

Lotteries - UK - April 2010

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What is this report about?

The National Lottery has become part of the everyday life of consumers in the UK, having reached its 15th birthday on 19 November 2009. While the National Lottery, via its operator Camelot, has become the central focus of consumer lottery activity, there are also a large number of smaller lotteries run in the UK which support hospices, sports clubs and local societies and charities.

With a new licence win under its belt, Camelot has now embarked on a strategy to both broaden the games on offer and to widen the distribution channels for ticket sales. New innovations are now coming to market, including more innovative interactive online play and the prospects of a World Lottery draw.

This report looks at the changes taking place in the Lottery market, including the growth of interactive platforms as sales channels and the developments within the draw-based and scratchcard segments of the market.

What have we found out?

- The lottery market has grown by 3.7% in 2008/09 and by an estimated 2.7% in 2009/10 to reach a total value of around £5.5 billion. This represents an increase in its share of total gambling expenditure because of its low cost and ease of play.
- The launch of the EuroMillions game in February 2004 gave the National Lottery a major boost in sales between 2004 and 2006 as the game became established. Once it became firmly entrenched, the trend in lottery sales was essentially flat in real terms.
- The National Lottery accounts for 97% of the total money staked on lotteries in the UK. The National Lottery's share has fallen very slightly in recent years but has remained around the 97% level.
- The major drivers of ticket sales in the past few years have been the increasingly popular online and interactive games, especially online scratchcards. Together, these games now account for around a quarter of National Lottery sales.
- While 49% of adults play lotteries, only 30% are loyal players. Most non-players tend to be of middle to higher income and are aged under 35. A third of adults have never played.
- The Lotto remains by far the most popular Lottery game played and is especially popular among frequent players. The EuroMillions and scratchcards are both successful in attracting younger and more occasional players.

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