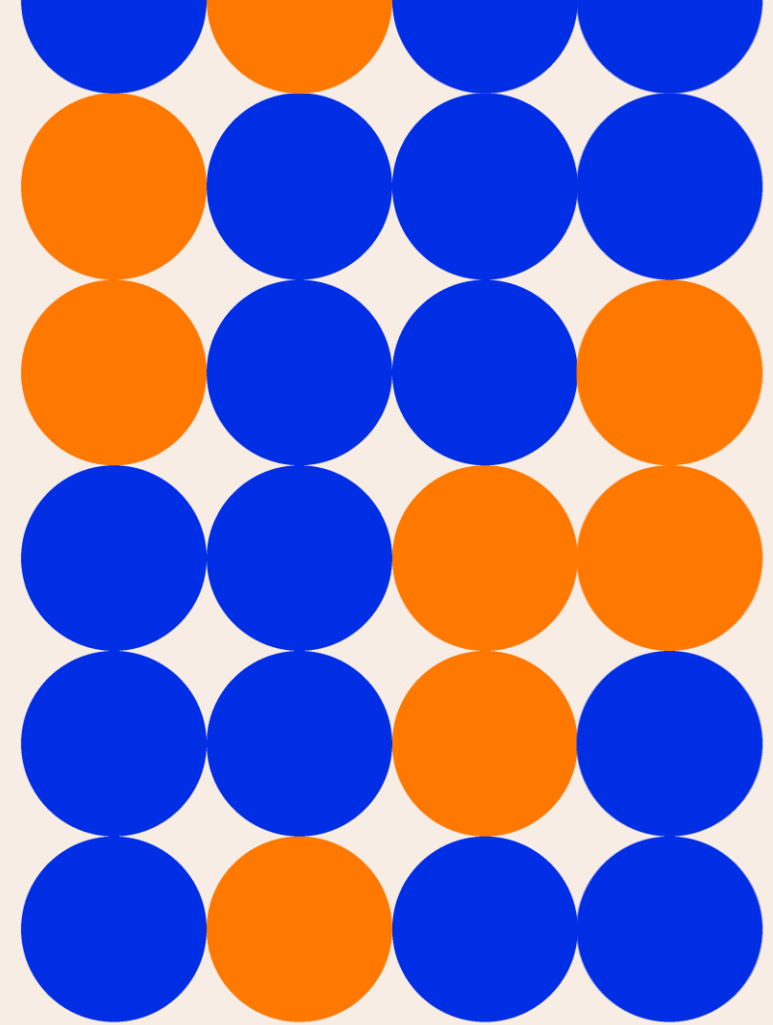
A team of 12 Market  
Research Experts with  
deep  
lottery market  
know-how

# Our task is supporting strategy and innovation through a structured market research approach





# What we learned from Italian market context



# What matters most to consumers today

## MAIN GLOBAL CONSUMER TRENDS

### KEYWORDS:

- INFORMATION
- SIMPLICITY
- EXPERIENCE



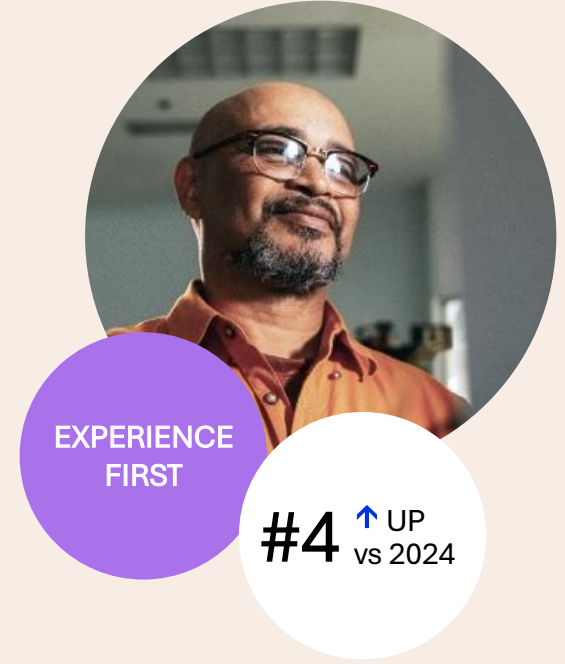
« I want to stay informed and always up to date. I want to choose after evaluating all the alternatives. »



« I do not have much time so I look for anything that makes my life easier. »



« I choose carefully — I expect real value and high standards from what I buy. »



« **Experience matters more than the product itself** — it's what truly makes a difference when I buy... »



“I always looking  
for a way to simplify  
my life.”

**40%**

% FULLY AGREE  
(BOOMERS +14% VS GenZ)

“I adopt new  
technologies primarily  
to simplify my life.”

**+4%**

% FULLY AGREE  
VS 2024

“I’m willing to pay  
more for products that  
help simplify my life.”

**69%**

% FULLY AGREE

## ● The Value of Simplification

# ● The Growth of E-Commerce

“I need shops and services that are **always open and available.**”

**55%**

+5% VS 2024

**More than half of Italians** have made online purchases in the last 12 months.

**Online shopping quickly becomes habitual:**  
~**80%** of shoppers in the past year have purchased again in the last 3 months.

# ● The Ongoing Relevance of PoS

“I often arrive in-store already informed, making my visit more focused and efficient.”

40%

% FULLY AGREE

“Going to the store is still part of my routine, even if I browse or buy online.”

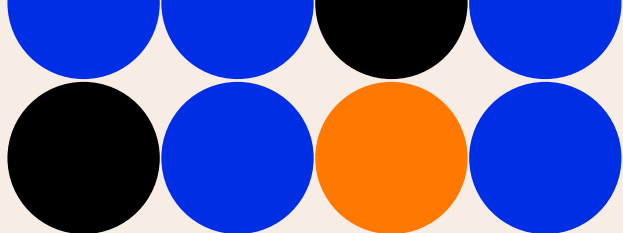
58%

% FULLY AGREE

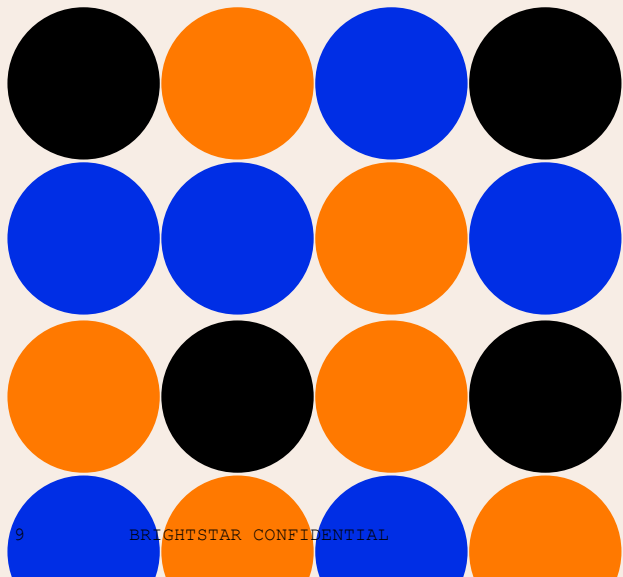
“In-store experience increases my confidence in making the right purchase decision.”

43%

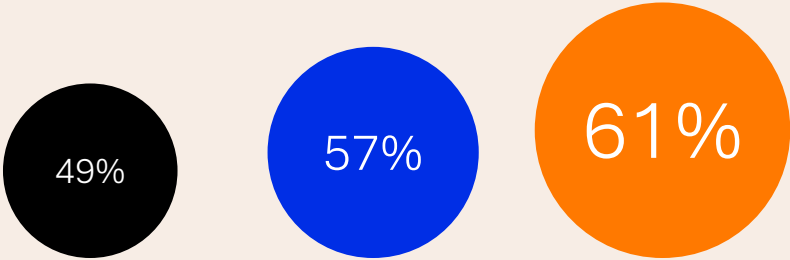
% FULLY AGREE



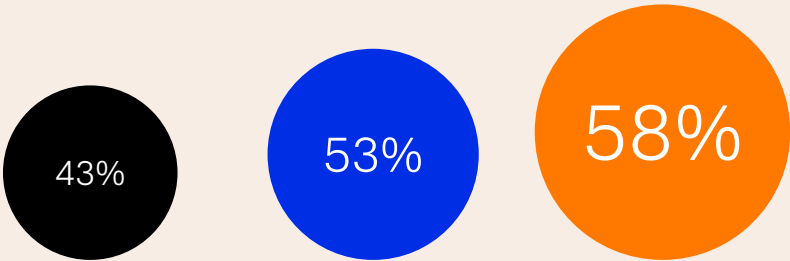
The usage of digital tools to enhance and simplify the purchase journey **is growing.**



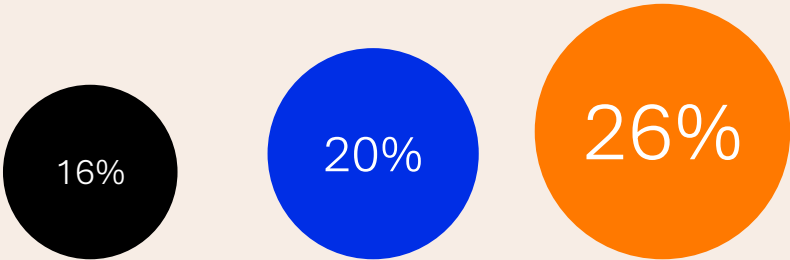
Usage of digital devices services to shop



Preference for digital information / leaflets over paper ones

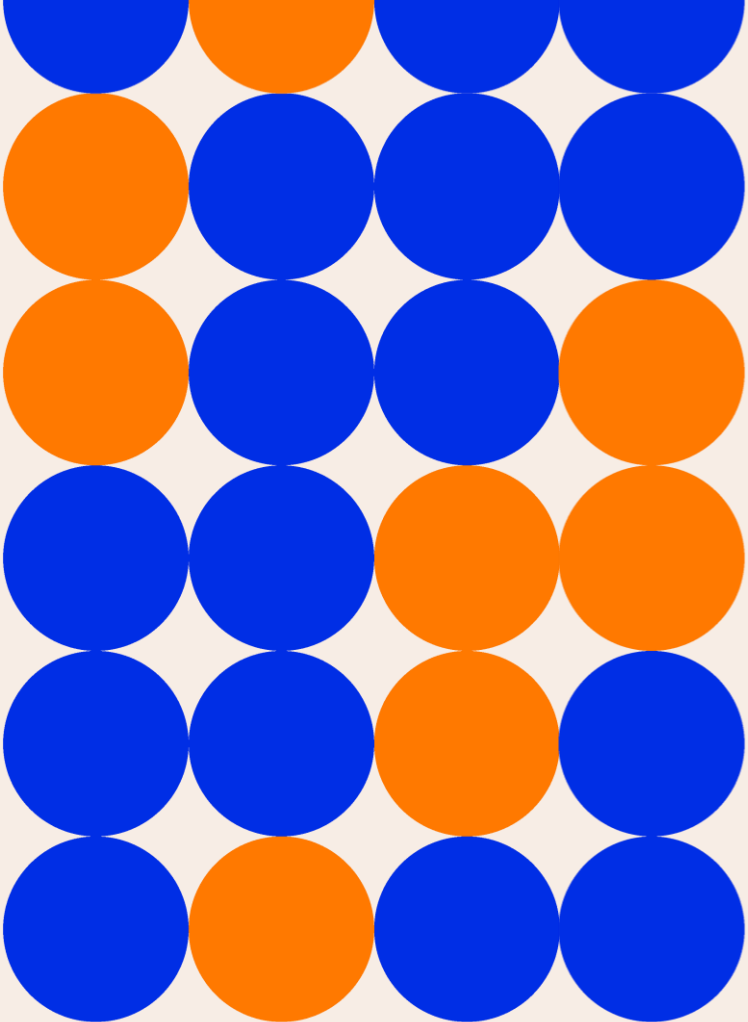


Usage of mobile payment Apps in shops





What we uncover  
through our  
player research



# Omnichannel consumers are an increasingly relevant share of lottery players



+38%  
vs 2023

- **More sophisticated and demanding** than other players (in terms of interests, attitudes, and willingness to experiment).
- **More mature** (+50% over 45) and **more female** (34% vs 20% of online-only players).
- **Higher average monthly spend** compared to pure retail players (and 4x vs online-only players)
- **PoS experience** remains **crucial** even with higher expectations for efficiency, personalization and innovation.

# New ways of playing: Call for innovative in-store gaming tools...

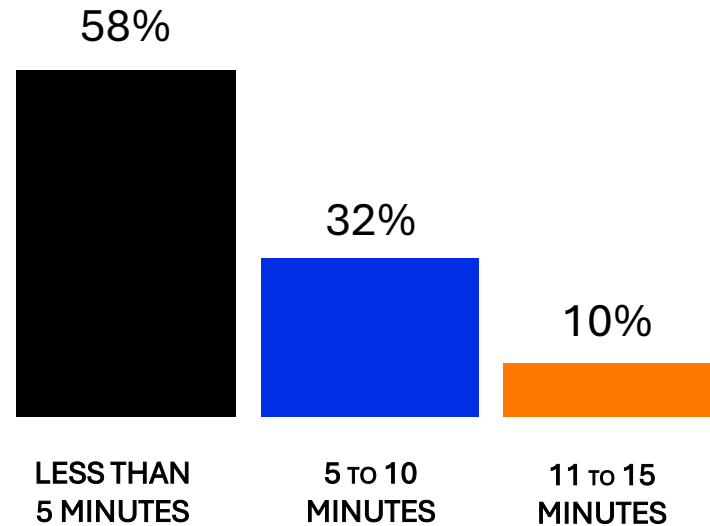


Players are shifting to a more **“Fast & Play”** approach:

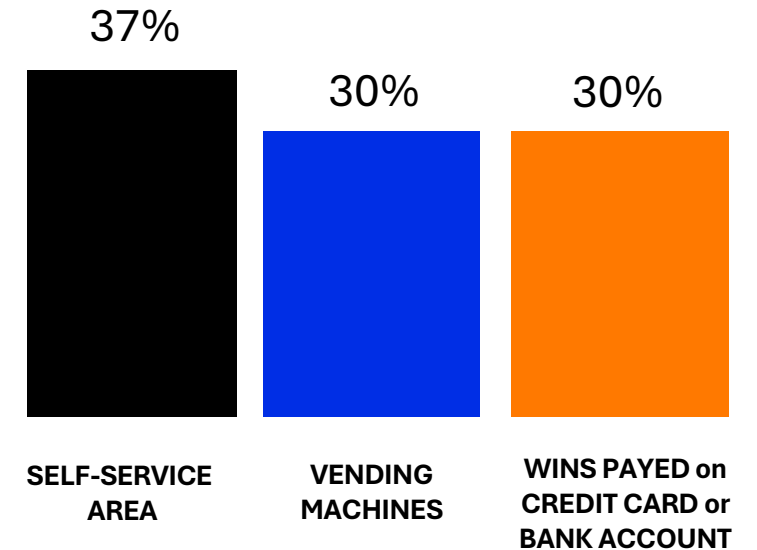


- **Shorter in-store time**
- **Quick interactions preferred**
- **Need for fast engagement innovations**

**Time Spent In-store** (SELF-REPORTED)



**Top Priorities for In-store Innovations**

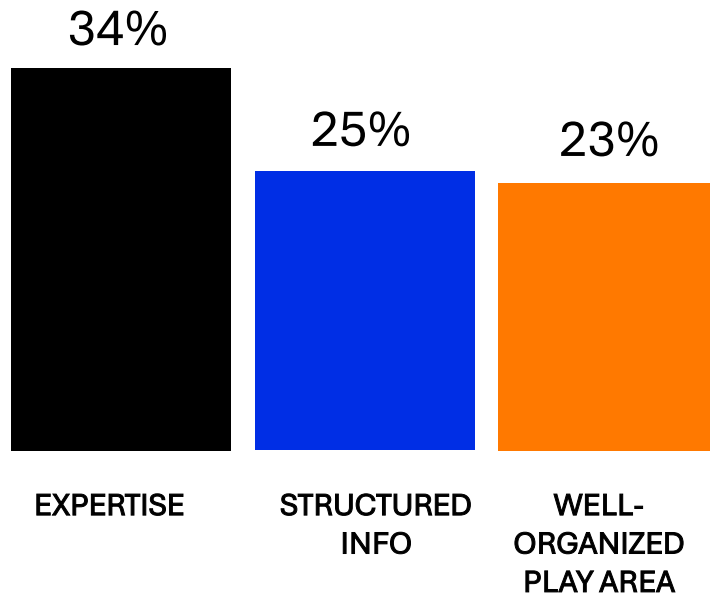


The ability to deliver clear, structured and immediate information is becoming a key success driver

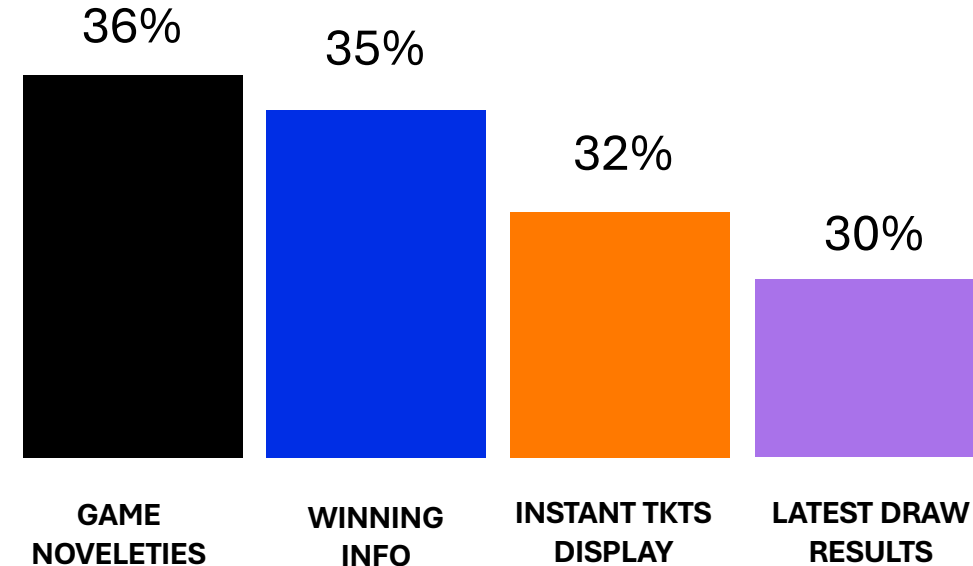


People **expect everything at a glance** — to save time and **quickly access key information**

Key Customer Expectations from Retailers

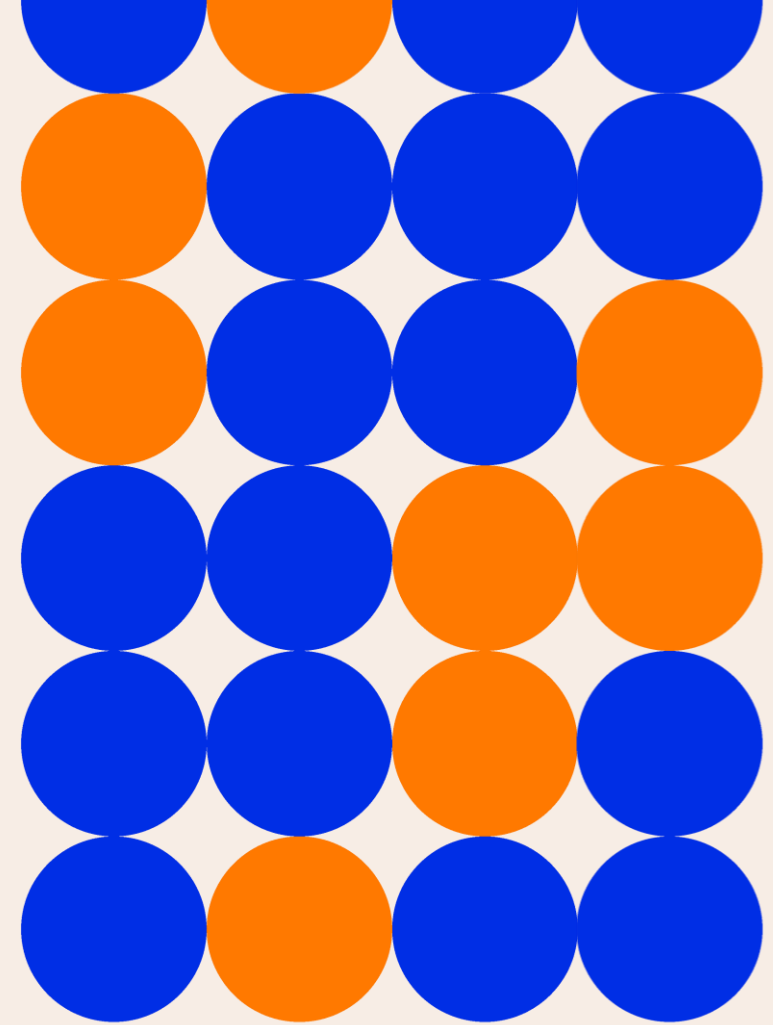


Information Needed in Retail

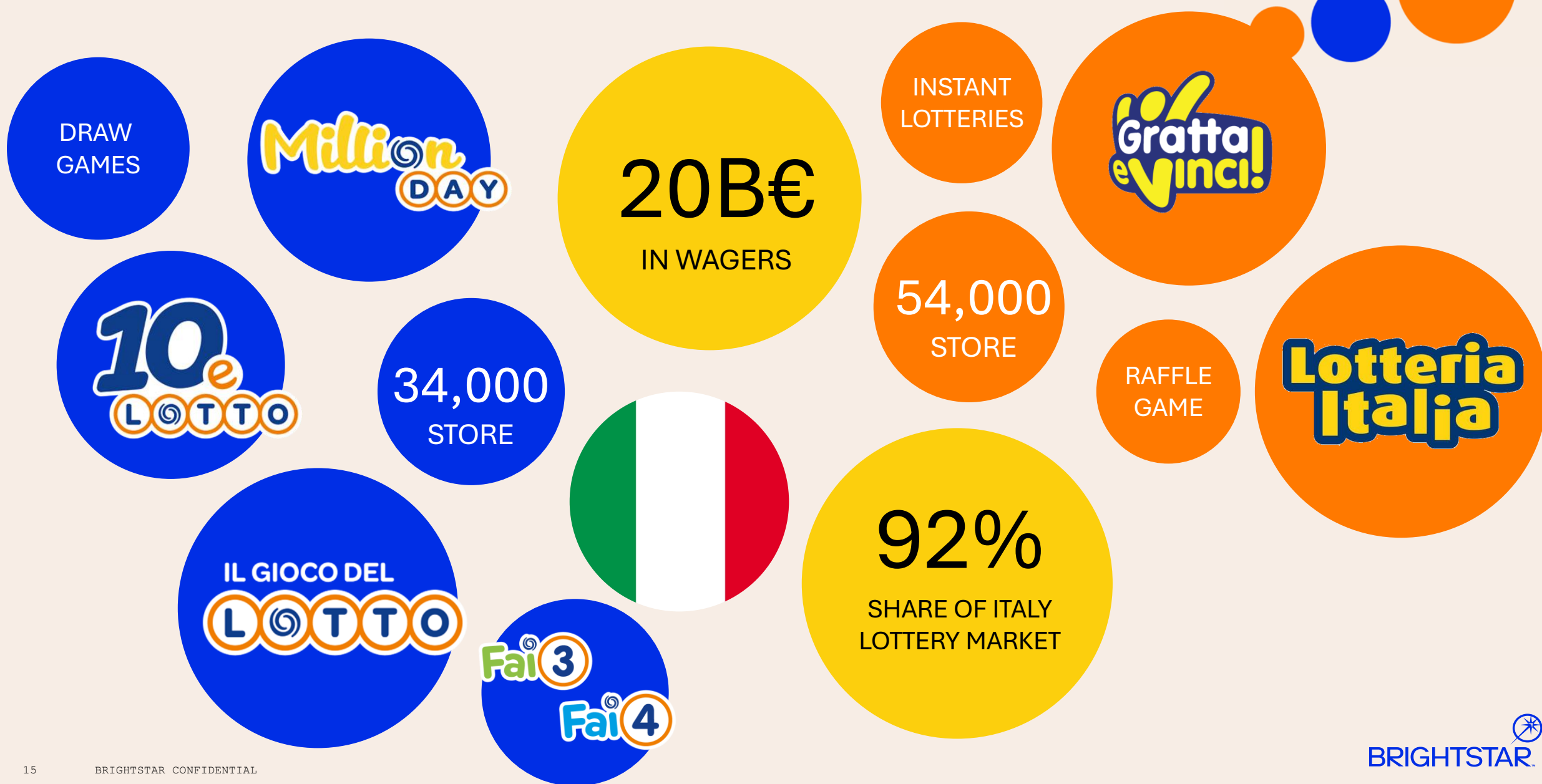




# From Insights to Retail Experience



# Brightstar Italy: Overview



# Our retail network: Key sales channels

TOBACCONIST



BAR



CHAINS/GAS STATION



TOBACCONIST WITH BAR



# From transaction to experience

## The Store Evolves From a Transactional Channel Into A Strategic Experience Platform



THEN...

### TRANSACTIONAL STORE

- Focus on **product availability & sales execution**
- Limited **customer interaction**
- **Communication** mostly functional (limited to gaming and not for awareness generation)
- **Digital** supports transactions only



TODAY

### EXPERIENTIAL STORE

- **Informed, personalized, immersive and safe experience**
- **Effective and personalized Communication**
- **Interactive digital touch points**
- **Retailer as engagement enablers**

# In-store Digital Innovation Map

## CUSTOMER ENGAGEMENT & INFORMATION



DIGITAL  
SIGNAGE



CUSTOMER  
DISPLAY



KENO  
MONITOR



CONNECTED PLAYER

CONVENIENCE  
APP



FREE WIFI



CUSTOMER JOURNEY



AWARENESS



PLAY



POST PLAY

SALES & DATA PLATFORMS

TERMINAL  
/ POS



BUSINESS  
INTELLIGENCE  
& RETAILER PORTAL



GAMING INTERACTION TOUCHPOINTS

SELF-  
SERVICE



WINNING  
CHECKER



VENDING  
MACHINE





DIGITAL SIGNAGE TURNS THE STORE INTO A  
LIVING COMMUNICATION SPACE

# Digital Signage: What it is

Digital signage is a **centralized communication system** that allows us to deliver dynamic, **high-impact multimedia content** across the retail network in **real-time**.

Content can be **updated centrally in real-time** or near real time, or triggered by retailer input through an approval-based workflow

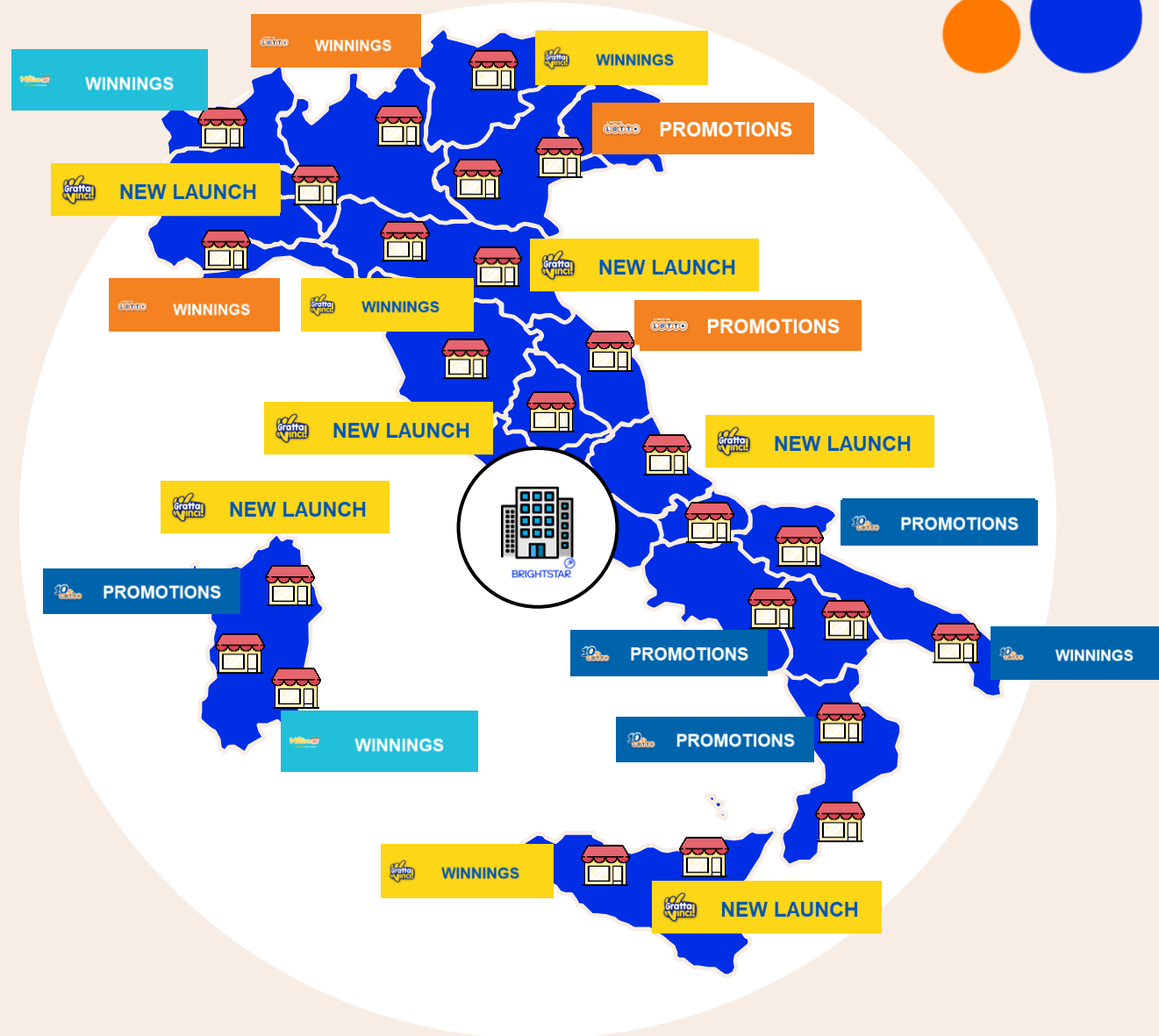
Content can be **tailored and personalized** at point-of-sale level

Supports multiple multimedia formats, including video, images and animations



# Digital Signage: What it is

Central Orchestration and  
Locally Relevant Communications



What we are doing in Italy...

+13pp Sell Out  
+ 18pp Launch

MULTIPLE  
FORMATS  
AND SCREEN  
SIZES

HORIZONTAL  
AND  
VERTICAL

ADAPTED  
TO DIFFERENT  
RETAIL LAYOUTS

10,000+  
STORES  
CONNECTED



# Digital signage critical success factors



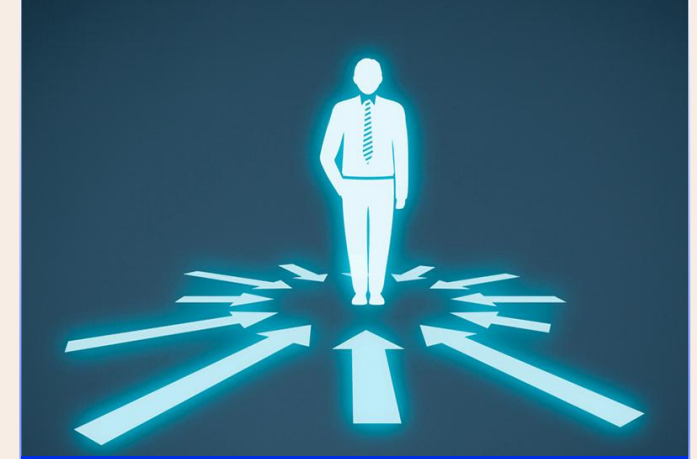
## EFFECTIVE CONTENTS

- Consistency with the brand and product
- Clarity and simplicity of the message
- Design and innovation



## STRATEGIC ORCHESTRATION

- Centralized content planning
- Touchpoint tailored content
- Real-time content activation



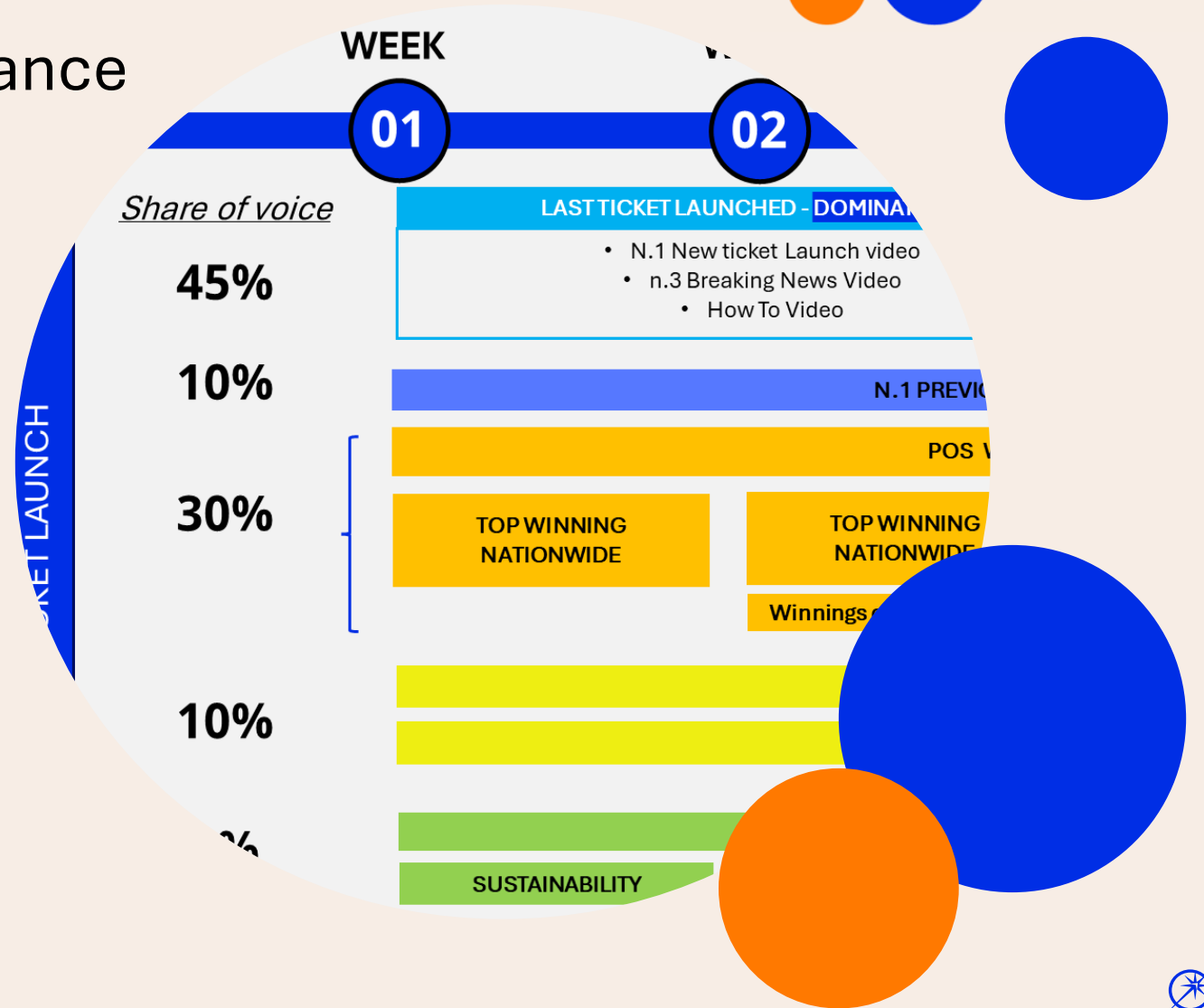
## PERSONALIZATION

- Data enabled messaging
- Location based personalization
- Context driven relevance

# Centralized content orchestration

Weekly Planning > Central Governance  
> Continuous Optimization

- Weekly centralized content planning
- Planning, prioritizing, and allocating space based on business objectives
- Weekly performance review and playlist optimization



# Personalization

Digital signage enables a clustered approach to **maximize relevance, effectiveness and share of voice**



→ RETAIL CHANNEL



→ GEOGRAPHIC AREA



→ STORE SIZE & FORMAT



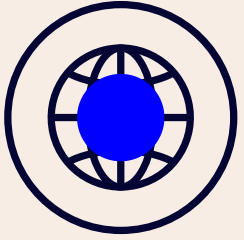
→ SCREEN FORMAT



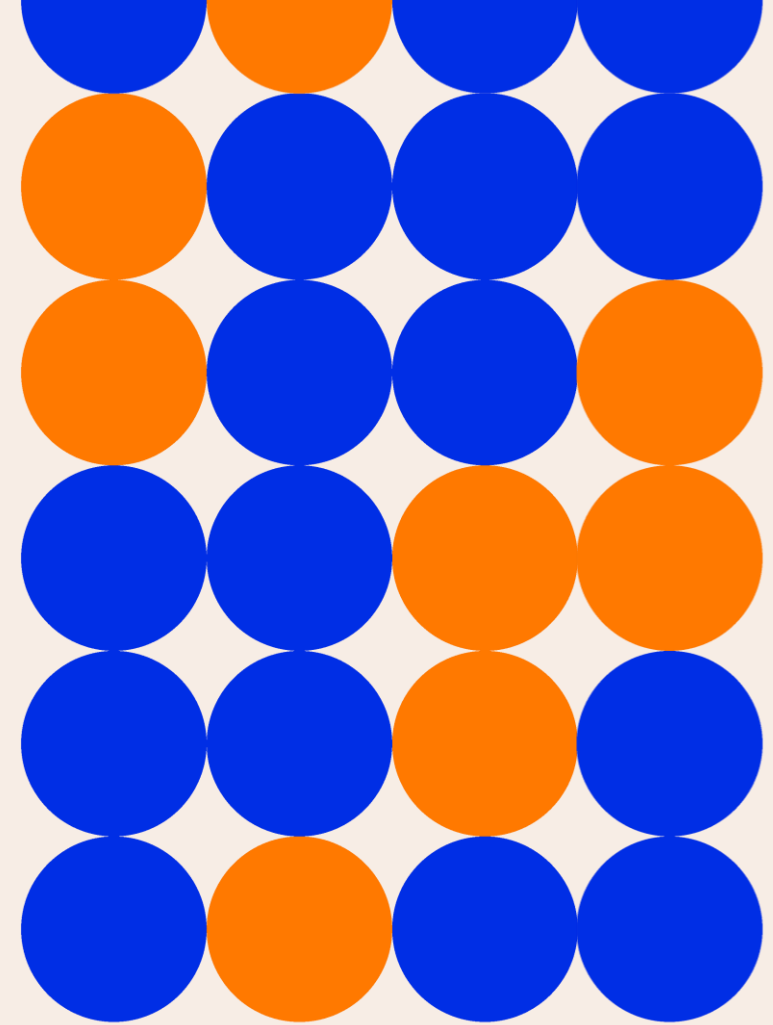
→ INSTORE TICKET ASSORTIMENT & STOCK



→ SCREEN PLACEMENT



# Lotteries Bridging Continents



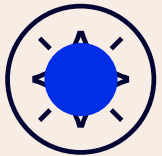
BRIGHTSTAR™



Replaces static scratch ticket displays with a **dynamic digital menu board**



Combines game visibility, promotions, and **real-time messaging**



Enables **centralized control** across all retail locations



Improves **player experience** and simplifies ordering



STRONG  
EXECUTION

**EQUALS**

MEASURABLE  
SALES LIFT

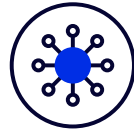
# From screen to store impact

## The **SCALE** Framework – A repeatable model to scale digital signage across lottery retail networks



### **Sense:** Understanding Shopper Journey

Analyze shopper behavior, retailer environment, and friction points to tailor digital signage effectively.



### **Centralize:** Content Governance

Manage content centrally to ensure consistent, agile, and efficient communication across multiple retail points.



### **Activate:** Engaging Content

Use compelling, high-impact content to promote products, winnings, digital adoption, and responsible gaming.



### **Localize:** Tailored Messaging

Customize content to geographic areas, store formats, and product assortments for enhanced effectiveness.



### **Evaluate:** Continuous Optimization

Monitor performance and optimize playlists iteratively to improve digital signage impact over time.



Digital signage works best when technology is **combined with content strategy, local relevance and disciplined execution.**

# Thank you!

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