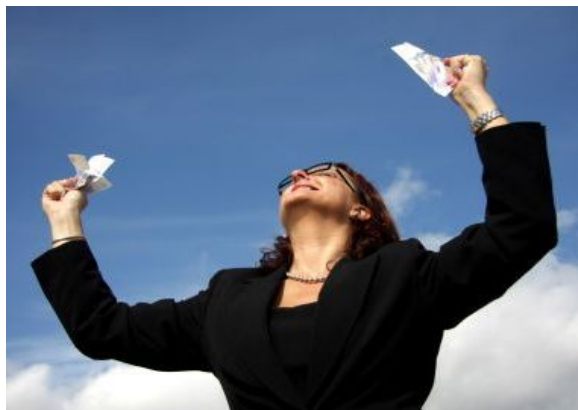


Lotteries - UK - March 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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“The biggest issue facing the lottery industry over the last 12 months has been the impact of the £2 Lotto ticket. Unfavourable economic conditions surrounding its launch mean a true picture will take time to emerge but initial indications are that while around half of players have reassessed their habits, only a small number have stopped spending altogether.”

– David Walmsley, Senior Leisure Analyst

This report looks at the following areas:

- What has been the impact of the £2 Lotto ticket on playing habits?
- How can lotteries increase levels of online play and maintain scratchcard growth?

After a recent period in which it was able to rely on new draws and one-off events to deliver significant sales growth, the UK lotteries market is moving towards a more sustainable mix of existing product development, pricing and promotion to maintain and increase consumer interest in play.

Lotto appears to have emerged from its doubling of ticket prices with the majority of its volume sales still intact and the scratchcard segment appears well placed to maintain recent growth, but a longstanding lack of significant expansion online and new competition from lookalike numbers betting products could still act as brakes to future progress.

This report tracks UK consumers' lottery-playing habits, assesses their reaction to the increase in the price of Lotto participation, tests the relative strength of a range of incentives to play and identifies ways in which the sector can respond to the themes, challenges and opportunities emerging.

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