

# Data in Motion

Marketing & Insights

February 22, 2022



## Insights and Data to Help Manage Today's Changing Consumer Environment

In this issue of Data in Motion, we provide an overview of the incredible growth that the PlayNow™ category – often referred to as Fast Play games – has experienced. We review sales trends and highlight upcoming innovations for this exciting product line.

### A Brief History

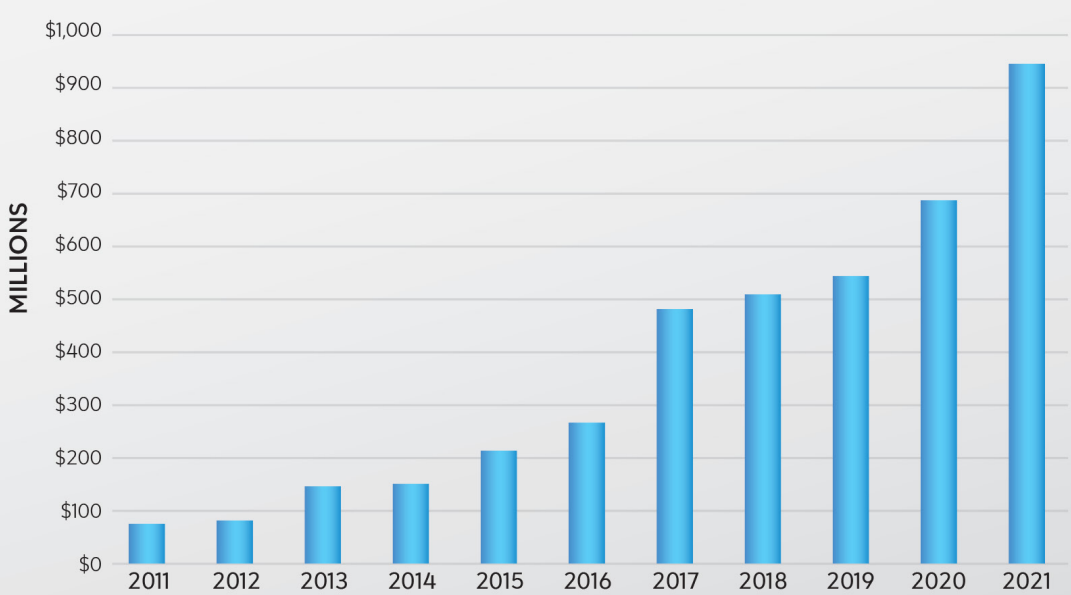
Scientific Games pioneered the PlayNow game category in 2004 in partnership with the Montana and Maryland Lotteries. Since those initial launches, the product category has evolved in several important ways: rudimentary graphics, low payouts, and limited play value gave way to games with highly attractive visuals, payouts that are in line with the instant product, and feature progressive jackpots, licensed themes, and more exciting playstyles.



### PlayNow Product Growth Leads the Terminal-Based Game Category

Currently, 24 lotteries offer Fast Play games and each lottery employs a different product category strategy. Some lotteries offer Fast Play games with high price points (\$20 and \$30), while other lotteries only offer games that feature shared progressive jackpots across different price points. Fast Play games are one of the fastest growing categories in the lottery industry, boasting a 30% 10-year CAGR. In CY21, Fast Play games represented 3% of total terminal-based game sales, closely rivaling the Lotto category which came in at 5% of total terminal-based game sales.

### U.S. Fast Play Sales by Calendar Year



The top ten performing Fast Play jurisdictions had weekly per capita sales that ranged from \$0.26 (#1) to \$0.16 (#10). The average WPC sales for these top ten performing Fast Play lotteries was \$0.21.

### Final Thoughts

So what's next for this incredibly exciting product category? As Fast Play games continue to evolve, we anticipate a number of product innovations, including:

- Strategic use of higher price points
- Games featuring multi-state progressive jackpots
- Tickets utilizing licensed properties
- Using the instant win feature inherent to Fast Play as an add-on or enhancement to traditional draw games
- Continuing to integrate Fast Play games in second-chance promotions with draw, instant, and iLottery games
- Selling Fast Play games online

It is clear from Fast Play's performance that these games have captured players' interests. As with all products, continued innovation within the category is vital to maintaining – and growing – its sales performance in the coming years.

Contributors: Amanda Cooper, Leslie Badger, and Susan Rolfs | Editor: John Paul Candler | Design: Bobbi Martucci