August 19, 2026

Fiscal Year 2026 U.S. Lottery Sales Analysis

In this issue of *Data in Motion*, we take a closer look at U.S. lottery performance for FY2026. **After last year's post-jackpot cooldown, the industry rebounded: total U.S. sales reached $93.2 billion**, a 2.4% increase over FY2025, driven almost entirely by two blockbuster Powerball jackpots. Instant scratch sales were essentially flat year over year, but the portfolio beneath that headline was not: lotteries continued shifting toward higher price points and strategically differentiated products, while terminal-based sales posted strong growth largely because of jackpot performance.

FY26 U.S. Lottery Sales Snapshot

	FY2026	VS FY2025
Instant Game Sales	$60.5 billion	▼ **Down** $0.5 billion (-0.8%)
Terminal Game Sales	$32.7 billion	▲ **Up** $2.7 billion (+9.1%)
Full Line Sales	**$93.2 billion**	▲ **Up** $2.2 billion (+2.4%)

FY26 U.S. Lottery Gross Gaming Revenue (GGR)

	FY2026	VS FY2025
Instant Game GGR	$15.9 billion	▼ **Down** $0.2 billion (-1.5%)
Terminal Game GGR	$15.8 billion	▲ **Up** $1.4 billion (+9.6%)
Full Line GGR	**$31.6 billion**	▲ **Up** $1.1 billion (+3.7%)

** Sales and game attribute data is self-reported across U.S. jurisdictions. Therefore, some competitor 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. Game counts generally refer to any games in market with at least $10,000 sales per week within the given year*

The Instant Scratch Game Story

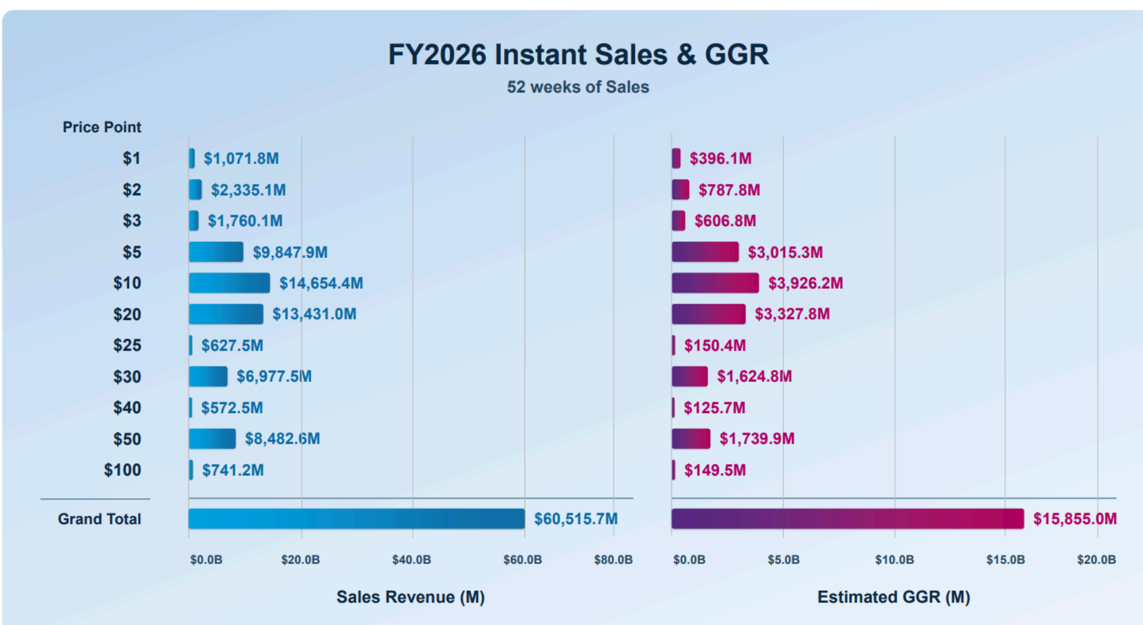
Instant scratch sales totaled $60.5 billion in FY2026, down $0.5 billion or -0.8% year over year. Estimated instant GGR decreased $0.2 billion, or -1.5%, to $15.9 billion. Total tickets sold were nearly unchanged, only falling 0.08%. Growth continued to shift toward higher price points, led by the $50 price point.

- The **$100 price point**, currently offered by only two lotteries, added $45.5 million in sales.
- **$50 games** added $746.3 million in sales and $143.5 million in GGR, the largest increase of any price point, despite no new lotteries offering this price point.
- The number of $50 games in-market grew from 79 to 99, a 25% increase.
- The **$20 price point** contributed another $515.5 million in sales and $129.1 million in GGR.

However, not all premium price points saw gains, possibly due to the continued expansion of $50 games.

- Sales at the **$30 price point** declined $515.8 million, or 6.9%, and **$25 sales** fell by 15.5%, the steepest percentage decline among all price points.
- The number of $25 games also dropped 12.5%.

Still, the increases at the $50 and $100 price points more than offset the $30 decline. This suggests that players continued to respond to select higher price point games, but simply offering a higher price point did not guarantee growth.



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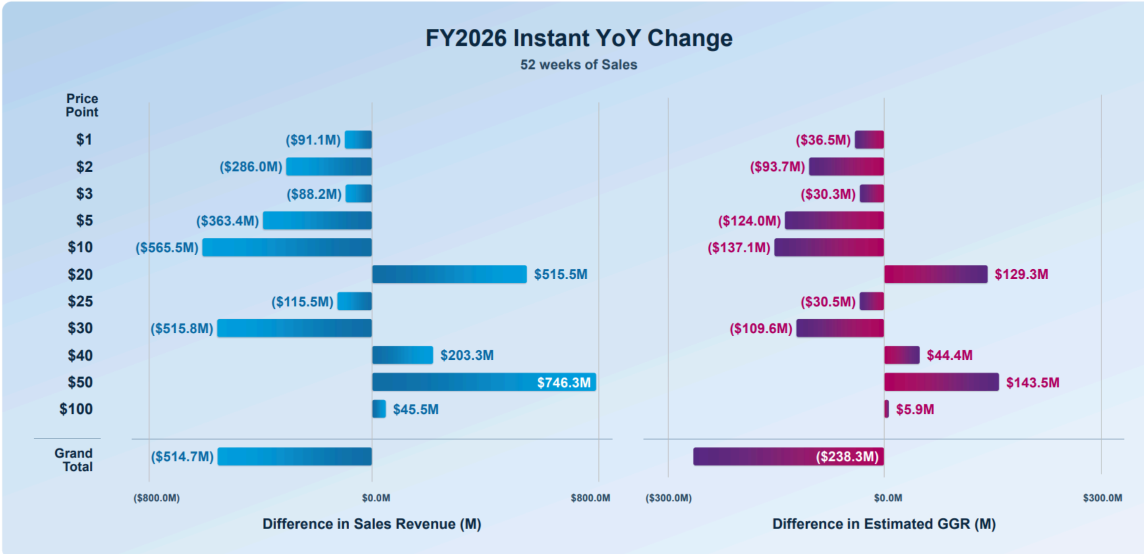

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Games priced below $20 saw wider and steadier declines. The largest dollar decreases came from $10 games (-$565.5 million) and $5 games (-$363.4 million). The $2 and $1 price points also saw sharp percentage declines of 10.9% and 7.8%, respectively. Since $5 and $10 games have a larger initial sales base, declines in these price points had the greatest impact on the total instant category.

Although the total number of in-market games declined by 0.6%, the number of higher-price-point games continued to grow, reflecting an ongoing shift in portfolio composition.

- The number of $30-and-above games increased by 37, or 13.5%.
- $10 and $20 games increased by 66, a 5.4% increase.
- $5-and-under offerings declined by 125 games, or 5.2%.

Lotteries are concentrating more of their portfolios on higher-value price points even as the total number of available games decreases.

Strategic Product Enhancements (SPEs) & Other Game Features

- **Eight of the top 10** weekly per-capita games in FY2026 featured at least one Strategic Product Enhancement.
- **SPEs made up 41% of game launches**, up from 36%. For the first time, games featuring an SPE accounted for the majority of instant sales despite representing less than half of game launches.
- **Games with SPEs delivered approximately 10% greater weekly sales** than games without an SPE when compared within the same lottery and

price point. This shows the value of SPEs beyond differences in market size or ticket price.

State-Specific Instant Sales

The top ten lotteries ranked by sales and GGR growth pursued different strategies, but **most shared a common theme: expanding their portfolios at higher price points**. Within this group, the largest lotteries by total sales generated the greatest dollar gains, while several smaller lotteries achieved stronger percentage growth through targeted portfolio optimization.

Instant Sales
52 weeks of Sales

Rank	State	FY2025 Sales	FY2026 Sales	▲ Sales
1	DE	$113.7M	$120.0M	5.5%
2	ID	$232.3M	$244.9M	5.4%
3	SC	$1,588.6M	$1,672.3M	5.3%
4	FL	$6,817.4M	$7,117.4M	4.4%
5	PR	$70.1M	$72.9M	4.0%
6	MO	$1,062.8M	$1,095.6M	3.1%
7	CO	$596.5M	$609.7M	2.2%
8	OK	$212.9M	$216.3M	1.6%
9	NJ	$1,873.7M	$1,901.4M	1.5%
10	WI	$617.3M	$625.0M	1.2%

Instant Estimated GGR
52 weeks of Sales

Rank	State	FY2025 GGR	FY2026 GGR	▲ GGR
1	SC	$401.9M	$422.6M	5.1%
2	ID	$65.1M	$68.5M	5.1%
3	PR	$21.9M	$22.8M	4.1%
4	MT	$8.7M	$9.0M	3.4%
5	FL	$1,702.4M	$1,759.7M	3.4%
6	DE	$35.0M	$35.7M	2.0%
7	CO	$160.8M	$163.1M	1.4%
8	CA	$1,860.6M	$1,883.4M	1.2%
9	AZ	$269.7M	$272.7M	1.1%
10	MO	$278.4M	$281.1M	1.0%

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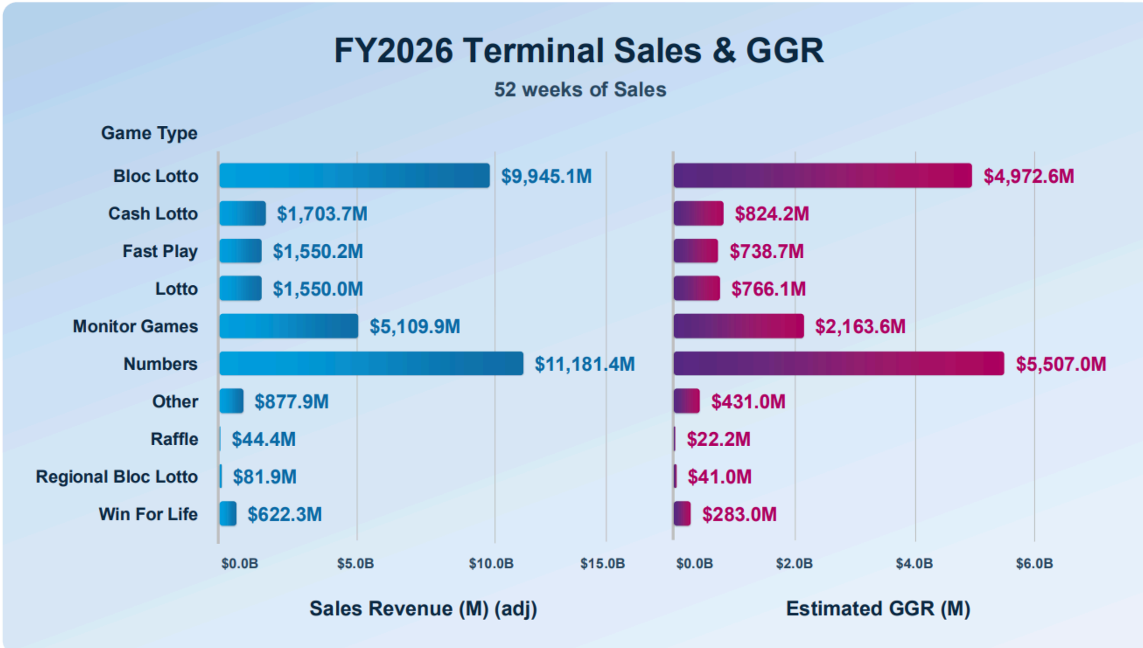
1. **Delaware (+5.5%) led the nation in percentage sales growth**, increasing instant sales by $6.3 million to $120.0 million. The $50 price point, introduced in May 2025, has been in-market for all of 2026. GGR increased 2.0%.
2. **Idaho (+5.4%) added $12.6 million in sales** while GGR rose 5.1%. Growth came primarily from launching more $20 games in FY26 versus FY25 and increasing the total number of $20 games in-market. GGR rose 5.1%.
3. **South Carolina (+5.3%) generated an additional $83.7 million in sales**, the second-largest dollar increase among the top 10. The $20 price point remained the principal driver, supported by two core games that captured an increasing share of sales. With no price point above $20, the Lottery achieved 5.1% GGR growth without moving into the $30 or $50 price points.
4. **Florida (+4.4%) added $300.0 million in sales to reach $7.1 billion**, by far the largest dollar gain among the top-growth lotteries. Growth centered on the $50 price point, including $500,000 Cash Blowout and 500X the Cash. GGR increased $57.3 million, or 3.4%.

5. **Puerto Rico (+4.0%) grew sales by $2.8 million to $72.9 million.** Unlike most mainland growth leaders, its gains came from the $5 and $10 price points. GGR increased 4.1%, placing it third nationally in percentage GGR growth.
6. **Missouri (+3.1%) added $32.8 million in sales**, with growth concentrated at $20 and $50. The Lottery expanded from roughly two to three concurrent $50 games. GGR grew 1.0%.
7. **Colorado (+2.2%) increased sales by $13.2 million to $609.7 million.** The state increased the number of $50 games from 2 to 3, with Set for Life and $3,000,000 Millionaire Maker primarily driving sales growth. Estimated GGR rose 1.4%.
8. **Oklahoma (+1.6%) added $3.4 million in sales**, led by its $100 games. A new $100 launch in FY2026, paired with a reactivation of the $100 Deluxe Gold game, strengthened the highest price point. As one of only two lotteries offering $100 games, Oklahoma demonstrates the incremental potential of this emerging segment.
9. **New Jersey (+1.5%) grew sales by $27.7 million to $1.9 billion.** The $20 price point drove the increase. Compared to FY25, three $20 games launched in FY26 each produced $3M in weekly sales. This shows that offering product variety within a price point can matter just as much as moving players to the portfolio's highest available price point.
10. **Wisconsin (+1.2%) added $7.7 million in sales.** At the beginning of calendar 2026, the Lottery expanded its portfolio to offer two concurrent $50 games instead of one. The change created modest growth while further diversifying the high-price-point portfolio.

** Rankings based on YoY instant sales growth*

Terminal-Based Games Story

Terminal-based game sales reached $32.7 billion in FY2026, an increase of $2.7 billion or 9.1%. Estimated GGR rose $1.4 billion, or 9.6%, to $15.8 billion. Bloc Lotto accounted for approximately 96% of the net sales increase, making jackpot performance, Powerball in particular, the main driver of terminal-based growth.



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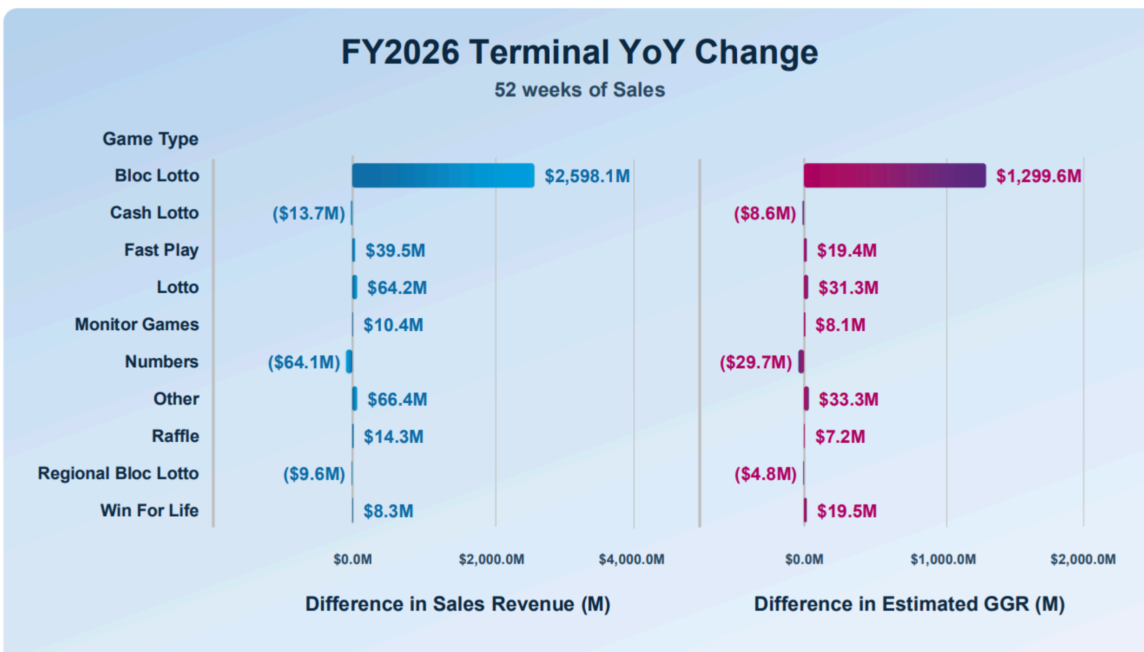

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Bloc Lotto

Bloc Lotto sales increased $2.6 billion to $9.9 billion, with GGR rising $1.3 billion to $5.0 billion. The category's overall gain masks different results for the two national jackpot brands: Powerball sales increased 88%, while Mega Millions sales declined 14.5%.

Powerball benefited from two extraordinary jackpots:

- $1.787 billion, won on September 6, 2025
- $1.817 billion, won on December 24, 2025

Mega Millions' largest jackpots during the fiscal year were:

- $983 million on November 14, 2025
- $536 million on March 10, 2026

The difference in jackpot amounts may have directed player attention and spending toward Powerball.

Mega Millions sales remained below the prior year following the April 2025 change to a $5 all-inclusive ticket. The higher base price has not yet been matched by Powerball-level jackpot momentum, and the category continues to show a slower sales response. Although more time is needed to assess the long-term impact, FY2026 results suggest that players are weighing the higher ticket cost against the perceived value of the jackpot.

Additional Draw Game Categories

The draw portfolio produced a mix of smaller gains and declines, not a big overall increase. Numbers games remained the largest terminal-based category, with $11.2 billion in sales, accounting for about 34% of the terminal portfolio. Sales declined $64.1 million, or 0.6%, and GGR decreased $29.7 million, or 0.5%.

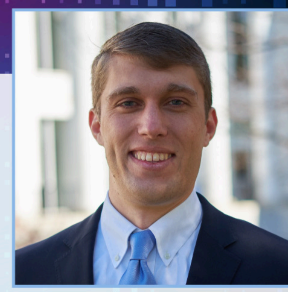
- **The Other Game category increased $66.4 million**, totaling $877.9 million, with Cash Pop sales increasing 20%. One additional jurisdiction added the game to its portfolio.
- **Raffle sales grew 47%** as availability expanded from five to seven jurisdictions, producing a $14.3 million sales increase.
- **Fast Play continued its steady expansion**, adding $39.5 million in sales and $19.4 million in GGR, growth of 2.6% and 2.7%, respectively.
- **Traditional Lotto also contributed to the overall category growth**, with sales up $64.2 million and GGR up $31.3 million. Michigan’s Classic Lotto 47 sales increased $48 million, more than doubling YoY sales.
- **Monitor Games were essentially flat**, with sales up 0.2% and GGR up 0.4%.
- **Cash Lotto** and **Regional Bloc Lotto sales** both **declined.**
- In February 2026, the Win for Life category replaced the Cash4Life and Lucky for Life games with Millionaire for Life. While Millionaire for Life drove $233M in revenue, the prior games lost $215M. Ultimately, the Win for Life category overall had only a modest gain of 8.3M or 1.4%.

Final Word

FY2026 highlighted two distinct stories within the U.S. lottery industry. Terminal-based growth was fueled primarily by extraordinary Powerball jackpots, while the instant category demonstrated an ongoing strategic shift toward higher price points, product enhancements, and portfolio optimization. The lotteries that performed best did not rely on a single strategy but combined targeted portfolio decisions with disciplined execution. As the market continues to evolve, success will depend on balancing proven core offerings with thoughtful innovation.

CONTRIBUTOR

Ian Jones, Manager, Business Intelligence, joined Scientific Games in 2020. When he's not digging into data, Ian reads, lifts weights and plays video games alongside his calico cat, Lucy.



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