

The Next Decade of Online: Key Dynamics for European Lotteries

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The Broadest, Best of Breed Offering



neogames®

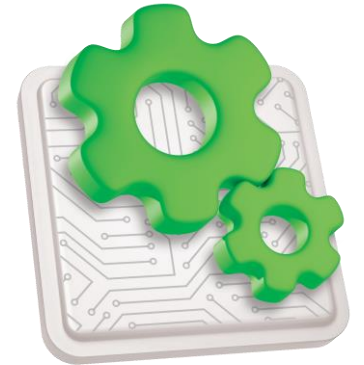
+



pariplay



BtoBet™



aspireglobal

Global Talent Serving Global Industry



+1,100
Workforce



+200
Partners



Customers on **4**
Continents



8 Main
Locations



+50 Regulated
Markets/States

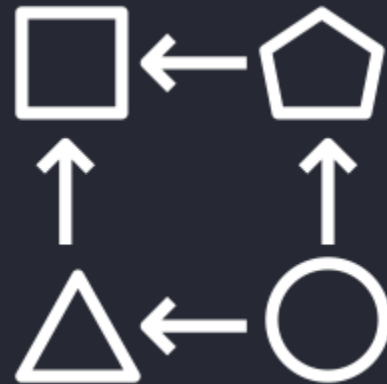
“

It is not the strongest of the species that survives, nor the most intelligent that survives. It is the one that is the most adaptable to change.

”

Charles Darwin

Are we **adaptable** as an industry?



Stepping Outside the Comfort Zone



2012

9/38

EL Countries
With iGaming/OSB
Regulation

2022

30/38

EL Countries
With iGaming/OSB
Regulation

26%

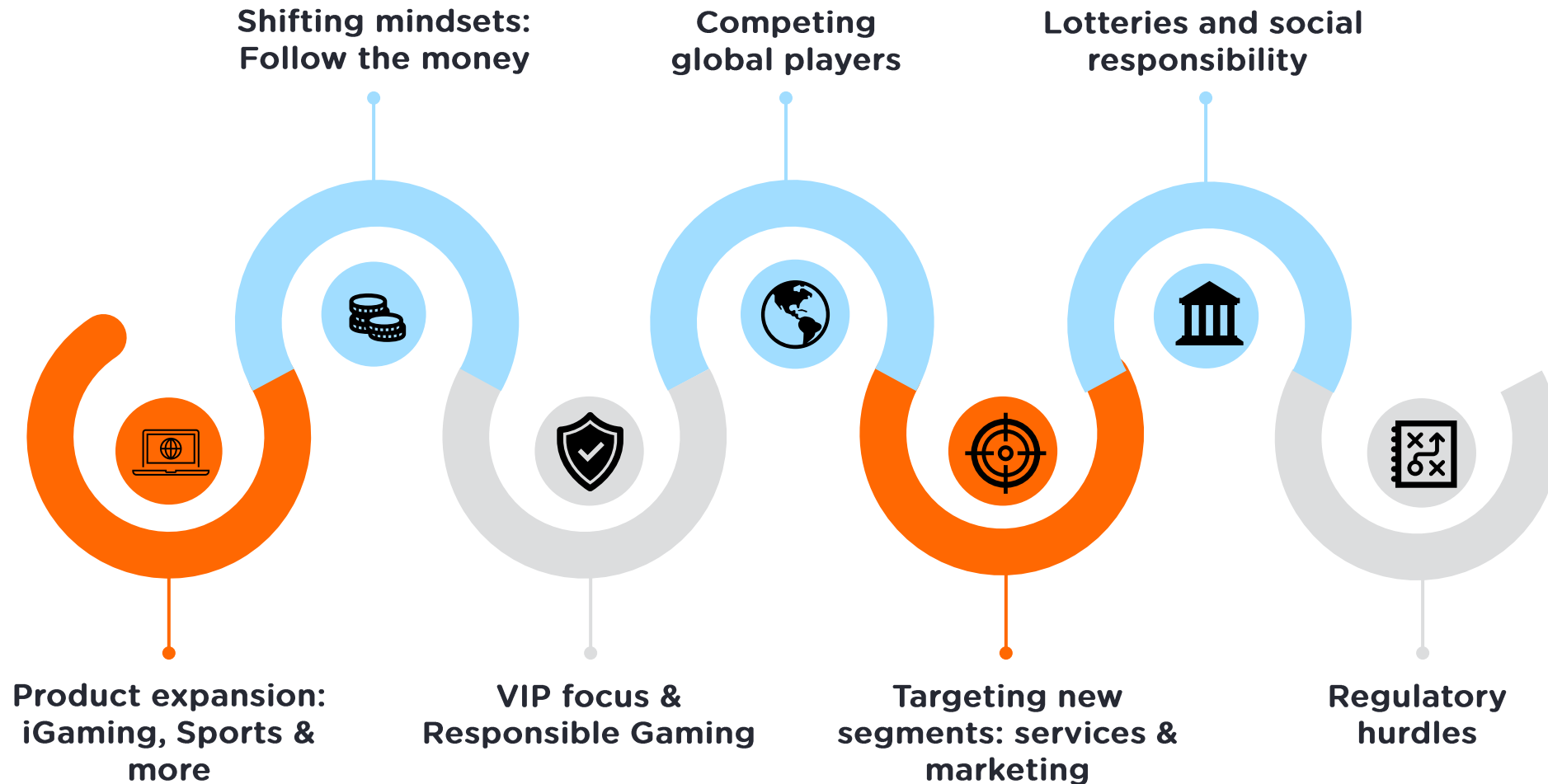
iGaming
EL Countries

45%

Sports Betting
EL Countries



The Impact of iGaming Adoption



Cycle of Echoes: Patterns Repeated, Lessons Learned?



Fantasy Sports



eSports



Social games



AI



Focus On Sustainable USPs



Brand credibility &
loyalty



Omni/retail
locations



Unique
products



Social
responsibility

The Blueprint for Success





Thank you!

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