

PUBLIC

GAMING

I N T E R N A T I O N A L

World's most widely read Lottery-Racino-Gaming magazine • Video, Racino, Casino, Internet, Wireless, Online, Scratch-Off

To: Lottery, Video Gaming & Racino Executives
Interested in Growth, Expansion & Added Success

Public Gaming Research Institute Inc.'s
International

MORNING REPORT

Your weekly supplement to
Public GAMING International Magazine
April 18, 2005



INTERNATIONAL LOTTERY & GAMING EXPO & ILAC CONGRESS 2005

*Bigger and better than ever for this year and in
the world's most exciting gaming venue, Bellagio
Resort Hotel, Las Vegas, Nevada, July 11-14.*



*in Las Vegas, Nevada. The event will be the
second consecutive year in which PGRI has
combined the EXPO and ILAC conferences,
giving attendees two conferences for the price of
one.*

TWO CONFERENCES FOR THE PRICE OF ONE

*July 11-14, 2005, Public
Gaming Research
Institute will host the
International Lottery &
Gaming EXPO and
ILAC Congress 2005 at
the famed Bellagio Hotel*

3 New monitor games
to excite your players
and accelerate
your online revenues.

The advertisement features a computer monitor displaying a game interface with the Scientific Games logo. To the right, there is a small image of a yellow and green race car.

This year also marks the **20th** consecutive
**ILAC (International Latin and Caribbean
Lotteries) Congress.**

GOOD TURNOUT EXPECTED

Last year, representatives **from forty-four
lotteries** and **20 countries** congregated at
PGRI's International Lottery & Gaming EXPO
and ILAC Congress 2004, held in Miami Beach,
Florida. Early indications are that participation
will be even greater at the Bellagio in Las Vegas
this year.

EXPO/ILAC FEATURES – GOAL: STIMULATE INCREASED REVENUES

This year's *International EXPO/ILAC
Conference* will feature technological
advancements, innovations in games, as well as
best management practices, advertising successes
and successful marketing strategies *for increasing
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The program will feature presentations and panel
discussions with special emphasis on broad
participation. Some of the latest examples of
successful *TV advertising will also be featured.*

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*A highlight of EXPO/ILAC will be the VIP
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LIFETIME ACHIEVEMENT AWARD

Public Gaming Research Institute is pleased to
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1973. The company has gone on to become the

world's leading supplier of instant ticket products and services as well as being a leader in all other lottery products. Presentation of his award will be on the afternoon of July 11 at the International EXPO/ILAC conference.

This is PGRI's second Lifetime Achievement Award for 2005 reflecting PGRI's new policy of having one such award at each of its two annual conferences. ***For additional information*** on EXPO/ILAC program participation, sponsorships and exhibit opportunities, contact: Raquel Orbezo at raquelpgr2@aol.com, tel. 425-765-4119 or Susan Jason at susanjason@aol.com, Tel. 425-985-3159.



COMPANY ANNOUNCEMENTS

JCM RECEIVES MULTIPLE TRIBAL GAMING LICENSES IN ARIZONA. JCM American has entered all corners of the Grand Canyon State. The currency-handling company was granted a temporary gaming license by the State last year, and now JCM has been granted several Tribal gaming licenses, allowing the company to immediately conduct business directly with the Tribes. JCM has been licensed by the Gila River Indian Community, which owns and operates Gila River Vee Quiva, Wild Horse Pass and Gila River Lone Butte; the Salt River Pima-Maricopa Indian Community, which owns and operates Casino Arizona at Indian Bend and Casino Arizona at McKillips; and by the Yavapai-Apache Tribe, which owns and operates the Cliff Castle Casino.

MACEDONIA SELECTS INTRALOT. (AP) Greek lottery systems developer and operator INTRALOT has signed a six-year contract to organize, operate and manage fixed-odds betting games in Macedonia. INTRALOT will select events for betting, set odds, monitor transactions on a real-time basis and manage risk. Under the contract, signed with the National Lottery Organization of Macedonia, Intralot will be paid a percentage of sales. The company didn't specify the percentage. Intralot already provides Macedonia with an integrated online system for lottery and instant ticket games. The company also expects to assist in expanding the Macedonian



Lottery Organization's sales network, which currently has 220 points of sale.

OR TO REORDER CLICK&PLAY SLINGO®. OGT announced that the Oregon State Lottery will reorder Click&Play (Cyber) Slingo after a quick sell-out of their initial launch on January 19, 2005. The six week sell-out is credited to the interactive computer game play and the brand's popularity, placing Click&Play Slingo as the highest performing \$2 game (excluding Crossword) in the past 12 months, and boasting sales which have outperformed the #2 selling game by 65%!



JCM RECEIVES FULL GAMING RELATED SUPPLIER LICENSE IN MI. JCM American has received a full gaming-related supplier license from the Michigan Gaming Control Board.

In addition, JCM's parent company, Japan Cash Machine Co., Ltd., and Johto Investment and Development, Inc., were found suitable as entity qualifiers, and the entire board of directors for JCM American and Japan Cash Machine were found suitable as individual qualifiers. JCM has been operating legally as a manufacturer and distributor in Michigan for years, and recent state regulatory changes required JCM to obtain a full gaming-related supplier license.

STAR WARS TICKETS FROM OGT. Oberthur Gaming has been chosen to bring the biggest film series of all time to the lottery industry! Under the terms of the agreement, lotteries around the world will be able to feature instant and electronic lottery games with *Star Wars* characters and famous movie shots, including the soon to be released final movie in the *Star Wars* saga, Episode III *Revenge of the Sith*! With the impending U.S. film release of *Revenge of the Sith* on May 19, 2005, multiple Lotteries have already committed to launching their own *Star Wars* instant ticket and/or Cyber Games™ with OGT. The following Lotteries will launch throughout April and May: Golden Casket Lottery Corporation and South Australia Lotteries (Australia), Loterie Nationale (Belgium), Atlantic Lottery Corporation and British Columbia Lottery Corporation (Canada), Provoloto (Mexico), California Lottery and Colorado Lottery (USA).



WIN WIN TO PURCHASE PIXIEM. Win Win Gaming, Inc., a Las Vegas-based operator of international lottery games and related gaming ventures has agreed in principle to acquire Pixiem, Inc., a global developer and publisher of wireless entertainment games. Pixiem develops and publishes mobile applications for the wireless entertainment market in North and South America, Europe, and Asia, and has created top-notch branded mobile games with high-quality content partners that include IMG/TWi and Wimbledon. The agreement in principle is reflected in a

non-binding letter of intent. The acquisition is subject to several conditions.



VIDEO GAMING/RACINOS

LONGER SLOT HOURS IN NM. New Mexico Gov. Bill Richardson signed a bill into law approving longer hours for slots at tracks. As of July 1, slots at tracks will be able to operate 18 hours a day, up from 12. The hours would be capped at 112 a week. The law also raises the state's cut of machine profits, from 25% up to 26%. The combined changes are projected to net the state an additional \$7 million to \$10 million annually.



OR PANEL OKs VIDEO RETAILER CUTS. (AP) Bars, taverns and other establishments

with video gambling machines will receive a smaller cut of profits under a plan unanimously approved Thursday by the Oregon Lottery Commission. Retailers with video poker machines currently receive an average 28.8 percent of the revenues. That will be reduced to 24.8 percent under the new five-year contract. The 24.8 percent rate will also apply to the new slot machine-type games that are being added this summer to the video poker machines in retail outlets that choose to offer them. Lottery Director Dale Penn called the new payouts a compromise that will yield an additional \$124 million for the state while still providing a reasonable profit for the lottery's retailers. The Commission also endorsed a provision saying that if video sales increase by 15 percent more than the lottery's projections in the first two years, the average rate will drop from 24.8 percent to 22.8 percent.

PA SLOT REGULATIONS PROPOSED. (AP) Slot-machine manufacturers and distributors would have to pay up to \$50,000 for each license, and document the identities of their financial backers and creditors under regulations proposed last week by the state Gaming Control Board. The board will now take public comments on the 98-page draft regulations for 30 days before taking final action. The board must issue licenses for manufacturers and distributors at least three months before it can license racetracks to operate the first slots parlors - a step not expected before December.

MD SLOT BILL DEAD. Maryland's slot bill has once again died after legislators were unable to find common ground. This is the third attempt at Maryland slots to fail in three years.

WV TABLE BILL DIES. Senate Bill 442 was recently pulled from the West Virginia House Judiciary Committee's

agenda. The bill, which would have allowed table games at West Virginia racinos, is dead for now.

ILITCH PURCHASE OF MOTORCITY CASINO APPROVED IN MI. The Michigan Gaming Control Board approved the transfer of ownership of MotorCity Casino to Detroit businesswoman Marian Ilitch. The transfer to Ilitch is subject to the conclusion of the buyout of Mandalay Resort Group Inc. by MGM MIRAGE, Inc. MotorCity Casino opened in 1998 and has led the Detroit market in revenue for the past two years. Ilitch, who owned a 25 percent interest in MotorCity Casino, is one of the leading entrepreneurs in the food and entertainment industry and with her husband Mike, jointly owns Little Caesars Enterprises, the Detroit Red Wings NHL hockey team, and Olympia Entertainment. MotorCity Casino has 2,800 employees and 53 percent were Detroit residents at the time of hiring. The casino paid \$55 million in taxes to the city of Detroit last year and \$40.9 million in wagering taxes to the state of Michigan. For March of 2005, MotorCity's revenue was \$40.3 million, which is 9.9 percent higher than the 2004 figure over the same period.



LOTTERY NEWS

INTERIM DIRECTOR NAMED IN VIRGINIA

Donna Van Cleave, former director of finance for the Virginia Lottery, will be the new interim executive director of the Lottery effective June 1. She replaces Penelope Kyle, who is succeeding Dr. Douglas Covington as president of Radford University.

CA UNANIMOUSLY APPROVES MEGA MILLIONS RULES AND REGULATIONS. The California Lottery Commission moved the Lottery one step closer to launching the multi-state Mega Millions lotto game in California by unanimously approving the game's rules and regulations. The Commission approval opened the door for a Lottery task force to receive the Mega Millions lotto game software in mid-May. Once received, the task force will put the software through a series of rigorous tests to ensure that it meets the highest level of security and reliability. Lottery officials estimate that the Mega Millions game testing could take a minimum of 4 weeks. If all goes smoothly, and the game software meets California's standards, the Lottery will then announce the official Mega Millions launch date.



VIRGINIA LOTTERY SALES CONTINUE TO

BREAK RECORDS: After two record-breaking sales quarters in FY05, third-quarter results continue the record-setting trend. Executive Director Penelope W. Kyle announced that total third-quarter sales were a record high:

nearly \$343.5 million, up 2% from the previous year. This comes after a record first half, in which sales were up 7% from the previous year. Sales of Scratchers, Pick 3 and Pick 4 also set individual records during January – March. Strong Pick 3 sales were supported by lucky players who won over \$41.8 million during the quarter, resulting in a payout rate of 62.2%. Heading into the fourth quarter, FY05 looks to set yet more sales and profit records. That's all great news for Virginia's K-12 public schools, the sole beneficiary of Virginia Lottery profits.



IL VETERAN'S GAME PASSES HOUSE. The Illinois House voted to create a new scratch-off lottery game and give the profit to veterans' programs. The idea passed 63 to 53. It now goes to the state Senate.



FRANCE LAUNCHES SAGA STAR WARS. On April 14, La Française des Jeux launched Saga Star Wars™. After Saga Star Wars™ (1999), Saga Indiana Jones™ (2000), Saga James Bond 007™ (2002) and Saga Lord of the Rings – The Return of the King™ (2003), Saga is back for the release of Star Wars™ Episode III, *Revenge of the Sith* which the film is planned for release on May 18, 2005. Saga is the generic brand of the instant games themed on the movies. The tickets feature 12 different collectable visuals that recall the main characters of the Star Wars™ trilogy. The tickets are sold separately and cost 2 euros each. Overall odds of winnings a prize are 1 in 4.2. Prize payout returned to players is 58%. Saga Star Wars™ is also available on La Française des Jeux's Internet site <http://www.fdjeux.com>.



PCSO EXPECTS GROWTH. The Philippine Charity Sweepstakes Office expects sales to grow by at least 20% this year in Visayas and Mindanao, reaching P3.2 billion. A data center and terminal upgrade from is expected to give PCSO the necessary boost to achieve the growth.

TELC LAUNCHES CASH 4. (AP) The Tennessee Lottery announced a new online game called CASH 4 that has its first draw today (Monday, April 18). Tickets for CASH 4 range between 50 cents and \$1, while prizes range from \$100 to \$5,000 each day. The nightly drawings will be televised at 6:28

p.m. CT. Players select a four-digit number and one of 13 ways to play the game. Winning numbers will be announced as balls are drawn from four separate machines. Each machine contains 10 balls numbered zero through nine. CASH 4 is the lottery's fourth computerized game -- along with CASH 3, Powerball and Lotto 5. The Tennessee Lottery also offers more than 35 instant ticket games.

HELP WANTED

SOUTH CAROLINA EDUCATION LOTTERY VACANCY ANNOUNCEMENT: PRODUCT DEVELOPMENT

MANAGER. The purpose of this position is to create and oversee the development and production of instant lottery tickets for the SCEL. Coordinates the daily operations and future planning of instant tickets. The position, under the direct supervision of the Deputy Director of Marketing, is not covered by the South Carolina Employee Grievance Procedure Act. **Job Functions and Responsibilities:** Oversees the introduction of new and/or additional products offered to the public; Develops business plan to meet sales and revenue goals; Monitors deadlines of products slated for introduction to meet deliverables for retail sales; Conducts search for new and possible instant products to be added to the sales mix; Reviews sales and product data to determine the success of the products; Provides analysis that can measure performance; Assists other work units within the Sales & Marketing Department regarding their function to the instant products offered; Reviews and suggests ways to best utilize and control product inventory; Serves as point of contact for instant products with vendor; Serves as liaison for established relationship with vendors and the lottery; Responds to routine product information requests from customers; and Reviews, evaluates and reports on assigned product development areas. **Knowledge Skills and Abilities:** Must have the ability to deal courteously and effectively with staff and the public; the ability to understand and comprehend SCEL policies, rules, regulations and procedures for conducting SCEL business; the ability to exercise judgment and discretion; the ability to establish and maintain effective working relationships; and the ability to communicate effectively. **Necessary Special Requirement:** The ability to effectively self-start and oversee the management of lottery products as they pertain to current and future trends in the industry. Knowledge of current and future instant games offered by other state and provincial lotteries. **Minimum Requirements:** A bachelor's degree, preferably in Business Administration or related field and 5 – 8 years of related experience in the lottery industry. **Responses** can be sent via e-mail, fax or mail. **E-Mail:** Jobs@scslot.com; **Fax:** 803-737-2893; **Mail:** SC Education Lottery; Attn: Recruiting; Post Office Box 11949; Columbia, SC 29211. Additional questions call: 803-737-2002, ask for recruiting.

Please submit material for next week's Morning Report by Wednesday of this week to Toddpgr2@aol.com

Public Gaming Research Institute's

EXPO-ILAC 2005

Bellagio Las Vegas

July 11 – 14, 2005

EXPO-ILAC 2005 is the conference for government, private operators on behalf of government and suppliers charged with maximizing revenues for lotteries, racinos and other gaming enterprises. The focus will be on the latest and smartest technologies and innovations for dramatically increasing sales and profits.

PROGRAM

JULY 10 - Sunday

8am-Midnight – Exhibit Set-up

JULY 11 –MONDAY

8am – 2pm – Exhibit Set up

12 NOON – 7pm Registration Open/

2pm – 3pm

ORIENTATION FOR THOSE NEW TO THE GAMING & LOTTERY INDUSTRY

3pm – 5:30pm – General Session I

WELCOME TO EXPO-ILAC 2005

DUANE BURKE

**CEO, Public Gaming Research Institute, Inc.; Publisher, Public Gaming International Magazine;
& CEO, Video Lottery Salons of Guatemala (ILAC de Guatemala, S.A.)**

5:30pm – 7:30pm

Reception in Exhibit Area

JULY 12 – TUESDAY

8am – 9am – Coffee & Danish in Exhibit Area

8am – 5:30pm – Registration Open

9am – 1pm – General Session II

1 – 3pm

Luncheon & Networking Break - Exhibit Area

3pm – 5pm – General Session III

5pm - On

Evening Open

JULY 13 – WEDNESDAY

8am – 9am – Coffee & Danish

8am – 2:30pm – Registration Open

9am – 1pm – General Session IV

1– 2pm

Luncheon & Networking Break in Exhibit Area

2:30pm – 6:00pm

VIP TOUR OF GAMING TECHNOLOGY

– Limited to government representatives only – ID required –

Transportation will depart from the front entrance of Bellagio at 2:30pm

And will return by 6:00pm

The most advanced and proprietary technologies of these companies will be presented.

Refreshments, paid for by conference Host Public Gaming Research Institute, will be served.

5:30pm – Evening Open

JULY 14 - THURSDAY

8am – 9am – Coffee & Danish

9am – 11am

EXPO-ILAC AWARDS

CLOSING DISCUSSIONS

11am

Conference Adjourned



EXPO-ILAC 2005 – Bellagio Hotel
JULY 11-14, 2005
CONFERENCE REGISTRATION FORM

Please fill out this form and fax back to 206-232-2564. Please mail original and payment to:
 Public Gaming Research Institute, 218 Main Street, #203, Kirkland, WA 98033, or charge to American Express, MasterCard, or Visa (see below).
 Each Registration is \$895.00

Conference registration includes all events, cocktail parties, continental breakfasts, luncheons, exhibit hall, all conference seminars, off-site events.

Contact/Title: _____
 Company: _____
 Address: _____
 City: _____
 State/Prov./ _____ Zip/Postal Code: _____
 Tel.: _____ Fax: _____
 Signature: _____

Number of Registrations _____ Total \$ _____

Payment Terms and Options:

Please charge to my credit card _____ Please invoice me _____
 Payment is accepted by American Express, MasterCard or Visa credit cards.
 Fill-in below for charges.

Amount: _____
 Card Number: _____ Exp. date: _____
 Signature: _____ Date: _____
 Name on Card: _____

HOTEL RESERVATIONS: CONFERENCE ROOM RATE \$159/ ROOM
Bellagio Hotel, 3600 S. Las Vegas Blvd., Las Vegas, NV 89109
Contact Room Reservations Department at (888) 987-6667, (702) 693-7444
or on the website at www.bellagio.com under the PUBLIC GAMING /
EXPO-ILAC 2005 to get special room rate.



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EXPO/ILAC 2004 Lottery Attendees

Aruba Lottery
Bahamas Gaming Board
Barbados Lottery
Beneficencia del Callao (Peru)
Connecticut Lottery Corp
DC Lottery & Charitable Games Control Board
Entretencimientos y Juegos de Azar (Argentina)
Florida Lottery
Instant Scratch Off Lottery of Mexico
Iowa Lottery
Kentucky Lottery Corp.
Loteria de Bogota
Loteria de Boyaca (Colombia)
Loteria de Falcon (Venezuela)
Loteria de la Beneficencia del Cusco (Peru)
Loteria de Oriente (Venezuela)
Loteria de Tolima (Colombia)
Loteria del Nino ILAC (Guatemala)
Loteria del Quindio (Colombia)
Loteria del Zulia (Venezuela)
Loteria do Estado da Paraiba (Brazil)
Loteria do Estado Sao Paulo (Brazil)
Loteria Electronica (Dominican Republic)
Loteria Nacional de Bolivia
Loteria Nacional de Ecuador
Loteria Nacional de El Salvador
Loteria Nacional de Nicaragua
Loteria Nacional del Ecuador
Loteria Santa Lucia (Guatemala)
Martin Lottery Agencies (India)
Mifal Hapais Israel National Lottery
Missouri Lottery
MUSL
National Lotteries Control Board (Trinidad)
New York Lottery
ONCE (Spain)
Ontario Lottery Corp
Pennsylvania Lottery
Rhode Island Lottery
Sorteo Extraordinario de Colombia (Colombia)
South Carolina Education Lottery
St. Lucia National Lotteries Authority
Tennessee Lottery
Virginia Lottery

**FORMULARIO DE INSCRIPCION PARA LA
CONFERENCIA
DE LOTERIA INTERNACIONAL EXPO Y EL CONGRESO ILAC
del 11 al 14 de Julio, 2005**

Bellagio Resort Hotel • Las Vegas, Nevada USA
Auspiciada por Public Gaming Research Institute

Nombre y
Cargo: _____

Nombre para su distintivo: _____

Nombre de esposa (o) si asiste: _____

Compañía: _____

Dirección: _____

Ciudad: _____ Estado: _____ CódigoPostal: _____ País _____

Teléfono: _____ Fax: _____

E-mail: _____ PáginaWeb: _____

DERECHOS DE INSCRIPCIÓN POR PERSONA (marque uno):

Compañías o Loterías particulares: Pagan US\$895 _____

Loterías públicas nacionales: No pagan _____

METODO DE PAGO: Todos los pagos se realizarán por adelantado. El espacio se confirma al recibir el pago. No se efectuarán reembolsos después del 30 de junio, 2005.

Autorización de la tarjeta de crédito para \$US _____ Fecha de la transacción _____ American Express _____ Visa _____ Mastercard _____

Número de la tarjeta _____ Fecha de expiración _____

Nombre del titular de la tarjeta de crédito _____

Firma: _____

Existen otras formas de pago disponibles bajo pedido

Para mayor información llame a Raquel al PGRI: 425-765-4119

ENVIE POR FAX SU FICHA DE INSCRIPCION AL CONGRESO:

Fax 206-232-2564

RESERVACION DE HOTEL

Llame directamente al hotel Bellagio Resort Hotel para reservar su habitación.

Habitaciones con descuento para los asistentes a EXPO/ILAC: US\$159 simple o doble

Bellagio Hotel, 3600 S. Las Vegas Blvd., Las Vegas, NV 89109

Contact Room Reservations Department at (888) 987-6667, (702) 693-7444

or on the website at www.bellagio.com under the PUBLIC GAMING /

EXPO-ILAC 2005 to get special room rate.