

NEWS EL PARTNERS 10 AUG 2026

Lottery 2035: Build, Borrow or Leapfrog

Every lottery wants to be ready for 2035. But there is no single roadmap for getting there.

For decades, lotteries evolved at a measured pace. Technology advanced, retail networks expanded and new games were introduced, but change was largely incremental. Today, transformation is accelerating. Digital channels are maturing, artificial intelligence is moving into practical applications, consumer expectations continue to evolve and regulatory scrutiny is intensifying. At the same time, lotteries must protect one of their greatest assets: public trust. The challenge is no longer whether to modernize, but how.

It is tempting to search for a single blueprint, yet conversations with lottery leaders suggest the opposite. No two lotteries begin from the exact same place, and no single modernization strategy will define success over the next decade.

Instead, the most successful organizations will choose the path that best reflects their market, organizational maturity and long-term ambitions.



Different Starting Points, Shared Challenges

European lotteries operate in remarkably diverse environments.

Some have invested heavily in digital platforms and omnichannel capabilities, while others continue to rely on legacy technology that has served them well for years. Regulatory frameworks, retail landscapes, consumer behaviors and competitive pressures also vary significantly.

Yet despite these differences, the questions being asked by lottery leaders around the world are strikingly similar.

- **How do we attract the next generation without alienating loyal players?**
- **How do we modernize responsibly while maintaining public confidence?**
- **How do we embrace emerging technologies without creating unnecessary operational or regulatory risk?**

And perhaps the most important question of all:

- **How do we continue delivering sustainable returns for the good causes that depend on lottery funding?**

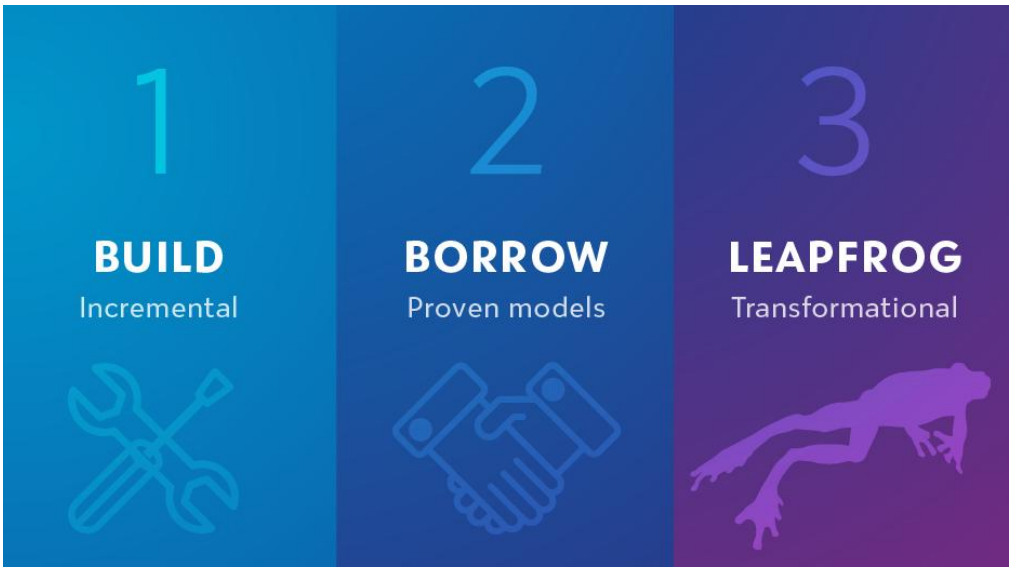
Modernization Is Now a Continuous Capability

A major systems implementation or digital launch once defined modernization. Today, that model no longer reflects reality.

Technology, player expectations and retail environments are constantly evolving, while digital experiences are influenced by innovation far beyond the lottery sector.

Modernization has therefore become less about completing a project and more about building an organization capable of adapting over time.

The lotteries best positioned for the future will not necessarily be those with the newest technology. They will be those with the flexibility to evolve confidently as conditions change.



Three Strategic Paths to the Future

Although every lottery's journey is unique, three broad approaches are emerging.

#1 Build on Strong Foundations

Many lotteries are choosing to modernize incrementally.

Rather than replacing existing operations wholesale, they are strengthening proven capabilities while introducing new technologies in carefully planned phases. Retail systems are upgraded, digital services expanded and data platforms become more connected without disrupting business continuity.

This approach balances innovation with stability. Its challenge is ensuring that steady progress keeps pace with changing consumer expectations.

#2 Borrow Proven Experience

Modernization does not always require inventing something entirely new.

Many lotteries are accelerating transformation by adopting proven technologies, learning from successful implementations and partnering with organizations that have already solved similar challenges.

This collaborative approach reduces implementation risk while allowing lotteries to benefit from global experience.

Borrowing successful ideas is not about replication. Every lottery operates within its own regulatory environment, serves its own players and reflects its own public policy objectives. Proven solutions still require thoughtful adaptation to local conditions.

#3 Leapfrog Legacy Constraints

Some lotteries have an opportunity that others do not.

Without decades of legacy infrastructure, they can adopt cloud-native platforms, mobile-first experiences, AI-enabled operations and integrated retail-digital ecosystems from the outset.

Rather than progressing through every historical stage of technology development, they can leap directly toward more modern operating models.

This approach can create significant advantages, particularly where organizational agility and regulatory support align. But technology alone is never enough. Successful transformation still depends on strong governance, operational readiness and long-term leadership.



Retail Is Not Disappearing—It Is Evolving

Few topics generate more discussion than the relationship between retail and digital.

Rather than competing channels, they are becoming complementary parts of a single player experience.

Retail remains the foundation of the lottery experience across much of the global industry. It builds accessibility, trust and community connections. Digital expands convenience, personalization and ongoing engagement.

Players do not think in channels. They expect interactions to be easy, intuitive and consistent wherever they choose to play.

That expectation is encouraging lotteries to move beyond managing separate retail and digital businesses toward creating connected player experiences supported by unified operations, shared data and consistent responsible gaming standards.

Omnichannel is no longer simply a technology objective—it is an operational strategy.

Data Is Moving into the Boardroom

Every lottery generates vast quantities of operational and player data.

The challenge is no longer collecting information. It is transforming that information into better decisions.

Forward-looking lotteries are using integrated data to improve forecasting, optimize retail operations, evaluate product performance, strengthen digital engagement and better understand player behavior across channels.

Data is becoming a strategic asset rather than simply an operational resource. Organizations that connect insights across retail, digital, product management and operations will be better positioned to respond as markets evolve.



AI Must Reinforce Public Trust

Artificial intelligence is rapidly moving from experimentation to practical application, and lotteries are no exception.

AI can improve forecasting, streamline operations, enhance analytics and strengthen responsible gaming initiatives.

Yet lotteries operate under a unique obligation. Every technological advancement must reinforce the integrity, transparency and accountability that define public confidence.

Success will not be determined by how quickly organizations deploy AI, but by how responsibly they use it to strengthen decision-making while preserving public trust. In this respect, governance may prove just as important as innovation.

The Competitive Advantage Will Be Adaptability

As lottery leaders look toward 2035, the most valuable capability may not be any single technology. It will be adaptability.

The organizations that thrive over the next decade will continuously refine their operating models, strengthen partnerships, embrace data-driven decision-making and respond to changing player expectations while never losing sight of their public mission.

Some will build. Some will borrow. Others will leapfrog.

None of these approaches is inherently superior. The most successful lotteries will choose the strategy that best fits their market, capabilities and ambitions.

What they will share is a recognition that modernization is not an endpoint. It is an ongoing commitment to strengthening resilience, enhancing player experiences and protecting the trust that has always distinguished the lottery industry.

While the road maps to 2035 may differ, the destination remains the same: stronger, more adaptable lotteries that continue delivering meaningful benefits to society for decades to come.

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