



September 17, 2025

Fiscal Year 2025 U.S. Sales Summary

In this issue of *Data in Motion*, we take a closer look at U.S. lottery performance for FY2025. In total, U.S. sales reached \$91 billion, marking a 5.6% decline compared to fiscal year 2024. Gross Gaming Revenue also decreased, down 8.3% year-over-year.

The story of the year: Terminal-based games drove most of the declines, particularly Bloc Lotto, which saw a decrease of \$5.1 billion after experiencing two years of record-breaking sales driven by jackpots in FY2023 and FY2024. Conversely, instant scratch games held their ground, finishing the year nearly flat, down less than 1% compared to FY2024.

While FY2025 delivered lower sales following two years of extraordinary Bloc Lotto jackpot-driven growth, player enthusiasm for instant scratch games and the emergence of innovative terminal-based game categories point to ongoing opportunities for growth.

FY25 U.S. Lottery Sales Snapshot

- FY2025 Instant Scratch Game Sales: \$61.0 billion, **Down \$0.3 billion (-0.5%)** from FY2024
- FY2025 Terminal Game Sales: \$30.0 billion, **Down \$5.1 billion (-14.4%)** from FY2024
- FY2025 Full-Line Sales: \$91.0 billion, **Down \$5.4 billion (-5.6%)** from FY2024

FY25 U.S. Lottery Gross Gaming Revenue (GGR) Snapshot

- FY2025 Instant Scratch Game Sales: \$16.1 billion, **Down \$0.2 billion (-1.4%)** from FY2024
- FY2025 Terminal Game Sales: \$14.4 billion, **Down \$2.5 billion (-14.9%)** from FY2024
- FY2025 Full-Line Sales: \$30.5 billion, **Down \$2.7 billion (-8.3%)** from FY2024

* All figures in this document are based on the first 52 weeks of fiscal year sales for publicly available information. Sales and game attribute data are self-reported across some U.S. jurisdictions. Therefore, some game information,

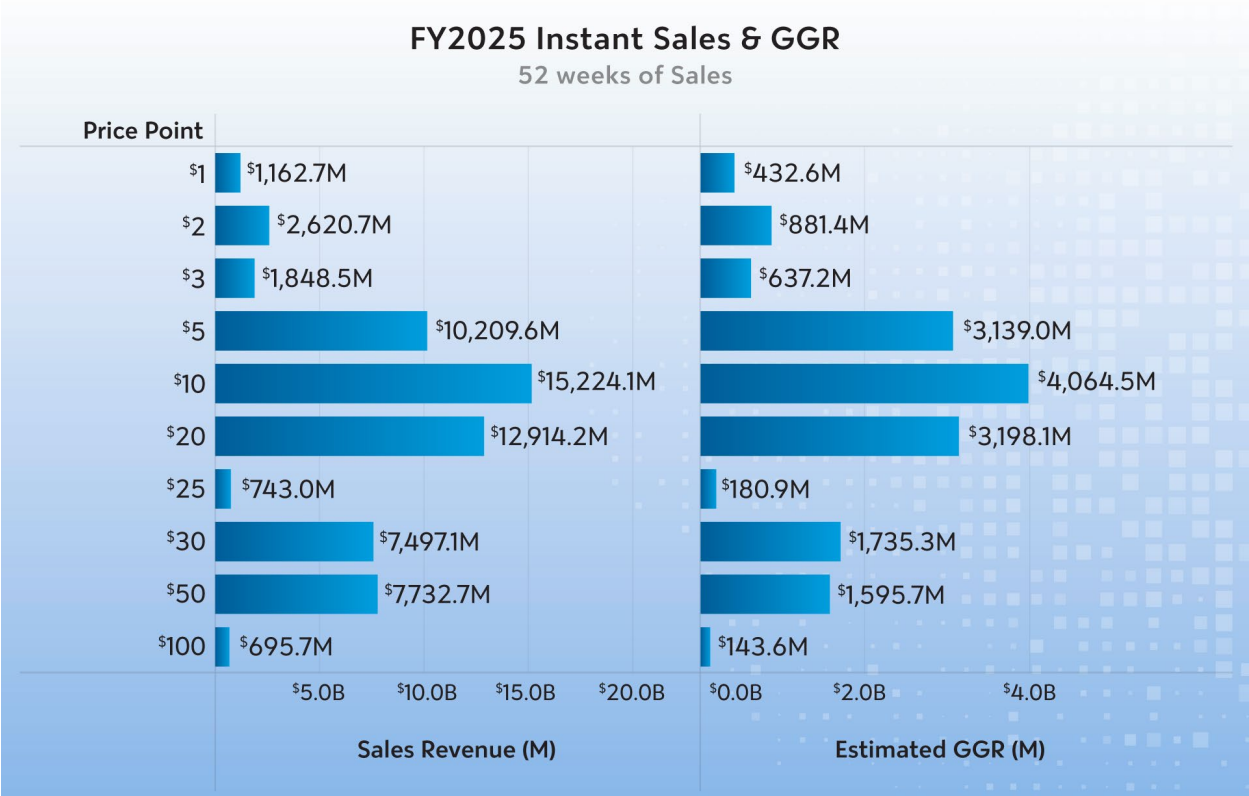
such as enhancements, may not be fully reported. Due to missing or incomplete sales data, this report excludes full-line sales for MS, RI, and VA; and terminal-based game sales for IN and WY. As industry standard, game counts generally refer to any games in market with at least \$10,000 in sales per week within the given year.

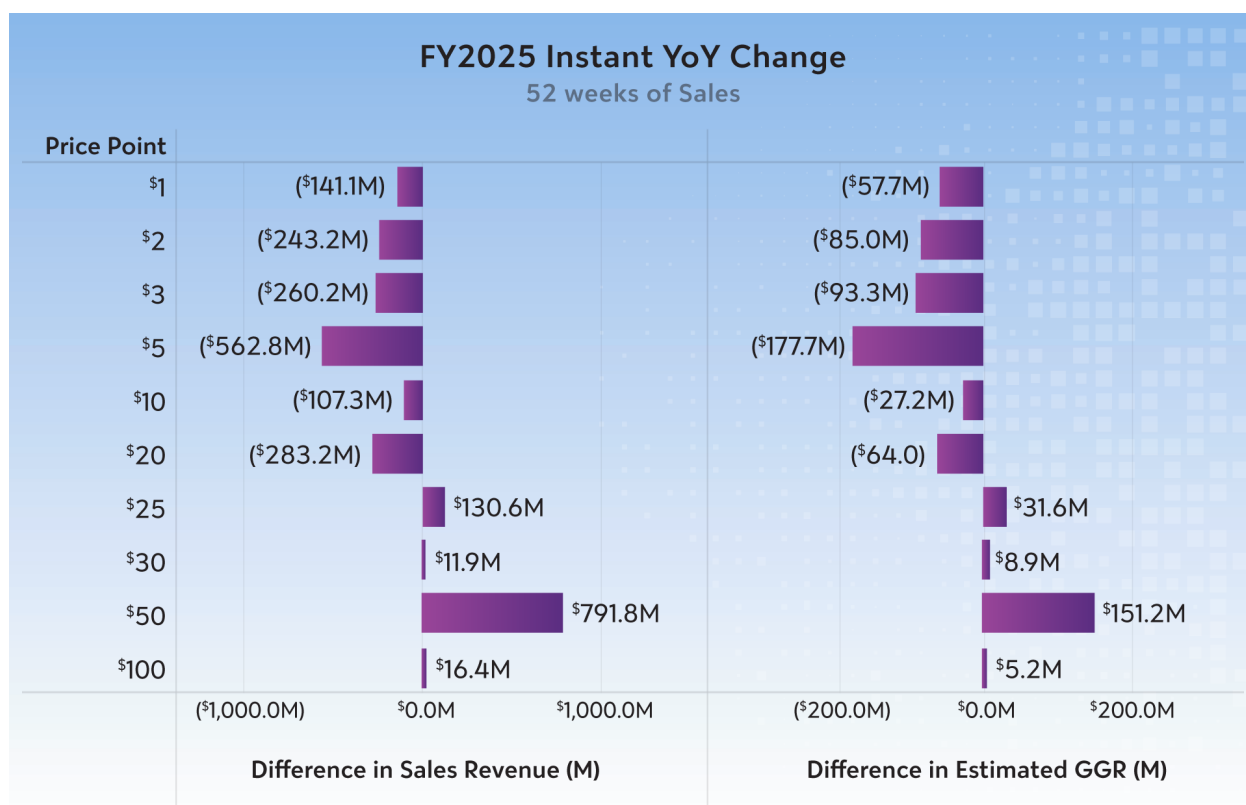
Instant Scratch Game Sales and GGR

Instant scratch games once again proved their resilience. Despite being essentially flat overall, the category’s premium price points surged:

- \$50 games soared, adding \$791.8 million in sales (+11.4%) and \$151.2 million in GGR year-over-year. Notably, FY2025 marked the introduction of the \$50 price point in both DC and Delaware.
- \$25+ game sales grew across the board, showing that players continue to embrace bigger, bolder play experiences.

At the other end of the spectrum, the \$5 price point saw the steepest decline, down \$562.8 million in sales and \$177.7 million in GGR. Still, \$5 games remain the workhorse of the category—with 1,029 games (more than any other price point), they accounted for 26% of all instant scratch games in FY2025.





Terminal-Based Game Sales and GGR

After back-to-back record years, terminal-based games ended FY2025 at \$30 billion in sales, the lowest since FY2020. All 42 reporting lotteries posted year-over-year declines, with Bloc Lotto leading the downturn:

- Bloc Lotto sales fell by \$5.1 billion (-41.2%), marking the sharpest decline since FY2020. Following extraordinary jackpot runs in FY2023 and FY2024, FY2025 delivered fewer blockbuster moments, leading to sales declines of 20% or more across all lotteries. In fact, 28 jurisdictions saw Bloc Lotto sales fall by 40% or greater.

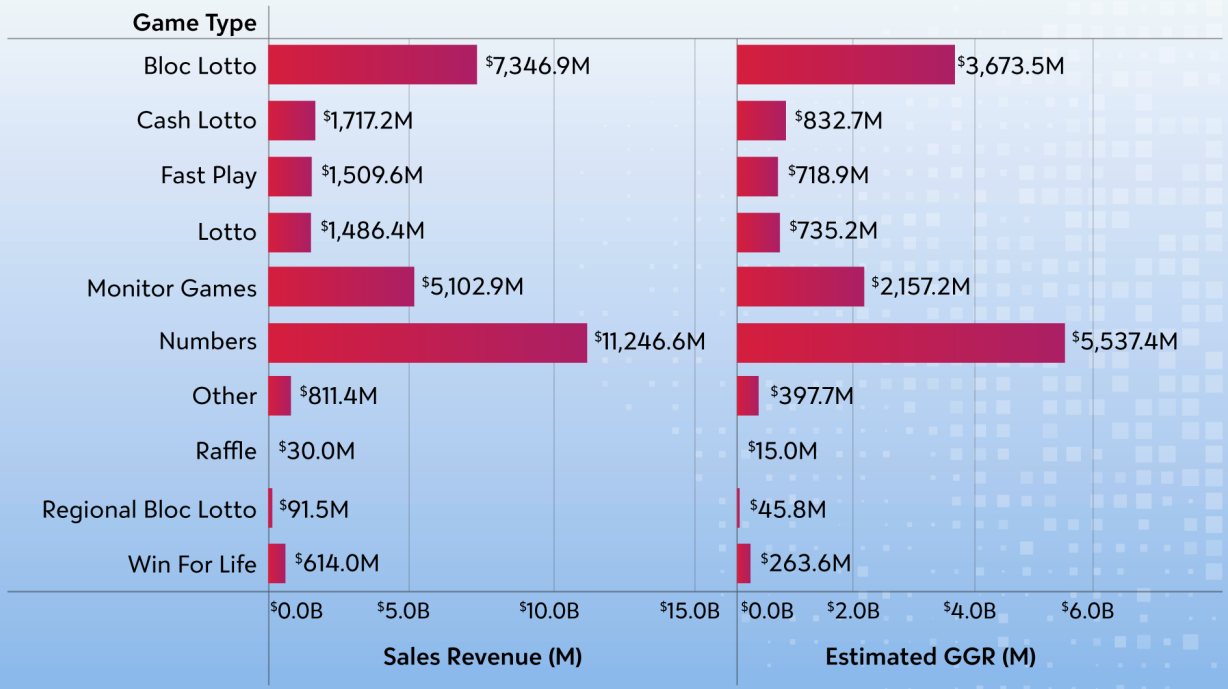
Yet not all terminal-based game categories were down. Several bright spots emerged:

- Fast Play (+6.6% year-over-year) continued its strong performance trend, growing sales by \$93 million.
- Other (+15.6% year-over-year), led by *Cash Pop* (which now makes up nearly half the category), added \$109.6 million in sales.
- Regional Bloc Lotto (+51.9% year-over-year) surged, with six of 14 participating lotteries posting growth above 50%.

These upward trends underscore the importance of innovation in the terminal-based space and highlight players' appetite for new game formats beyond traditional draw games.

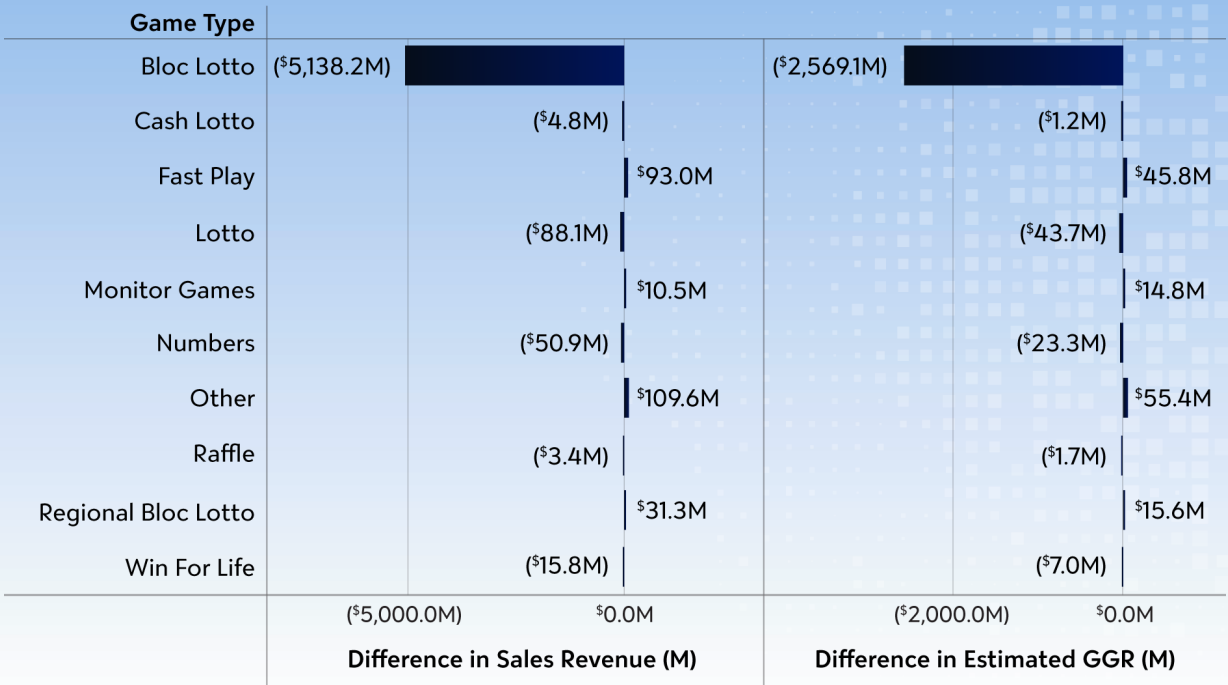
FY2025 Terminal Sales & GGR

52 weeks of Sales



FY2025 Terminal YoY Change

52 weeks of Sales



Final Word

FY2025 marked a transition in the lottery marketplace, following record-breaking jackpot runs in the previous two fiscal years. Players continue to respond enthusiastically to premium instant scratch games and innovative terminal-based offerings. For lotteries, the message is clear: product diversification and fresh play experiences remain key to driving growth.

Your Scientific Games representative is available to provide a more in-depth analysis of these results and their implications for your jurisdiction. In the meantime, if you have any questions, please don't hesitate to reach out to us. We're here to help you translate data into insights and insights into action.

CONTRIBUTOR

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

Fun fact: Danielle is also a proud Florida State alumni with a B.S. in Marketing and Management.



Sources:

1. FY2025 Annual Highlights Analysis Report, Scientific Games. All references and data points are provided pursuant to the FY2025 and FY2024 Annual Highlights Analysis Reports. The figures and tables presented are the result of a comparative analysis of those reports.

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