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FastPlay™: A Digital Opportunity Hiding in Plain Sight

As the lottery industry continues to evolve and modernize, more U.S. jurisdictions are offering digital sales. While online sales channels are growing, player expectations are shifting, and lotteries need to meet these expectations with a sustainable, high-performing digital portfolio.

Experience has shown that durable digital growth doesn't come from chasing volume or launching as many games as possible. Long-term success is shaped by thoughtful category management, understanding who your players are, how they want to engage, and creating consistent, high-quality player experiences.

FastPlay has emerged as a clear example of how a well-defined category can support digital readiness and long-term portfolio value.

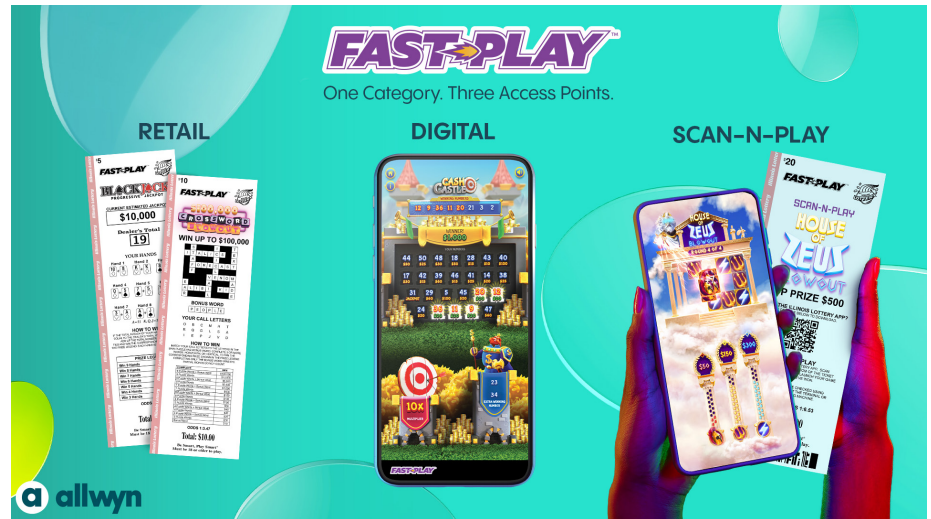
Digital Players Are Not a Monolith

In today's increasingly complex environment, performance depends on discipline and intentional design. Unfortunately, a key step in this process is often overlooked: defining digital categories by player behavior.

Digital players are not a single audience. Some prefer more passive play and anticipation-based experiences rooted in traditional draws. Others seek interactive, immediate-play formats that mirror modern digital entertainment. Sustainable growth depends on clearly distinguishing these segments and building categories intentionally around how each player wants to engage. Serving different audiences well requires purpose-built categories, not a one-size-fits-all approach.

The most durable digital growth comes from building defined categories with intention — understanding who your players are and creating experiences that earn their trust over time.

Adapted for both retail and digital channels, FastPlay's fixed-price, draw-based games deliver immediate outcomes while maintaining the familiarity of passive traditional lottery play. It occupies a defined space within the portfolio.



Disciplined Category Development

In Illinois, the FastPlay category wasn't built overnight. The category launched at retail in 2020, expanded online in 2021 with the same core content, and evolved through Scan-N-Play in 2022 and enhanced studio content in 2023.

At each stage, the foundation for brand recognition, player familiarity, and long-term stability was preserved. Steady progression and intentional expansion brought players along the journey, with pricing, features, and promotions evolving together as part of a connected experience.

The results of this approach are evident. FastPlay has become a clearly defined, high-performing category in the Illinois portfolio that integrates naturally across channels. It is considered a "lily pad" category that allows players to move easily between retail and digital environments with a consistent experience.

A high-performing, mature FastPlay portfolio delivers intentional alignment between price tiers and the experiences they deliver. Entry-level offerings prioritize clarity and accessibility, low barriers, familiar mechanics, and easy-to-understand outcomes. As price

points increase, player expectations shift. Players seek deeper engagement, extended play mechanics, compelling progressives, and experiences that reflect increased investment.

Getting this alignment right distinguishes a FastPlay category that performs consistently from one that cannibalizes itself or confuses players. It also creates natural upgrade pathways within the category.

Portfolio architecture is not a radical concept, but it requires active management, including regular reviews of player behavior data, game benchmarks, and market trends.

The Online Acceleration Opportunity

For lotteries that already have retail FastPlay programs, the online opportunity is significant. Retail establishes familiarity and trust; digital accelerates reach, drives incremental sales, and opens new player acquisition channels. FastPlay clearly has a role online as a structured category that grows with intent. These observations are based on our direct, firsthand experience. As lotteries continue evaluating the future of their portfolios, a disciplined FastPlay strategy may represent a valuable opportunity to strengthen both retail and digital play, and one that many jurisdictions are beginning to explore.

To learn more about Allwyn's FastPlay offerings visit: allwyn-northamerica.com/digital-games/



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