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Scientific Games' Greta Larson Talks Draw Games

As terminal-based products continue to grow and digital lottery accelerates, the U.S. draw games market is becoming increasingly portfolio-driven. While headline-grabbing jackpots remain powerful, sustained growth now extends far beyond jackpot runs—reshaping how draw products are positioned within the broader portfolio.

Bloc-lotto games have had volatile growth over the past several years, suggesting that draw portfolios could be adjusted for less reliance on billion-dollar jackpots by leaning into alternative products.

“Draw game portfolio management is important. When prize structure strategy, branding, and integrated retail and digital experiences work together, that alignment empowers lotteries to move beyond individual game launches and toward cohesive ecosystems that deepen engagement and support long-term portfolio strength,” says Greta Larson, Manager, Sales & Marketing, Lottery Systems for Scientific Games.

A rising expert on the company’s draw games strategy team, Larson points to several areas where that portfolio approach is influencing performance—from Fast Play and licensed games to regional collaborations and digital expansion.

Fast Play

Fast Play continues to gain momentum. Based on CY 2025 retail weekly per capita sales, three of the top five performing U.S. lotteries offering Fast Play games were Scientific Games partners: Vermont (No. 1), Maine (No. 3) and Maryland (No. 5), with Pennsylvania following closely (No. 6).

For Larson, the results underscore the value of sustained category management rather than isolated product launches.

“Lotteries strengthening their Fast Play portfolios are prioritizing innovation, refining prize structures and staying closely connected to performance data so they can consistently deliver fresh, engaging experiences to their players,” she explains.



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The Maryland Lottery’s launch of what is believed to be the industry’s first landscape-oriented Fast Play ticket.

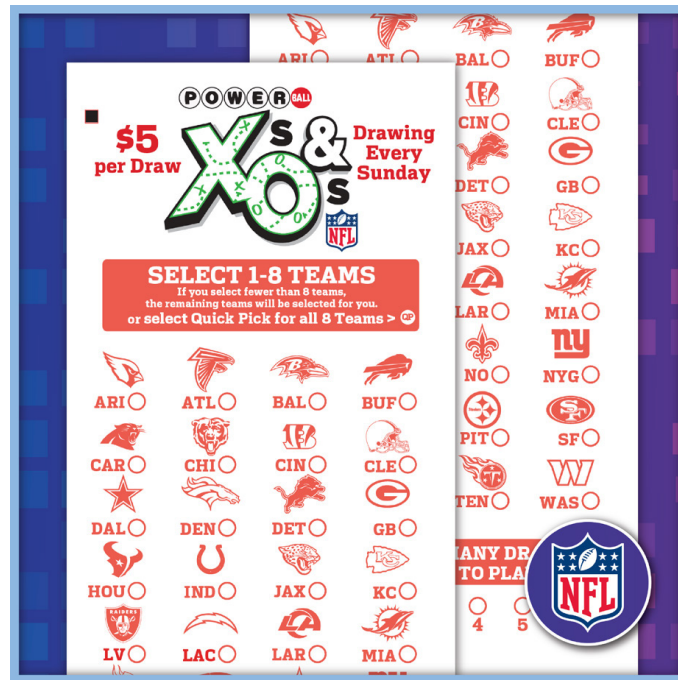


The Maine Lottery’s JURASSIC PARK-branded Fast Play game featuring a loaded prize structure—the top-performing JURASSIC PARK Fast Play game



The Vermont Lottery’s disciplined Fast Play execution, anchored in thoughtful prize structures—a focused portfolio of 9 to 13 active games and high-visibility progressive wins has helped sustain its No. 1 Fast Play retail sales ranking.





Fast Play (cont'd)

Scratch Connect

Digital engagement tools are extending the retail instant game experience beyond the point of sale. QR code-driven microsites and interactive digital reveal features like Scratch Connect add an additional layer of interaction to terminal-generated products, turning the player's ticket-check moment into a digital touchpoint that bridges retail and mobile play.

Licensed Brands in Fast Play

Lotteries are embracing licensed, branded Fast Play games, with the number of licensed Fast Play games launched increasing more than 90% from CY 2022 to CY 2025. When paired with second-chance promotions, these games become true performance powerhouses offering recognizable brands and low-barrier entry points while encouraging repeat engagement through second-chance win opportunities.

Loaded Games

The share of loaded Fast Play game launches has more than doubled in the past few years, surging from approximately 6% in 2022 to nearly 13% in 2025. Loaded games are designed to concentrate value in a higher-than-expected number of lower tier prizes to offer players more winning experiences rather than relying solely on a single headline top prize or a progressive jackpot.

“As the category continues to grow, Fast Play warrants the same intentional planning, marketing support and long-term strategic vision traditionally applied to instant game portfolios. Fast Play performance shows it is no longer a supplemental product but a core driver of retail growth.”

—Greta Larson, Scientific Games

NFL Powerball Xs & Os

Anticipated to launch in 31 U.S. states (as of press time) later this year, 2026 Powerball Xs & Os is a new \$5 draw game from the Multi-State Lottery Association in partnership with the NFL. Weekly Sunday drawings will feature a rolling jackpot that starts at \$1 million, along with a second-chance component that's built directly into the prize structure. *Powerball Xs & Os* is designed to provide an alternative to jackpot-dependent draw games while attracting younger adult players and tapping into NFL brand affinity. Pre-launch research showed the NFL brand indexed 11% to 37% higher than any other brand among players ages 18 to 34, with more than half of self-identified NFL fans expressing interest in an NFL-branded lottery game.

“Much like a state lottery launching a scratch game featuring its local NFL team, *Powerball Xs & Os* was intentionally designed to resonate with a defined consumer segment,” shares Larson. “The NFL partnership provides a platform to engage younger, sports-oriented audiences in a differentiated draw experience.”

The new game reflects a broader effort to expand the player base and align draw products with evolving entertainment preferences.

Millionaire for Life

The evolution of \$5 lifetime draw games represents another example of portfolio development. Offered by 31 U.S. lotteries, Millionaire for Life builds on the Lucky For Life and Cash4Life concepts while aligning with modern player expectations around prize scale and structure.

With nine ways to win and overall odds of approximately 1 in 8.5, Millionaire for Life balances aspirational lifetime prizes with frequent wins starting at \$8. The top prize increases from \$1,000 a day for life to \$1,000,000 a year for life, reframing the opportunity to win from financial comfort to undeniable

wealth. Players can choose annual payments or a lump sum. A second lifetime tier of \$100,000 a year for life further strengthens the value proposition. At a \$5 price point, the game establishes a premium position supported by elevated lifetime prizes and a strengthened prize structure designed to deliver value across multiple tiers.

“Expanding the scale of lifetime prizes while maintaining strong odds and continuity allows lotteries to modernize their draw portfolios without sacrificing trust or brand equity,” Larson says.

eDraw Games

The eDraw category is the digital extension of traditional draw games exclusively sold at retail, allowing players to purchase their favorite draw games online. Unlike eInstants which are digital-only games, eDraw games mirror existing draw offerings while adding the convenience of mobile and desktop access, multiple payment options and automatic crediting of winnings.

Currently offered in eight U.S. jurisdictions, the category has gained meaningful momentum. Even in smaller jurisdictions like North Dakota, 11.6% of Powerball sales were online in 2025, demonstrating that digital adoption is not limited to large population states.

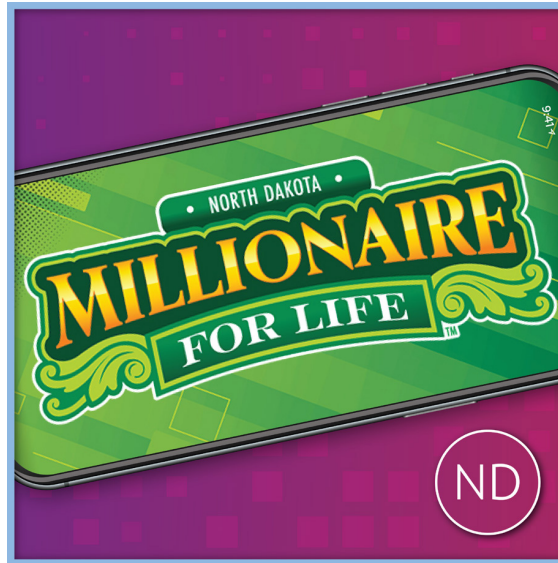
From a performance standpoint, eDraw has driven year-over-year digital revenue growth and meaningful incremental sales within iLottery portfolios. It also serves as a strong player engagement driver, bringing players into the iLottery ecosystem through high jackpot draw game purchases and introducing play across other online draw and eInstant games.

“eDraw enhances convenience, supports younger and mobile-first audiences, reduces friction in prize payment, and can improve portfolio economics by shifting sales to digital channels,” Larson explains. “As lotteries refine their omni-channel strategies, eDraw acts as a critical bridge between traditional draw products and a more digitally integrated future.”

Scientific Games supports lottery partners with the platforms, insights, and integration expertise needed to seamlessly connect retail and digital draw experiences and drive long-term growth.

Regional Games: Tri-State Megabucks

Regional collaborations continue to play an important role, particularly for smaller lotteries seeking greater



jackpot scale while maintaining local identity.

Since its debut in 1985, Tri-State Megabucks has served Maine, New Hampshire and Vermont as the nation’s first multi-state lottery game. The partnership helped lay the groundwork for national games that followed and demonstrated the impact of pooled resources.

Over four decades, the game has evolved through prize enhancements, improved odds and additional drawings, while preserving the regional character that first resonated with players.

“Sustaining and modernizing a historic game like Tri-State Megabucks requires ongoing alignment and innovation,” Larson says. “Scale is not only created through size. Smaller jurisdictions can expand their impact by pooling jackpots, modernizing legacy games with intention and marketing collaboratively so that every win feels bigger.”

Scientific Games supports the Maine Lottery and Vermont Lottery through its systems partnerships and provides the analytics-driven Scientific Games Enhanced Partnership program for instant game management in Maine and New Hampshire.

From 2022–2025, the company has helped generate a compound annual growth rate for Tri-State Megabucks of 3% in Maine and nearly 11% in Vermont in that same period.

Final Thoughts

Larson sums up her team’s observations that 2025 proved that growth is not limited to billion-dollar jackpots.

“Non-jackpot draw categories, Fast Play and digital and licensed brand tie-ins are demonstrating that product architecture, prize structure and player experience truly matter,” she says. “Lotteries can expand engagement, reach new audiences and evolve legacy categories in ways that honor their foundations while keeping them relevant.”

SOURCE: Scientific Games INFUSE platform.
Note: CY2024 vs. CY2025 metrics reflect the first 52 weeks of sales each year and exclude IN, MS, RI and VA.

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