

Data in Motion

Marketing & Insights



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Fiscal Year 2024 Instant Scratch Game Sales Summary

As long-time Data in Motion readers know, we dedicate two issues each year to providing a sales summary for the U.S. lottery market, one at the end of the fiscal year and one at the end of the calendar year. For FY24, we are going to do things a little differently and break the summary up over two issues, one for the Instant Scratch Game category (this issue) and one for the Terminal-Based Game (TBG) category (next issue). Both will start with an overview of full-line sales and gross gaming revenue (GGR) for FY24.

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 Instant Scratch Game Story

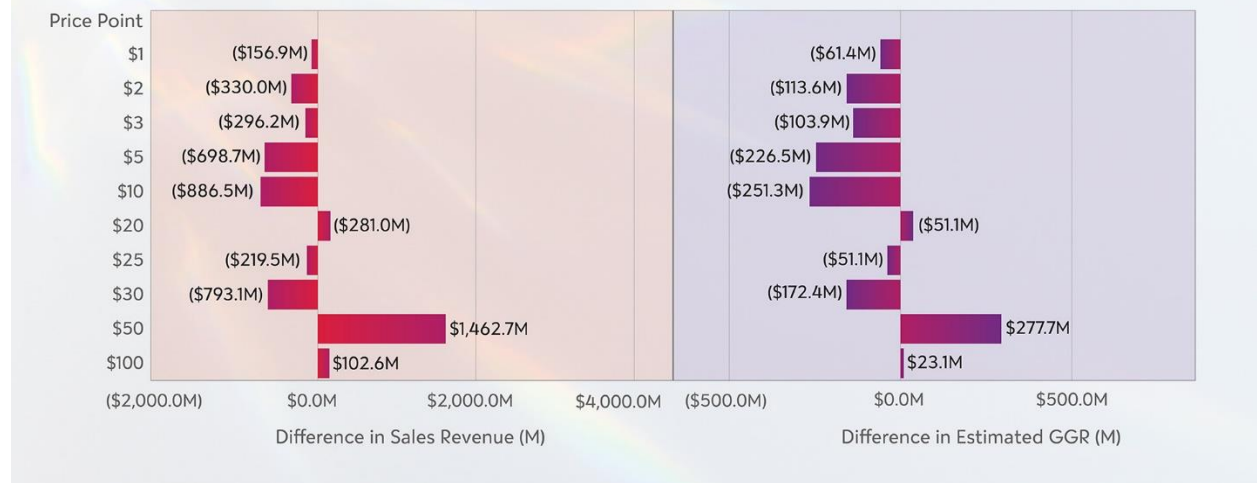
Year-over-year instant sales declined at every price point except for the \$20, \$50, and \$100. The largest increase in sales came from the \$50 price point which added 19 more games and sold in five more jurisdictions than in FY23, contributing to a sales lift of almost \$1.5 billion. This also helped the \$50 price point capture a larger market share of the overall instant category, going from 8.9% in FY23 to 11.5% in FY24.

The \$10 price point saw the largest year-over-year decline with a \$886.5 million drop in sales vs. FY23. Still, the price point made up the largest portion of FY24 instant sales at just under 25%.

FY24 Instant Scratch Games Sales and GGR by Price Point



FY24 Instant Scratch Games Sales and GGR by Price Point – Year-Over-Year Change (vs. FY23)



In total, there were 57 fewer games in market in FY24. Similar to trends seen in previous years, the largest decreases occurred at the lower price points with the \$1 and \$2 price points down 64 and 44 games, respectively.

Some Highlights

Holiday game sales saw a 16.2% sales increase in FY24. The industry had 18 more holiday-themed games in market vs. FY23, with the number of games increasing at every price point \$5 and up. Increases in holiday game sales occurred at the \$20 price point (up \$762.2 million) and the \$30 price point (up \$48.4 million). In fact, the \$20 price point replaced the \$10 as having the largest market share of holiday game sales at 33.2%, followed by the \$10 and the \$5 price points.

Extended Play games also saw a bump in FY24 with sales increasing by 2.1%. The \$10 price point made up the bulk of extended play sales at 27.1%, followed by the \$5 and \$20 price points, each of which accounted for roughly 20% of total Extended Play sales. The overall number of extended play games in market was flat year-over-year. As in previous years, most extended play games were at the \$3 price point.

Family of Games sales increased by 2.1% in FY24 with significant increases at the \$30 and \$50 price points which grew by \$306.8 million and \$541.7 million, respectively.

Final Word

In our next issue of Data in Motion, we will provide an FY24 sales summary for Terminal-Based Games, so be on the lookout for that in your inbox sometime the second week of September.

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