## MiNTEL

## Lotteries - UK - January 2018

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.
"Sliding sales of National Lottery draw games and scratchcards have damaged the market as a whole but could usher in a new period of innovation as Camelot scrambles to recover and its rivals look to cash in."

- David Walmsley, Senior Leisure Analyst


## BUY THIS REPORT NOW

- Have we reached peak scratchcard?
- Will new transparency promote giving over winning?

VISIT: store.mintel.com

CALL:
EMEA
$+44(0) 2076064533$

Brazil
08000959094

Americas
+1 (312) 9435250

China
+86 (21) 60327300
+61 (0) APAC 282848100
EMAIL: reports@mintel.com

## Lotteries - UK - January 2018

Report Price: $£ 1995.00 \mid \$ 2693.85$ | $€ 2245.17$

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

## Overview

What you need to know
Covered in this Report

## Executive Summary

## The market

Sales slide as National Lottery loses lustre
Figure 1: Forecast of UK lottery sales, 2012/13-2022/23
Scratchcards' success story takes a knock
Figure 2: National Lottery sales, by segment, 2012/13-2016/17
Society lotteries set pace in growth
Figure 3: UK lottery sales, by operator share, 2012/13-2016/17
The consumer
Most eyes on a single prize
Figure 4: Lottery games played, October 2017
Competition heats up in second tier
Figure 5: Lottery draw games played, October 2017
Giving back becomes a more attractive look
Figure 6: Future interest in playing lottery games, October 2017
Players happy to stick with retail habits
Figure 7: Methods of purchasing lottery draw tickets, October 2017
Easy to play - but hard to win
Figure 8: Attitudes towards lottery draw games, October 2017
Jackpot drought sees high demand for shortened odds
Figure 9: Incentives to playing a new lottery game, October 2017
What we think

## Issues and Insights

Have we reached peak scratchcard?
The facts
The implications
Will new transparency promote giving over winning?
The facts
The implications

## The Market - What You Need to Know

Sales fall as players desert new National Lottery formats
Scratchcards' success story takes a knock
Regulatory focus turns to transparency

BUY THIS REPORT NOW

## Lotteries - UK - January 2018

Report Price: $£ 1995.00 \mid \$ 2693.85$ | $€ 2245.17$

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Market Size and Forecast

Sales slide as National Lottery loses lustre
Figure 10: UK lottery sales, 2012/13-2022/23
Forecast
Figure 11: Forecast of UK lottery sales, 2012/13-2022/23
Forecast methodology

## Market Segmentation

Instant-wins lose sales but gain share
Figure 12: National Lottery sales, by segment, 2012/13-2016/17

## Market Drivers

Lottery most popular - but slots most valuable
Figure 13: Consumer expenditure* on gambling, April 2016-March 2017
Online opportunities more open to all
Figure 14: National Lottery draw game and scratchcard/IWG sales, by channel, April 2016-March 2017
Regulators looking for greater transparency
Figure 15: Regulations applying to society lotteries, January 2018
Next focus on fundraising?
Figure 16: Lotteries' contributions to good causes, 2012/13-2016/17

## Companies and Brands - What You Need to Know

Society lotteries set pace in growth
Camelot sets out recovery plans
Adspend rise levels off

## Market Share

Society sector chips away at National Lottery's lead
Figure 17: UK lottery sales, by operator share, 2012/13-2016/17

## Launch Activity and Innovation

New strategy to return National Lottery to growth
Licence contest looks like heating up
Non-stop lottery draws attention to instant wins
Lotteries' charity begins at home
Marketing gets personal

## Advertising and Marketing Activity

Spending slows after major players' promotional push
Figure 18: UK lottery operators' main monitored media advertising spend, 2014-16

## The Consumer - What You Need to Know

Only one game in town
Society lotteries compete in smaller prize segment

## Lotteries - UK - January 2018

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Giving back a more attractive look

Players happy to stick with retail habits
Playing is easy - but winning much less so
Player preferences are cost and value conscious

## Lottery Games Played

Most eyes on a single prize
Figure 19: Lottery games played, October 2017
Scratchcards and IWGs must both defend and attack
Figure 20: Participation in lottery scratchcard and online instant win games, by age, October 2017

## Lottery Draw Games

Competition heats up in second tier
Figure 21: Lottery draw games played, October 2017

## Future Interest in Lottery Play

Taste for transparency to prioritise giving over winning?
Figure 22: Future interest in playing lottery games, October 2017

## Methods of Lottery Play

Convenience factor keeps play personal
Figure 23: Methods of purchasing lottery draw tickets, October 2017
Supermarkets avoid the crowding-out effect
Figure 24: Methods of purchasing lottery draw tickets in person, October 2017
Online players plan (and pay) ahead
Figure 25: Online lottery draw ticket purchasing habits, October 2017

## Attitudes Towards Lottery Draw Games

Easy to play - hard to win
Figure 26: Attitudes towards lottery draw games, October 2017
Regular purchasing adds up for all
Figure 27: Agreement with the statement 'the lottery draw game I play most regularly is cheap to play', by lottery draw games played, October 2017

## Incentives to Lottery Game Play

Jackpot drought drives demand for shortened odds
Figure 28: Incentives to playing a new lottery game, October 2017
Good cause focus to grow female player pool
Figure 29: Incentives to playing a new lottery game, by gender, October 2017

## Appendix

Data sources
Abbreviations
Fan chart forecast
Best/worst case chart

## Lotteries - UK - January 2018

