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Fiscal Year 2024
Terminal-Based Game Sales Summary

In our last issue of Data in Motion, we provided an FY24 sales summary for the Instant Scratch Game category. In this issue, we provide an FY24 sales summary for the Terminal-Based Game (TBG) category. As with our last issue, we begin with a snapshot of full-line sales and gross gaming revenue (GGR) below.

Full-Line Sales and Gross Gaming Revenue

Total U.S. lottery sales for FY24 came in at $98 billion, falling just shy (1.1%) of the previous fiscal year. Overall GGR also fell by 1.1%. Instant scratch game sales saw a year-over-year decline of 2.4% which was somewhat offset by a 1.4% gain in TBG sales.

FY24 U.S. Lottery Sales*

- FY24 Instant Scratch Game Sales: $62.8 billion, **Down $1.5 billion (-2.4%)** over FY23
- FY24 Terminal-Based Game Sales: $35.2 billion, **Up $0.5 billion (+1.4%)** over FY23
- FY24 Full Line Sales: $98.0 billion, **Down $1.1 billion (-1.1%)** over FY23
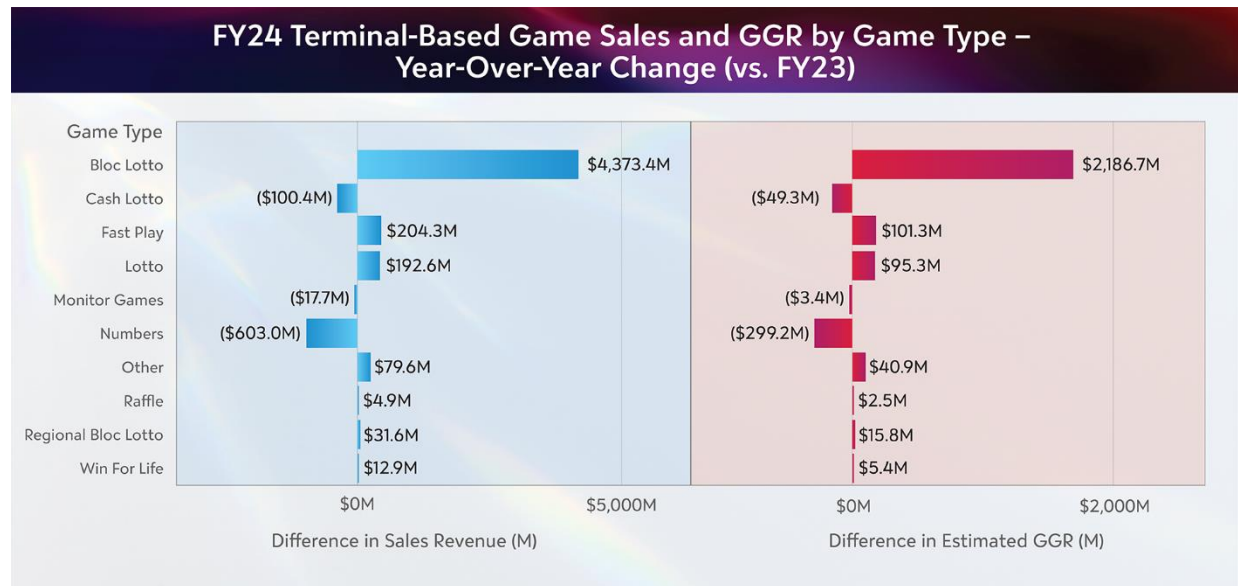
FY24 U.S. Lottery Gross Gaming Revenue (GGR)

- FY24 Instant Scratch Game GGR: $16.7 billion, **Down $0.6 billion (-3.6%)** over FY23
- FY24 Terminal-Based Game GGR: $17.0 billion, **Up $0.2 billion (+1.5%)** over FY23
- FY24 Full Line GGR: $33.7 billion, **Down $0.4 billion (-1.1%)** over FY23

* All figures are based on the first 52 weeks of fiscal year sales. Sales and game attribute data is self-reported across U.S. jurisdictions. Due to missing or incomplete sales data, full line sales for MS and terminal-based game sales for IN, VA, and WY are not included.

The Terminal-Based Games Story

Terminal-Based Games (TBG) generated $476.1 million more in sales over FY23, a moderate 1.4% gain. Of the ten game categories under the TBG umbrella (see below),

half experienced growth in FY24, most notably Bloc Lotto and Fast Play which, together, accounted for $824 million more in sales and $408.5 million more in GGR vs. FY23.

FY24 Terminal-Based Game Sales and GGR by Game Type

Game Type	Sales Revenue (M)	Estimated GGR (M)
Bloc Lotto	$11,948.2M	$5,974.2M
Cash Lotto	$1,752.4M	$847.2M
Fast Play	$1,237.6M	$587.1M
Lotto	$1,623.7M	$803.5M
Monitor Games	$5,233.8M	$2,187.9M
Numbers	$11,511.5M	$5,666.4M
Other	$589.2M	$286.2M
Raffle	$34.6M	$17.3M
Regional Bloc Lotto	$92.3M	$46.2M
Win For Life	$631.8M	$271.5M

FY24 Terminal-Based Game Sales and GGR by Game Type – Year-Over-Year Change (vs. FY23)

Game Type	Difference in Sales Revenue (M)	Difference in Estimated GGR (M)
Bloc Lotto	$4,373.4M	$2,186.7M
Cash Lotto	($100.4M)	($49.3M)
Fast Play	$204.3M	$101.3M
Lotto	$192.6M	$95.3M
Monitor Games	($17.7M)	($3.4M)
Numbers	($603.0M)	($299.2M)
Other	$79.6M	$40.9M
Raffle	$4.9M	$2.5M
Regional Bloc Lotto	$31.6M	$15.8M
Win For Life	$12.9M	$5.4M

Bloc Lotto = Powerball and Mega Millions

Cash Lotto = In-state draw games with an all-cash fixed top prize or rolling jackpot

Fast Play = Terminal-generated instant win games

Lotto = In-state draw 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 = MUSL's 2by2 and other games with unique attributes

Raffle = Short duration raffle-type game with guaranteed prize tiers

Regional Bloc Lotto = Lotto America

Win for Life = Cash 4 Life and Lucky for Life

Some Highlights

On its own, **Bloc Lotto** generated $574.1 million more in sales revenue vs. FY23, a 4.8% increase. Bloc Lotto game sales were $12.5 billion in FY24, accounting for more revenue than any other TBG category for the second year in a row (36%). Overall, the increase in Bloc Lotto was primarily driven by Powerball games which saw an 18.2% sales increase in FY24.

Bloc Lotto sales increased in over 80% of reporting jurisdictions as jackpot totals for Mega Millions and Powerball achieved record-setting levels in FY24. In fact, the year held five of the ten largest jackpots in U.S. lottery history including:

- A $1.602 billion Mega Millions jackpot won in Florida, August 2023
- A $1.765 billion Powerball jackpot won in California, October 2023

Fast Play games ranked second in TBG growth after adding $249.9 million in additional sales, a year-over-year increase of 21.4%. This category of games continues to be launched in new jurisdictions, most recently in Kansas in June, 2024.

Numbers Games, which led the TBG category until last year, saw another year of declining sales after dropping by $192.7 million (-1.7%), more than any other terminal-based game product. Three-digit games accounted for almost two thirds of the loss, coming in $125 million behind FY23. Despite these declines, Numbers games were still the second largest contributor to overall TBG sales.

Monitor Games also declined in FY24 with 1.4% less in annual sales. The category still ranked third in market share at roughly 15%.

Final Word

We hope you found value in our breaking up the fiscal year sales summary over two issues so that we were able to provide a more detailed picture for each game category. Look for our Calendar Year Sales Summaries in early 2025.

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