

DATA IN MOTION

Marketing & Insights



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CY2024 Sales Summary

In this issue of Data in Motion, we share some U.S. sales and revenue highlights from calendar year 2024. Total U.S. lottery sales came in just shy of \$95 billion, a decline of 4.2% versus CY2023. Total Gross Gaming Revenue (GGR, or sales minus payout) was also down. These declines were primarily driven by a year-over-year drop in Terminal Based Game (TBG) sales, which were down 8.2% versus CY2023, the first time the category has seen a decline since CY2020.

CY2024 U.S. Lottery Sales Snapshot*

- CY2024 Instant Game Sales: \$62.7 billion, **down \$1.3 billion (-2.0%)** versus CY2023
- CY2024 Terminal Game Sales: \$32.1 billion, **down \$2.9 billion (-8.2%)** versus CY2023
- CY2024 Full Line Sales: \$94.8 billion, **down \$4.2 billion (-4.2%)** versus CY2023

CY2024 U.S. Lottery Gross Gaming Revenue (GGR) Snapshot

- CY2024 Instant Game GGR: \$16.6 billion, **down \$0.5 billion (-3.2%)** versus CY2023
- CY2024 Terminal Game GGR: \$15.4 billion, **down \$1.4 billion (-8.4%)** versus CY2023
- CY2024 Full Line GGR: \$32.0 billion, **down \$2.0 billion (-5.7%)** versus CY2023

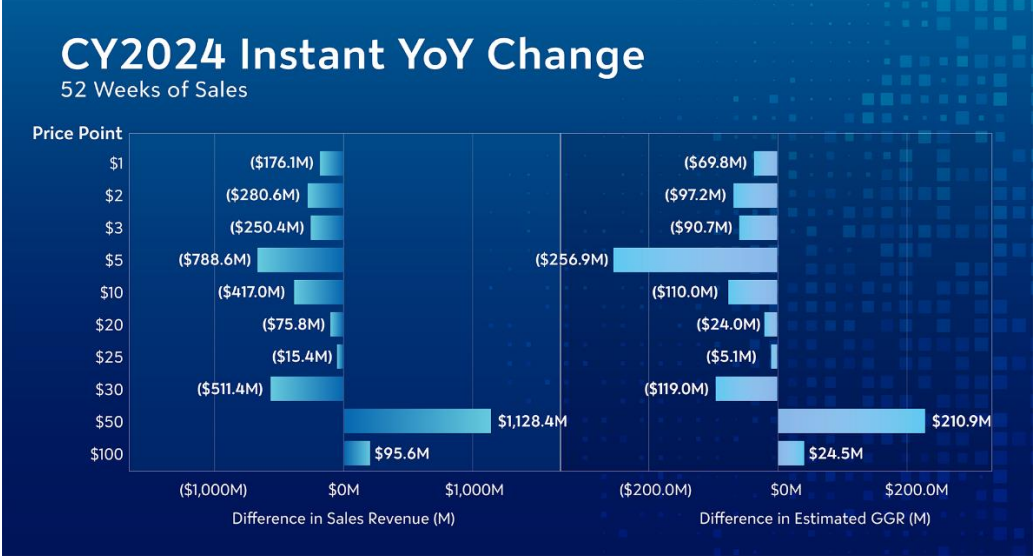
** All figures are based on the first 52 weeks of yearly sales. Due to missing or incomplete sales data, this report excludes full-line sales for MS and terminal-based game sales for IN, VA, and WY.*

Instant Scratch Game Sales and GGR

While not as significant as the Terminal Based Game category, the Instant Scratch Game category also saw declines in sales and GGR. Instant Scratch sales were \$62.7 billion, a decline of 2% compared to CY2023, and GGR was \$32 billion, a decline of 5.7%.

The declines came at every price point except for the \$50 and \$100 price points, which

grew by 16.8% and 15.5%, respectively. The \$50 price point performed exceptionally well versus CY2023, growing by \$1.1 billion and expanding its market share to 12.5% (a 2% increase over CY2023), surpassing the \$30 price point for the first time. While both were down versus CY2023, the \$10 and \$20 price points continue to dominate Instant Scratch Game market share.



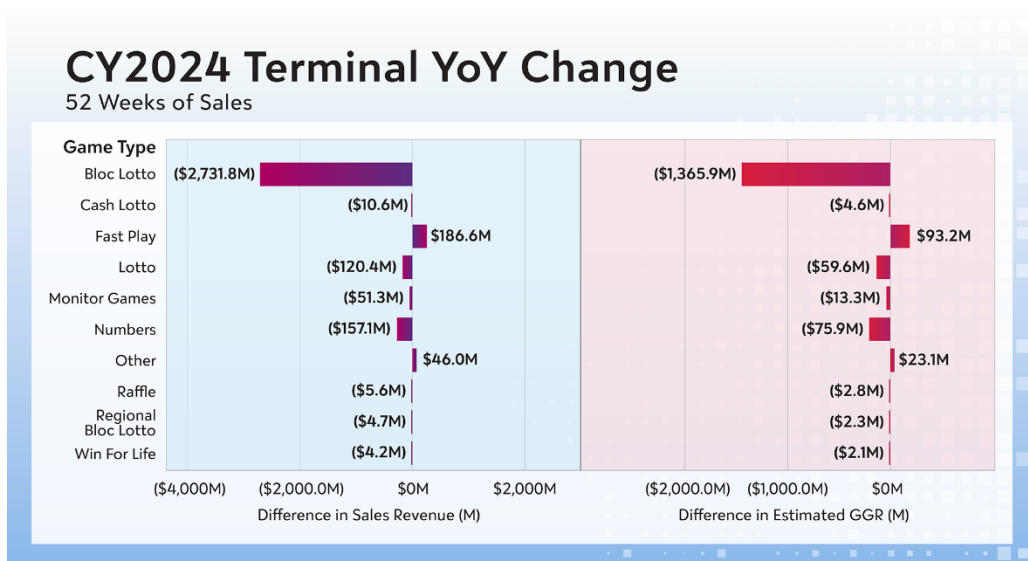
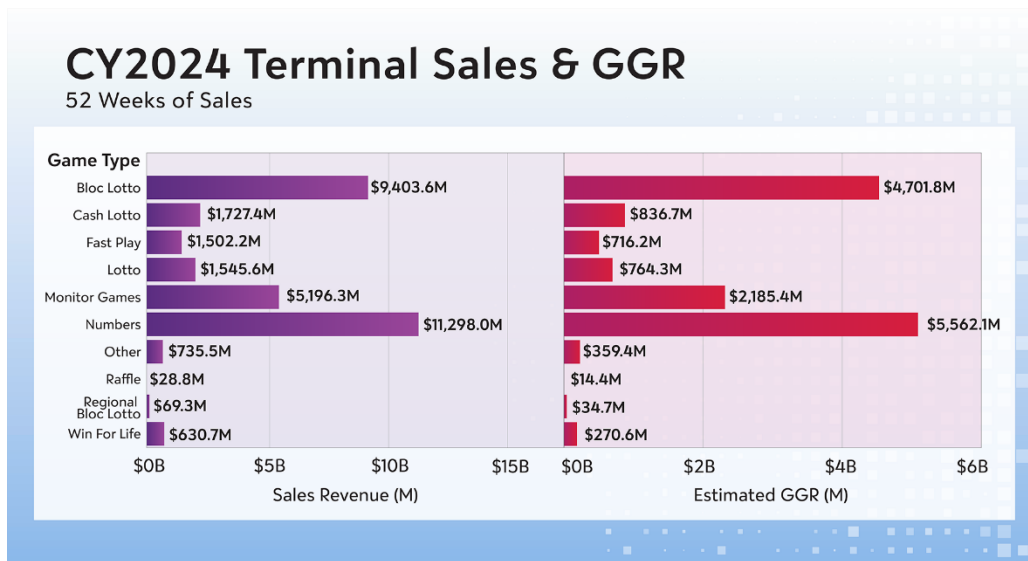
Terminal Based Game Sales and GGR

The Terminal Based Game category experienced a year-over-year sales decline of 8.2%. The only two TBG categories that grew were Fast Play (+14.2%) and “Other”, which includes games like Cash Pop (+6.7%).

Fast Play’s overall growth for the year came to \$186.6 million in sales and \$93.2 million

in GGR. Of the 25 lotteries offering Fast Play, 14 grew year-over-year. Fast Play market share increased by one percentage point, ending the year with 5% of total TBG sales.

Bloc Lotto accounted for the most significant chunk of the TBG category’s total \$2.9 billion decline, coming in at \$2.7 billion less than CY2023. It’s worth noting that CY2023 was a banner year for Bloc Lotto thanks to a number of large jackpots. Sales grew across 98% of reporting lotteries in CY2023 and booted – for the first time – Numbers Games out of the first-place spot for market share. That growth proved unsustainable in CY2024, which resulted in declines across all reporting jurisdictions and relegating Bloc Lotto back to the #2 position (behind Numbers). Monitor Games, which saw a decline of 1.0%, remained in third place with 16.2% of TBG market share.



Final Word

We hope you found this CY2024 sales and revenue summary helpful. In the coming weeks, your Scientific Games representative will have a more detailed accounting of the year, so if you have any questions, be sure to reach out to them. We look forward to sharing a FY2025 sales and revenue summary with our readers in August.

CONTRIBUTOR



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Danielle is one of Scientific Games' Business Intelligence Analysts and contributes impactful data stories and visualizations to Data in Motion. She joined the lottery industry in 2021.

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