

# Data in Motion

Marketing & Insights



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## Instant Scratch Game Enhancements

Instant game enhancements, sometimes referred to as “value-adds” or “options,” have become an integral part of most instant scratch game portfolios. There are generally three types of enhancements:

- **Visual enhancements** such as special substrates (e.g., foil or holographic), special inks and alternate finishing techniques that add depth and dimension
- **Play-related enhancements** such as extended or additional play actions, unique play actions and digital extensions
- **Marketing-related enhancements** such as licensed properties

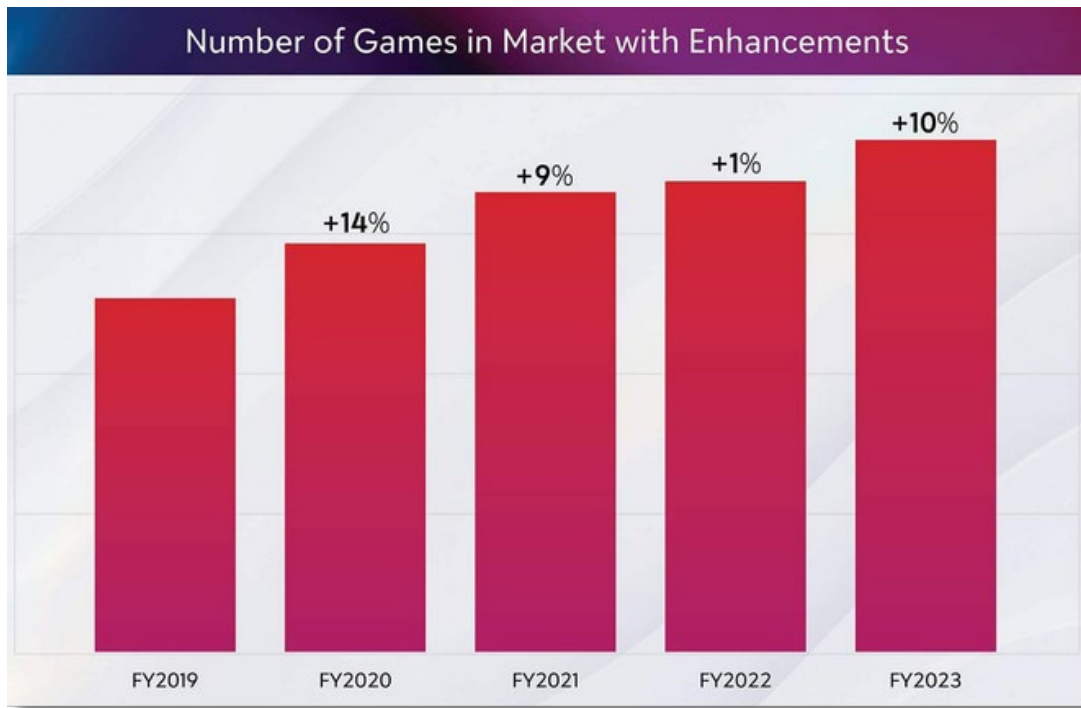
In this issue of Data in Motion, we take a closer look at these instant scratch game enhancements and how they can be used to visually elevate games and deliver a better, more satisfying play experience.



## A Growing Category

Instant scratch game enhancements aren't new – lotteries have been offering die-cut tickets and games on foil substrates (just to name two) for decades. But in recent years, the number and types of these enhancements have grown, as has their usage. **In fact, the number of instant scratch games featuring at least one enhancement increased by approximately 10% last fiscal year.** In FY2023 alone, 24% of all instant scratch games featured at least one game enhancement.<sup>1</sup>

Historically, lotteries have reserved these enhancements for higher price point games, either to highlight a prize or to call attention to the game's primary value proposition. But this "game enhancement = higher price point" trend is less true today than it has been in the past for one very good reason – families of games, or 'FOGs' (see our [December 20, 2023 issue](#) for more on FOGs).



As more lotteries launch families of games (93% of all reporting lotteries launched a FOG in FY2023)<sup>1</sup>, instant scratch game enhancements have been utilized in two important ways:

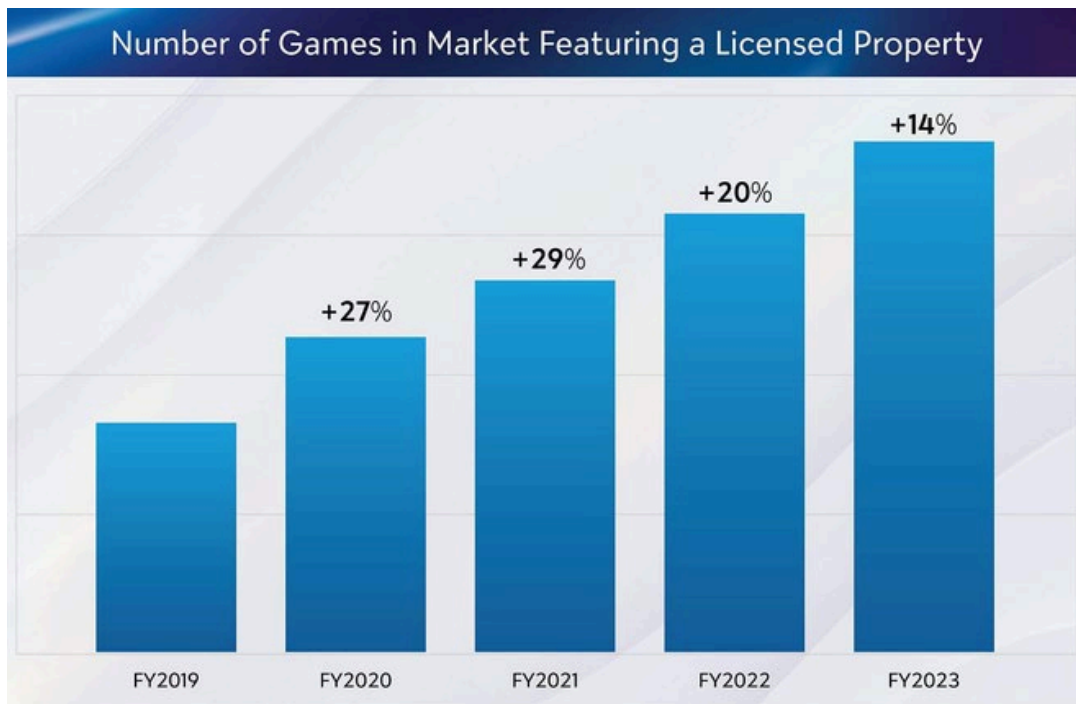
- First, **an enhancement on any ticket generally sets that game apart from others**, and this is no less true of FOGs
- And second, by applying a common or similar enhancement across each of the FOG's *individual* games, **players are more likely to see the games as a related group which can encourage the purchase of multiple price points**

More than half (52%) of the families of games launched in FY2023 featured an enhancement of some sort and, importantly, those games performed 10.3% better than families of games without an enhancement based on an average fiscal index.<sup>1</sup>

## Licensed Property Games

Applying a licensed property to a game would be considered a marketing enhancement and can impact that game in several positive ways:

- There is often a **public relations/communications hook** to a licensed property game that can be capitalized on
- The **positive association that a consumer might have with a particular brand** is now being associated with a lottery product
- There is often a **promotion associated with licensed property games** that gives players even more reason to purchase the game and increases the value they receive from that purchase
- **Licensed property games have been shown to attract new players and reengage lapsed players.** In FY2023, the number of games featuring a licensed property increased by 14%<sup>1</sup>



## Are They Worth It?

The reasons a lottery might add an enhancement to a game may vary, but ultimately it is to differentiate that game (or games) with the goal of driving sales. There is typically an upcharge for printing a game with an enhancement, so the reasonable expectation is that the bump in sales will exceed the investment. And on this front, instant scratch game enhancements seem to be paying off – **66% of the top performing scratch games sold in FY2023, based on weekly per capita sales, featured at least one game enhancement.**

## Final Word

As noted earlier, the number and types of instant scratch game enhancements have grown in recent years and continues to be an area of innovation, investment and research for suppliers to the lottery industry. Some enhancements are proprietary while others are offered more generally by multiple suppliers. **So, when evaluating how enhancements can optimize your instant scratch game portfolio, it is important to ask questions, request samples and research how they have performed in other jurisdictions.**

Sources:

1. *Infuse*<sup>™</sup>, Scientific Games' Business Intelligence Platform. Figures cited are for Scientific Games-produced tickets only.
2. From the top-performing 100 US instant scratch games based weekly per capita sales

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