

Data in Motion

Marketing & Insights



February 28, 2024

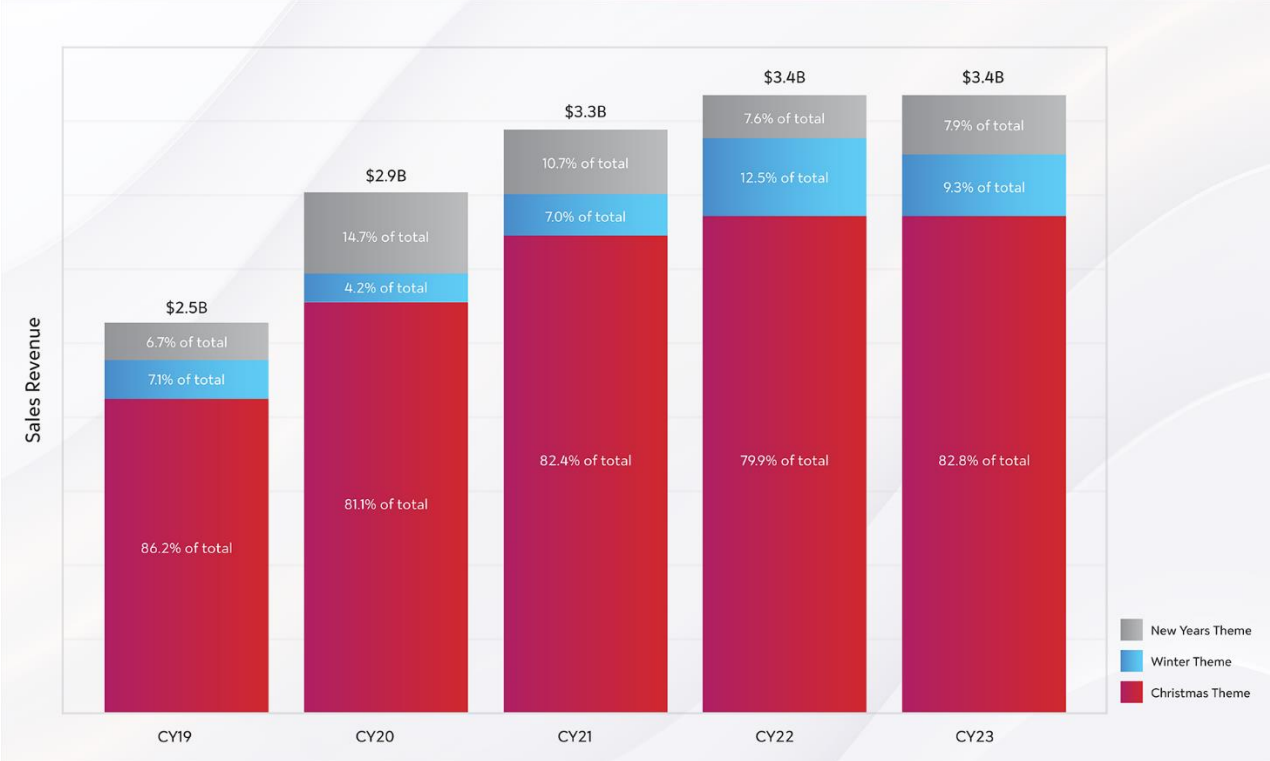
2023 Holiday Game Sales Summary

As lotteries begin planning for the 2024 holiday season, we thought this would be a good time to share some highlights from the 2023 holiday season. For the purpose of this particular issue of Data in Motion, “holiday” refers to those games launched in the fourth quarter of 2023 having a Christmas, winter, or New Year’s theme. In a future issue, we plan to cover the holiday game category more broadly, to include St. Patrick’s Day, Halloween, and others.

Year-Over-Year

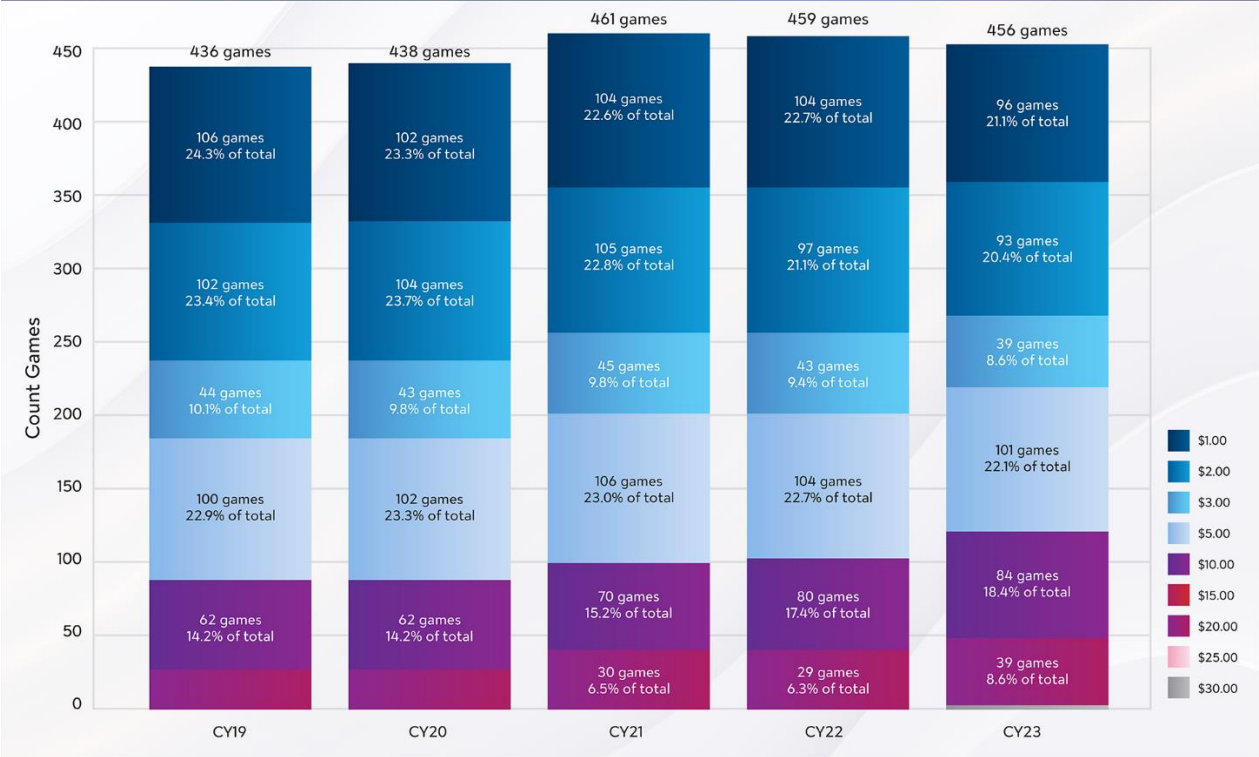
Mirroring the overall instant scratch game category, 2023 holiday game sales were essentially flat compared to 2022 holiday game sales, coming in at \$3.44 billion (versus \$3.41 billion in 2022). Sales from Christmas- and New Year’s-themed games each grew by roughly 4%, while general winter-themed game sales declined by 25%. The number of New Year’s-themed games in-market increased somewhat year-over-year, from 16 to 22. The number of Christmas-themed games in-market decreased slightly, going from 396 to 389, as did the number of winter-themed games, going from 47 to 45 games in-market.

Holiday Game Sales by Year/Theme



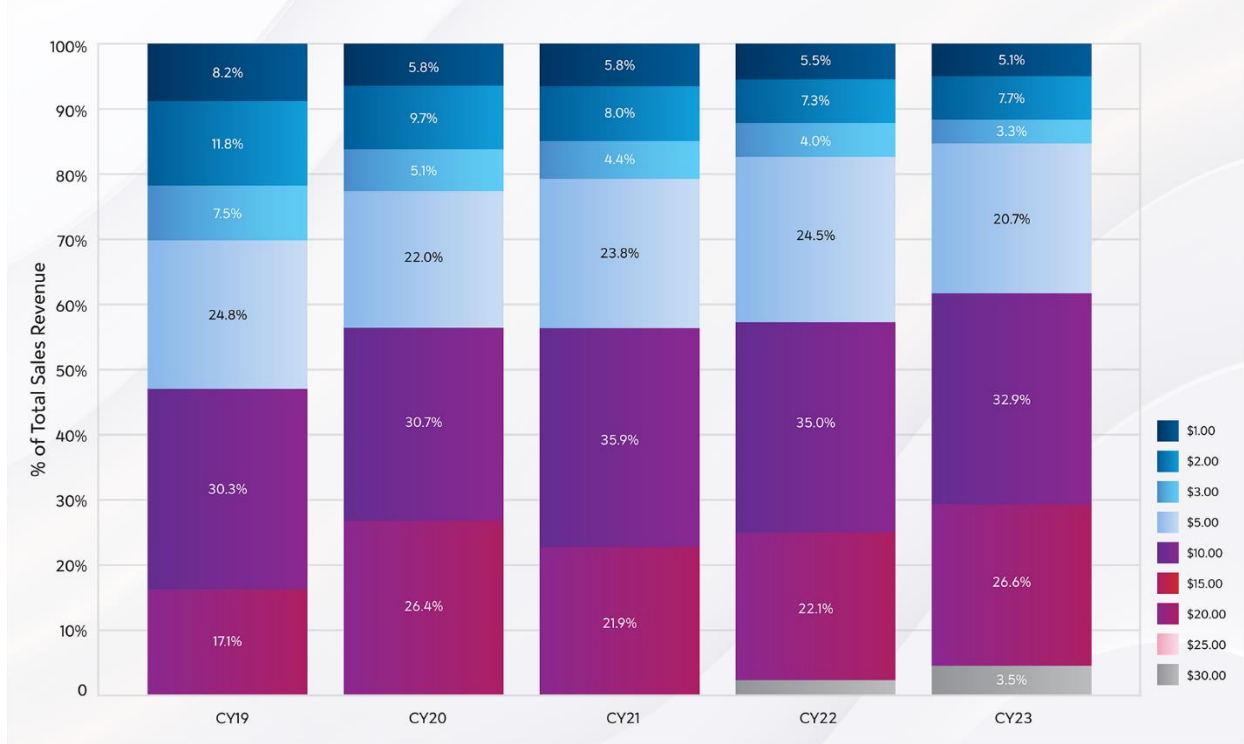
The number of holiday games launched in 2023 was roughly equal to the number launched in 2022, 459 vs. 456, respectively. There were fewer holiday games launched at the lower price points (\$5 and under) versus 2022 and more games launched at the higher price points (\$10 and above).

Holiday Game Launches by Year/Price Point



Although the \$5 price point had the largest number of games in market, it experienced a 4% decline in market share (sales), the largest decline of all price points. The \$10 price point was the market share leader, delivering just under a third (32.9%) of total holiday game sales for 2023. The \$20 and \$30 price points made up only 9.4% of the games in market but accounted for over 30% of total holiday game sales for 2023.

Holiday Game Market Share by Price Point/Year



Final Word

The holidays are an important time of year for the retail industry in general and our own industry is no exception. But as retail continues to adapt to changing consumer behaviors, including online shopping and the gifting of experiences, the lottery industry would do well to explore non-traditional avenues for keeping our games top-of-mind. Crossover games (games with both a physical and digital component), social media marketing, and experiential prizes are just a few examples of how lotteries can maximize this time of year to grow sales and deliver additional revenues to the good causes they support.

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