



The Next Era of Lottery Play

Built Around Players, Powered By Trust

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Business and Customer Development**



Market Changes.



Evolving Players.



Impact to Lottery.



Market Changes.





1995



2000



2000s



Evolving Regulated Gaming Options



Casinos



**Horse
Racing**



**Charitable
Games
and Bingo**



**Lottery
(Retail)**



**iLottery
(online)**



iGaming

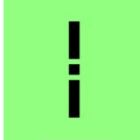


**Sports
Betting**

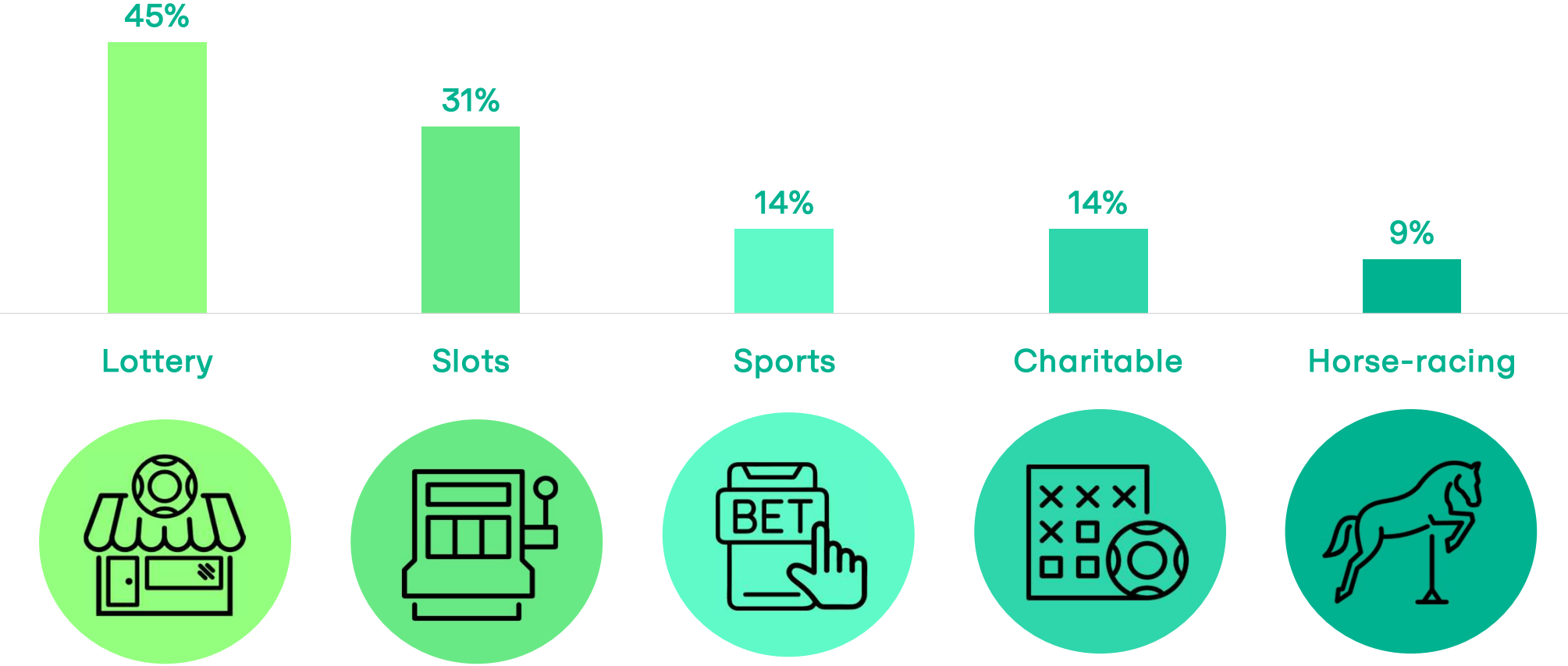
Holistic Player Understanding



Players Explore Gaming Options



Past Year Claimed Participation (In person)

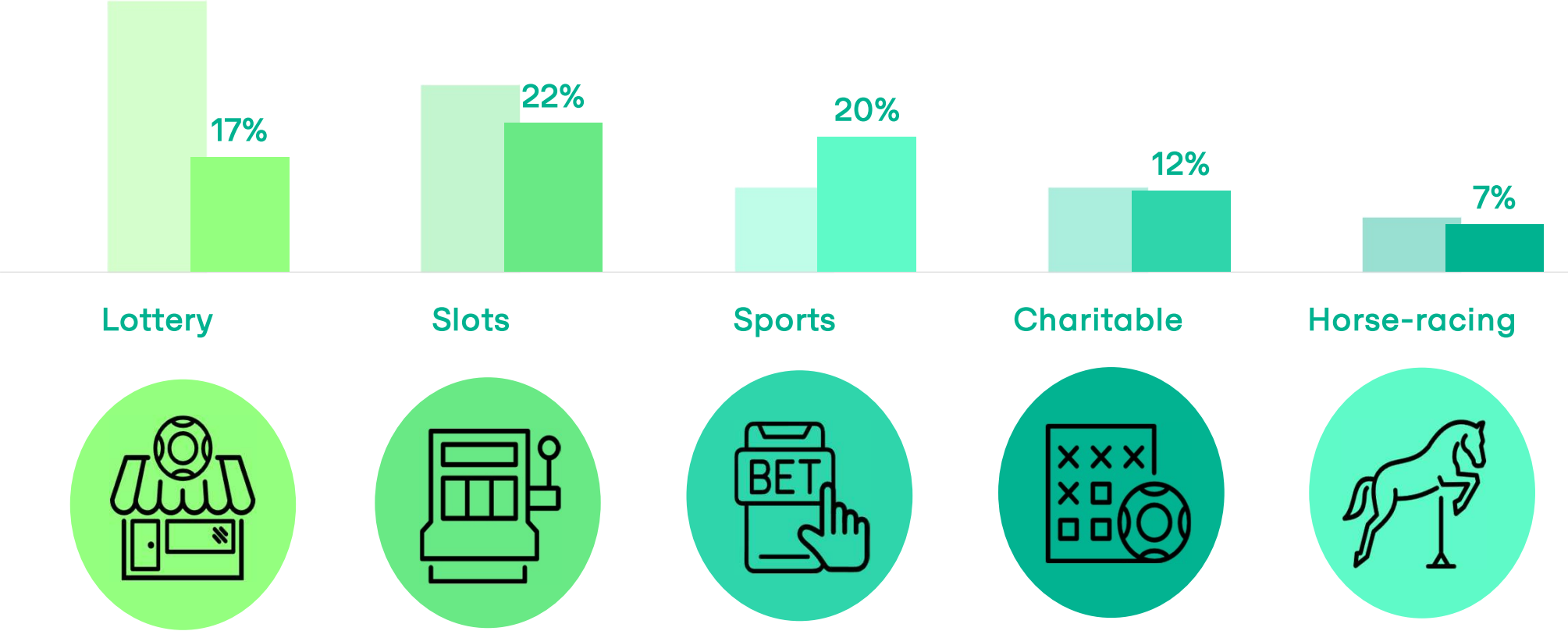


Source: U.S. Multi-channel Market Study, Research Strategy Group – September 2025 n=26,005

Players Explore Gaming Options Including Online

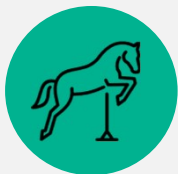


Past Year Claimed Participation (Online)



Source: U.S. Multi-channel Market Study, Research Strategy Group – September 2025 n=26,005

What Drives Play – And What Holds It Back



Motivation

Experience
Sensory



Motivation

Trust
Routine



Motivation

Access
Simplicity



Motivation

Convenience
Instant rewards



Motivation

Fandom
Live Action

Barriers

Travel
Cost

Barriers

Travel

Barriers

Awareness
Skepticism

Barriers

Security
Pay out
Trust

Barriers

Complexity
Saturation

Motivation

Barriers

Growing Sector

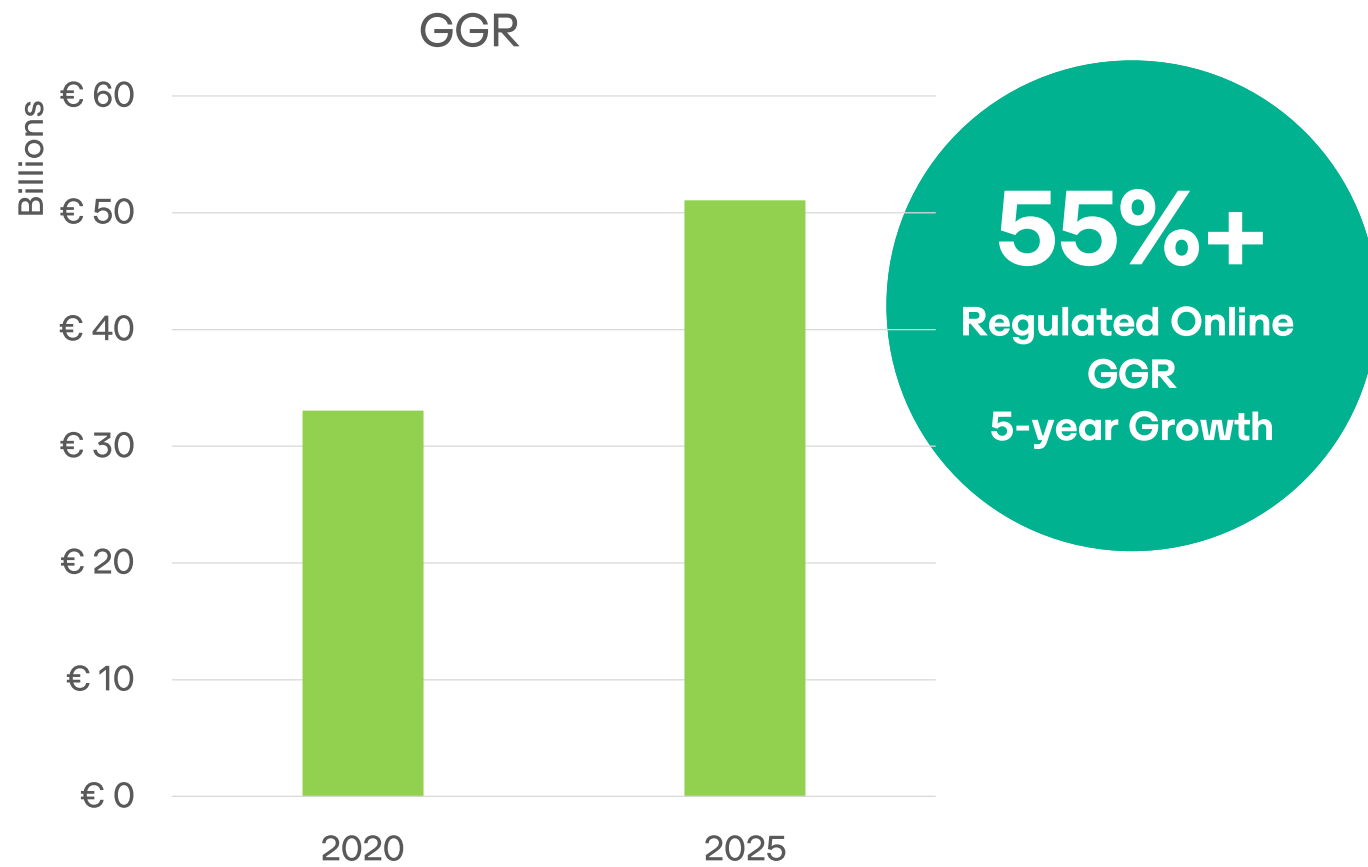


95%

EMEA Regulated
Gaming Revenue
5-year Growth

Source: EL - Report on the Lottery Sector in Europe

Growing Channel



Source: EGBA/H2 Gambling Capital European Gambling Market

Evolving Players.



Online Demographics Are Reaching a New Segment



Male

57% online lottery players, 6 pts more than retail only

18-44

59% online lottery players, versus 49% retail

New

6% played online as their first point of play

ONLINE PLAYERS OVER-INDEX



69%

Higher Education



51%

\$75K+ Household Income



73%

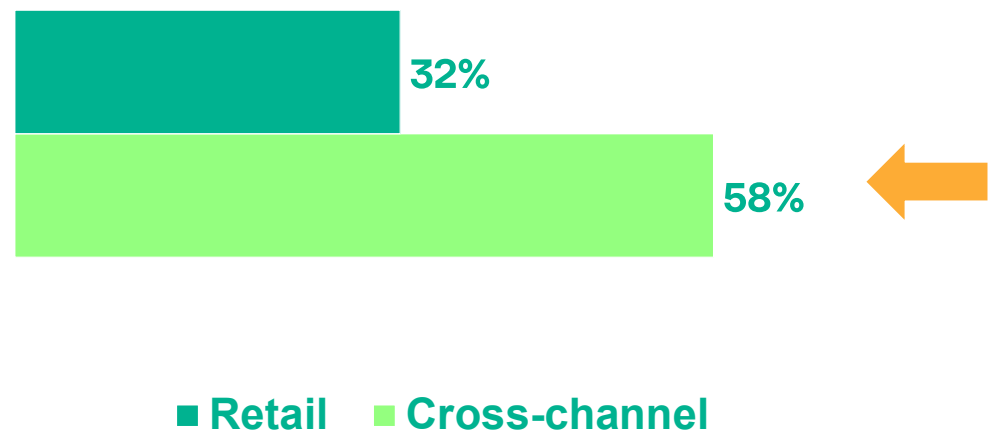
Employment



Source: Online Lottery Engagement, Aristocrat Interactive – September 2025 (n=1,000)

Evolving Player

Weekly Participation

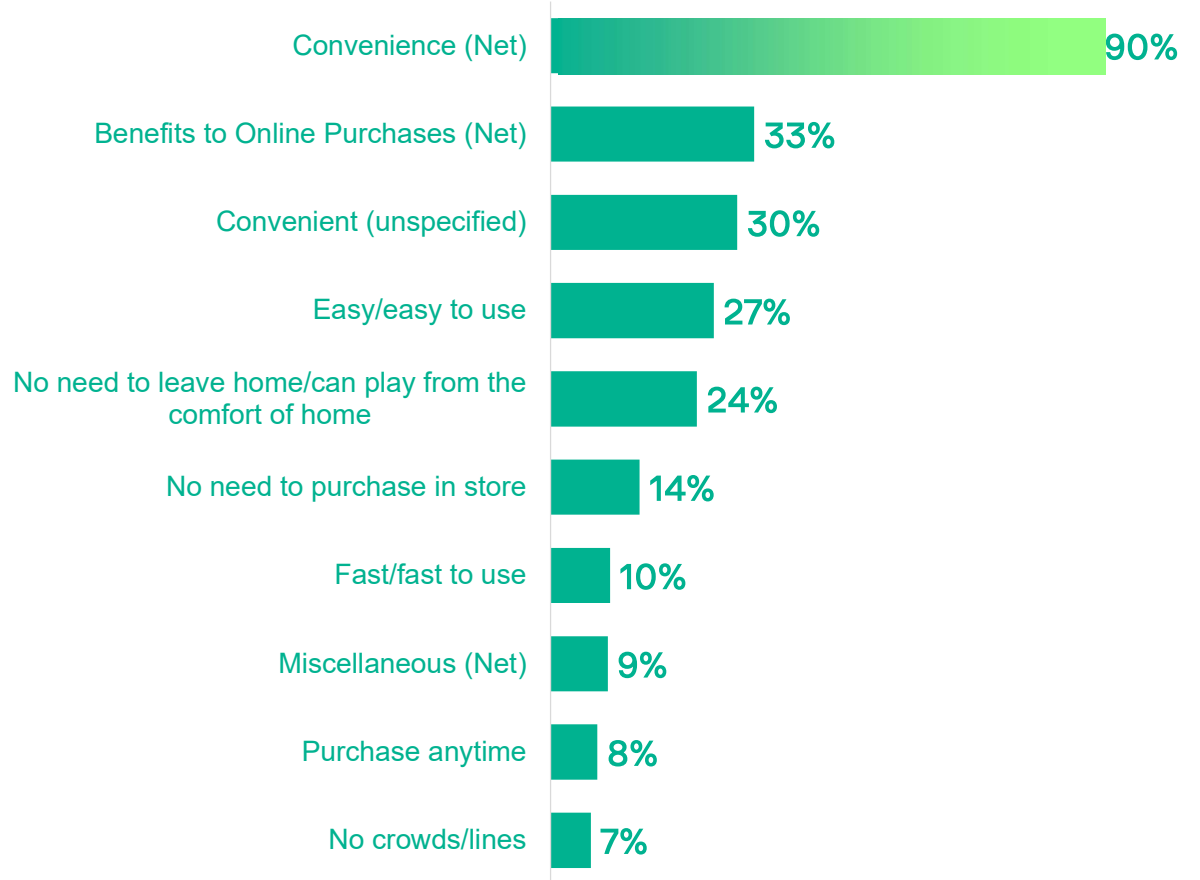


Source: Online Lottery Engagement, Aristocrat Interactive – September 2025 (n=1,000)

Convenience Drives Online

What do you like about purchasing online?

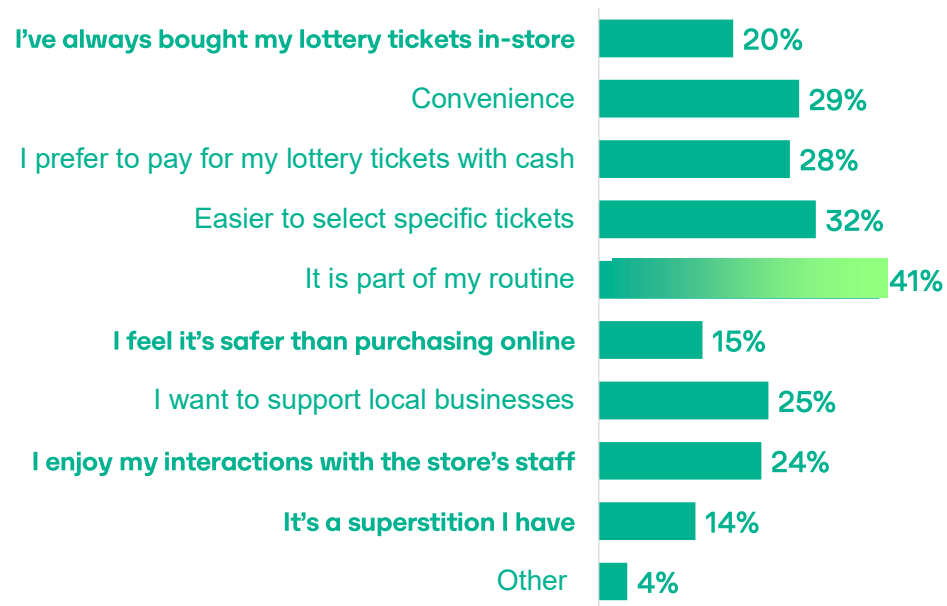
Cross-Channel



Source: Online Lottery Engagement, Aristocrat Interactive – September 2025 (n=1,000)

Routine Drives Retail

Reasons for Liking In-Store Purchasing Cross-Channel



Source: Online Lottery Engagement, Aristocrat Interactive – September 2025 (n=1,000)

Themes that Shape Player Expectations





Connection

58%

**Cross-channel players
claimed to play weekly.**



Connection

88%

**Artwork impacts
enjoyment.**



Convenience

90%

Cite convenience as a core benefit of online play.

Source: Online Lottery Engagement, Aristocrat Interactive – September 2025 (n=1,000)



Convenience

Simplicity

Drives usability and task completion.



Confidence

Nearly Half

**Are hesitant to try online
due to trust concerns.**

Source: iLottery Market Studies, Aristocrat Interactive – August 2025 and January 2026 (n=410 and 1,008, respectively)



Confidence
—

Clear Steps

**And transparency in
deposits drives confidence.**



Content

61%

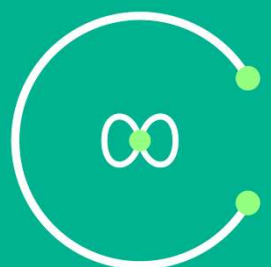
**Of iLottery time is spent on
instant games, resulting in
80% of sales.**



Content

Variety

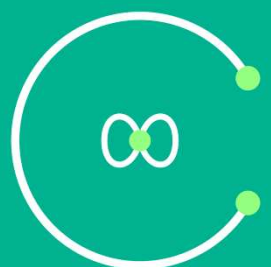
**Of content and bonuses
drives engagement.**



Continuity

Majority

**Expect to use both
channels, not replace.**



Continuity

Retail

Remains critical to player experience.



Connection



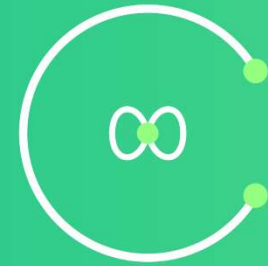
Convenience



Confidence



Content



Continuity

Impact to Lottery.



**Your Lottery
is Unique.**



**Your Mission
is Shared.**



Routine and Convenience – An End-to-End Player Journey





Digital Solutions:

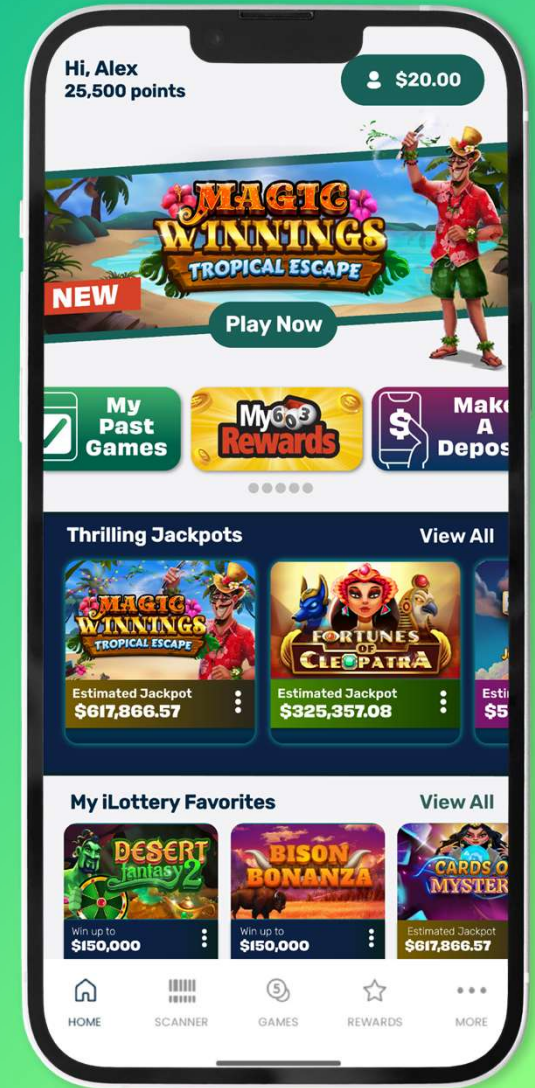
From One Channel to One Experience

Broadcast to Behavioral: Games Lobby



Retail
Content

iLottery
Content



Broadcast to Behavioral: Loyalty Programs



Retail

Scratch, Fast Play, or Draw Tickets purchased at Lottery Retailers



500 Points
Per \$1 Scanned

Online

Powerball, Mega Millions, Megabucks, Gimme 5, Millionaire For Life, or eInstants purchased online



100-500 Points
Per \$1 Purchased

Engagement

Bonus Points for Using the App

Welcome Bonus
First Time Deposit
First Scan
Subscribe to Emails
Account Anniversary
Player's Birthday
Responsible Gaming

Variable
One Time Events



Weekly Drawings



Monthly Drawings

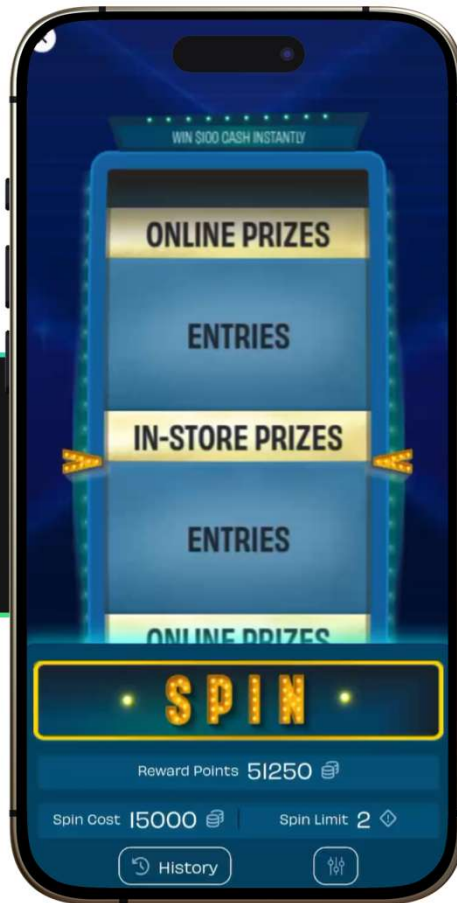


Quarterly Drawings

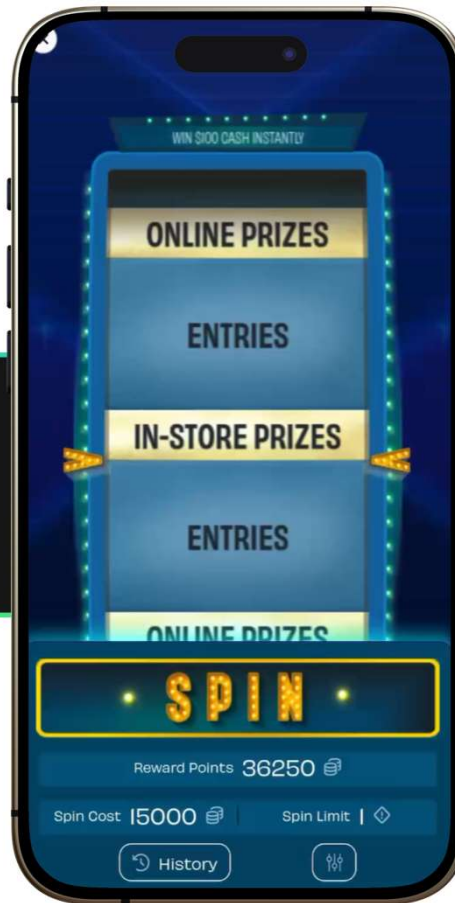


Annual Drawings

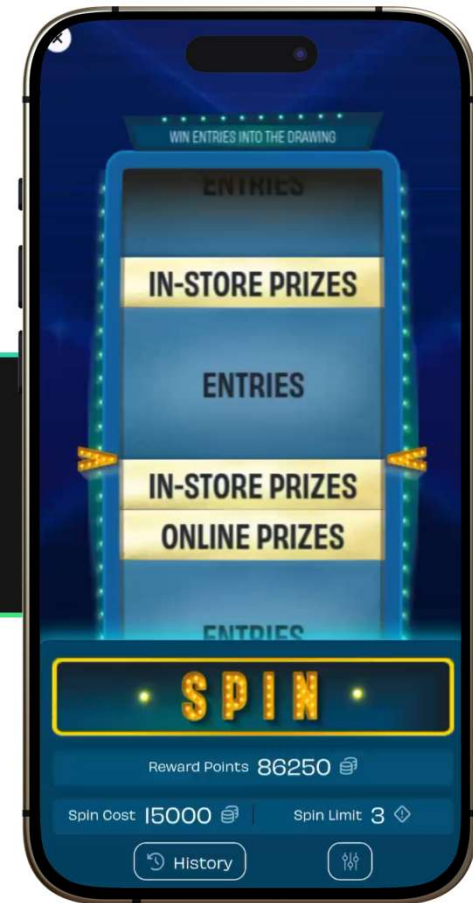
Broadcast to Behavioral: Spin to Win Rewards



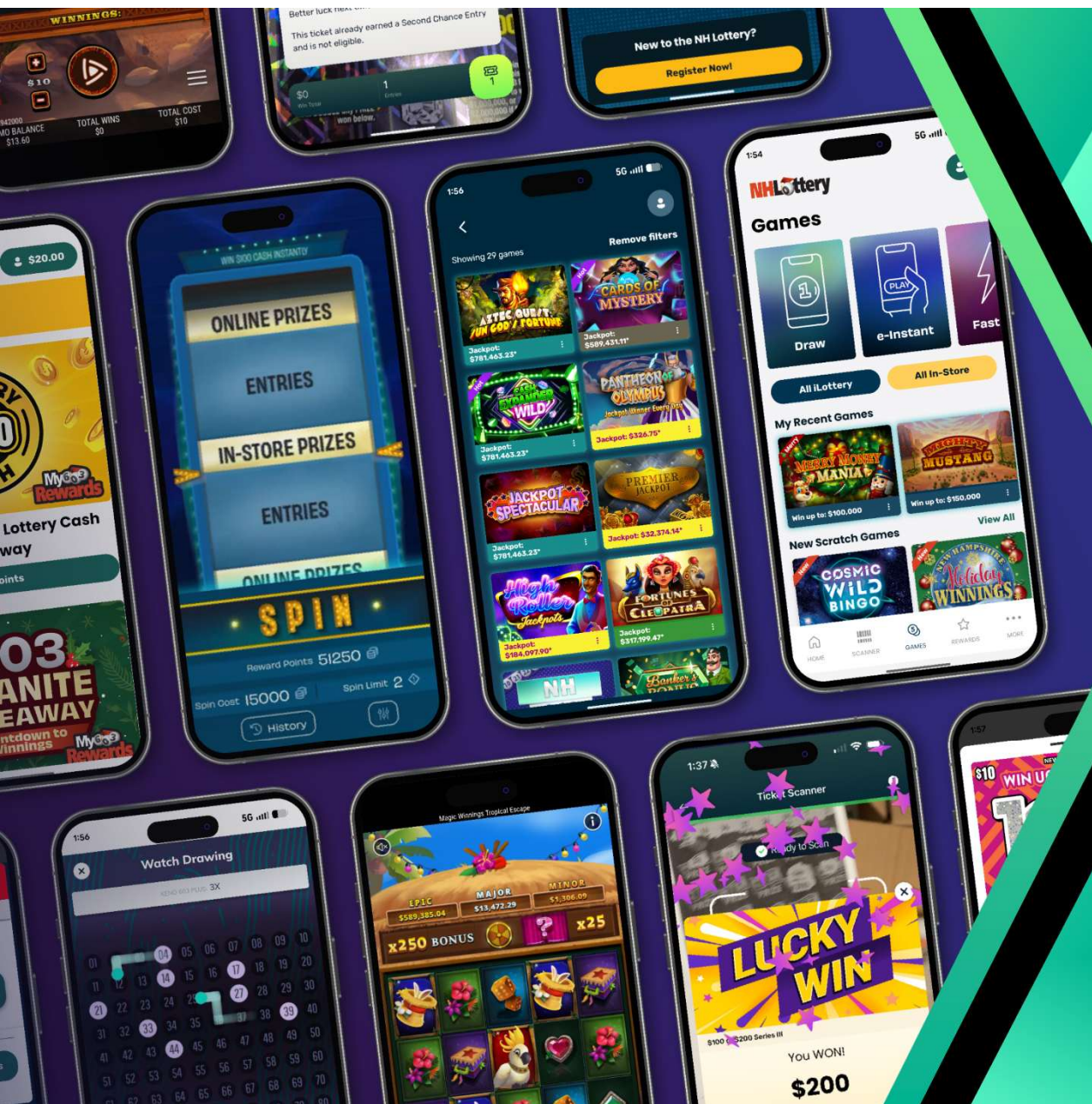
In-Store Prizes



Online Prizes



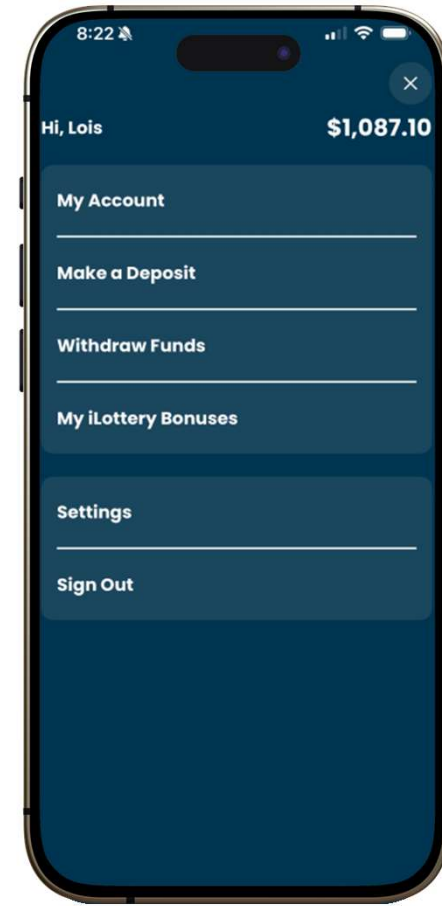
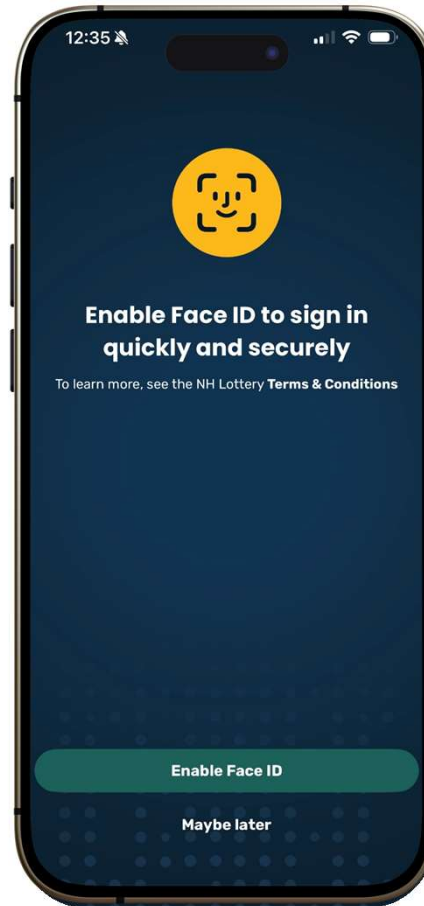
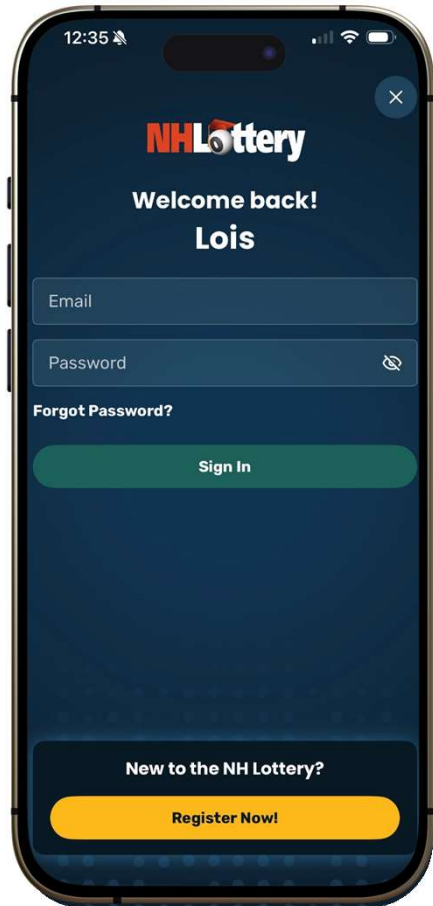
Entries



Digital Solutions:

The Digital Extension of Retail

Features that Matter: Account Management

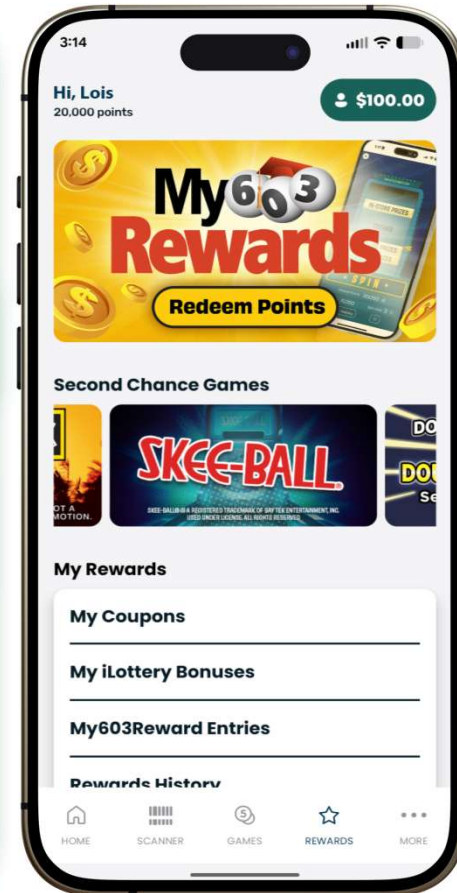
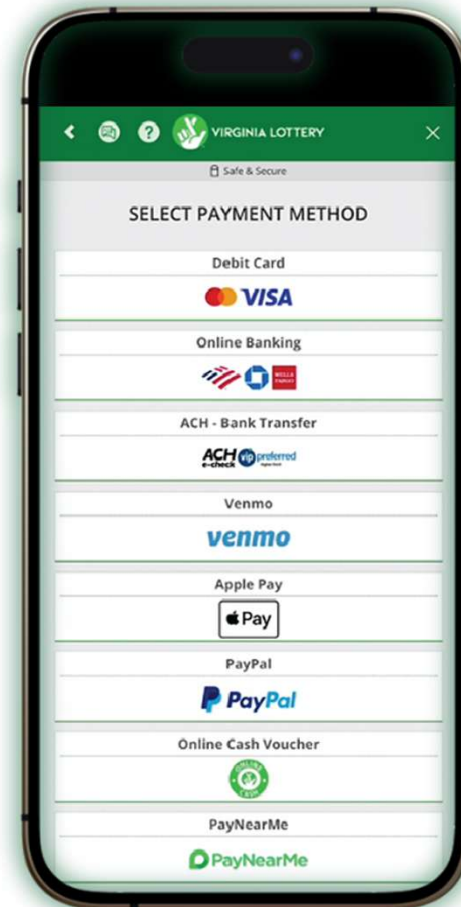
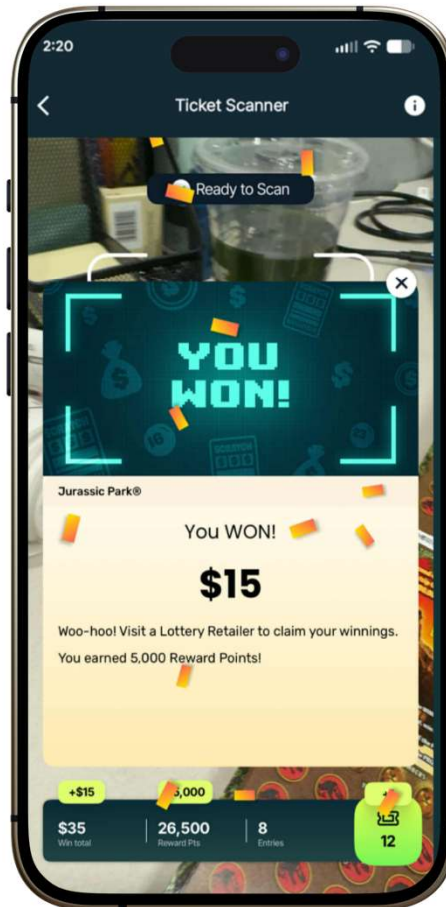


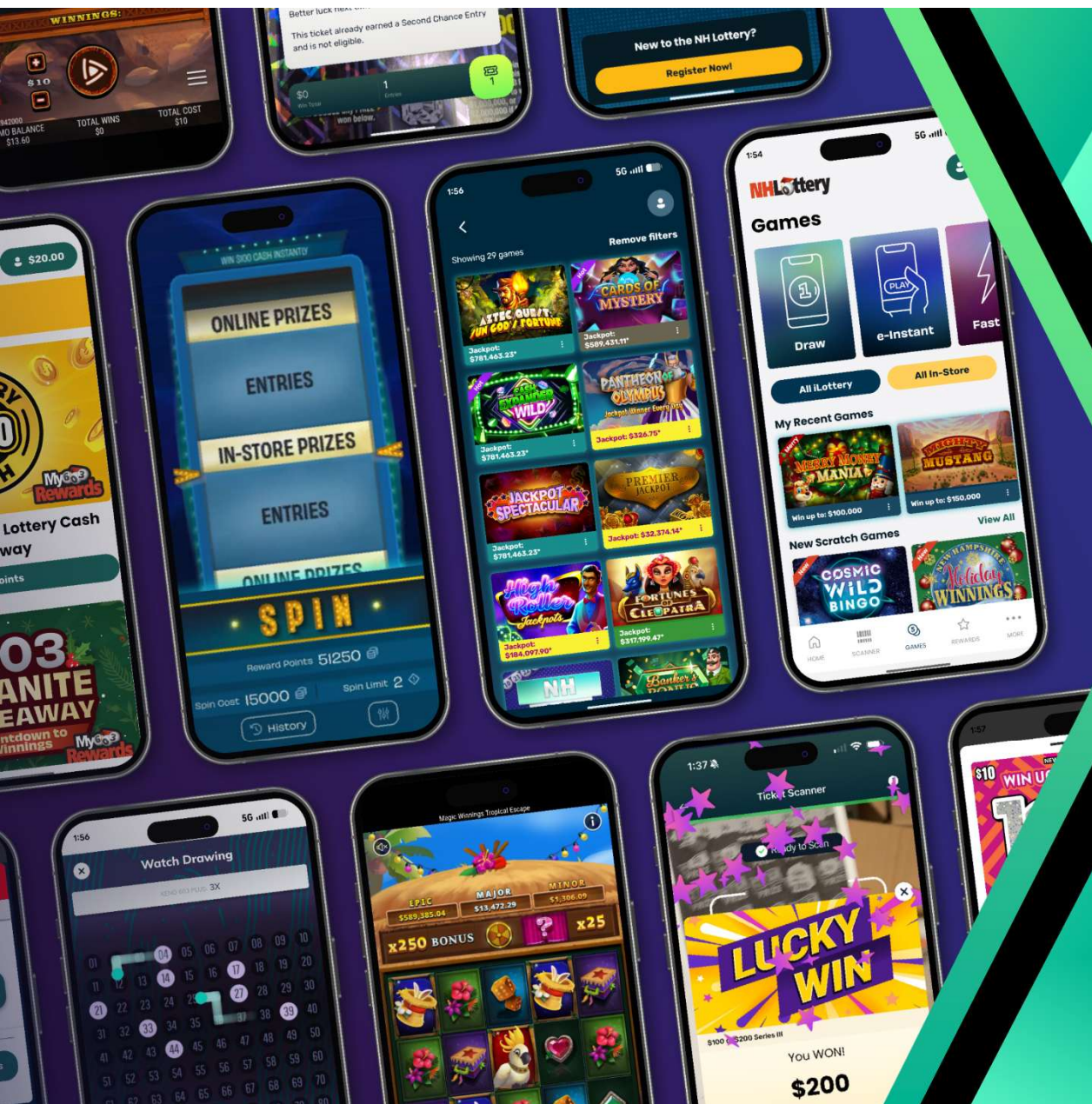
Features that Matter: Cross-channel Utilities

Deposit ➔

Withdraw ➔

Extend the Play ➔





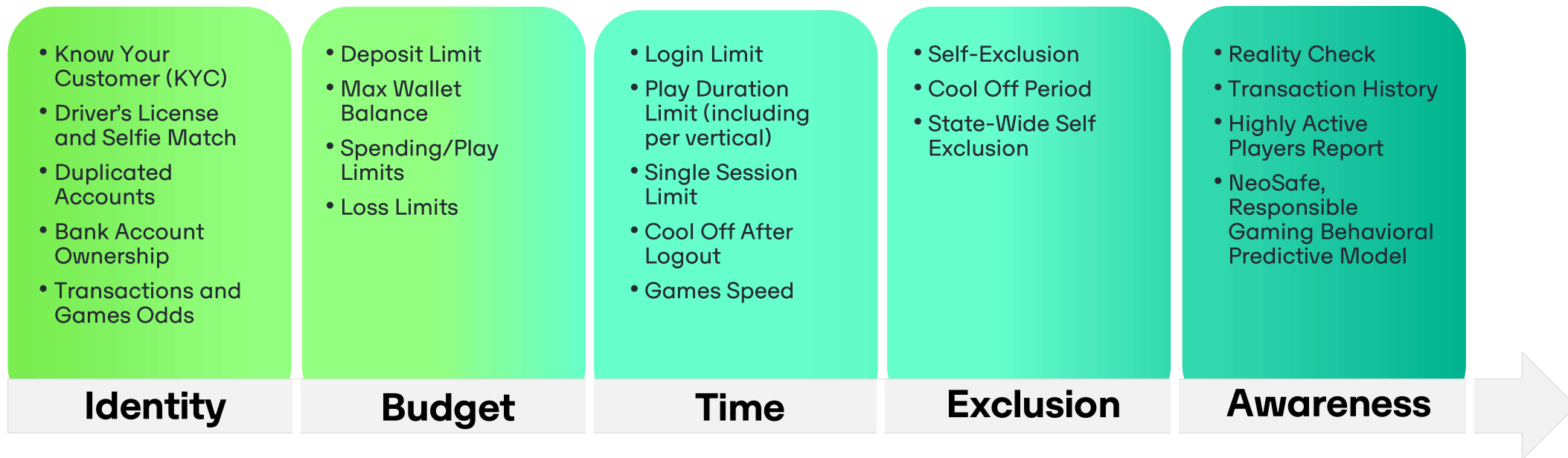
Digital Solutions:

Responsible Gameplay

Responsible Gameplay at the Core

We create entertaining experiences, which Comply with industry regulations and internal standards, Empower players to make informed choices about their play, while pushing ourselves to continually Improve.

Responsible gameplay controls across the player journey.



CERTIFIED
WLA RESPONSIBLE GAMING
STANDARDS FOR ASSOCIATE MEMBERS
VALID UNTIL 2024



NCPG
National Council on Problem Gambling

Responsible Gambling

NeoSafe, Responsible Gaming Risk Evaluation

- **Target** – Proactively reduce risk
- **Method** – Actively manage player risk scores
- **Controls** – Integration with NeoEngage for proactive intervention:

**Levels
50-70**

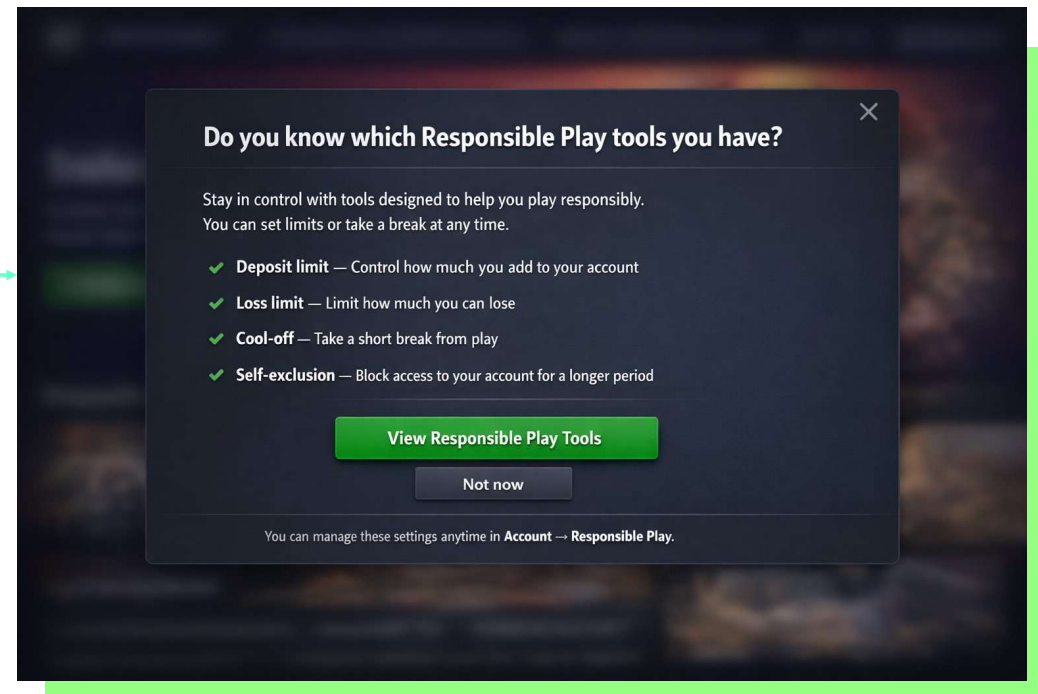
Responsible gaming education
messaging

**Levels
71-85**

Responsible gaming Weblayers/ In-
App messages as seen in the example

**Levels
85+**

Proactive promotion of self-exclusion



Responsible Gambling

Marketing Engagement, Powered by NeoEngage


Play Now | View Winners | Sign In



PROBLEM GAMBLING AWARENESS MONTH

PLAY RESPONSIBLY.

March is Problem Gambling Awareness Month, and we'd like to share a few tips on playing the lottery responsibly with you.

- Always play for fun.
- Remember to set a budget for lottery tickets that you buy in stores, and you may also [set deposit limits](#) when you play online through NH iLottery. If you need to, set a limit and stick to it.
- Know the odds. The odds of winning for all lottery games can be found on the NH Lottery website and app, on each game page.
- Never play with a need to win.

If you or someone you know has a problem with gambling, help is available. Please contact the National Council on Problem Gambling hotline at 1-800-MY-RESET or by text at 800GAM. Or visit their [website](#).

Remember, it's only a game. Please play responsibly, New Hampshire.

Learn More


Over \$3 Billion and Counting for our Schools

To Download the NH Lottery Mobile App:



account update

Setting deposit limits is one way to ensure responsible play. New in 2025, the Virginia Lottery is allowing you more flexibility to monitor your play.

Beginning Wednesday, January 8, the next time you login to your account, **you will need to take action to establish your preferred deposit limit.**

Go to My Account > General Settings > [Deposit Limit](#) > Select your time period from the dropdown, enter the maximum amount you'd like to spend, and choose Submit to save your settings. If you choose to increase your deposit limit, your change will take effect 48 hours later.

While you will now control your daily, weekly and monthly deposit limits, please note that selected limits may be impacted by **payment processor** limits. If you reach the limit set by one payment processor, you may choose to add another payment method.

The Virginia Lottery encourages you to have fun but also be mindful about your play. For more information about our Play Responsibly program and problem gambling resources, visit us [here](#).

 **play responsibly**
Virginia Problem Gambling Helpline: 1-888-532-3500

LATEST WINNERS

FIND A RETAILER

PLAY NOW



LET US KNOW
WHAT YOU THINK!

You are invited to complete a short survey to help the Virginia Lottery better understand its players and some of their views on a variety of topics.

The information you provide will remain completely anonymous and confidential. This survey will take about 10 minutes of your time.

Take the survey



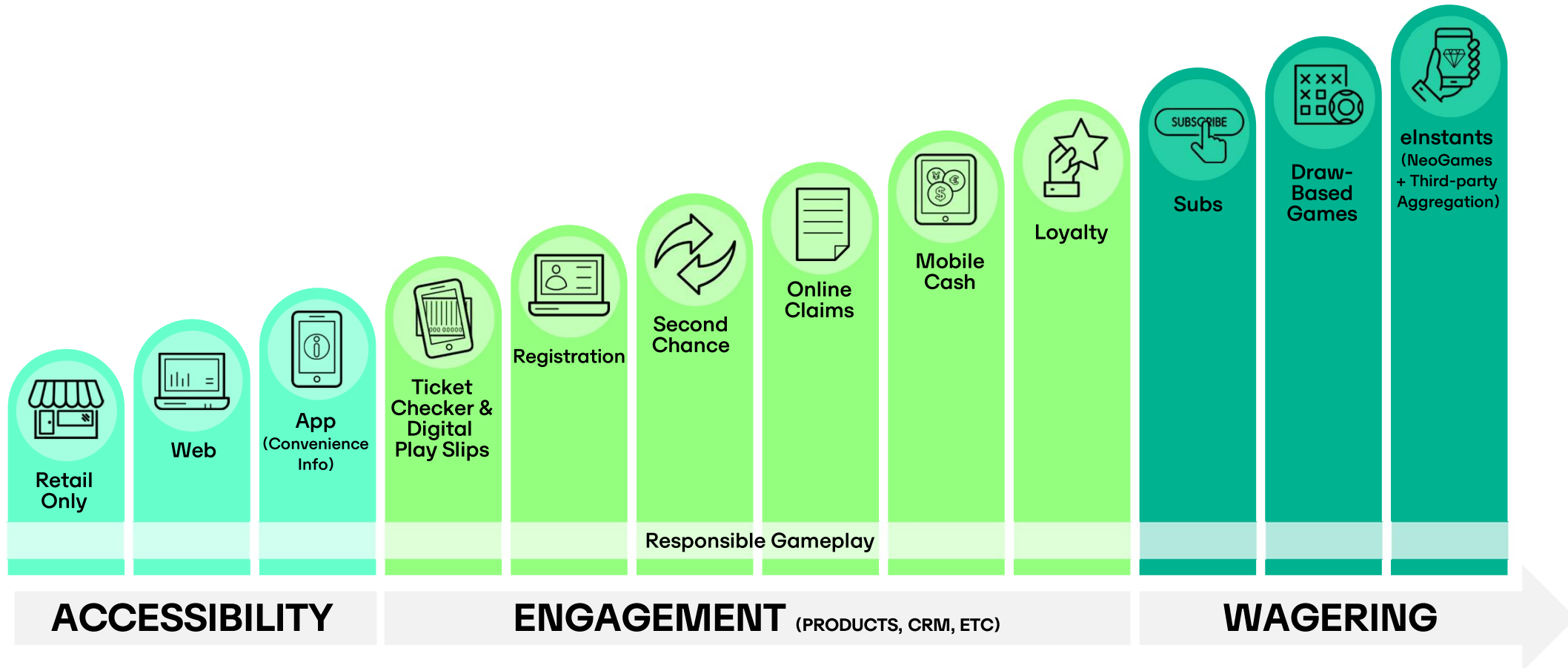
Complete this survey to earn 75 Rewards points!

For each of the following statements, indicate how much you **AGREE** or **DISAGREE** with that statement.

Continue

Evolving the Lottery Experience

No matter where you are on your digital journey,
having your end game in mind...



Your Lottery, Your Brand Experience.



Unify Player Data

Design the Bridges

Continuous Innovation



Thank you!

ARISTOCRAT
INTERACTIVE™