

Data in Motion

Marketing & Insights



February 14, 2024

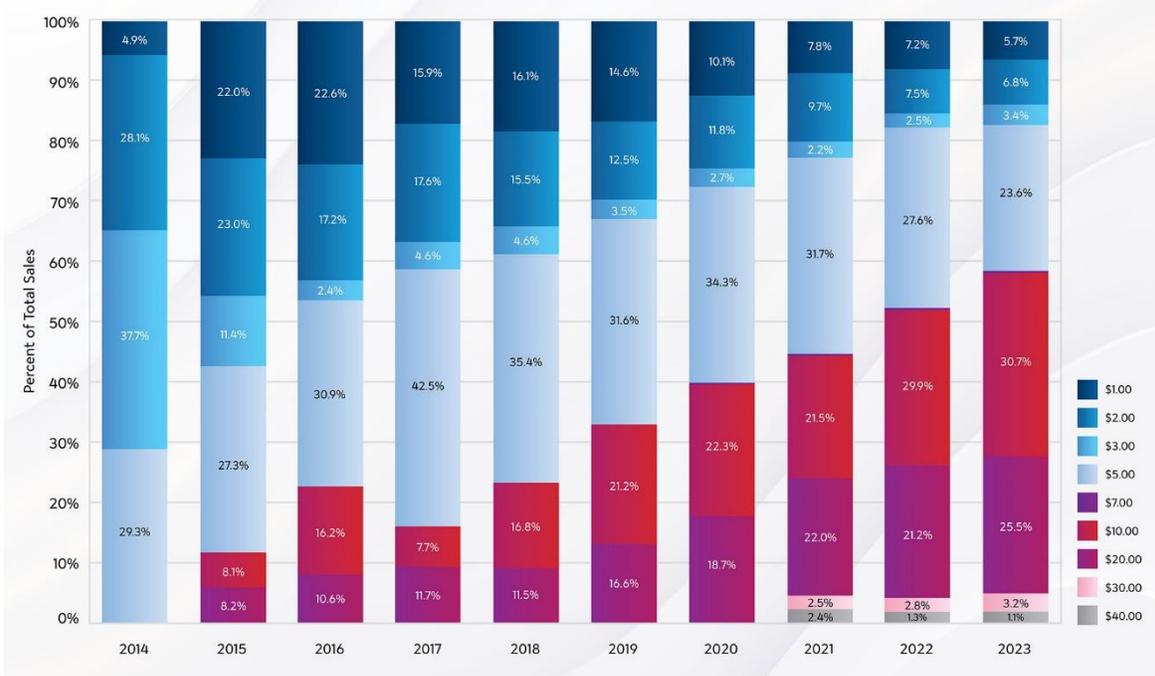
Fast Play Update

Fast Play games – instant win games that are printed on demand via the lottery’s retail terminal – continue to be the fastest growing category of terminal-generated games, boasting a 5-year compound annual growth rate (CAGR) of 19% (2019 – 2023)¹. Currently, 26 jurisdictions offer Fast Play games, with several others considering the category for CY24. International interest in Fast Play is growing as well with Aruba having launched the product in January 2023. In this issue of Data in Motion, we provide an update on this increasingly popular product and share some insights into who is playing.

Trending Up

Over the past year, Fast Play game sales have remained steady at most price points. There was a slight decrease at the \$1 price point and an increase at the \$20 price point. A portion of the year-over-year sales growth the category experienced can be attributed to the Illinois and Georgia Lotteries selling Fast Play games online in addition to being available at traditional retail channels.

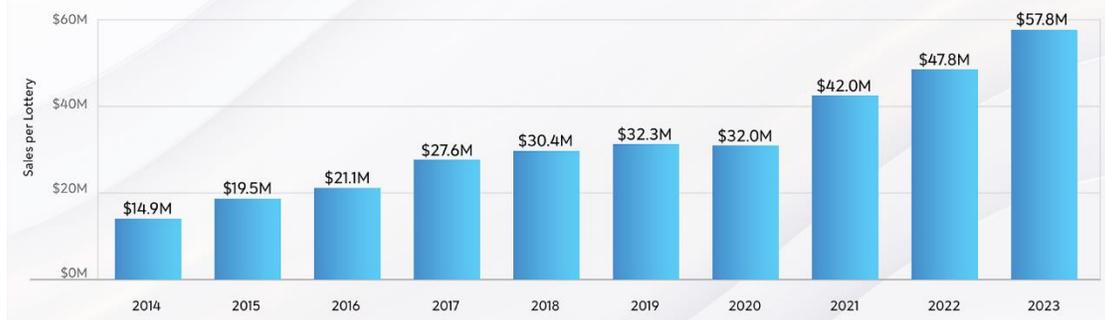
Percentage of Fast Play Game Sales by Price Point by Calendar Year



Total Fast Play Game Sales by Calendar Year



Average Fast Play Game Sales Per Lottery by Calendar Year



Average Weekly Per Capita Fast Play Game Sales by Calendar Year



Success Stories

Both the Georgia and Vermont Lotteries exceeded industry sales growth by significant margins but for different reasons. The Georgia Lottery relaunched their Fast Play category as Quick Win, offering the entire product line for sale both online and at traditional retail outlets. Prior to the re-launch, average weekly sales for their Fast Play games were about \$79,000. In the first ten weeks of offering Quick Win both digitally and in-store, sales soared to an average of \$2.6 million per week, an increase of more than 32X!

In Vermont, after converting their central gaming system and revamping their Fast Play portfolio with new games and more strategically designed prize structures, sales increased by an impressive 89%.

Who's Playing Fast Play?

According to our most recent *ONE* Segmentation/Digital study, Fast Play games appeal to a broad range of ethnicities and education levels. Fast Play players tend to skew male versus all lottery players (70% vs. 59%). They also tend to be younger, with 51% of Fast Play players being 18 – 39 (Millennials) versus 38% for general lottery players.²

Interestingly, the study showed that Fast Play players purchased instant scratch games slightly less than general lottery players (55% vs. 65%). This suggests that Fast Play games may help attract traditional draw game players to an instant win product. Fast Play players also tend to play more instant games than general lottery players (35% vs. 19%), an especially relevant finding given the recent success of Fast Play games being sold online.

Final Word

Fast Play games are just one example of how lottery product definitions continue to evolve with advances in technology, new channels of distribution, and player preferences. When developing a strategy for any product falling into the “instant win” category, the entire product portfolio must be considered. Whether it’s a traditional scratch game, a terminal-generated game, or a digital game, all need to coexist with each other and deliver unique value propositions to minimize the potential for cannibalization.

There is a lot to look forward to when it comes to the Fast Play category: more lotteries offering these games, multi-jurisdictional progressive Fast Play jackpots, new licensed property tie-ins, and omnichannel product launches that include a Fast Play game. So stay tuned for additional updates on this exciting category in a future editions of Data in Motion.

1. *Infuse*, Scientific Games’ Business Intelligence Platform
2. Scientific Games’ *ONE Segmentation*/Digital. All data points are based on those who had purchased either Fast Play or general lottery in the past 12 months.

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