

DATA IN MOTION

Marketing & Insights



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U.S. CY2025 Sales Summary

The CY2025 results are in! Below are the key sales trends that shaped the U.S. lottery market:

- High Price Point Growth
- Strategic Product Enhancements (SPEs) Driving Growth
- Bloc Lotto Sales Ups & Downs
- Notable Sales Performance by Select Draw Game Categories

CY25 U.S. Lottery Sales Snapshot*		
	CY2025	Vs CY2024
Instant Game Sales	\$61.0 billion	Down \$0.2 billion (-0.3%)
Terminal Game Sales	\$32.5 billion	Up \$0.5 billion (1.5%)
Full Line Sales	\$93.5 billion	Up \$0.3 billion (0.3%)

CY25 U.S. Lottery Gross Gaming Revenue (GGR) Snapshot		
	CY2025	Vs CY2024
Instant Game GGR	\$16.0 billion	Down \$0.1 billion (-0.9%)
Terminal Game GGR	\$15.6 billion	Up \$0.3 billion (1.6%)
Full Line GGR	\$31.7 billion	Up \$0.1 billion (0.4%)

**All figures in this document reflect the first 52 weeks of yearly sales. Sales and game attribute data are self-reported across U.S. jurisdictions. Therefore, some games and product enhancements not produced by Scientific Games 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. Game counts generally refer to any games in market with at least \$10,000 sales per week within the given year.*

The Instant Story

Overview

- The number of instant games on sale declined 0.5% YoY.
- The number of games launched was down by 4.4%, driven by a 13% decrease in \$1 launches.
- In contrast, games launched at \$20, \$30 and \$50 price points increased 3.8%.
- This continues a multi-year downward trend, with total U.S. game launches per year declining 12% since CY20.

Takeaway: *There's a clear shift towards launching fewer lower price point games. Lotteries are experimenting with portfolio strategies to focus on high price point games, base games, holidays, and families of games.*

High Price Point Growth

High price point sales (\$20, \$30, and \$50) as a category collectively grew 1.62% YoY.

- \$20 sales increased 0.9%. Growth was largely driven by the five lotteries where \$20 is the highest available price point.
- \$30 sales declined 3.9%. Launch counts remained flat; however, total ticket volume decreased 15%, as lotteries reduced order quantities per game.
- \$50 sales increased 9.1%.
- \$50 was the fastest-growing price point, adding 19 new games for a 28.4% YoY increase in game launches.

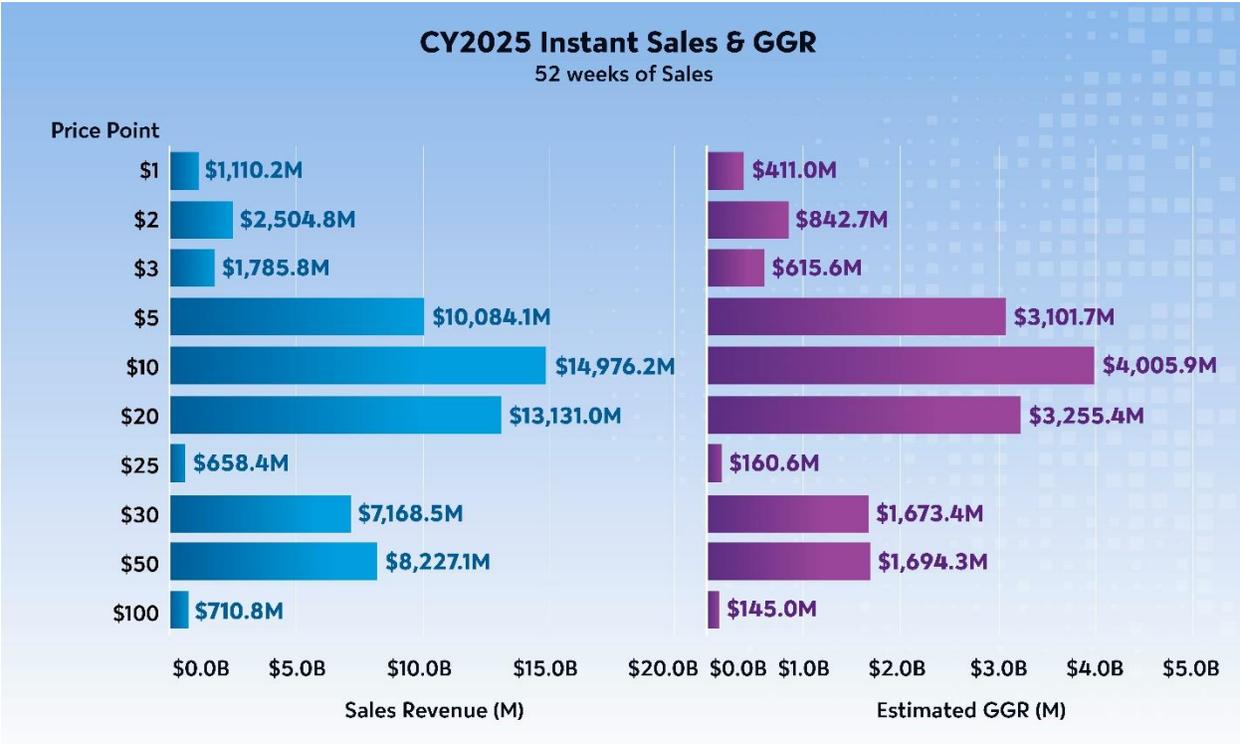
Takeaway: *The high price point category delivered 1.62% YoY growth, driven by momentum at \$20 and expansion at \$50 games. In contrast, \$30 sales declined as lotteries reduced order quantities and shifted portfolio focus. Strategic differentiation through prize structures and game design remains key to sustaining growth.*

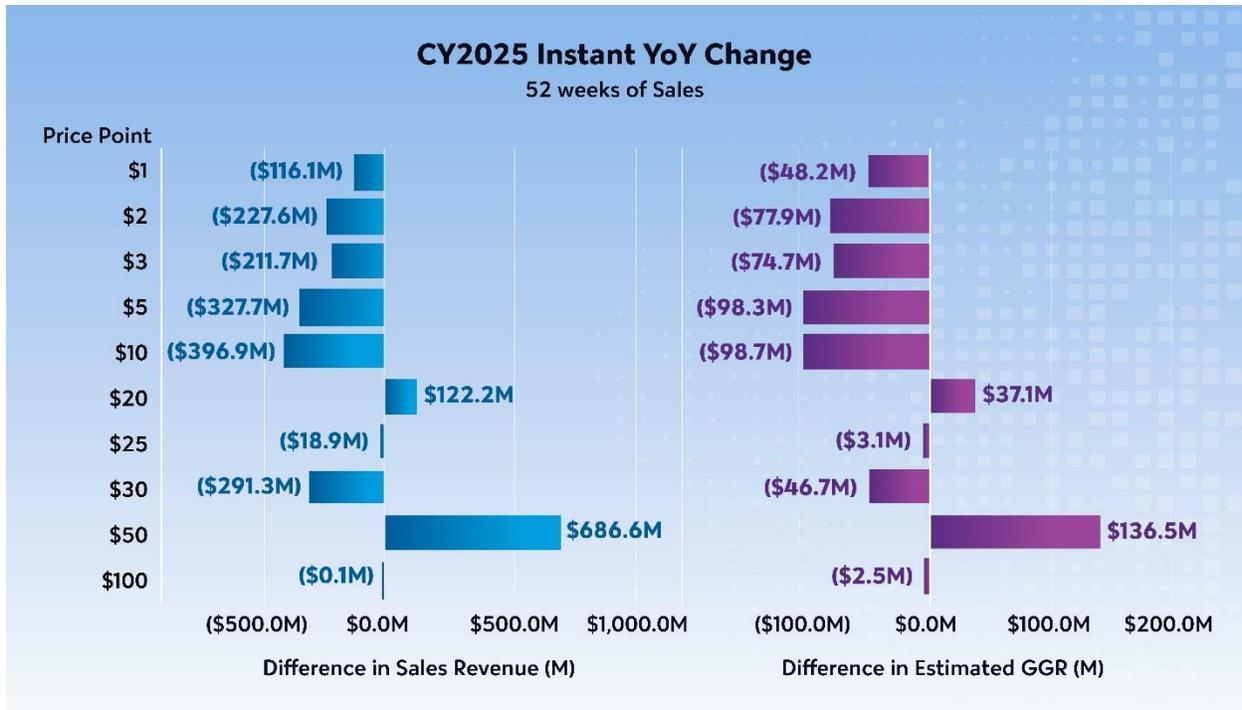
Strategic Product Enhancements (SPEs) Are Driving Growth

- Nine of the top 10-performing weekly per capita (WPC) games in CY2025 featured at least one SPE.
- SPEs were represented in 37% of game launches but generated 50% of total instant game sales.

Takeaway: SPEs continue to outperform games without strategic enhancements. They are clear growth drivers and increasingly central to high-performing instant portfolios.

Competitor SPE data not captured.





The Terminal-Based Games Story

Bloc Lotto Sales Ups & Downs

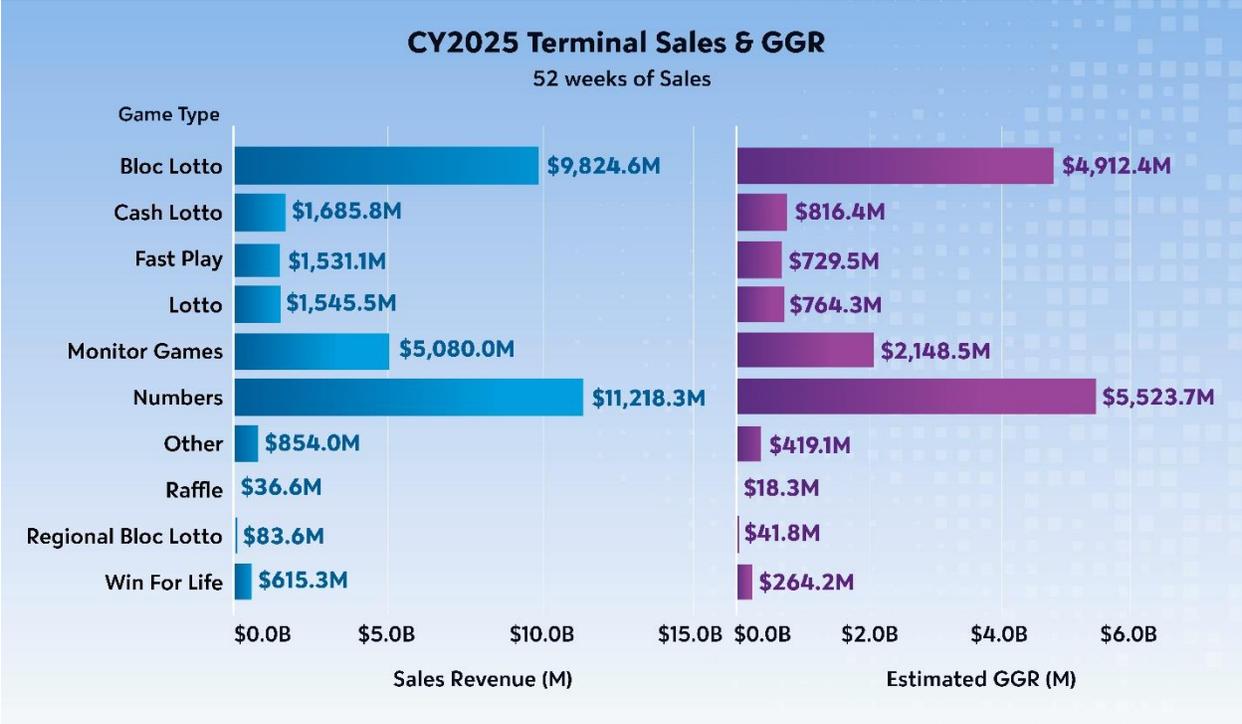
- Powerball had a strong year, with two jackpots exceeding \$1.5 billion and sales growth of 44%.
- Mega Millions sales declined 34%. Mega Millions increased its base ticket price in April 2025 from \$2 (+ optional \$1 multiplier) to an all-inclusive \$5. With less than a full year in market, performance continues to be monitored.

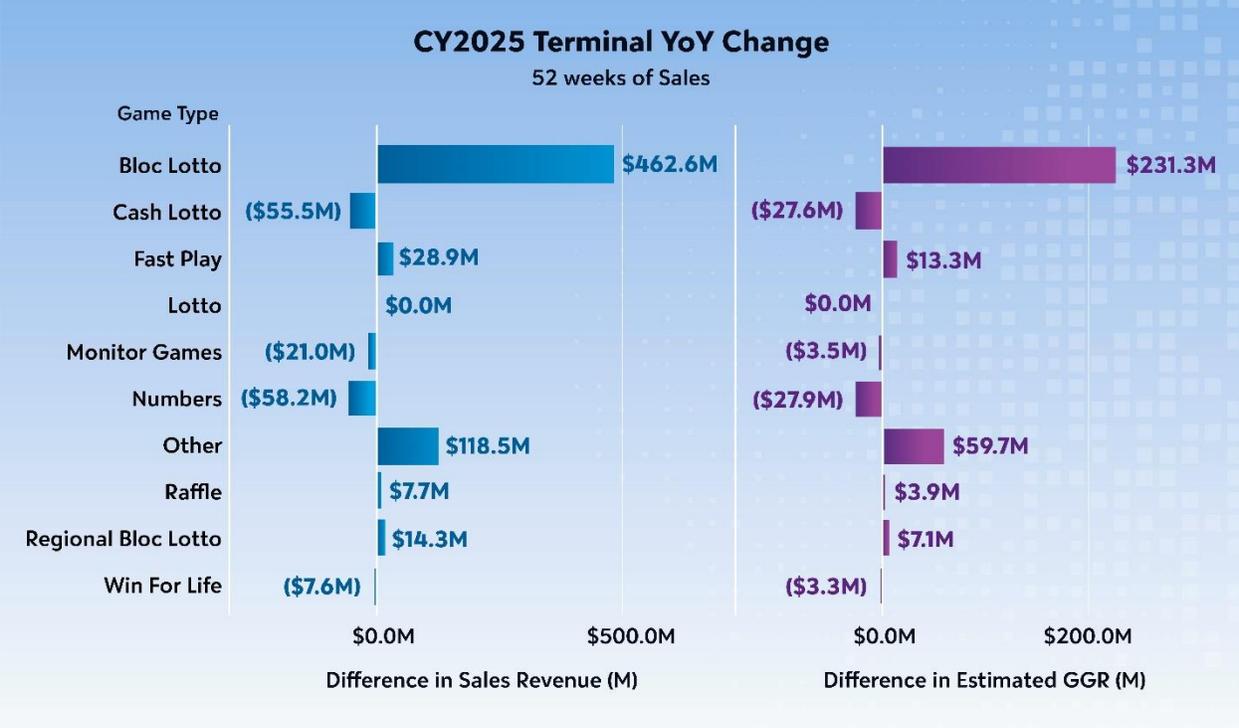
Takeaway: While it remains early to assess the long-term impact of the Mega Millions price change, early trends suggest evolving player behavior within the category. Clearer product differentiation has emerged, and the overall Bloc Lotto segment remains resilient.

Notable Sales Performance in Select Draw Game Categories

- The Other Game category grew 16%, driven largely by Cash Pop, which launched in two additional jurisdictions during CY2025.
- Fast Play sales grew 1.9% YoY, increasing by \$28 million. Growth was supported by new price points, enhanced prize structures, omnichannel strategies, progressive jackpots, and games with simple play mechanics that continue to attract players.

Takeaway: Non-jackpot driven draw game growth is possible through focused product differentiation within the category.





Bloc Lotto = Powerball and Mega Millions
 Cash Lotto = In-state lotto games with fixed all cash top prize
 Fast Play = Terminal-generated instant win games
 Lotto = In-state lotto games with rolling annuitized jackpot top prize
 Monitor Games = Rapidly drawn games like Keno, virtual sports, etc.

Numbers = Pick 2, Pick 3, Pick 4, and Pick 5
 Other = Cash Pop, MUSL's 2by2, and other games with unique attributes
 Raffle = Short duration raffle-type games with guaranteed prize tiers
 Regional Bloc Lotto = Lotto America
 Win for Life = Cash 4 Life and Lucky for Life

Final Word

CY2025 demonstrated the U.S. lottery market's resilience and adaptability. While overall sales growth was modest, performance tells a deeper story: a continued shift toward high price point instant games, the outsized impact of Strategic Product Enhancements, and steady gains in terminal-based products. Lotteries are launching fewer games but doing so with greater strategic focus, prioritizing differentiation, optimized prize structures, and portfolio discipline. This intentional portfolio management will be critical to deliver value to players in a changing demand landscape.

CONTRIBUTOR

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Source: INFUSE™, Scientific Games' Business Intelligence Platform

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