

# eINSTANT SALES GETTING **SLUGGISH?** **DIVERSIFY!**




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GAMES STUDIO



## THE CHALLENGE FACING iLOTTERY PROGRAMS IN NORTH AMERICA

As iLottery programs mature in the North American market, attracting first-time depositors has become increasingly difficult and the rapid sales growth realized early on eventually begins to taper off. Industry data shows that the number of iLottery first-time depositors dropped by approximately 25% from 2023 to 2024. Additionally, eInstant sales growth has begun to plateau with fewer first-time players being acquired and retention rates dropping. In a recent Eilers & Krejcik Gaming Report that looks at quarterly sales, comparing Q4 sales over the last three years shows that while eInstant sales grew by 30% in 2022, this growth dropped to 17% in 2023, and further declined to 11% in 2024, with less than 1.5% growth observed over the last two quarters.

**How can lotteries address the challenges of declining iLottery player acquisition and retention rates? Here is what industry data and experience reveal:**

-  Large jackpot runs provide a temporary boost in iLottery player acquisition; however, they are ultimately unpredictable and unreliable for sustained growth.
-  Paid advertising is an expensive player acquisition source for lotteries.
-  Lotteries generally lack the iLottery budget needed to compete with the bonuses offered by iGaming companies.

## UNLOCKING NEW PLAYERS THROUGH OMNI-CHANNEL STRATEGIES AND DIVERSIFICATION

As Nike co-founder Bill Bowerman once said, "Everything you need is already inside". For lotteries, the key to finding new iLottery players lies within their already engaged and loyal retail player base. Consider this: a 2022 Leger study found that 52% of North American adults purchased a lottery ticket at a retail location in the past year, suggesting a vast fertile ground for potential iLottery players. However, the same study also revealed that nearly 70% of retail lottery players were not even aware that iLottery exists!

**How can lotteries better educate and engage their retail players while also promoting awareness and participation in iLottery? Pollard Banknote has identified two key strategies to address these challenges:**



## OMNICHANNEL OPPORTUNITIES

Lotteries can cost effectively promote online versions of the games that retail players like to play. By offering both an instant ticket and an elnstant version of a game, complemented by a robust loyalty campaign, lotteries can successfully market elnstant games to retail players. QR codes can also be added to instant tickets to help direct retail players to the iLottery program, providing an easy, affordable, and engaging call to action.

Pollard Banknote has built a portfolio of omnichannel games that players can access both at retail locations and on digital and charitable game platforms. We have developed a programmatic approach to encourage players to engage across channels, allowing them to enjoy their favorite games wherever they prefer.

## DIVERSIFYING PLAY STYLES AND GAME DESIGNS

Just as it is at retail, play style diversification is essential to elnstant sales growth. Take Crossword games for example; they invariably perform poorly in focus tests because core players find them slow to play. Yet there is a dedicated segment of players who enjoy them. In fact, in 2024, the Ontario Lottery and Gaming Corporation (OLG) achieved 23.24% of its total instant sales from Crossword games alone!

The same concept can be applied to elnstant games. To attract and retain players—and boost sales—lotteries should offer a well-rounded mix of elnstant games and play styles, such as multi-ticket, pull-tab, Crossword, Keno, key number match, and symbol-based games. At the same time, it is essential to keep these games fresh and exciting to maintain long-term player engagement. As player preferences evolve, game designs must adapt accordingly to sustain interest and excitement.

***To reignite sluggish elnstant growth, lotteries should tap into their loyal retail player base. By creating omnichannel opportunities to engage retail players and committing to diversifying play styles and game designs, lotteries can boost awareness and encourage repeat play of elnstant games, all while keeping the experience fresh and engaging.***

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