



# **FY 2023-24**

# **U. S. Lottery Sales**

California State Lottery Commission

Item 6d

# CA Continues as 2<sup>nd</sup> Largest Lottery in U. S.

- CA sales of \$9.28 billion earned 2<sup>nd</sup> place in U.S.
- CA was also 2<sup>nd</sup> for the prior three fiscal years.
- The gap behind FL has narrowed. \$133 million versus \$551 million LY
- Some states are stronger for Instant sales; others with Terminal games.

<u>State</u>	FY 2023-24 Total Traditional Lottery Sales	Rank in FY 2022-23 Total Sales	Rank in FY 2023-24 for Instant Sales	Rank in FY 2023-24 for Terminal Game Sales
#1 Florida	\$9,417.5	#1	#2	#2
#2 California	\$9,284.4	#2	#3	#3
#3 Texas	\$8,389.8	#3	#1	#10
#4 New York	\$8,197.9	#4	#4	#1
#5 Massachusetts	\$6,129.8	#6	#5	#6
#6 Georgia	\$5,355.3	#5	#6	#7
#7 Pennsylvania	\$4,861.0	#7	#7	#8
#8 Michigan	\$4,630.0	#8	#10	#4
#9 Ohio	\$4,543.9	#9	#9	#5
#10 North Carolina	\$4,241.3	#10	#8	#13

Source: All Industry Sales data is from LaFleur's Magazine Sept/Oct 2024 edition; Traditional Sales excludes VLT's  
 Note: CA Lottery sales provided to LaFleur's were very preliminary, unaudited figures for FY 2024-25



# Most large Lotteries declined in sales during FY 2023-24

State	FY 2023-24 Total Traditional Lottery Sales	% Change from Prior FY
Florida	\$9,417.5	-3.9%
California	\$9,284.4	0.5%
Texas	\$8,389.8	-3.8%
New York	\$8,197.9	-1.1%
Massachusetts	\$6,129.8	0.3%
Georgia	\$5,355.3	-3.6%
Pennsylvania	\$4,861.0	-3.5%
Michigan	\$4,630.0	-2.3%
Ohio	\$4,543.9	1.8%
North Carolina	\$4,241.3	-2.3%

- CA's sales growth of 0.5% was 20<sup>th</sup> among all U. S. lotteries and second best among the Top 10 selling states.
- FL and TX both declined by more than 3% compared to the prior fiscal year. IL had the best showing at a 6.9% gain.
- Slightly more than half (23) of the U. S. lotteries had sales declines in FY 24.



# CA in the middle for Per Capita Sales

- Per Capita sales in CA (defined as: sales / total population) were \$238
- This represents the 25<sup>th</sup> best per capita sales – roughly in the middle of all U. S. lotteries.
- Massachusetts is #1 in Per Capita sales – selling at over 3.6 times the rate in CA
- FL has stronger PC sales than CA; if our PC were equal to FL, our total sales would be over \$16B

<u>State</u>	FY 2023-24 Total Traditional Lottery Sales	Annual Per Capita Sales	Rank in PC Sales
#1 Florida	\$9,417.5	\$417	#7
#2 California	\$9,284.4	\$238	#25
#3 Texas	\$8,389.8	\$275	#20
#4 New York	\$8,197.9	\$419	#6
#5 Massachusetts	\$6,129.8	\$876	#1
#6 Georgia	\$5,355.3	\$486	#2
#7 Pennsylvania	\$4,861.0	\$375	#12
#8 Michigan	\$4,630.0	\$461	#3
#9 Ohio	\$4,543.9	\$386	#11
#10 North Carolina	\$4,241.3	\$391	#9



# Instant Ticket Sales in the U. S.

- Even though CA Scratchers sales were flat in FY 2023-24, most of the other top 10 lotteries had larger sales declines.
- About 2/3<sup>rd</sup> of all states had sales declines for Instant Tickets
- 8 of the top 10 lotteries had a \$50 ticket or higher with TX having the highest at \$100
- CA per capita sales towards the middle of all U. S. lotteries; lowest among the Top 10

<u>State</u>	FY 2023-24 Instant Ticket Sales	% Change from Prior FY	Highest Price Point	Rank in PC Instant Sales
Texas	\$6,644.5	-1.3%	\$100	#12
Florida	\$6,618.1	-6.0%	\$50	#4
California	\$6,570.5	-0.1%	\$30	#21
New York	\$4,373.5	-0.7%	\$30	#10
Massachusetts	\$4,013.0	-0.8%	\$50	#1
Georgia	\$3,454.2	-6.5%	\$50	#2
Pennsylvania	\$3,102.5	-7.3%	\$50	#6
North Carolina	\$2,922.3	-1.9%	\$50	#5
Ohio	\$2,383.6	1.9%	\$50	#15
Michigan	\$2,314.0	-2.1%	\$50	#8

NOTE: e-Instants are not included in Instant Ticket Sales

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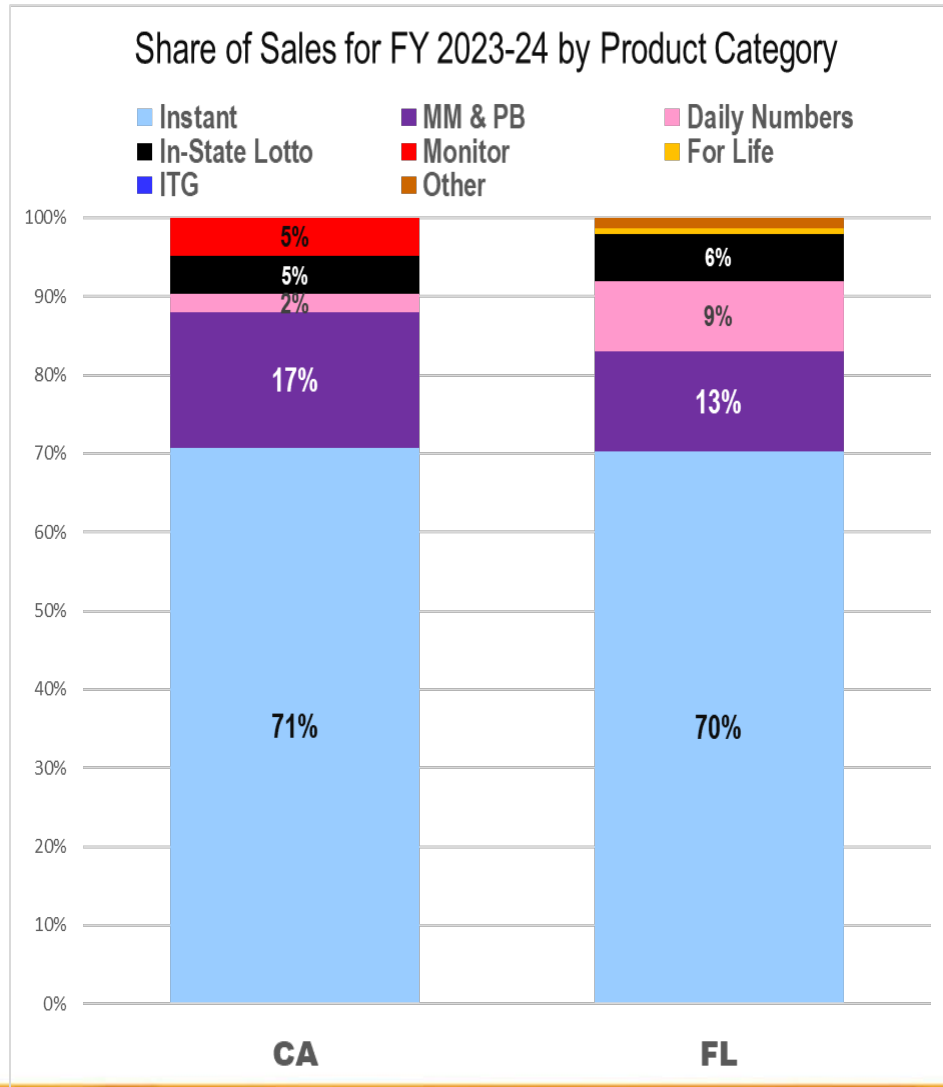
# Other Industry Rankings

In addition to being #2 in Total Lottery sales, and #3 for Scratchers sales, CA was also.....

- #1 state for Mega Millions sales
- #1 state for Powerball sales
- However, CA was #5 for Monitor Games sales
- CA will likely be 3<sup>rd</sup> in the nation in terms of estimated contributions to its beneficiary
  - NY #1: \$3,775 million (includes revenue from VLTs)
  - FL #2: \$2,386 million



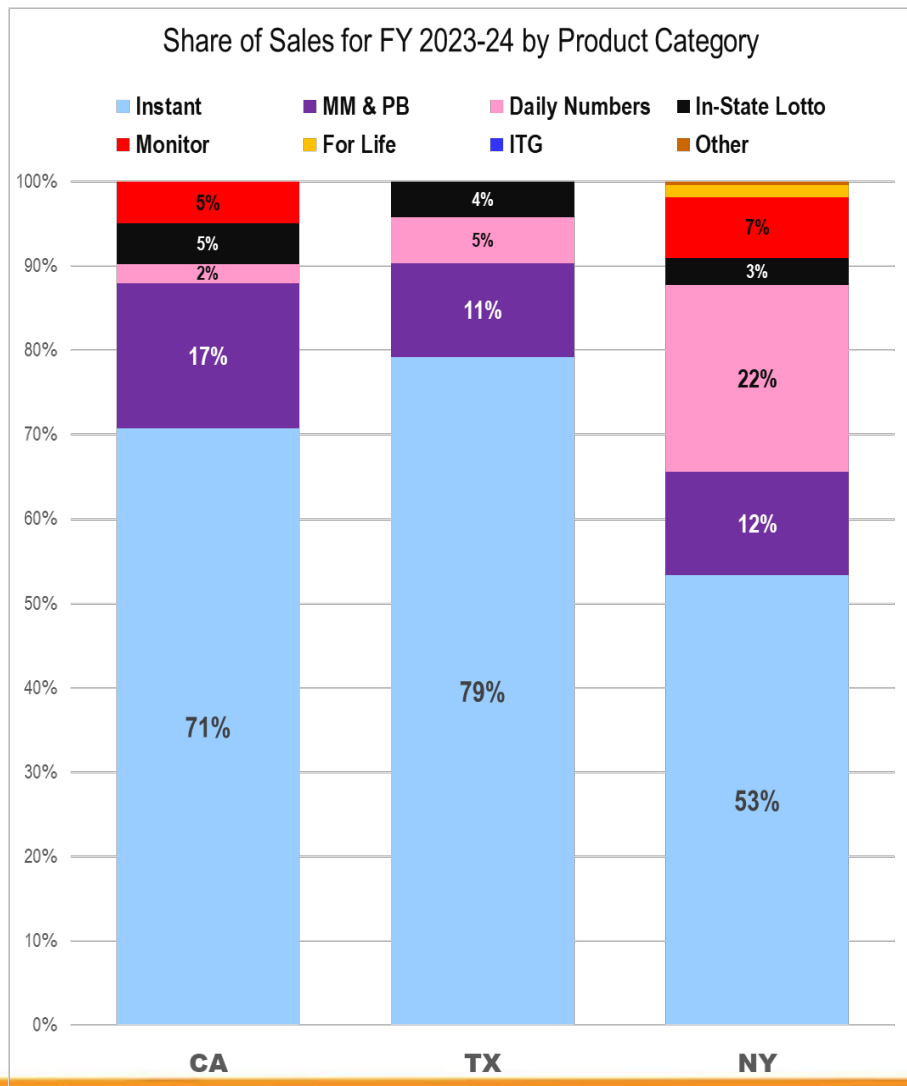
# Comparing CA and FL Sales



- Many similarities with Instant Ticket sales and In-State Lotto sales comprising similar percentages
- CA relies a bit more on its multi-state jackpot games than FL
- FL has a bigger share coming from Daily Numbers Games – like Daily 3 and Daily 4; also, have Pick 2 and Pick 5 games.
- They do offer a Cash 4 Life game
- On the other hand, FL does not offer any monitor games like our Hot Spot.



# Comparing CA Sales with TX and NY

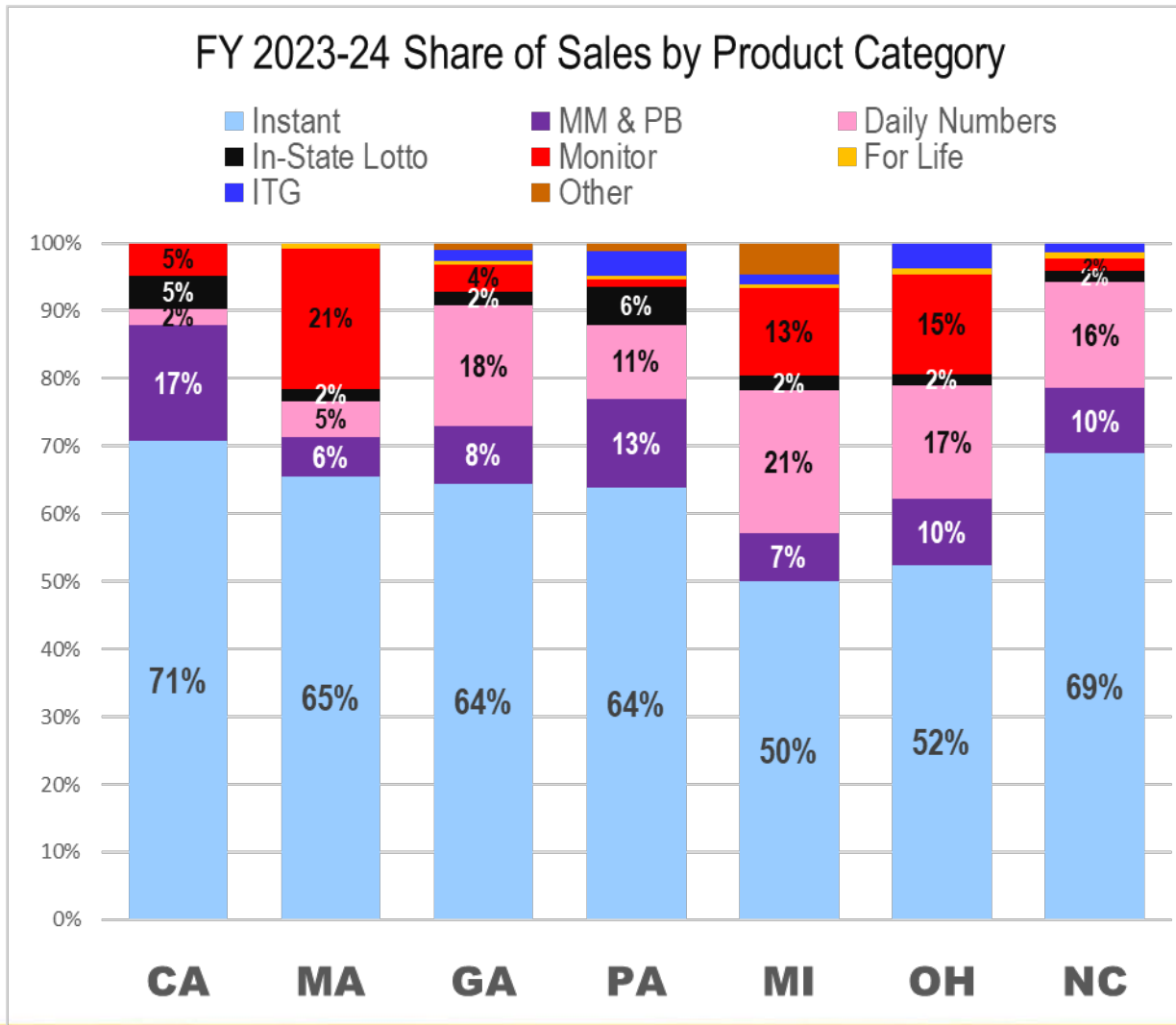


- TX and NY have a different profile than CA
- TX has a greater share of sales from Instant Tickets but does not offer a Monitor game.
- NY has a significantly smaller share of sales coming from Instant Tickets but much more sales from Draw Games
- In NY, their equivalent to our Daily 3 and 4 games sold over \$800 million more than their combined MM & PB sold last year.
- They sell the Cash 4 Life multi-state game as well as offering something similar to Hot Spot called Quick Draw.





# Comparing CA Sales with other Top 10 Lotteries



- All these eastern states had higher percentage of sales from Daily Numbers games than CA
- MI and OH had Instant Ticket sales representing just half of their total sales
- All had monitor games but with varying percentages
- Many offered games not part of the CA product mix



# Most Top Lotteries Offer Other Games or Add-ons

- 8 of 10 are part of multi-state “For Life” Draw Game (not TX or CA)
  - CA cannot participate as this game has a fixed top prize (banked game)
- GA, MI, NC, OH and PA offer Instant Win Terminal Games (ITG) named Fast Play in some states
  - You purchase at retail, a ticket prints out of the terminal that provides an instant win experience
- Many states offer different add-ons to their Lotto or Daily Games
  - Example: Double Play - for an additional dollar, your numbers are eligible to use a second set of winning numbers for different prizes
  - In other states, it has fixed prizes; CA can't offer a banked game

