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Accounting for Future Growth

Mary Harville,

Chief Executive Officer and President, Kentucky Lottery Corporation



Rooted in Mission, Driven by Innovation: Inside the Transformation of the California Lottery

Harjinder K. Shergill-Chima,

Director, California Lottery



The Mission Is Education: Inside the Strategy, Leadership, and Vision of the country's top-selling Lottery

John Davis,

Secretary, Florida Lottery

The Modern CFO: From Analyst to Strategic Ally

Maggie Garrison,

Vice President and Chief Financial Officer, Kentucky Lottery Corporation



IGT Lottery transitions to BRIGHTSTAR

Renato Ascoli, Chief Executive Officer Global Lottery, Brightstar

There's a Whole New Interest in Extended Play Games



Danielle Hodges (left) and Haley Bobo (right)

No one knows lottery games—and players—like Scientific Games. The company's *ONE Segmentation Study* has long tracked player motivations, and while a significant shift in players' behavior was anticipated in a post-pandemic world, recent data reveals a striking trend. Extended play games are booming, largely fueled by a huge surge in player engagement.

In the past five years (CY 2019-2024), the extended play category has grown by 32%. It now represents 18.3% of U.S. lottery retail sales. What was once a niche product has evolved

into a major force, offered by 44 U.S. lotteries, with retail sales topping \$11.5 billion last year.

According to the *ONE Segmentation Study*, extended play has traditionally been most popular with two specific segments of players: *Fans* (fans of instant scratch games and the most avid lottery players)

and *Visitors EXT* (players that come and go with scratch games who tend to like games that take longer to play—and tend to be low frequency players).

"Comparing our 2024 to our 2014 study, the biggest shift is the size of those two segments. *Fans*' playership grew from 24% to 36%, with *Visitor EXT* playership growing from 16% to 27%," explains Haley Bobo, Director of Data Science, for the world's largest lottery games company.

Expanding Popularity—and Price Points

Extended play game revenue has grown at a much higher rate than non-extended play games in the past five years. The compound annual growth rate for non-extended play games in the U.S. from 2019 to 2024 is 3.36%, compared to 5.81% CAGR for extended play games.

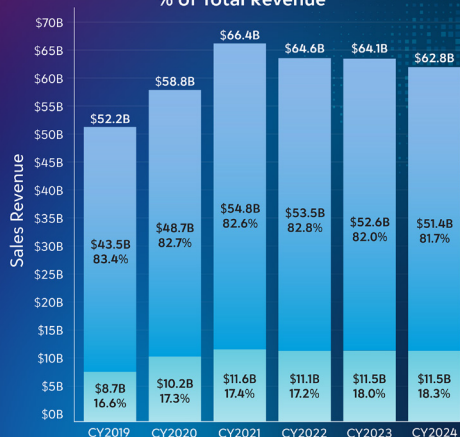
"Players are experiencing more extended play scratchers every year. Every reporting U.S. lottery had at least one extended play game in its portfolio in fiscal year 2025, and the number of games continues to grow," says Bobo.

While the \$3 price point remains the most popular for the majority of lotteries, the percentage of extended play at other price points has grown significantly, with lotteries offering games at almost every price point from \$5 to \$100.

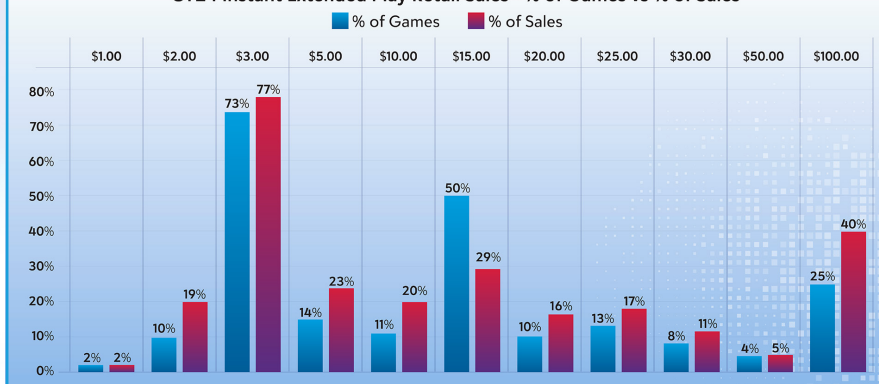
In 2019, 55% of lotteries offered a \$10 extended play game. This surged to 77% in 2024. Similarly, the \$30 price point, offered by only two U.S. lotteries in 2019, is now available from nine lotteries. Scientific Games research shows that higher price point extended play games are appealing to more players in the *Fans* segment than ever before, offering a longer scratch experience that's different from the other games they play.

"Based on sales trends and consumer research, interest in extended play games was not just a fluke coming off the pandemic. There's significant interest in these products across all price points. It's important that we continue to expand our product offerings in this category, and not just by going up the price point ladder," Bobo advises.

Instant Retail Sales - Extended vs Non-Extended Play % of Total Revenue



CY24 Instant Extended Play Retail Sales - % of Games vs % of Sales



For example, there is certain affordability to a \$1, \$2 or \$3 extended play games that play an essential role in the portfolio for entry-level and other player segments.

Researching the extended play experience from the player's perspective is an important long-term investment that lotteries can make across both retail and digital products to achieve significant growth opportunities.



Innovating for Next Gen Players

From bingo nights at community gatherings and lazy afternoons spent working the newspaper's Sunday crossword, the two most popular extended playstyles came to scratchers in the 1990s. Although crossword games arrived five years after bingo, they've since surpassed bingo in popularity.

"Everyone has deeply ingrained memories of growing up with bingo and crossword. And of course, everyone wants to win when they scratch a lottery instant game. But the more leisurely experience of extended play games provides a glimmer of that same memorable fun and entertainment," says Hodges.

For more complex extended play games, she advises adding a callout with clear how-to-play instructions in the game design. The North Carolina Education Lottery cleverly calls out that its \$10 Cashword King game is "Puzzle Play" in the upper corner of the game to alert players to the extended experience.

With the recent surge in demand for extended play game designs, the Scientific Games' Dream Team has been busy developing all-new playstyle concepts and enhancing traditional games. For higher price point games, lotteries are adding special touches to the extended play experience with *Strategic Product Enhancements* to offer even more value.

"We've had customers add enhancements like holographic, *Platinum* and *Micromotion*—a highly reactive foil finish that gives the illusion of movement," explains **Danielle Hodges, Senior Director, Global Product Development & Innovation**. "We have a new way to produce extended play games with the holographics shining through the grid. So, players experience the holographic effect when they start to scratch."

Additionally, the company's patented, premium marking system, *Graphic ClearMark*, offers limitless creative options for game design by integrating colors and graphics into the play area to enhance the play action.

"With *Graphic ClearMark*, there is nothing comparable in the industry. The extended play scratch experience is much more leisurely as players take their time and savor the moment. Players enjoy the theme continued into the grid area, easy-to-read images and intuitive new ways to win on their favorite games," she says.

And speaking of the scratch experience, Hodges shares that an exciting new marking system is launching soon.

EXTENDED PLAY GAMES — CY 2024 —

- **\$11.5 Billion**
Retail Sales
- **44 U.S. Lotteries**
(reporting jurisdictions)
- **18.3% of U.S.**
Instant Game
Retail Sales



Graphic ClearMark

A premium marking system offering clean, easy-to-read play symbols in extended play games. The system integrates colors and graphics into the play area, expanding game design possibilities and enhancing the play action.



Licensed Brands, Playstyles On Trend & More

One of the most powerful tools lotteries have to create excitement and build loyalty is licensed brands. Scientific Games offers more than 100 brands to choose from. And its creative teams work closely with lottery product teams to develop new, brand-immersive experiences for their players.

“Some brands naturally lend themselves to extended play games,” says Hodges. “Those that immediately come to mind are *SLINGO*, *LOTERIA*, *SCRABBLE* and *UNO*. Brands offer highly recognizable logos, colors and visual elements that are part of the overall experience.”



With the heightened interest in extended play, some lotteries are setting trends and reaping the benefits of innovation with strong sales performance.

“Poker-themed extended play games have been on the rise in recent years,” says Bobo. “A great example is the South Carolina Education Lottery’s \$5 *Poker Night* game, which is performing 27% better than other \$5 games in its portfolio.

Bobo also points to tic-tac-toe games making a comeback. In 2025, the Mass Lottery brought back its \$1 *Luck of the Irish Tripler* with great success. The game is performing 25% better than its other \$1 games.

Another trend in extended play is the use of multiple playstyles in a single game, such as the Ohio Lottery’s *Casino Nights* game.

The \$10 game offers five separate games including tic-tac-toe, match 2, match 3, add up and key number match. It’s also performing well—25% higher than other \$10 games currently on sale in the state.



BATTLESHIP

Clue

CONNECT 4

DEAL
OR
NO DEAL

FAMILY FEUD

LOTERIA
ON CLEMENTE

MONOPOLY

PLINKO

PRESS YOUR LUCK

SCRABBLE

SLINGO

UNO

Yahtzee
the SHAPE, SCORE, and SHOUT GAME!

WHAT LOTTERIES ARE SAYING

"*Poker Night's* strong performance—indexing at 127—shows how much players value extended-play experiences that blend entertainment with meaningful rewards. Casino-style games are seeing a resurgence because they offer a familiar, strategic format with longer play time. Our extended-play success is consistent at the \$3 price point; launching *Poker Night* as a \$5 ticket diversifies the product mix and offers a rich prize structure, hopefully drawing \$3 players to \$5. Adding a second-chance component gives players even more reason to engage, increasing retention and excitement. With neon colors and eight chances to beat the dealer's hand, *Poker Night* feels less like a ticket and more like a game night, which is exactly what today's players want."

Scott Warner
South Carolina Education Lottery
Product Manager

"Extended play games are experiencing a resurgence as Mass Lottery players seek more than just a quick scratch—they want engaging, puzzle-like experiences. Our \$1 *Luck of the Irish Tripler* is FY25's top \$1 game, indexing at 129 with \$6.1 million in sales over 23 weeks. Our \$10 *\$2,000,000 50X Cashword*, with rotating color pulses, remains the top extended play game. With strong performers across the \$2, \$5, \$10, and \$20 price point, extended play continues to drive steady sales and player satisfaction across our portfolio. In FY26, we plan to expand the extended play lineup into higher price points."

Tom Aiello
Mass Lottery Manager, Product and
Promotional Development - Instant Tickets

"Starting in July, the N.C. Education Lottery will brand extended play games as "Puzzle Play" games. Players will see the new branding with our \$5 *LOTERIA Fiesta* scratch-off in July and with \$10 *Cashword King* in August. Extended play games have proved so popular with players that we are adding different game mechanics and multiple price points. We are ending our \$3 price point, where extended play games first began. Puzzle Play branding will ensure players can identify extended play games at other price points and allow the marketing of these games as a subcategory within our scratch-off portfolio."

Vicky Scott
N.C. Education Lottery
Director of Product Development

"Over the past couple of years, we have seen players coming back to the Lottery, and many of these players prefer the extended play versions of scratch-off games because they are looking for more game play for the value of their money. With multiple games on our *Casino Nights* ticket, it is engaging players and helping them feel like it is a low-cost form of play compared to a few seconds of engagement. Our *Cashword* games at the \$2, \$5, \$10, \$20 and \$30 price points are very popular. Post-pandemic, we released the \$30 *Cashword* game which has helped us attract more game play and revenue in this product line. We have also released, or are releasing, other extended type games like \$5 *PLINKO* and the *Gigantix* tickets with multiple games on the front and back."

Ron Fornaro
Ohio Lottery
Scratch-Off Product Manager

"Montana has a long history of extended play games with \$2 crosswords and bingos comprising the majority of that price point. This approach is currently a major focus of our product department as we scrutinize product profitability, which will likely result in significant adjustments to extended play games in the future. Probably the largest contributing factors to their popularity are the decades these play styles have been in our market and the developed core player following. Additionally, the volume of games we offer at any given time are staple in retail locations."

Jay Boughn
Montana Lottery
Instant Product Manager



CONTACT YOUR SCIENTIFIC GAMES REPRESENTATIVE FOR MORE INFORMATION ON EXTENDED PLAY GAMES