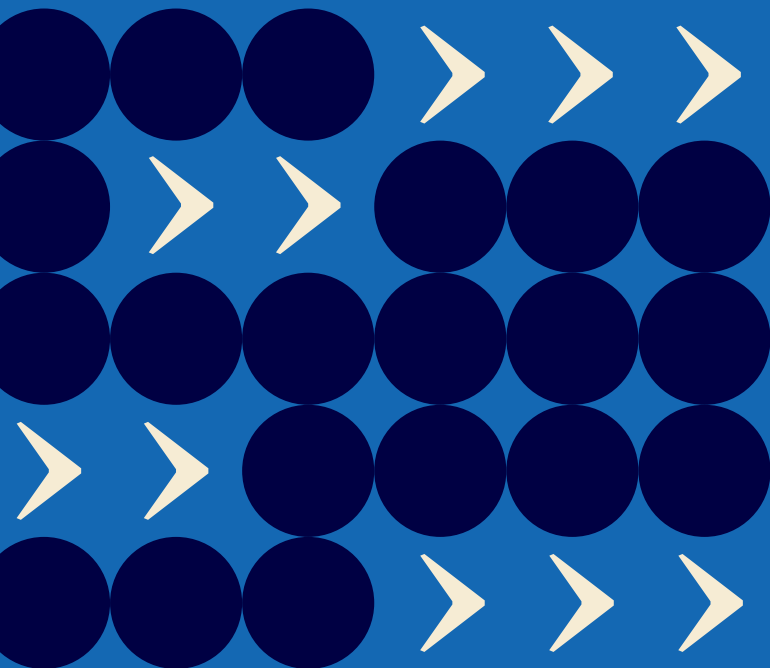# Innovating with Intent

Solutions & Investment Where It Matters to Lotteries

As lotteries strategically reshape their operations to adapt to changes in consumer behavior, digitalization, and new forms of competition for players' attention, taking action requires flexible solutions that meet current needs and support ongoing evolution.

In its transformation to Brightstar Lottery from IGT Lottery, Brightstar has set the stage by purposefully evolving its lottery product roadmaps and aligning its resources with these objectives in mind. The result is forward-looking products and services that meet the challenges lotteries have cited as high priorities.

Here are just some of the ways lotteries can take action to unlock more potential today, in accordance with their specific needs, and drive sustainable and meaningful revenue growth for lottery beneficiaries.

BRIGHTSTAR

We're not an iLottery jurisdiction. What can we do to engage new players at retail?

The brick-and-mortar channel still accounts for the lion's share of lottery sales in North America, while the iLottery channel has advanced the industry's approach to **player acquisition** by successfully demonstrating how it can be done with a registered player base and the data and analytics to segment, build offers, and understand consumers' preferences and purchase response. If you're not an iLottery jurisdiction, you can still take advantage of the learnings and adopt a similar approach using Brightstar's **Connected Play** solution. Connected Play functionality enables retail players to engage, purchase, and claim lottery in a more modern way, via their own mobile device at retail, and it is available to any lottery, whether regulated to offer internet wagering or not. Beyond refreshing lottery's relevance and meeting players' changing preferences, Connected Play provides previously unavailable retail-player transaction data that lotteries can use to create more personalized offers, enhance the player experience, and **support acquisition in a way similar to iLottery programs**.

Integrated second chance and loyalty products from Brightstar foster increased player engagement by rewarding players for purchases made at retail and enabling digital interactions and participation in second chance promotions, allowing them to enter tickets into special drawings for more opportunities to win. Brightstar's solution supports drawings for instant and draw games and no-purchase-necessary promotions, and allows players to convert loyalty points for entries into exclusive drawings.

Exciting, experiential second chance prizes are attention-getters that can appeal to new players and enhance the overall player experience. Whether supporting a single game, a family of games, or a licensed game, Brightstar's **Winner's Choice™** second chance offering allows lottery winners to **select their own unique prize**, whether cash, merchandise, trips, or some combination – enabling a lottery to truly offer something for everyone. Brightstar delivers each program with its unparalleled white-glove customer service that has set a new standard for serving lottery winners.

Mobile Claims, with improved prize redemption, makes lottery easier for retail players by allowing them to claim larger prizes conveniently via a mobile app, supporting repeat play and eliminating the barriers of additional driving and time required to receive a prize when they win. In two jurisdictions where Brightstar's mobile claims solution has been recently deployed, lotteries have seen successful implementation with 20% of prizes $600-$5,000 claimed through mobile in one jurisdiction and 14% of prizes $115-$5,000 claimed by mobile in the other.

77% of weekly lottery players (35% sometimes + 29% often + 13% very often) consider purchasing a product or service after noticing digital signs in-store or on their way to the store, according to 2025 global research by Brightstar in partnership with Foresight Factory. Brightstar's **Digital Menu Board** software solution makes it easy for shoppers at retail to be aware of new scratch games as they launch and view current, in-stock games, supporting trial and adoption. It can also feature dynamic content, for example to support jackpot awareness. This unique software solution is integrated with the lottery terminal application, allowing retailers to easily update the available-game displays in real time, and it can drive just about any digital signage hardware on the market. Brightstar's Digital Menu Board solution can also drive a mini-display to showcase a smaller selection of lottery tickets in limited in-lane spaces.
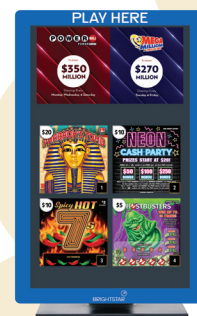
Lotteries can pursue new retailer channels to connect with potential players: Brightstar's award-winning **LotteryLink™** solution makes it easier. This small device integrates lottery sales with a retailer's existing point-of-sale (POS) system, simplifying in-lane expansion and enabling players to buy draw games and instant tickets in the same transaction with other items purchased at retail. With LotteryLink's ability to connect lottery marketing campaigns with retailers' existing loyalty programs, the deployment opportunities are vast.
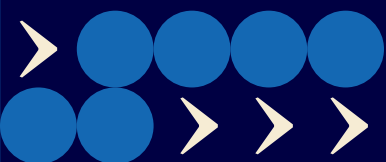
Advanced Vending for Modern Retail.

GameFlex 48 boasts the highest instant game capacity in the industry, plus ticket-by-ticket activation for enhanced security, control, and inventory tracking. We're redefining what's possible in lottery vending.

Learn how at BrightstarLottery.com/GameFlex48

BRIGHTSTAR™

BrightstarLottery.com

How do we make lottery relevant, profitable, and easier for the retailers who sell our products?

To help lotteries access more of retail's untapped potential, Brightstar has evolved its technology solutions and developed the teams and analytics tools to simplify lottery sales for retailers, help optimize retail operations, improve the experience for players in-store, and expand lottery into corporate chains and other new retail spaces. Here are just some of the solutions lotteries can access:

Brightstar's **LotteryLink™** solution (see previous pages) assures **ease of in-lane adoption for retailers**. Integrated accounting, with lottery sales included in regular POS data and reporting, **streamlines retailers' reconciliation process**. LotteryLink also supports **better inventory management** for retailers, as all activations/sales are accounted for on a ticket-by-ticket basis, making it easier for retailers to track and maintain their instant game inventory. LotteryLink contributes to **theft deterrence**, as non-activated tickets have no value, reducing the incentive and impact of theft.

41% of players and 50% of Gen Z have used self-service kiosks, showing high comfort levels with retail tech and opportunities for engagement through interactive screens, according to 2025 global research by Brightstar in partnership with Foresight Factory. Brightstar's **GameFlex Draw™** prototype, introduced to attendees at this year's NASPL and EL conferences, is built to sell all types of draw games and offer more **flexibility for retailers**: Its extremely compact design is suitable for both traditional and nontraditional retail environments, with placement options for floor, counter, and wall mount, giving lotteries the opportunity to penetrate a wider range of retail spaces with self-service offerings. Like all of Brightstar's self-service terminal options, this unique and flexible retail touchpoint **supports ease, relevance, and productivity for retailers** by enabling players to easily make their own game selections via a touchscreen, play their own numbers, scan their mobile playslips, and access a "play it again" feature to reuse the same numbers.

67% of players have used or would be interested in using retailer-specific digital wallets regularly, underlining the need for **cashless payment options** at vending machines and POS terminals, according to 2025 global research by Brightstar in partnership with Foresight Factory. Cashless transactions offer more than modern convenience for players – they **make it easier for retailers to sell lottery and avoid lost opportunities for a sale when a consumer isn't carrying cash**. Brightstar's Connected Play solution allows a consumer to pay for lottery purchases with their lottery eWallet, with the additional benefit of associating a player's unique identity with LVM transactions. Brightstar's lottery vending machines support all major card brands for payment using Swipe, Chip and Tap, and Tap payment methods can be made by card and mobile/eWallet.

Brightstar's **GameFlex 48**, the highest capacity lottery vending machine in the industry, accommodates up to four dozen instant games along with draw games, monitor games, and Fast Play games via a modern user interface and state-of-the-art ticket delivery system. Its **retailer-friendly design** makes loading tickets easier than ever for retailers and supports ticket-by-ticket activation and out-of-stock alerts to **help retailers stay on top of game replenishment**. It also supports theft deterrence, as non-activated tickets have no value.


Lotteries and their retailers have access to **two robust, interconnected teams** within Brightstar that work in coordination to support retail sales growth and make the lottery category easier for retailers:

Brightstar's Retail Innovation and Partnerships team looks inside and outside the lottery industry for innovative retail solutions and identifies technologies and solutions that can be applied to the industry, with a focus on retail and omnichannel solutions. Among its activities, the team collaborates with **national retail chains** to help them optimize lottery performance, measure and manage lottery with the same confidence as any other product they sell, **recruit new chains** to lottery sales, and explore **retailer-led innovations for applicability to lottery**. The team is equally dedicated to solutions that make lottery easier to manage, monitor, and sell for smaller, **independent stores** that cater to their lottery-playing customers.

Brightstar's North American Sales Development team provides targeted services to help lottery customers achieve their goal of increasing funding for their beneficiaries. Services include: **game and portfolio performance analysis, sales opportunity development, retail optimization, and additional retail execution services**. To support U.S. retailer growth in the lottery category and solve a major industry need, the team developed and manages the **Retail Market Insights® (RMI) tool**, a national database that provides **lottery sales staff and their retailers** with the cross-jurisdictional lottery sales data they need to inform decision making.
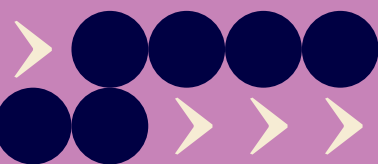
What can lotteries do today to counter increased competition from other entertainments and non-regulated operators?

Solutions from Brightstar that support lotteries' ongoing ability to thrive and contribute include games rooted in creativity and forward-thinking strategies, resulting in groundbreaking experiences to redefine player engagement.

Brightstar's **Cash Pop™** draw game is attracting new and younger adult players—with frequent players averaging roughly 10 years younger than most other traditional draw-based games. **Player enthusiasm** has fueled the game's expansion, now live in 16 U.S. jurisdictions and counting. **Flexibility** is central to Cash Pop's player appeal: players can personalize their strategy and their play experience to improve their odds and winnability. Lotteries have launched Cash Pop in **both the retail and digital channels,** and have developed a wide range of creative promotions, including highly interactive live events, to amplify awareness and showcase new ways to play.

Lotteries can access Brightstar people for industry-leading data and custom tools to help identify and unlock opportunities for growth in the **draw-game portfolio**. Brightstar looks to recommend **innovative game changes and additions** to the portfolio that will fulfill game value propositions and add multiple layers and options to the existing portfolio. The team commits to not only developing new play mechanics, but to a focus on highly profitable draw games, such as the daily Numbers and the multistate large jackpot games, which help to balance a lottery's return to state in the context of rising sales and payouts from scratch and eInstant products. Applying learnings from across the globe, Brightstar provides **tailored draw-game planning and recommendations** based on each lottery's existing portfolio and player preferences, and continuously engages players for feedback on potential revenue growth opportunities.

Brightstar strategically focuses on acquiring **licensed content** that can be translated into entertaining and compelling lottery games and turnkey marketing programs, with standout examples including iHeartRadio and Wheel of Fortune. Lotteries can leverage the associated **brand equity** to enhance their portfolio of games with content that has the **relevance and reach** to connect with players across various demographics.

Omnichannel games give players a multidimensional experience, updating lottery's relevance and boosting category growth and competitiveness. Omnichannel games also allow lotteries to **leverage brand awareness through marketing**, for example by promoting the content on a lottery's website, app, and instant tickets, to spread awareness of games that offer a new player experience. Brightstar's award-winning omnichannel game portolio features both proprietary brands,

including the unique, player-favorite draw game Cash Pop, and licensor-branded games to boost sales and player engagement through recognizability and **brand-appeal, enhanced media partnerships,** and **innovative printing techniques.**

With its ability to enhance virtually all elements of an instant ticket, Brightstar's **Infinity Instants™** technology has opened another world of opportunity: enabling **all-new play mechanics** and **customized graphics** that can be offered across multiple channels. By boosting visual impact, enabling new ways to play that are adaptable across a variety of game themes, and refreshing core categories like Crossword, lotería, seasonal families, and licensed properties, Infinity technology can help lotteries **level the playing field** with other forms of entertainment, supporting long-term growth across channels.

iLotteries can access Brightstar's diverse and engaging **eInstant** game portfolio of more than 200 eInstant games across categories—including bespoke licensed-branded options, record-breaking progressive jackpots, and Brightstar's first **AI-developed game, Viking Gold**, now in market—to stay competitive in this rapidly evolving channel.

37% of multichannel lottery players prefer promotions delivered via app notifications, supporting the importance of digital engagement through personalized communication, according to 2024 global research by Brightstar in partnership with Russell Research. Brightstar's **Player Marketing Services** team helps increase iLottery competitiveness and player engagement, in partnership with each customer, through **data-driven marketing, personalized player journeys,** and **omnichannel engagement strategies**. Brightstar's AI-powered front-end personalization features, such as real-time eInstant game recommendations, have **boosted player engagement by 24%**, as measured by the number of unique games per player. Digitalization of lottery at retail via Brightstar's **Connected Play** solution provides retail and iLottery **data for a single-player view**, enabling personalized notifications and targeted marketing communications to retail players as well.

What else can empower lotteries to reach their full potential?

Advanced Instant Ticket Services: Innovative instant-ticket printing technologies, state-of-the-art security, and all-new mechanics and game designs support lotteries' ability to adapt and grow in a competitive entertainment landscape. Brightstar has invested heavily in its Lakeland, Florida, printing facility, most recently with a brand new printing press with the largest capacity in the industry; state-of-the-art packaging automation that increases packaging capacity to match the new press; and automation supported by robotics to ensure efficiency and quality control throughout the manufacturing process. With a focus on leapfrogging the industry's status quo, the company's commitment to modernization includes the introduction of tools such as a ticket reconstruction portal, advanced proofing technologies, and enhanced data analytics to optimize workflows and improve the customer experience. These innovations are coupled with an end-to-end focus on sustainability and integrity.

Applying Research & Insights: To help customers and the industry stay ahead of the curve, and to inform and shape Brightstar's product plans, Brightstar has stayed at the fore-front in adapting its research approach to incorporate the best newly available methodologies. The company regularly shares findings to highlight ideas that are actionable for lotteries and works with customers to leverage the insights and shape stronger business plans. Over the past year, Brightstar conducted 330 studies across global markets, engaging more than 370,000 players and retailers.

A recent lottery industry study from Brightstar, **"Who Are Our Players, By Game?,"** presented at NASPL PDS, offers a comprehensive demographic and behavioral profile of lottery players across the U.S., examining detailed data on **game preferences, spending habits, broader gaming behaviors,** and **retailer choices**.

And watch for two forthcoming whitepapers based on Brightstar's recent **global study on payment modalities** for new findings that impact playership at retail, including: **cashless/contactless** payments, **mobile wallets**; **courier and delivery ecosystems**; updated paths to purchase, and more.

Unlocking New Possibilities: Brightstar has established a new, dedicated innovation team to actively build **partnerships with universities and third-party vendors**, with the objective of sourcing novel solutions, creating faster feedback loops, and unlocking new possibilities to help customers stay at the forefront. This team is exploring, for example, new delivery paradigms, the use of advanced technologies including AI, and other potential areas of innovation.

Product Feedback: Customer feedback is welcomed by Brightstar and used to **validate and improve products and solutions**. Final products such as LotteryLink™, GameFlex 48, and the Retailer Pro S2 terminal debuted in concept or prototype form at industry events and were refined based on lottery feedback. Products like these, shaped through listening and collaboration, represent Brightstar's commitment to work in partnership with customers to reimagine what's possible, incorporate the feedback into roadmaps and development plans, and deliver final products that expand the lottery category's potential.

● Listening to Customers

The latest Brightstar customer satisfaction survey, recently completed, adds to the company's understanding gained over years of customer feedback, conversations, observed trends, and research, and provides direct insights into customers' latest priorities and challenges.

As a partner that is fully committed to the lottery space and is invested for the long term, Brightstar will continue to transform lottery needs and priorities into solutions and strategies that empower customers to evolve, defining the future of lottery success together.

To learn how these solutions could be applied to your lottery, speak with your Brightstar general manager.

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