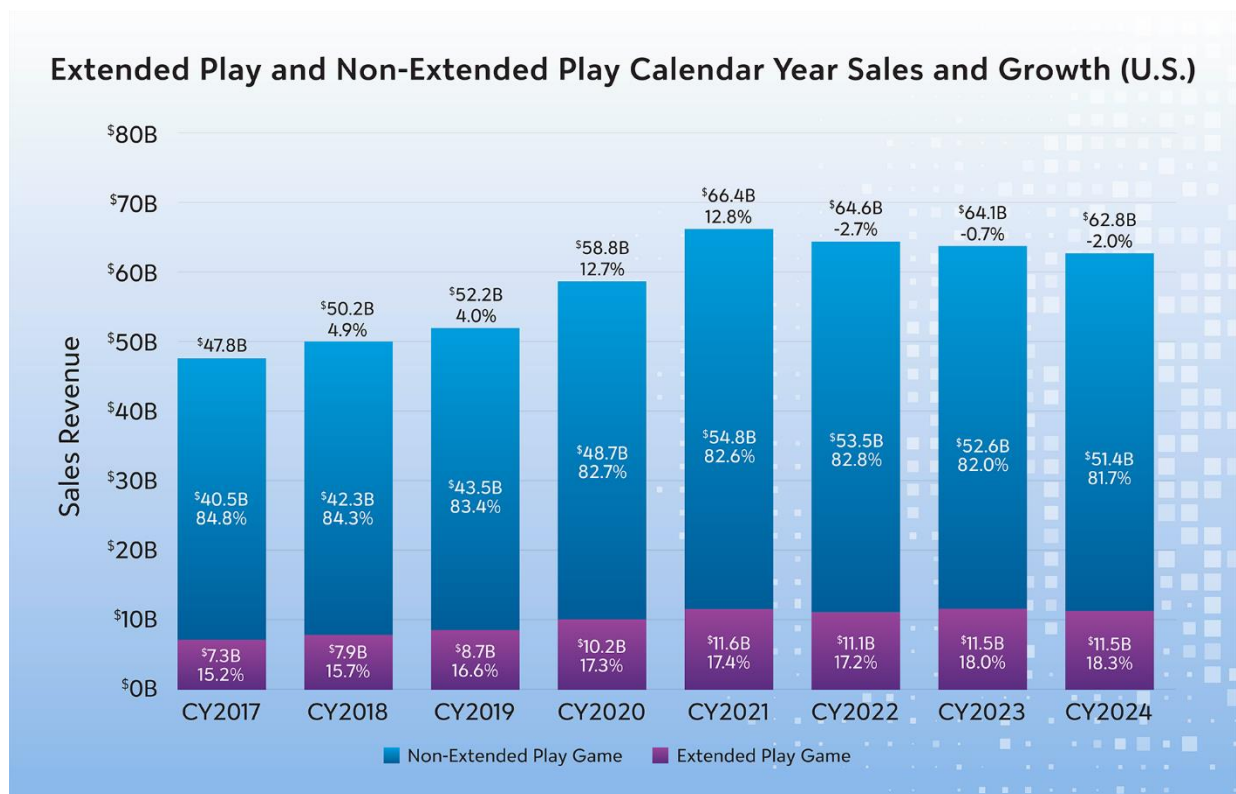


Data in Motion

August 20, 2025

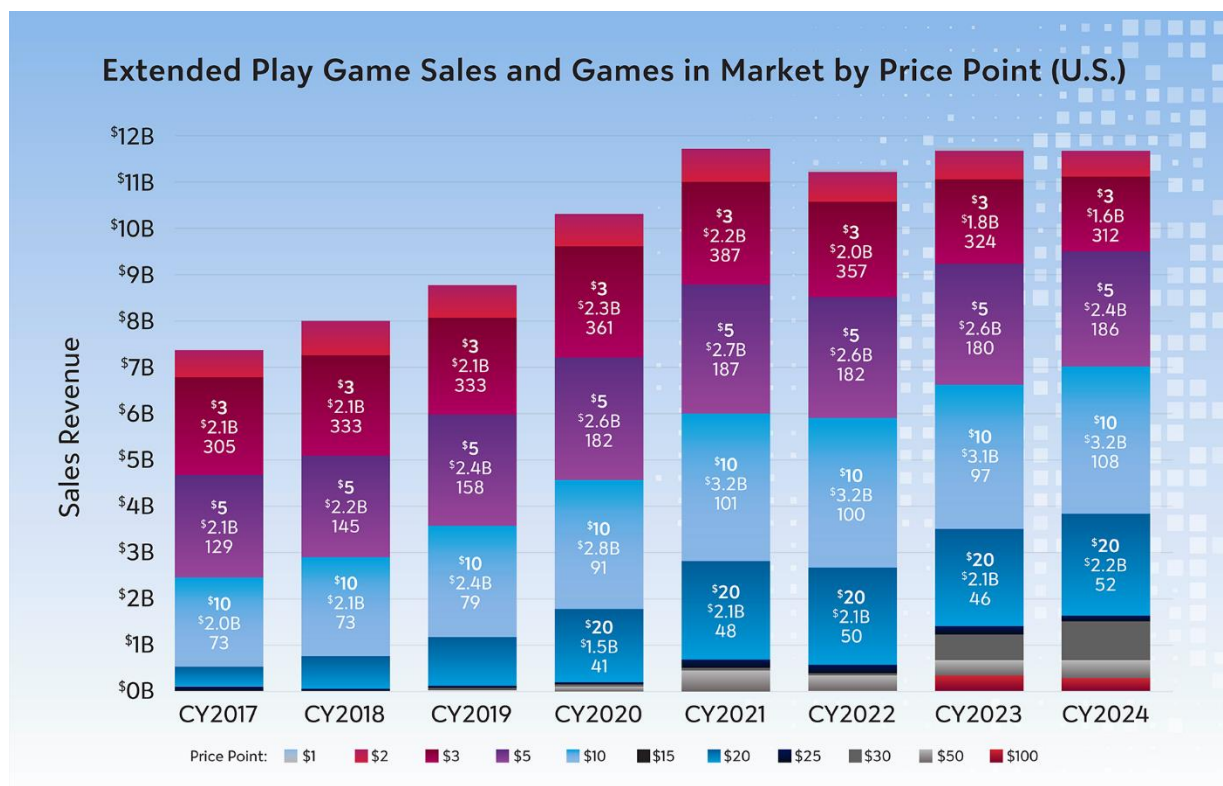
A Renewed Focus on Extended Play Games

Extended play instant games, long considered a niche product in a lottery's instant scratch game portfolio, exploded in popularity post-pandemic. This remarkable surge began in 2020 as players actively sought new entertainment and gaming alternatives. In the past several years, the sales of extended play games have remained steady at approximately \$11.5B, while non-extended play instant products have seen a decline. In this edition of *Data in Motion*, we dive deep into the rise and strength of extended play games and uncover why they're now a crucial component of the instant game landscape.



The success of extended play games becomes even more compelling when examining price point trends. While historically linked to the \$3 price point, higher-priced extended play games are growing more prevalent each year. For instance, \$20+ extended play game sales have surged an astounding 245% since 2019 (pre-pandemic), compared to the 65% growth experienced by non-extended play games for the same period of time and at that same price point. That growth is driven by a shift in focus toward launching more \$20+ extended play games. In 2019, there were only 30, \$20 extended play games available in the U.S. market. By 2024, that number increased to 52. Additionally, in 2024, five lotteries introduced a \$30 extended play game. This is interesting because these higher price point extended play

games were introduced approximately 8-10 years after higher price point non-extended play games. Given the current strong demand for these products, lotteries have an opportunity to accelerate adoption by offering attractive extended play games at high price points as players continue to move up the price point ladder.



To further understand the impact of extended play games, it is important to understand the Sales Efficiency Index. This metric reveals how a subset of games (in this case, extended play games) is performing at a specific price point. It is calculated by dividing the percentage of sales generated by those games by the percentage of games in market at that same price point, then multiplying it by 100.

Understanding the Index:

- An index of **100** signifies that a game's sales performance is exactly proportional to its market presence. For example, if extended play games represent 20% of \$5 game sales and \$5 games in market, their index is 100 – performing as expected.
- An index in the **150-200 range** indicates exceptional performance: these games are generating 50% to 100% more sales than their market share would suggest. Essentially, they are highly “efficient”; that is, capturing a larger proportion of sales while occupying less retail space.

As shown in the chart below, extended play games at the \$2, \$5, \$10 and \$20 price points exhibited exceptionally high Sales Efficiency Indexes in CY2025. This also highlights a significant market opportunity: the industry may be underleveraging extended play games by not having enough of them at these highly efficient price points.

Sales Efficiency Index by Price Point – U.S. Extended Play Games							
(EP % of Sales / EP % of GIM) x 100							
	CY2019	CY2020	CY2021	CY2022	CY2023	CY2024	CY2025
\$1	55.0	33.8	64.8	188.0	212.0	113.9	83.2
\$2	167.6	171.3	191.4	197.9	203.4	183.3	163.4
\$3	114.6	114.3	108.1	109.1	110.1	106.5	108.7
\$5	153.5	146.6	149.7	159.5	157.0	159.8	168.7
\$10	167.9	154.9	160.5	176.5	177.0	185.3	209.1
\$20	128.8	124.0	134.2	155.4	159.8	162.7	164.8
\$25	122.4	105.2	176.5	87.9	146.6	135.6	92.6
\$30	15.7	12.7	16.6	21.4	102.1	139.6	137.3
\$50		124.8	169.1	109.1	131.8	110.8	129.4
\$100					154.3	161.0	150.4

Driving Revenue: Extended Play Attracts High-Value Players

An analysis conducted over approximately 38 million sessions across 16 lottery jurisdictions, powered by Scientific Games' SCiQ retail ecosystem, revealed crucial insights into purchase behavior. The results showed that market baskets containing extended play games consistently showed higher average spend and more games than those baskets without extended play games.

Additionally, the SCiQ market basket data highlighted a significant demand imbalance: while extended play games were included in 29% of all market baskets, they represented only 12% of the available games for purchase. This stark difference underscores the high consumer demand for these games.

Final Word

The evidence is clear and points to a fundamental, positive shift for an enhancement of extended play offerings: increased sales, remarkable efficiency, growth at higher price points and attraction of high-value players. Extended play games are no longer a niche product or an afterthought; they are a powerhouse category demanding strategic attention. By applying proven instant game strategies, like alternate prize structures, enhanced play actions and strategic callouts, the lottery industry can unlock the full potential of extended play games and keep players coming back for more.

What steps will your lottery take to fully leverage the extended play advantage?


Sources:

1. *Infuse*, Scientific Games' Business Intelligence Platform

CONTRIBUTOR

Haley Bobo

Haley is Scientific Games' Director of Product Analytics for the company's Analytics & Insights team and loves the industry and helping lotteries drive returns to good causes. She joined the company in 2018.

A photograph of Haley Bobo, a woman with reddish hair, standing next to a man with white face paint and a striped suit. They are both smiling and posing for a photo outdoors.

Editor: Jared Johnsen

Design: Sarah Shroeder

SCiQ® and *Infuse*™ are trademarks of Scientific Games, LLC. © 2025. All rights reserved.

The information contained herein is for the intended consumption by Scientific Games employees and other authorized parties. This information is not compiled or otherwise made available for public dissemination or as a marketing, selling, or other reference point for outside or other 3rd parties without the express written consent of Scientific Games.