

Looking Forward

Driving Sustainable Play Together

Aspiring To Behave In Sustainable Ways
That Positively Impact People And Planet

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INSPIRING GLOBAL TRANSFORMATION



VALUING AND PROTECTING
OUR PEOPLE



ADVANCING
RESPONSIBILITY



SUPPORTING OUR
COMMUNITIES



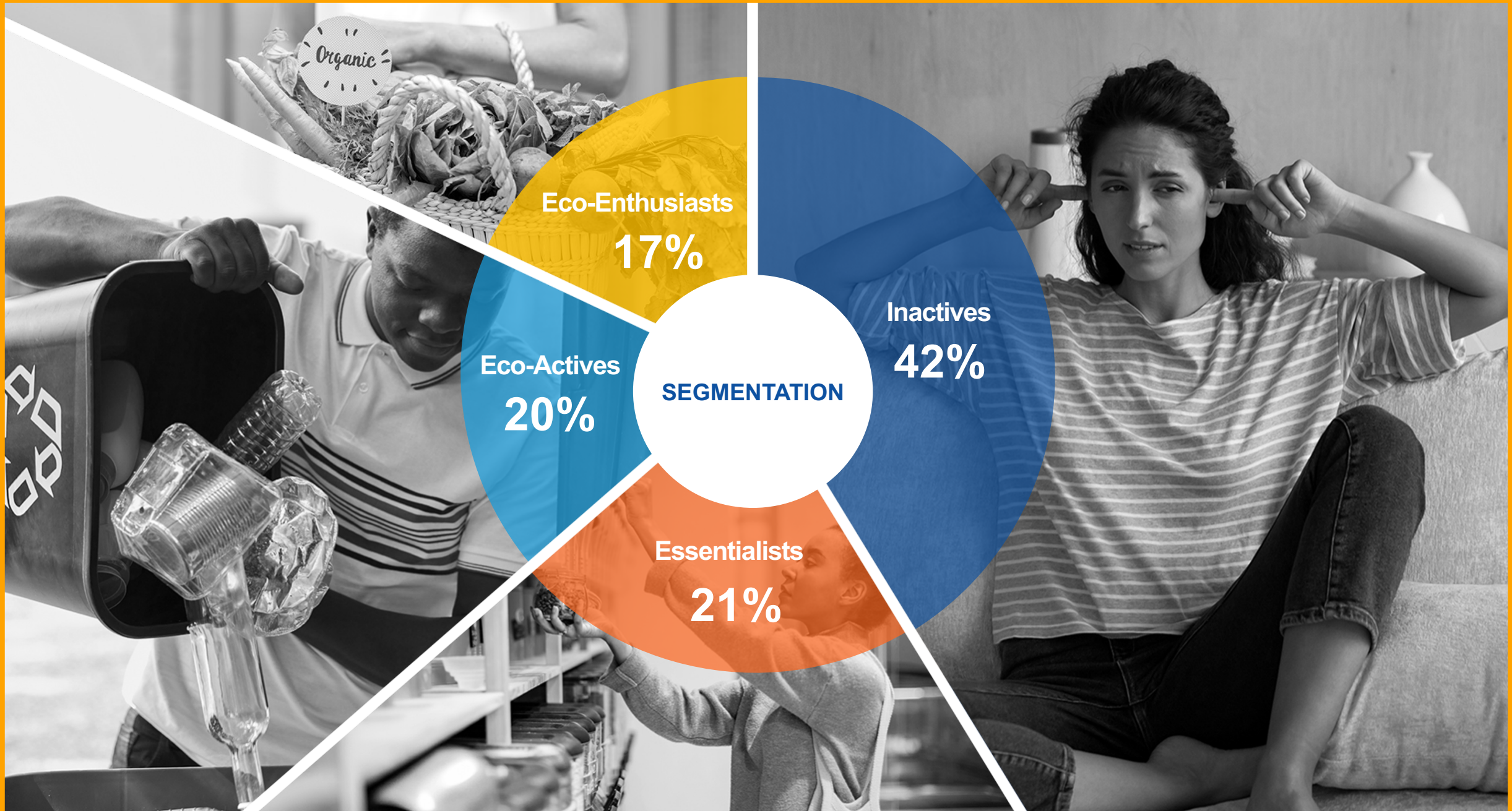
FOSTERING SUSTAINABLE
OPERATIONS



SustainablePlay™

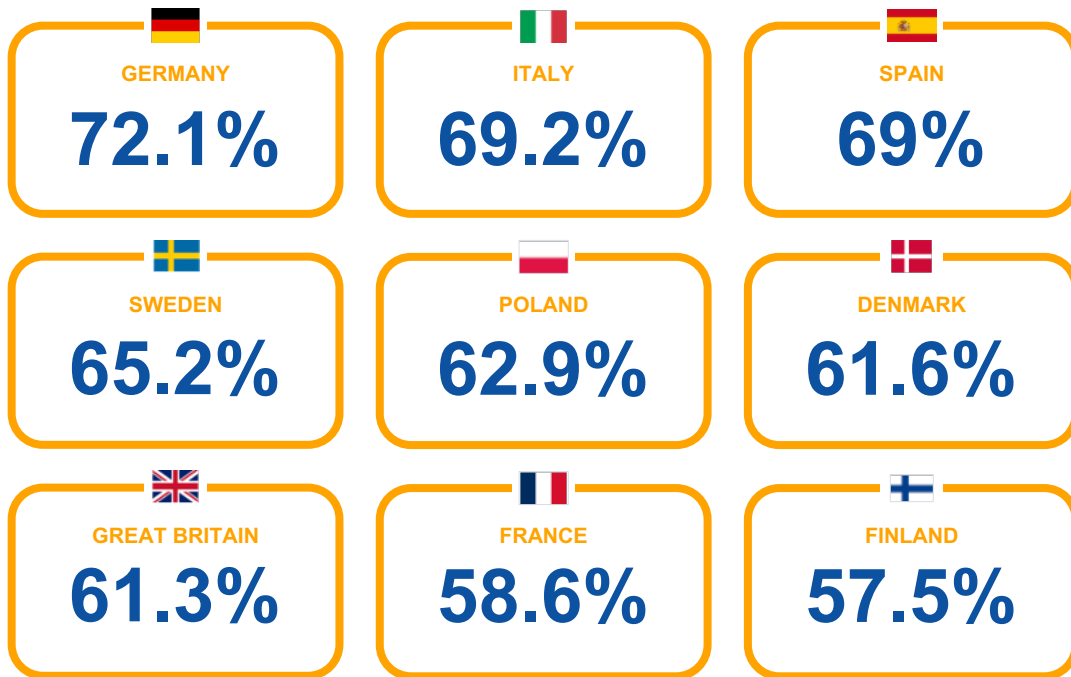
PEOPLE RESPONSIBILITY COMMUNITY ENVIRONMENT





"I am concerned about what I personally can do to help protect the environment."

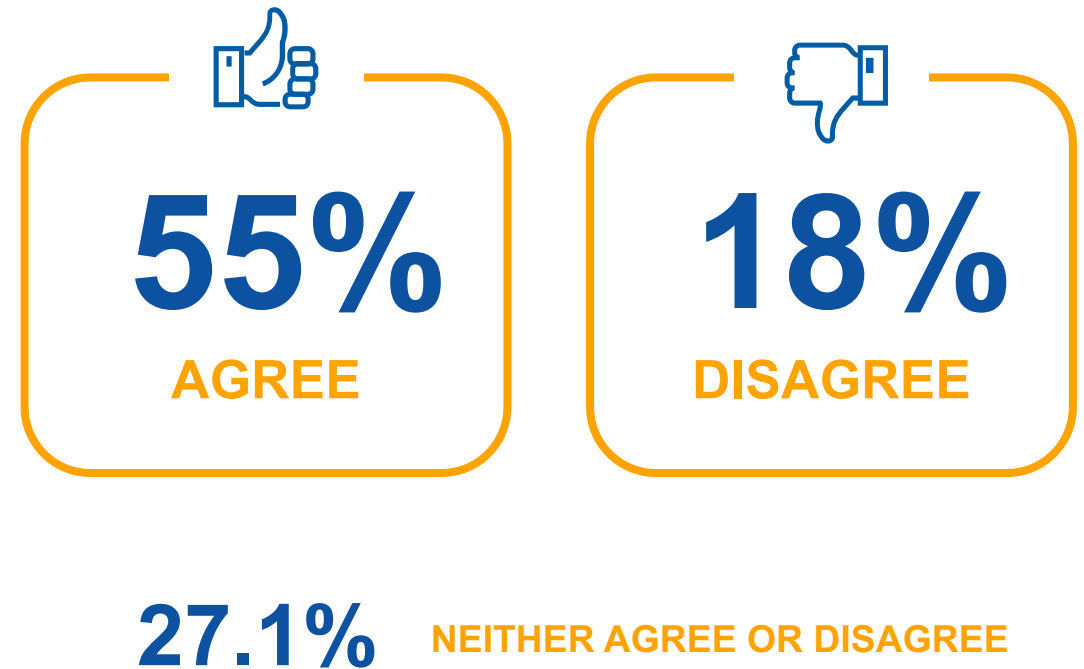
(WEEKLY LOTTERY PLAYERS)



Source: Foresight Factory | Base: Audience Filter among 618-3744 online respondents per country aged 16-64, 2021 March

"I am willing to spend more on a product if ethically produced."

(WEEKLY LOTTERY PLAYERS)



Source: Foresight Factory | Base: 726-1582 online respondents per country aged 16-64, 2022 January

"I am more likely to buy from companies that are working to reduce climate change."

(WEEKLY LOTTERY PLAYERS)



61.5%

STRONGLY AGREE /
AGREE



10.6%

STRONGLY DISAGREE /
DISAGREE

28% NEITHER AGREE OR DISAGREE

Source: Foresight Factory | Base: Audience Filter among 618-3744 online respondents per country aged 16-64, 2021 March

"I try to make sustainable choices when I purchase products and services."

(WEEKLY LOTTERY PLAYERS)

DESCRIBES ME VERY WELL

20.1%

20.8%

26.5%

19.0%

6.9%

3.3%

3.4%

DOES NOT DESCRIBE ME AT ALL

Source: Foresight Factory | Base: 726-1582 online respondents per country aged 16-64, 2022 January

Brands Should Do More to Prove Their Product Claims

"Which of these sustainable practices, if any, do you think are important for brands to adopt?"

(WEEKLY LOTTERY PLAYERS)

64.5%

Completely Recycled
Packaging



55.2%

Making Products from
Sustainable Materials
or Ingredients



51.2%

Helping to Regenerate
Natural Resources
(ex. Re-planting Forests)



50.2%

Zero Plastic Policy
(ex. No Plastic
Packaging or Products)



47.6%

Offering to Take
Back a Used
Product to Recycle
or Resell it for Me.





MACRO TRENDS TO WATCH

The Future of Technology





Security



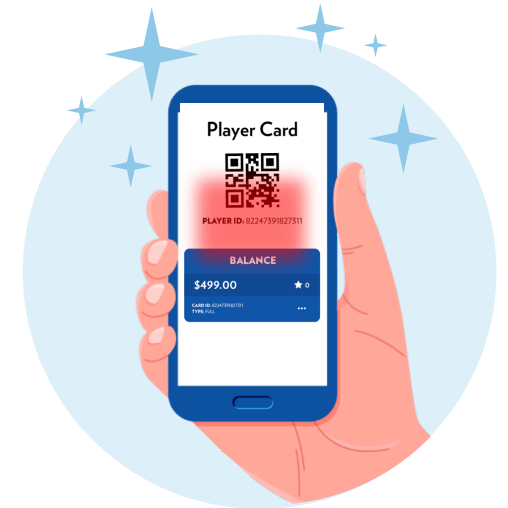
Scalability



Rapid Upgradability



Scan and Redeem Winning Paper Ticket to eWallet



The player has a winning ticket, scans it conveniently outside of store

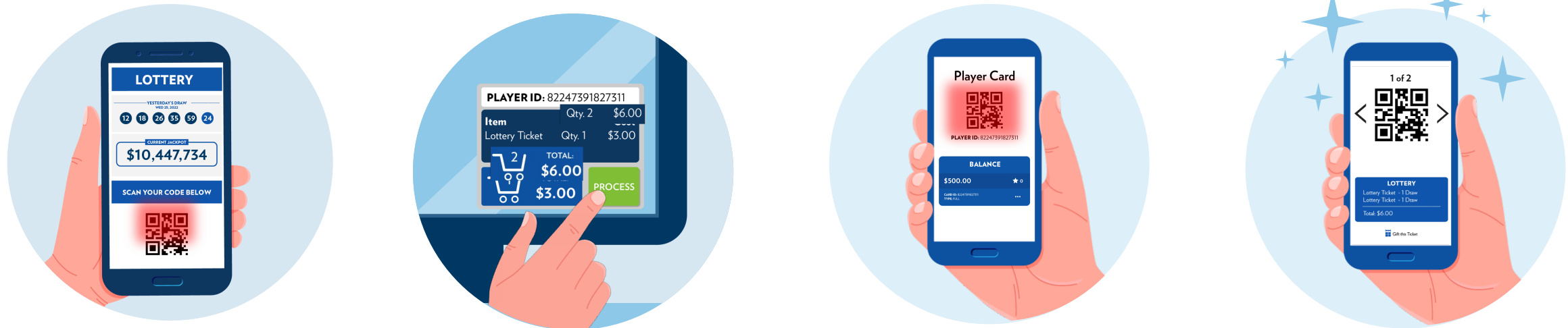
Player scans ticket to redeem win to eWallet.

eWallet balance now reflects win

Player can use funds for future purchase or transfer funds out

Play at Retail with a Digital Playslip Paying with eWallet.

Digital or Paper Ticket Produced.



Player selects the digital playslip in the app and scans / taps at terminal.

Player ID is captured from the digital playslip scan and associated with the purchase.

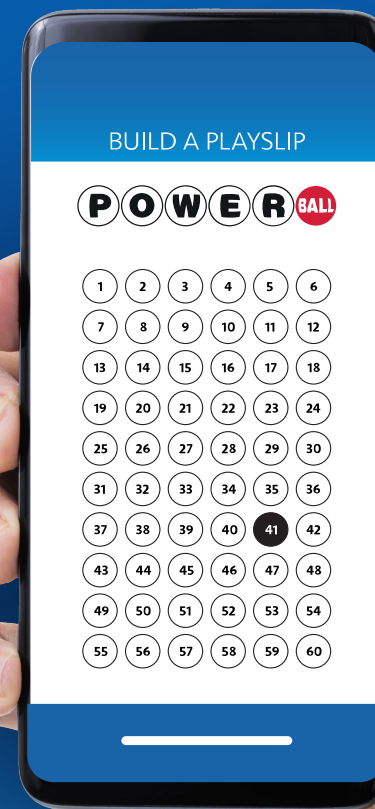
Player chooses to pay with eWallet

The digital ticket is automatically delivered to the app or a printed ticket if preferred

How the **Oklahoma Lottery** said "Goodbye" to Paper Playslips



From PAPER...



to PIXELS!



Mass Lottery App Making Measurable Environmental Impact



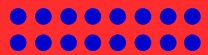


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PEOPLE RESPONSIBILITY COMMUNITY ENVIRONMENT

SUSTAINABLE WAY OF OPERATING MONEY GAMES

– case Veikkaus



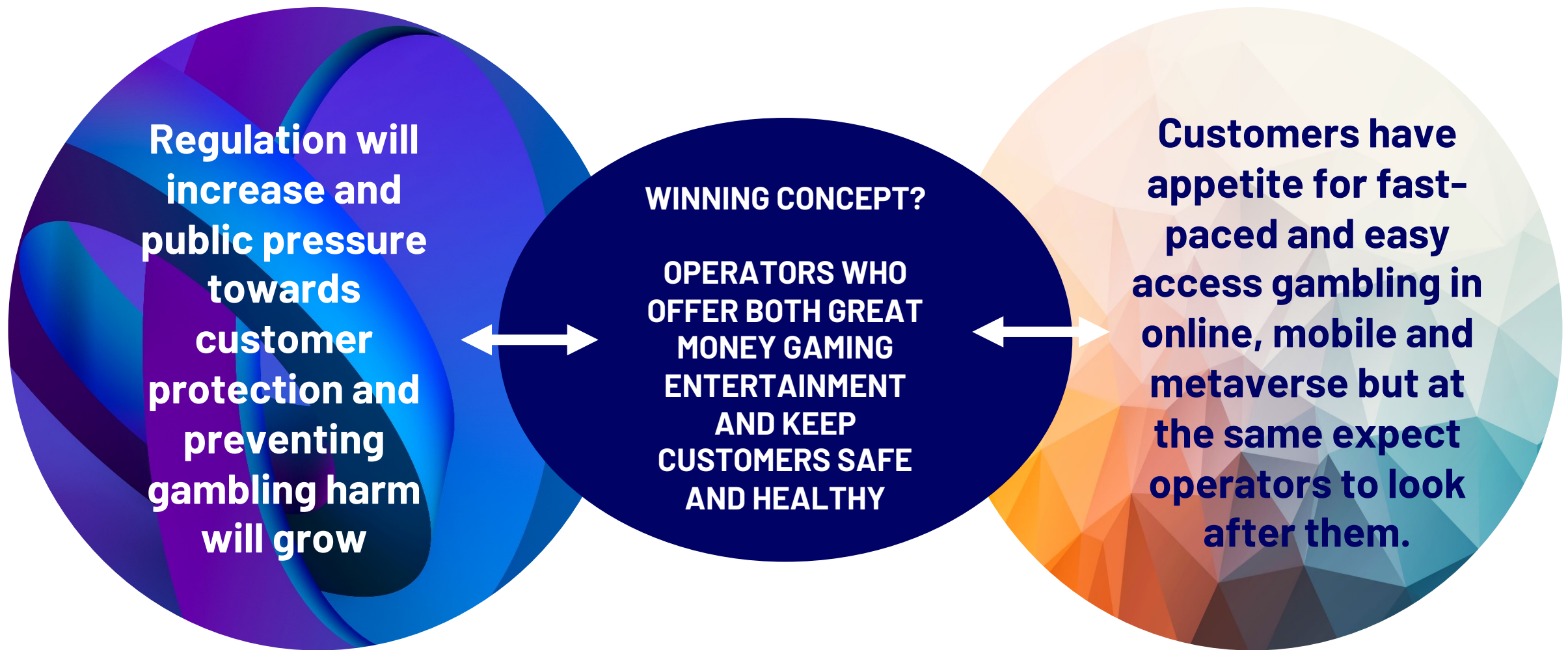
EL CONGRESS 5.6.2023

Olli Sarekoski



FUTURE TRAILBLAZERS OF MONEY GAMING INDUSTRY

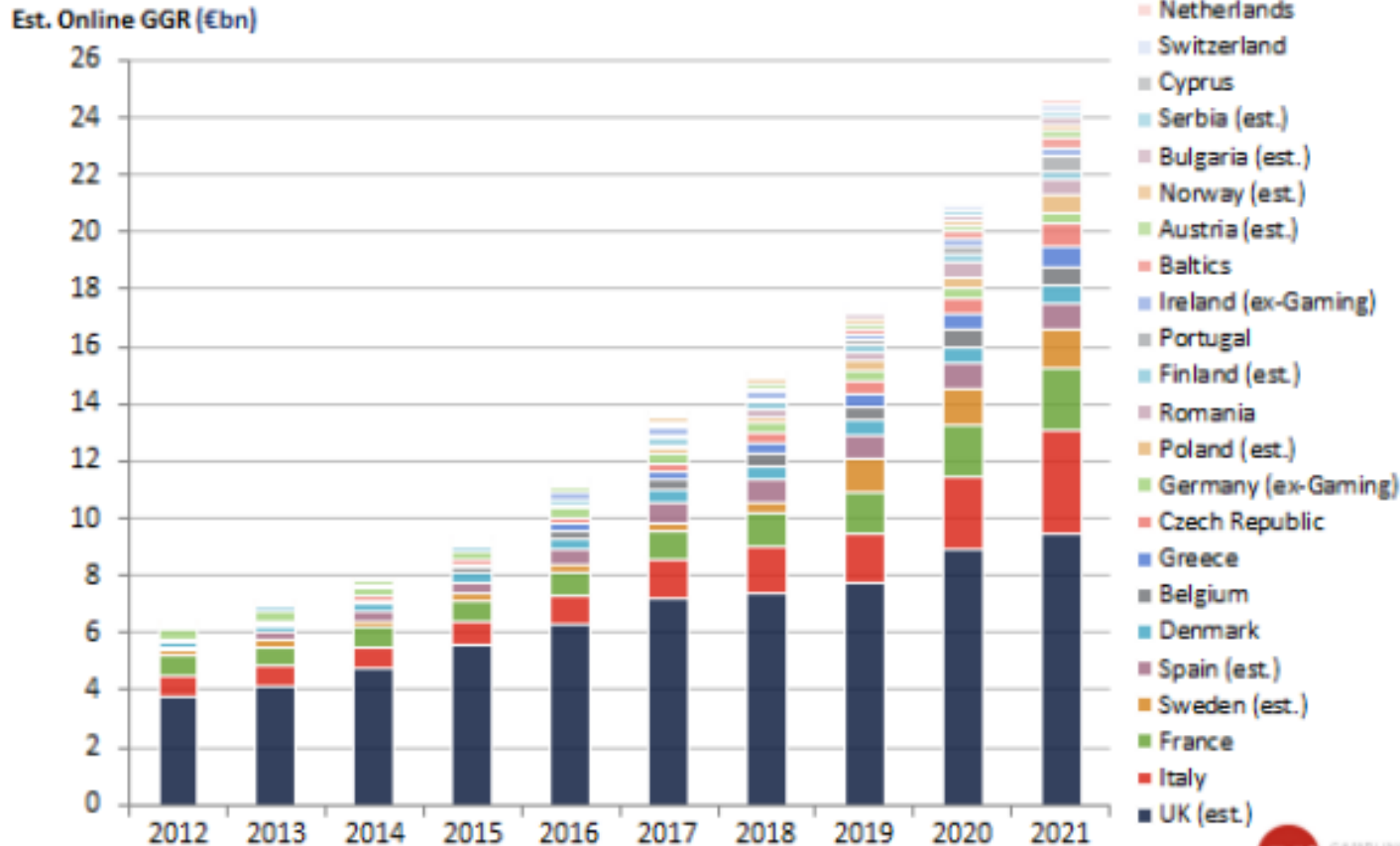
How to keep up with the sustainability tsunami?



EUROPEAN DIGITAL MARKET HAS QUADRUPLLED

Growth comes from sports betting and internet casino games

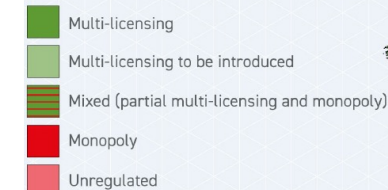
Europe: Est. Regulated Online GGR ex-Lotteries (€bn) - 2012 to 2021



Source: National regulatory bodies, VIXIO Gambling Compliance estimates



European online gambling licensing regulations (2021)



Austria: Sports betting is multi-licensed, while casino gaming and poker are both provided by a monopoly. **Cyprus:** Sports betting is multi-licensed, while casino gaming and poker are both prohibited. **France:** Sports betting and poker are both multi-licensed, while casino gaming is prohibited. **Germany:** Sports betting is multi-licensed, but casino gaming licensing is at the discretion of the respective Länder; virtual slots will be allowed for private operators from 1st July 2021. **Hungary:** Sports betting is provided by a monopoly company, while casino gaming and poker are both multi-licensed. **Ireland:** Multi-licensing regulation is expected to be introduced in 2021/2022. **Poland:** Sports betting is multi-licensed, while casino gaming and poker are both provided by a monopoly company. **Sweden:** Sports betting is provided by a monopoly company, while casino gaming and poker are both multi-licensed.



OUR INDUSTRY IS FACING GROWING CALL FOR ETHICS

The industry needs to change to succeed in the future

Money gaming has transformed from local to global along with digitalization

Growing call for ethics have lifted the harms caused by gambling into the spotlight

The urge and demands for common industry ground rules have increased alongside with the evolution of the international business context

VEIKKAUS DECIDED TO TAKE ENORMOUS RG-STEPS

Those decisions made us “horrified”

We decided to be one of the forerunners in the journey towards sustainable way of operating money games

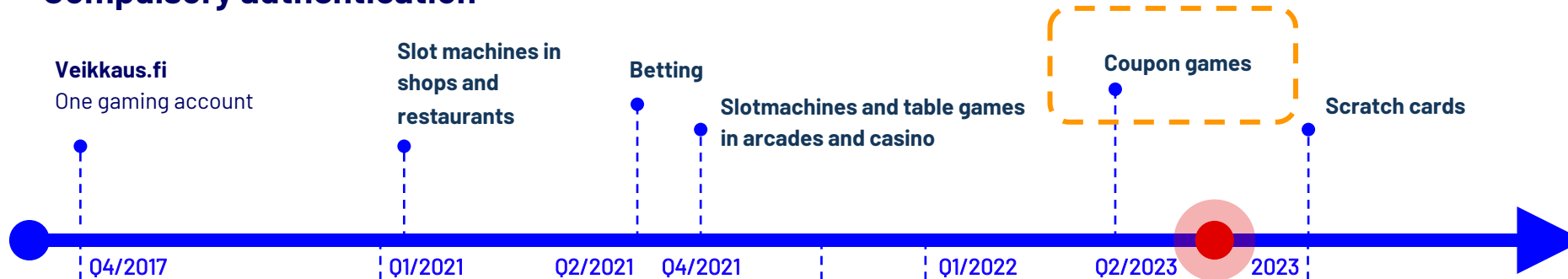
Which means:

to build **SAFE AND RESPONSIBLE GAMING ENVIRONMENT** for our customers

to operate it **RESPONSIBLE AND ETHICAL WAY** to protect our customers

WE BELIEVE THAT BEING A RESPONSIBLE TRAILBLAZER MEANS SUSTAINABLE AND THRIVING BUSINESS IN THE LONG RUN

Compulsory authentication



Preventing harmful gambling

Mandatory money transfer limits online gaming and mandatory loss limits for online fast-paced games.

Game bans and self exclusions online gaming

Game history

Self exclusion on slot machines in shops and restaurants

Time Reminder for slot machines

Piloting the contact model

Self exclusion on slot machines and table games in own arcades

Mandatory loss limits for online fast-paced games expands to slot machines and table games.

Self exclusion and loss limits for slot machines and table games at casino



Trailblazer of responsible player experience

- ✓ 100 % gaming authenticated
- ✓ Wide-ranging tools for self exclusion and controlled gaming throughout the portfolio
- ✓ All customers have been categorised according their gaming behaviour.
- ✓ Advanced models and methods for identifying and contacting customers with risky behaviour
- ✓ Total Yearly lost limit 15 000 €

SOME IMPLICATIONS:

41,000

SELF-EXCLUSIONS IN EFFECT

RISK LEVEL GAMING

DECREASED AND ALL TIME LOW

40,000

LOST LIMIT CUTS MONTHLY



FUTURE TRAILBLAZERS OF MONEY GAMING INDUSTRY

Who will win this game?



BRANDS THAT CUSTOMERS CAN TRUST TO BE FUN AND FAIR AT THE SAME TIME



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PEOPLE RESPONSIBILITY COMMUNITY ENVIRONMENT



TOTALIZATOR
SPORTOWY

iLottery system migration

Maciej Kasprzak

Šibenik, June 5th, 2023

Few words about TS portfolio



Lottery



Online Casino



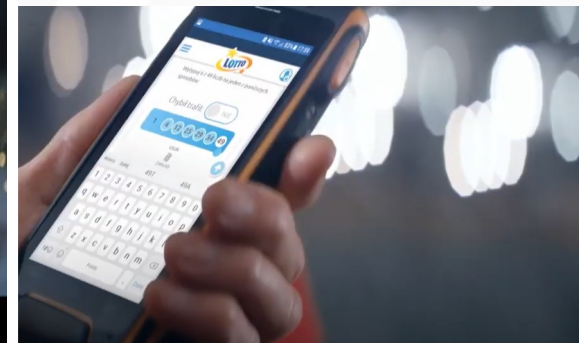
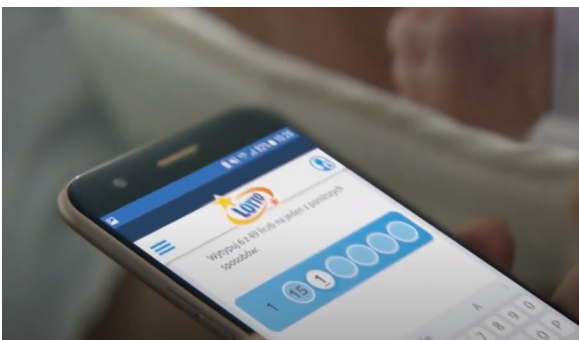
Slot Venues



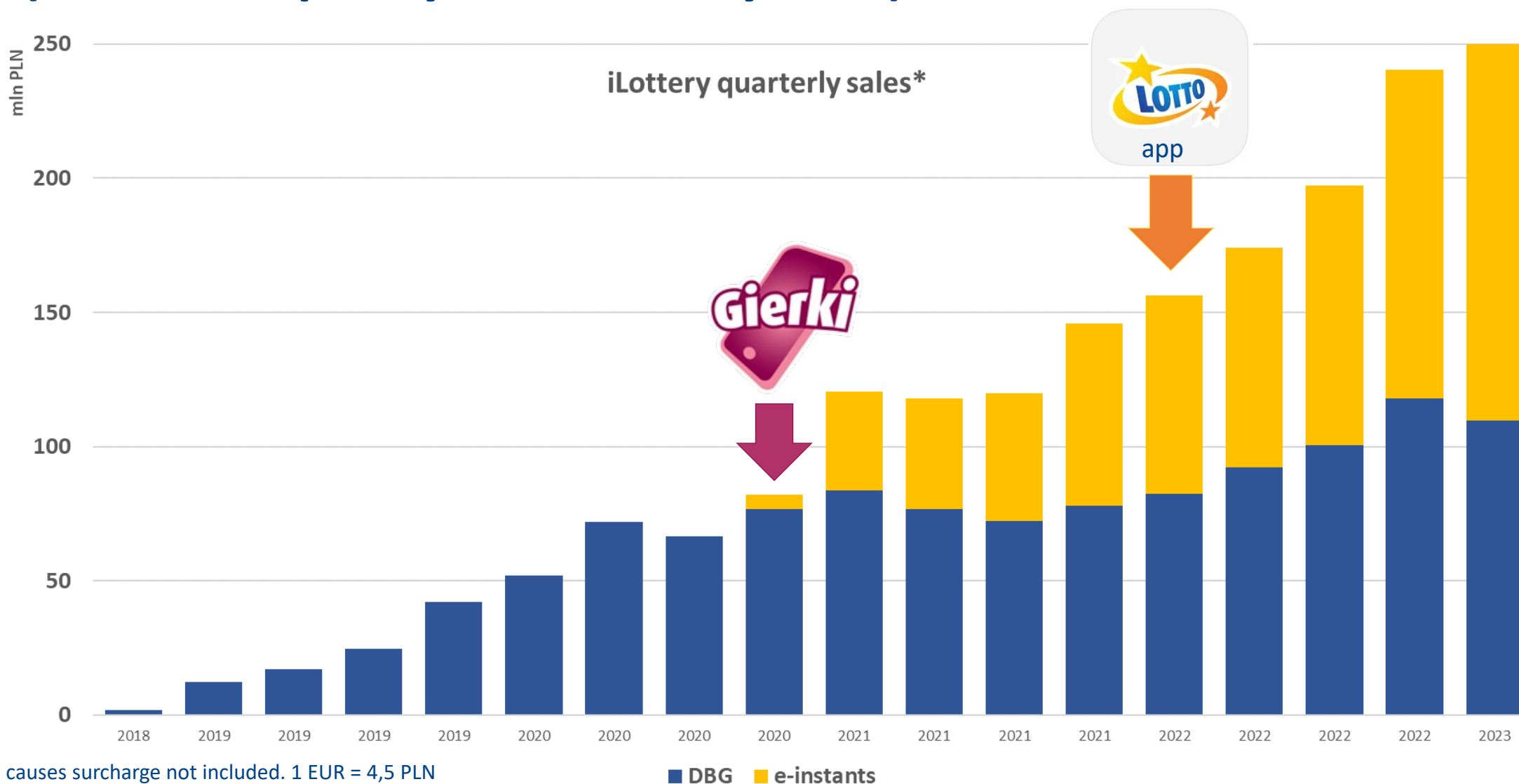
Horse Racing Tote



December 2018 – „Lotto is everywhere”



iLottery growth beyond expectations (and the capacity of the old system)



*Good causes surcharge not included. 1 EUR = 4,5 PLN

From time to time the user experience went „boohoo”



doges

29.11.2022, 23:01:47

I've won PLN10, but I cannot log into my account. They took my money and run, what can I do now? Boohoo...

╰(´´)╯

#lotto #afera



Our goals



- Improvement of the platform performance
- New product features
- Central player database + 360° customer view
- Integration of the CRM tool + near real-time data flow
- Loyalty programme
- Responsible gaming policy development
- Cybersecurity

Our goals

The migration took place on March 26/27th.



And, we're almost there.

Key learnings



- Map the processes
- Check the data
- Wide scope of UAT is required
- The whole migration process can take some time
- Get your customer support & marketing prepared



Flexible
cloud-based systems
are ~~the Future~~
the requirement of today.





TOTALIZATOR
SPORTOWY

Thank you!

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`www.totalizator.pl`



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PEOPLE RESPONSIBILITY COMMUNITY ENVIRONMENT

Future Forward.

Growth Driven.



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Future Forward. Growth Driven.

Learn More at Booth: **#617**

