



GAMING COMPLIANCE

Gaming Update

July 30, 2025

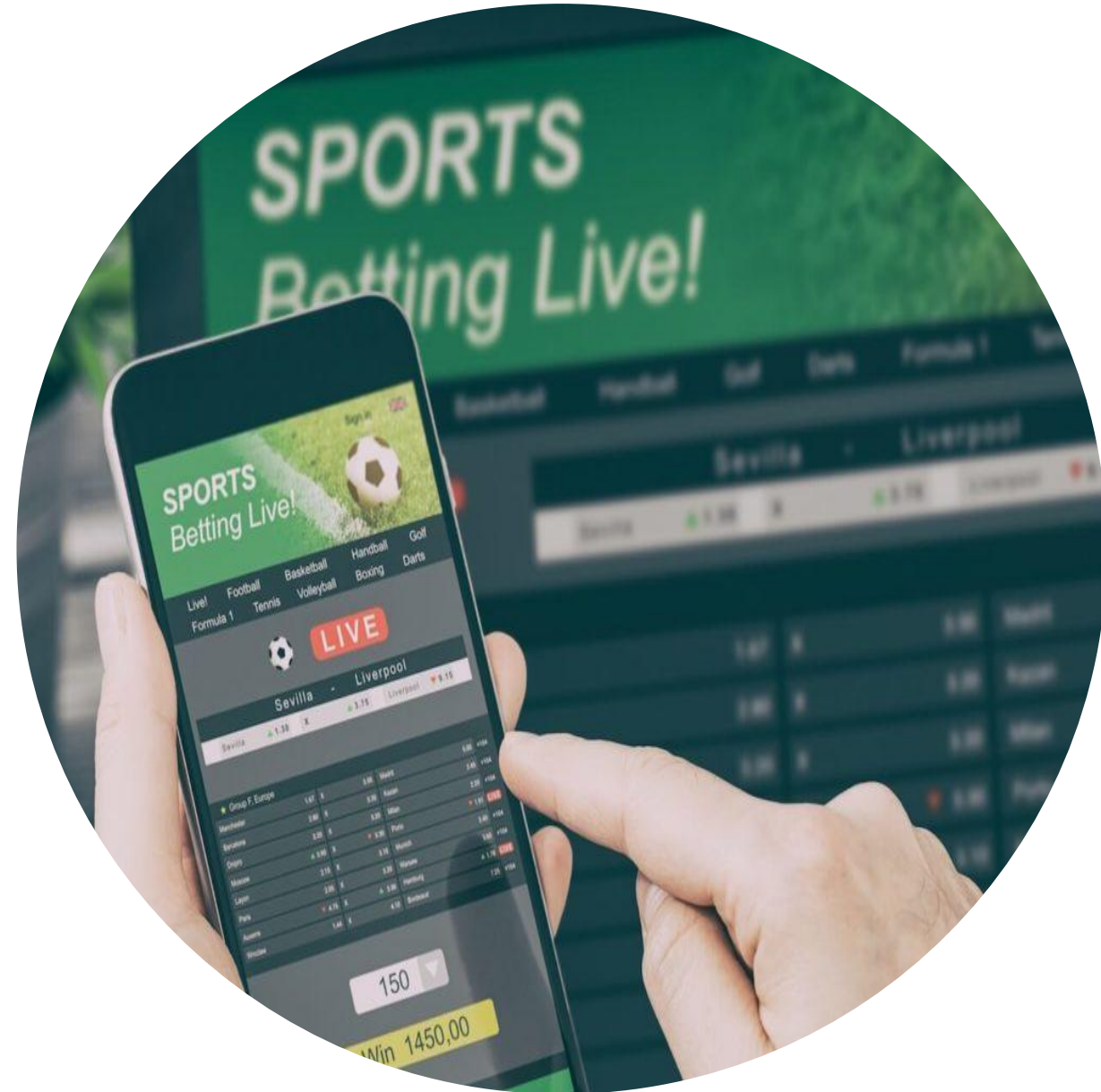


Sports Betting
Casinos
Voluntary Exclusion Program



GAMING COMPLIANCE

Sports Betting Update



Approved Sports Wagering Permit Holders

Jan 2021	Jan 2021	Jan 2021	Jan 2021	Feb 2021	Aug 2021	Nov 2021	Dec 2021	Mar 2022	Dec 2022	Jan 2023	Sep 2023	Oct 2023	Oct 2024
FanDuel	DraftKings	BetMGM	BetRivers	Caesars	ESPN	Bally's	Fanatics	Hard Rock	Betfred	bet365	betr	SuperBook	Sporttrade
Betfair Interactive US, LLC in conjunction with Washington Commanders (d/b/a FanDuel)	Crown Virginia Gaming, LLC (d/b/a DraftKings)	BetMGM, LLC	Rivers Portsmouth Gaming, LLC (d/b/a BetRivers)	Caesars Virginia, LLC	Penn Sports Interactive, LLC (d/b/a ESPN Bet)	Bally's Interactive, LLC (d/b/a/ Bally Bet)	Colonial Downs Group, LLC (d/b/a Fanatics)	HR Bristol, LLC (d/b/a Hard Rock Bet)	*DC Sports Facilities Entertainment, LLC (Nonoperational, former d/b/a Betfred)	Hillside (Virginia), LLC (d/b/a Bet365)	Betr VA, LLC	*PlayLive Virginia LLC (Nonoperational, former d/b/a Superbook)	Sporttrade Virginia, LLC

- The Annual Permit Application period for available permits was May 15th through May 31st. - **No new applicants.**
- DC Sports Facilities Entertainment, LLC (d/b/a Betfred) – Permit expires December 14, 2025. **Currently not operational, but it is exploring engaging a new platform provider.**
- PlayLive Virginia LLC (d/b/a Superbook) —The Permit expires September 28, 2026. **Currently not operational, agreement in place between Superbook & Cordish Gaming, no timeline has been provided.**
- Betr VA, LLC —The Permit expires September 28, 2026. **Stopped accepting wagers on July 1, 2025.**



VIRGINIA LOTTERY

Sports Wagering Permit Renewals Due CY25

Hard Rock Bet

bet365

BetFRED
Sports

Permit Holder	Initial Expiration Date	Renewal Status
HR Bristol LLC (d/b/a Hard Rock Bet)	March 31, 2025	Renewed
Hillside Virginia LLC (d/b/a Bet365)	August 15, 2025	Investigation In Progress
DC Sports Facilities Entertainment LLC (Nonoperational, formerly d/b/a Betfred)	December 14, 2025	Renewal Notification Provided

Sports Betting Suppliers & Vendors - CY25

Suppliers:

- (2) Renewals
- (1) Supplier has not renewed and surrender their license.
 - No longer permitted to provide their platform in the Commonwealth

Vendors:

- (17) Renewals
- (19) Expired or Not renewing
 - No longer permitted to provide services in the Commonwealth

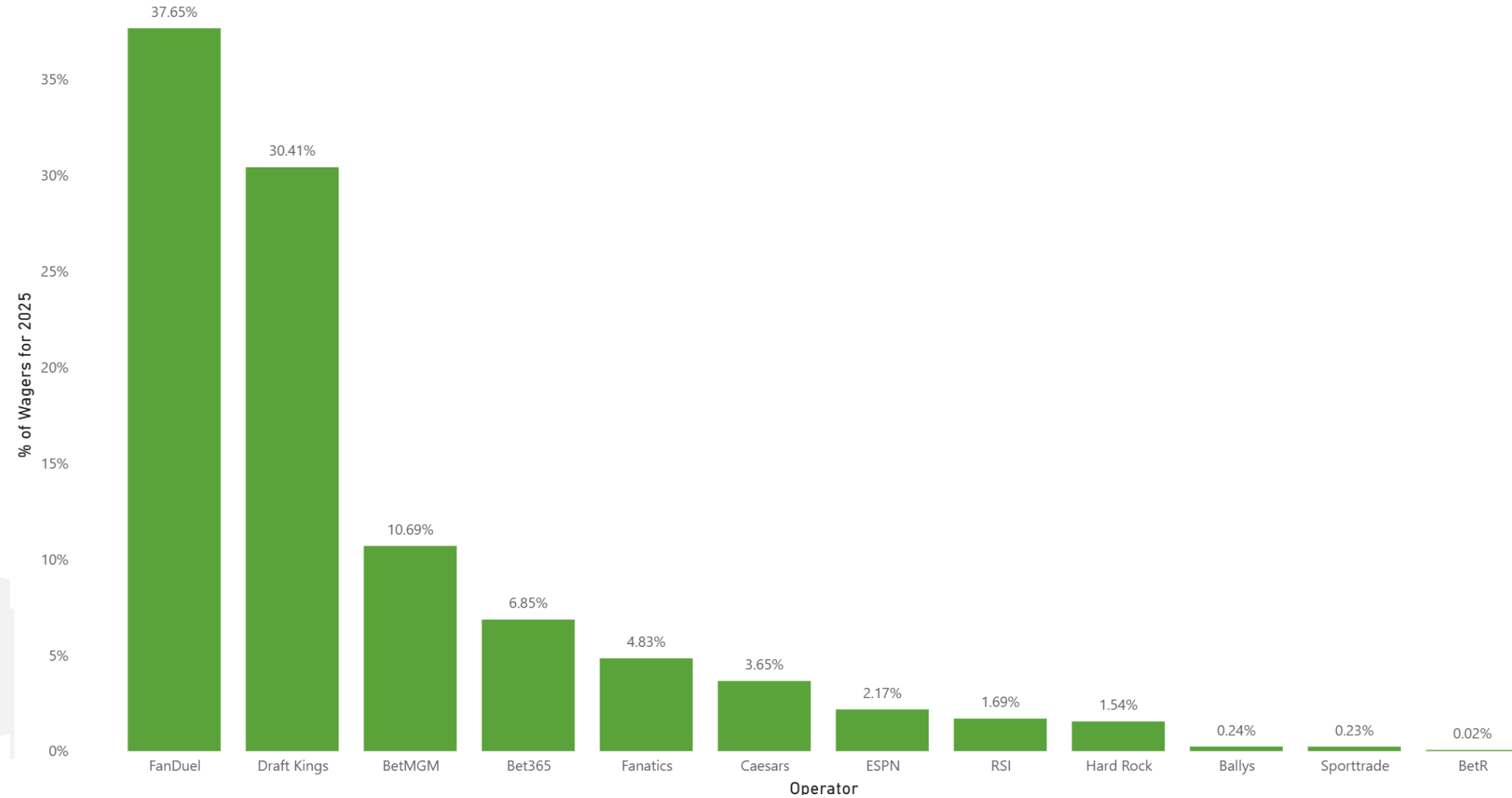


VIRGINIA LOTTERY

Market Share by Operator

% of Wagers for 2025 by Operator and Quarter

Quarter ● Qtr 2

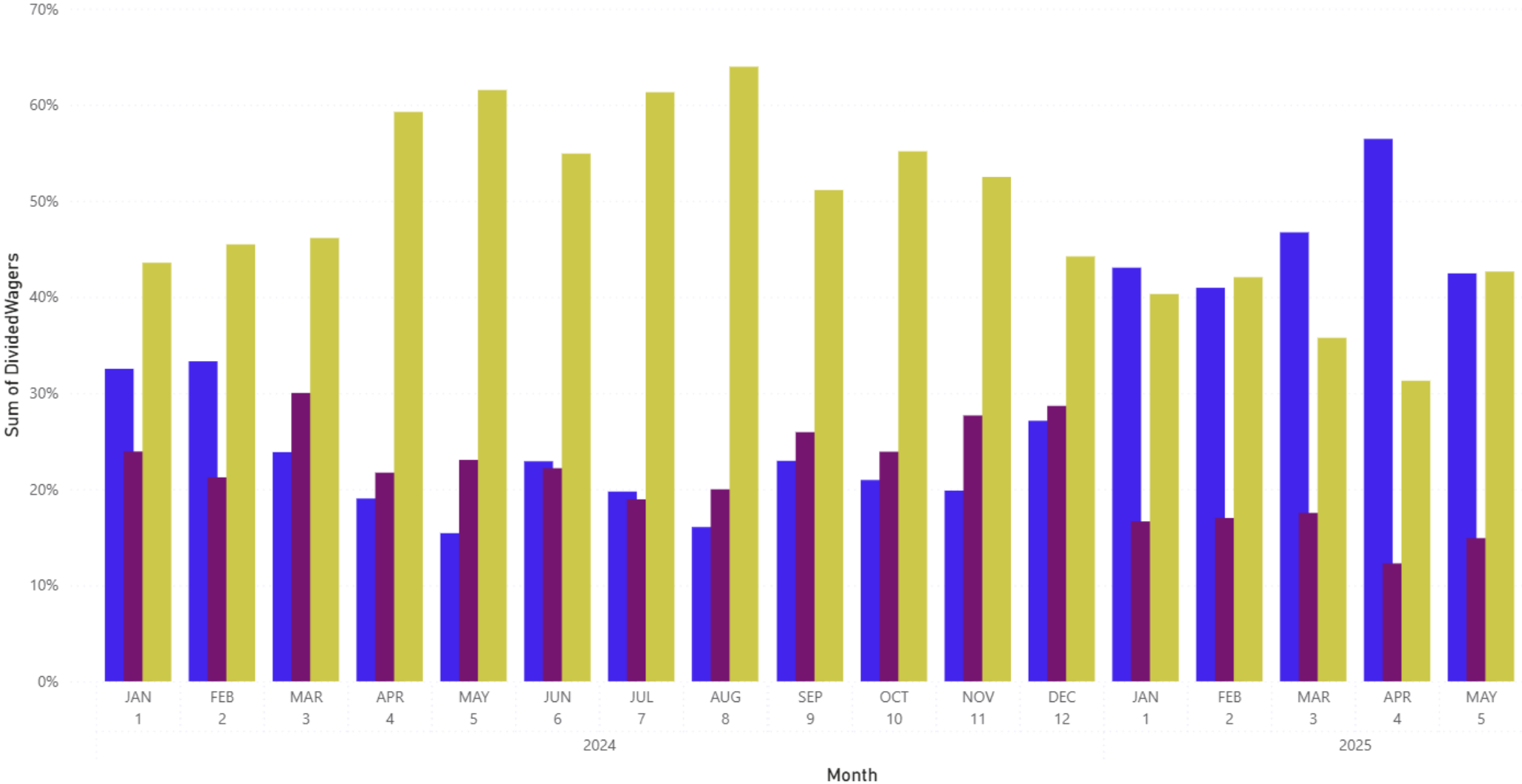


VIRGINIA LOTTERY

Timeline of Retail Sportsbook Handle

% of Retail Sportsbooks Handles

Retailers Caesars Hard Rock RSI



VIRGINIA LOTTERY



GAMING COMPLIANCE

Sportsbetting - Questions





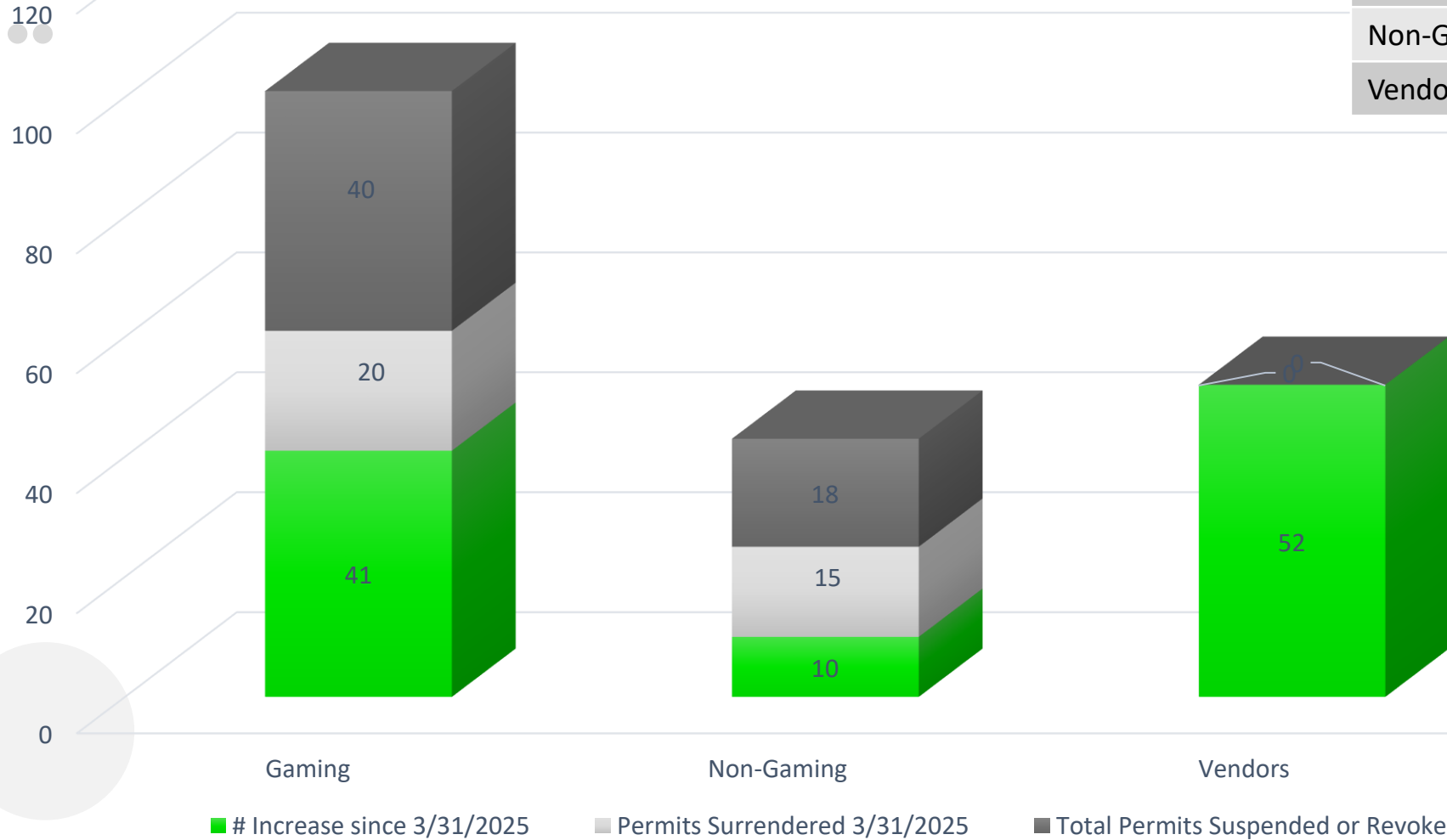
GAMING COMPLIANCE

Casino Update



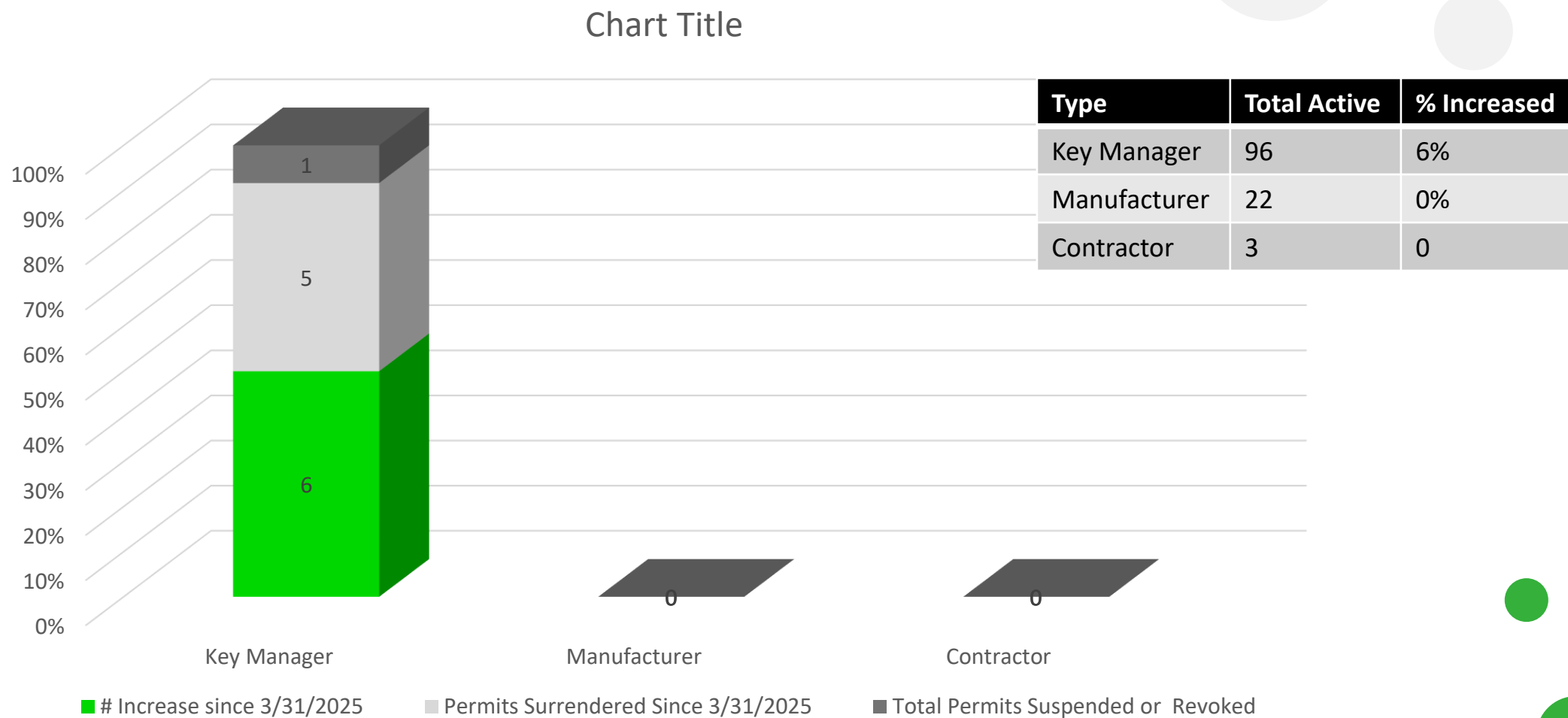
Service Permits Status as of June 30, 2025

Type	Total Active	% Increased
Gaming	4069	1.01%
Non-Gaming	964	1.04%
Vendors	879	5.92%



The previous "Total Approved" category was updated to "Total Active"

Supplier Permit Status as of June 30, 2025



**** Slot Machine Management is a 4th type of Permit. Currently, all potential qualifiers are licensed as Manufacturers.***

****The previous "Total Approved" category has been updated to "Total Active."***

Hard Rock Casino Bristol

In the Last Quarter

- The Lottery approved:
 - Thirteen (13) scheduled projects involving
 - Two Hundred and Seventy-Seven (277) slot machines, and
 - Two (2) table projects involving eight (8) tables

Continuing to work with Hard Rock on day-to-day activities.



Rivers Casino Portsmouth

In the Last Quarter

- The Lottery approved
 - Eleven (11) scheduled projects involving
 - One Hundred and Eighty-Six (186) slot machines
 - Two (2) table projects involving eleven (11) tables

Continuing to work with Rivers on day-to-day operations.



Caesars Danville



In the Last Quarter

- The Lottery approved:
 - Sixteen (16) scheduled projects involving
 - Five Hundred and Two (502) slot machines and
 - One (1) table project consisting of three (3) tables.

Working with the Caesars team on day-to-day operations.

Norfolk Casino

- Working on the Investigative and Executive Licensing Reports for our licensing recommendation and presentation to the board.
- Construction activities on the temporary casino are progressing well.
- Construction on the permanent casino underway.
- Conducting weekly meetings with the Norfolk team to complete necessary reviews and approvals.



Petersburg Casino



- Casino Operator application has been submitted, reviewed and deemed complete.
 - Licensing & Investigative teams actively working on all parts of the application.
- Conducting bi-weekly meetings with the Petersburg team.
- Gaming Compliance toured the project site on July 15th.



GAMING COMPLIANCE

Casino - Questions





VIRGINIA LOTTERY

Responsible Gaming Update

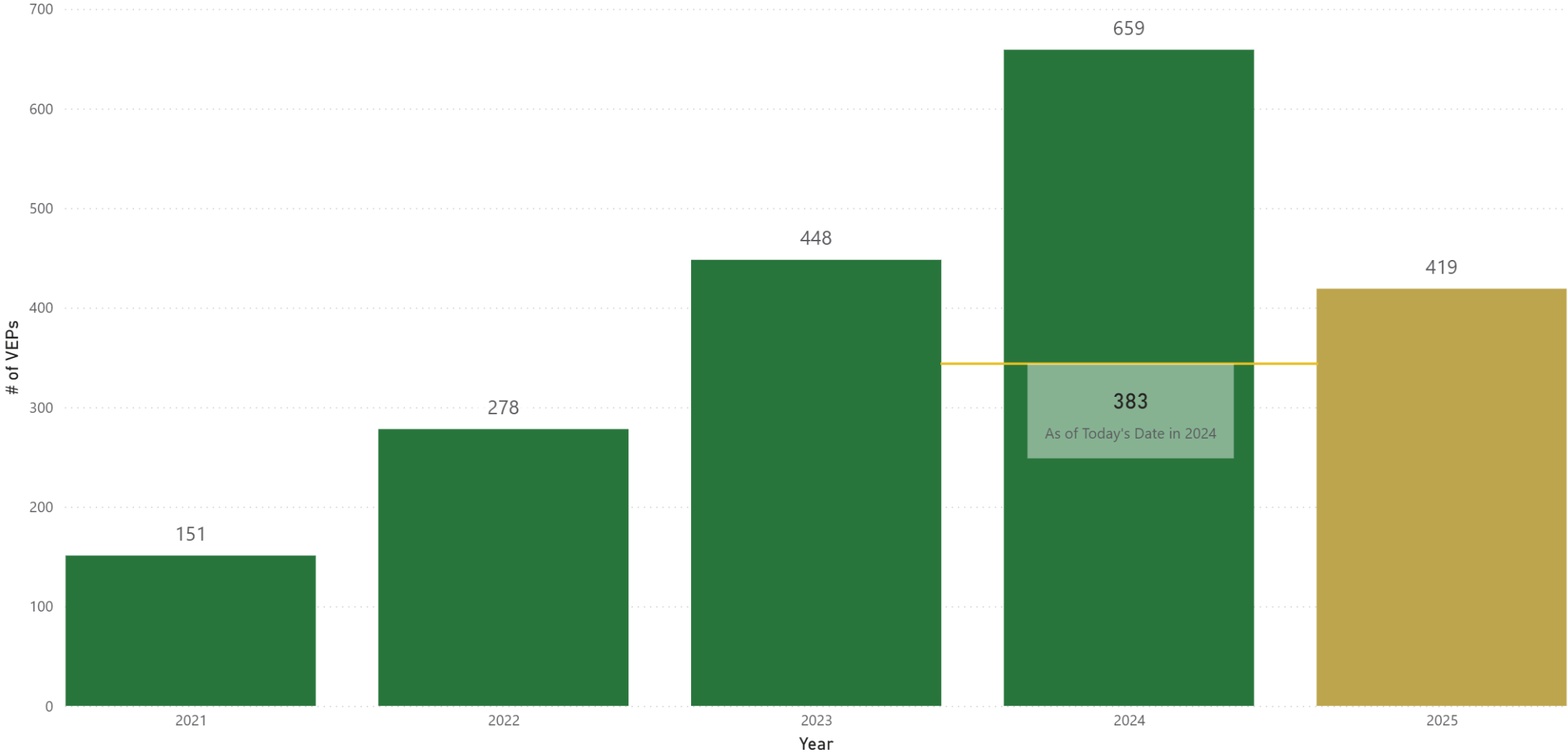
Board Presentation

July 30, 2025



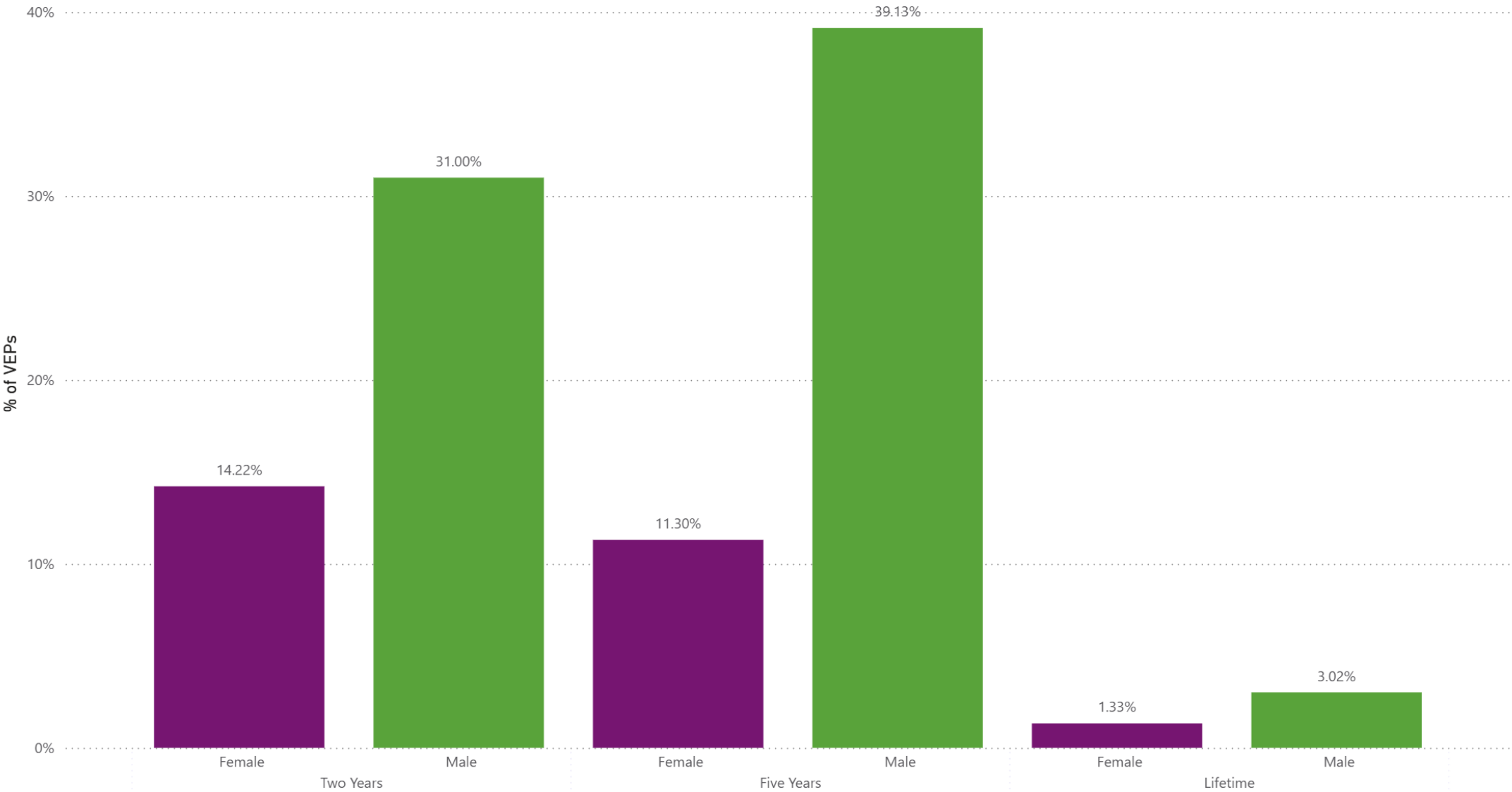
VEP Program Timeline

of VEPs by Year

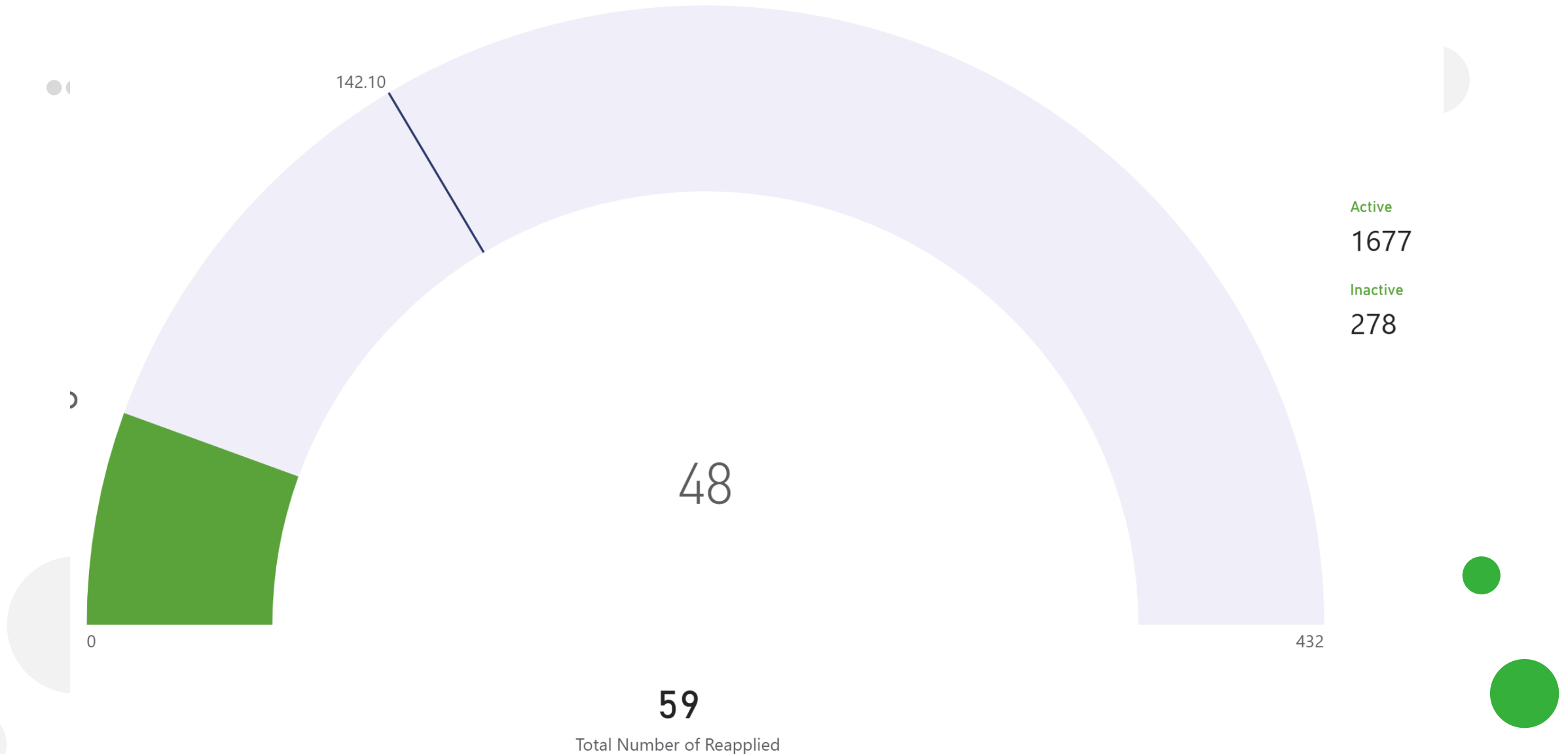


VEPs by Gender

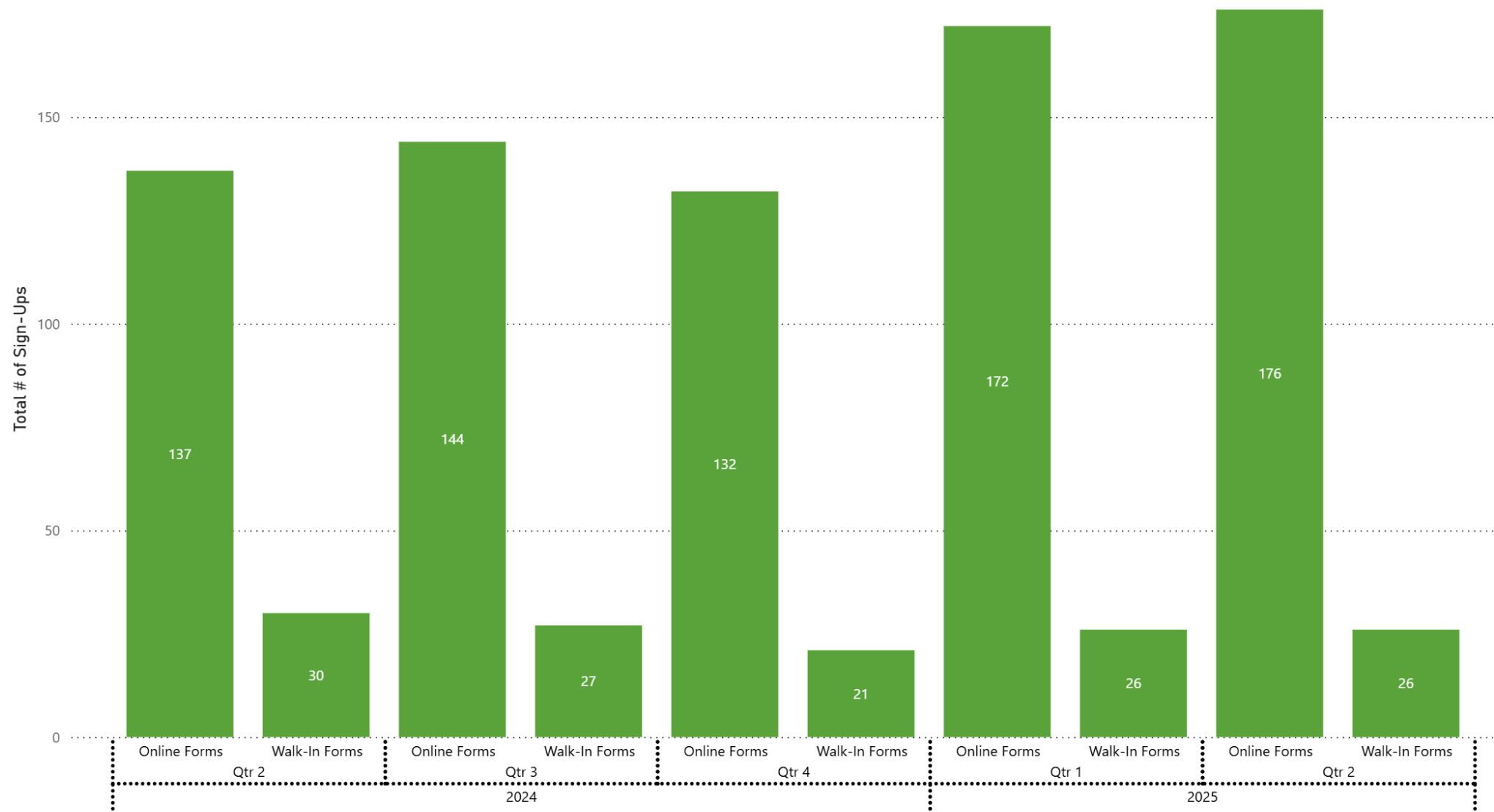
% of VEPs by Count.Exclusion_Period and Count.Gender

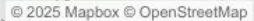


Median number of days for patrons to reapply



VEP Form Registration – Online vs. Walk-In







VIRGINIA LOTTERY

Voluntary Exclusion Program - Questions

