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From Emerging to Established: Fast Play's Ongoing Evolution

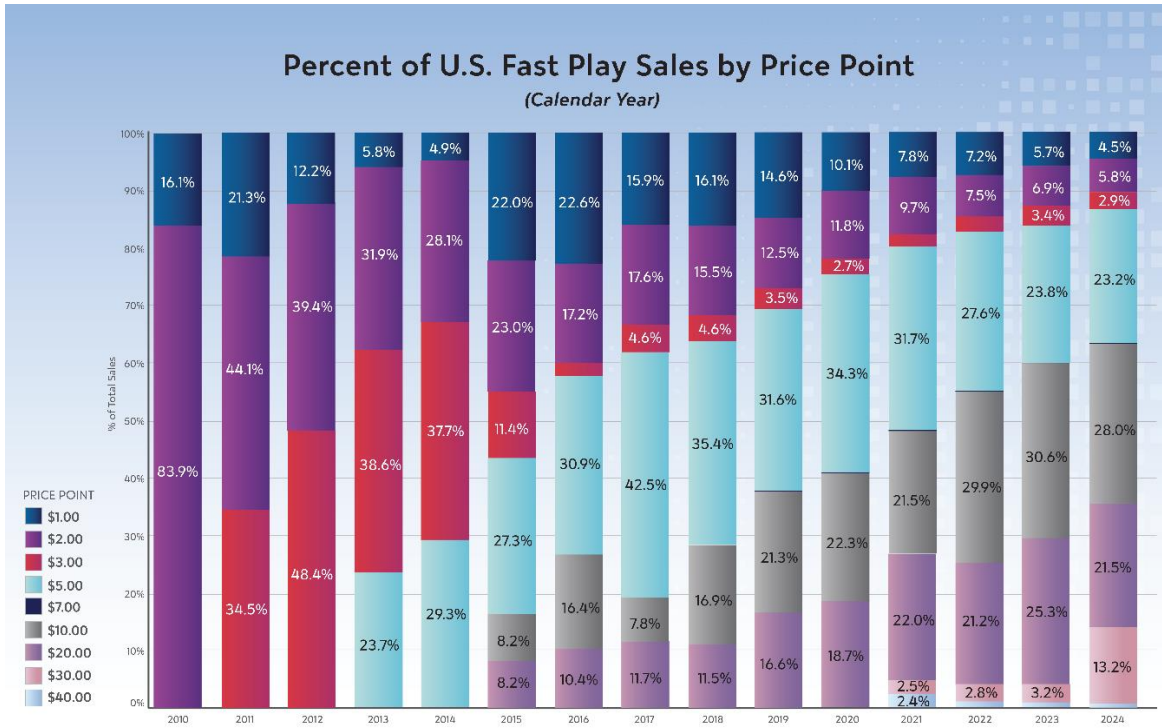
In this issue of *Data in Motion*, we spotlight Fast Play, one of the fastest-growing categories in U.S. lottery retail sales. Over the past five years (2019–2024), Fast Play sales have experienced an impressive compound annual growth rate (CAGR) of 23.3%—more than triple the 7.5% growth of instant scratch games over the same period.

Now available in 27 jurisdictions, Fast Play continues to attract players with its unique blend of instant-win excitement, progressive jackpot options, terminal-based convenience and diverse play styles. This growth signals that Fast Play has moved well beyond being an “emerging” category. In CY2024, it accounted for 4.7% of total terminal-generated game sales, nearly matching Lotto's 4.8% share—a clear indicator that Fast Play is now a core sales driver with accelerating momentum, especially at higher price points.

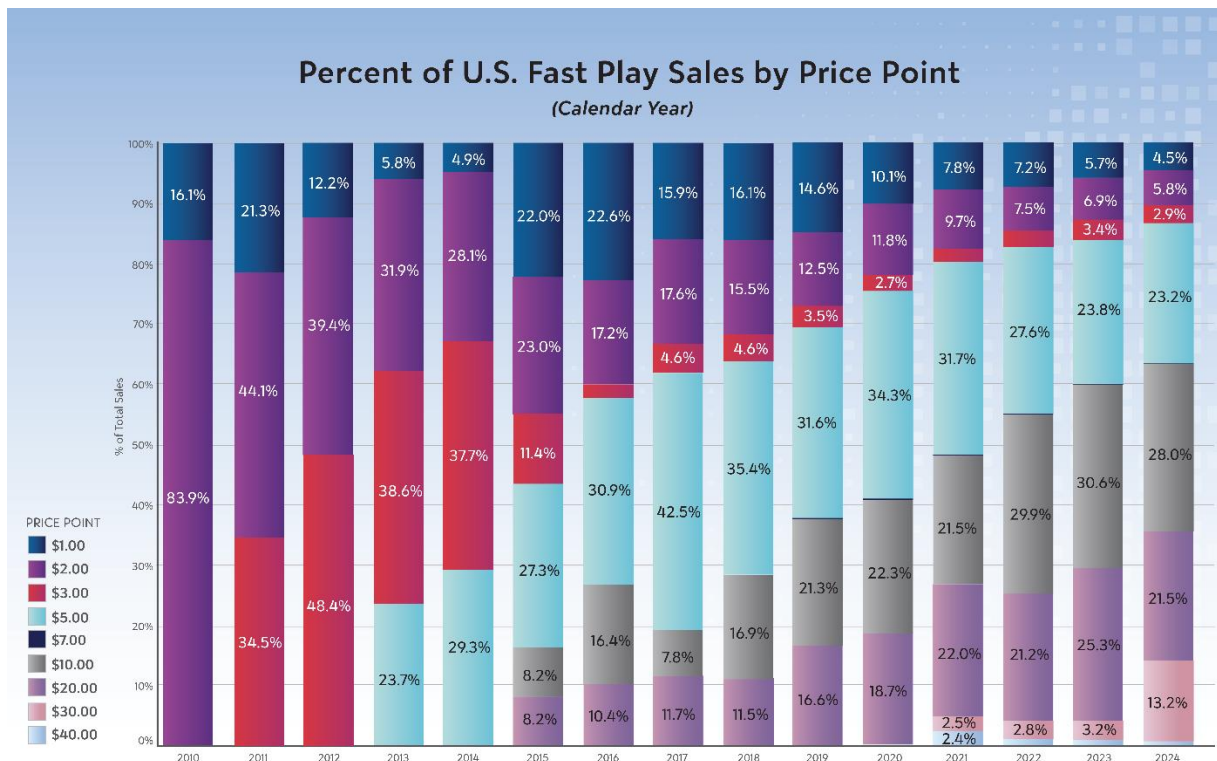
Trending Up: The Rise of Premium Play

A defining trend in Fast Play's growth is its expansion into premium price points. Since the launch of the first \$30 games in 2021, the price point has grown from 2.5% to more than 17% of category sales in 2025. Remarkably, these \$30 games accounted for only 3% of all launches, indicating that players are actively seeking bigger, bolder play experiences.

What's notable is that this shift hasn't come at the expense of other price points. While share has moved upward from \$20 to \$30 games, lower price points have remained stable, showing the category's broad appeal across price ranges.



Sales-to-launch ratios further underscore Fast Play’s strength at the top end. In 2025, low-price games (\$1–\$3) accounted for 40% of launches but only 13% of sales, while high-price games (\$10 and above) delivered 64% of sales from just 34% of launches. The \$5 tier landed in the middle, with 28% of launches and 23% of sales. This mirrors patterns in instant scratch games, where higher price points deliver stronger sales performance—a clear sign that Fast Play has evolved into a mature, scalable growth category.



The Future of Fast Play

Fast Play's trajectory is now extending beyond the U.S. After more than two decades as a uniquely American product, the category is gaining international traction. Both Poland and Aruba have introduced Fast Play, while lotteries in Canada and Europe are actively evaluating it.

The category also reached a major milestone in October 2024 with the debut of the first multi-jurisdictional Fast Play game—Jackpot USA—initially offered in D.C. and Idaho. New Mexico will be joining the game in July 2025 and additional jurisdictions are expected to join up and participate in the near term. The future of Fast Play is also looking into iterations that could introduce new themes, price points, and jackpot structures to further enhance player engagement.

Fast Play is additionally proving its adaptability through linked game initiatives, including the successful launch of *JURASSIC PARK*. Looking ahead, the category is well-positioned for digital crossover extensions, similar to *SCRATCH CONNECT*, where a Fast Play ticket could act as the entry point for interactive play online or via mobile.

These innovations point to a future where Fast Play isn't just another game category—it's being positioned to become a platform for connected, omnichannel play experiences that bridge retail and digital channels.

Final Word

With sustained double-digit growth, premium price point expansion and an expanding international footprint, Fast Play stands as one of the most dynamic and forward-looking lottery categories worldwide. What began in 2004 as a niche U.S. product has evolved into a global growth opportunity, one that blends instant gratification, flexible formats and endless innovation potential.

As more lotteries explore the category and multi-state games gain traction, Fast Play is positioned to be a defining force in the next era of lottery play.

CONTRIBUTOR

Jacob Kreider is Director of Operational Data Science and has been with Scientific Games since 2013. He works directly with our Lottery customers to understand their goals, predict player and retailer behavior, and grow revenue for good causes.



Source: *Infuse™*, Scientific Games' Business Intelligence Platform

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Editor: Jared Johnsen

Design: Bobbi Martucci