

# Lotteries – UK – January 2021

Report Price: £2195 | \$2995 | €2600

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

## This report looks at the following areas:

Changes in people's shopping behaviours during the COVID-19 pandemic have fuelled rapid growth in digital lottery play, with the National Lottery registering 1.3 million new online customers and seeing remote sales increase 39% year-on-year between April and September 2020.

This widening of the digital player base, together with the rapid recovery of retail sales, has helped the market come through the crisis so far relatively unscathed, with the record revenue figures achieved during 2019/20 set to slip only marginally in the current year despite the new lockdown announced in January 2021.

The main threat to the market over the short to medium term is that younger players, whose participation is most vulnerable to a downturn in their financial circumstances, lose the lottery habit during the ongoing recession.

The big opportunity is for the development of new game and prize formats enabled by the greater regulatory freedom being granted to society lotteries now and to the National Lottery during its next operating licence period.

- The impact of COVID-19 on lottery participation and sales.
- The implications of growth in digital play.
- The role of technology in keeping the retail channel relevant.
- The potential of new formats to attract younger players.
- Opportunities for innovation presented by regulatory change.
- The importance of good causes as a driver of play.



“The lotteries market entered the COVID crisis on the back of a year of record revenues and is set to emerge from it in robust shape as its retail segment has proved strongly resilient, digital participation has reached new heights and regulatory change creates new opportunities for innovation in game formats, technology and models of distribution.”

– David Walmsley, Senior Leisure Analyst

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Table of Contents

### OVERVIEW

- **Key issues covered in this Report**
- **COVID-19: Market context**
- **Impact of the January 2021 lockdown and the vaccination rollout**
- **Covered in this Report**

### EXECUTIVE SUMMARY

- **Impact of COVID-19 on lotteries**  
Figure 1: Short, medium and long-term impact of COVID-19 on lotteries, 5 January 2021
- **The market**
- **Market size and forecast**  
Figure 2: Forecast of consumer expenditure on lotteries, 2015/16-2025/26\*
- **New game drives draw sales growth**  
Figure 3: National Lottery sales, by segment, 2015/16-2019/20\*
- **COVID crisis pushes more players into digital switch**  
Figure 4: National Lottery sales, by channel, 2015/16-2019/20\*
- **Companies and brands**
- **National Lottery slows loss of share**  
Figure 5: Lottery sales, by operator share, 2015/16-2019/20
- **The consumer**
- **Interest splits along lines of age**  
Figure 6: Lottery games played, November 2020
- **Set For Life draws a younger crowd**  
Figure 7: Lottery draw games played, November 2020
- **Lottery's new generation is default digital**  
Figure 8: Methods of purchasing lottery draw tickets, November 2020
- **Remote play challenges retail's rationale**  
Figure 9: Benefits of buying lottery draw tickets online, November 2020
- **Society players more charity-minded**  
Figure 10: Motives for playing lottery games, November 2020
- **COVID crisis puts younger players at greatest risk**  
Figure 11: Changes in lottery-playing habits during the COVID-19 outbreak, November 2020

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

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

## ISSUES AND INSIGHTS

- **COVID crisis pushes play towards digital – online and in-store**
- **High street still mighty**
- **The next normal: Accelerating emerging trends**
- **Digital and retail converge**
- **All lotteries can learn from success of Set For Life**
- **Value concept about more than cash**
- **Experiences to the fore in the next normal**

## THE MARKET – KEY TAKEAWAYS

- **Lottery revenues hit record high**
- **Spending sustainable through COVID and beyond**
- **New draw drives ticket sales growth**
- **Digital play wins lockdown lottery**
- **New rules open market to innovation**

## MARKET SIZE AND FORECAST

- **Lotteries largely immune to pandemic**  
Figure 12: Short, medium and long-term impact of COVID-19 on lotteries, 5 January 2021
- **Spending reaches record heights**  
Figure 13: Lottery sales and consumer expenditure\*, 2015/16–2019/20\*\*
- **Lotteries well placed to weather COVID storm**  
Figure 14: Forecast of consumer expenditure on lotteries, 2015/16–2025/26
- **Market drivers and assumptions**  
Figure 15: Key drivers affecting Mintel's market forecast, 2015–25 (prepared on 5 January 2021)
- **Learnings from the last recession**  
Figure 16: UK lottery sales, 2007/08–2011/12\*
- **Forecast methodology**

## MARKET SEGMENTATION

- **Draw games stop slide against scratchcards**  
Figure 17: National Lottery sales, by segment, 2015/16–2019/20
- **Retail rebounds but lockdown accelerates digital growth**  
Figure 18: National Lottery sales, by channel, 2015/16–2019/20\*

## MARKET DRIVERS

- **It could be who? National Lottery licence up for grabs**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 19: National Lottery sales, 1994/95–2019/20

- **Digital expansion heads for online slots territory**

Figure 20: Consumer expenditure\* on gambling, by segment, 2019/20\*\*

- **Large societies win big prize rise**

Figure 21: National Lottery duty payments, 2015/16–2019/20

- **Good causes move up the lottery agenda**

Figure 22: National Lottery returns to good causes, 2016/17–2019/20

## COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Mixed outlook for societies sector**
- **COVID support highlights community value**
- **Competitive tensions fuel rising adspend**

## MARKET SHARE

- **Mixed fortunes for society lottery challengers**

Figure 23: Lottery sales, by operator share, 2015/16–2019/20

## LAUNCH ACTIVITY AND INNOVATION

- **Community support stepped up during COVID**
- **Charity bets blur lotto boundaries**
- **National Lottery marks quarter century**
- **Scratchcard stake cut to limit potential losses**

## ADVERTISING AND MARKETING ACTIVITY

- **Arms race drives leaders' spending**

Figure 24: UK lottery operators' main monitored media advertising spend, 2017–19

- **Nielsen Ad Intel coverage**

## THE CONSUMER – KEY TAKEAWAYS

- **Retail recovers as digital sales soar**
- **Interest splits along lines of age**
- **Set For Life draws a younger crowd**
- **Lottery's new generation is default digital**
- **Remote play challenges retail's rationale**
- **Society players more charity-minded**
- **COVID crisis puts younger players at greatest risk**

## IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Lottery sales survive shopping switch**

Figure 25: Changes in shopping habits during the COVID-19/ coronavirus pandemic, April–November 2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

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

- **Community solidarity fades as pandemic drags on**

Figure 26: Change in prioritisation of local community since the outbreak of COVID-19, April and October 2020

### LOTTERY PLAYERS

- **Mass migration opens online opportunities for instant wins**

Figure 27: Lottery games played, November 2020

- **Repertoire expansion a key driver of value growth**

Figure 28: Lottery game repertoires, November 2020

### DRAW GAME PLAY

- **Societies target different draws and demographics**

Figure 29: Lottery draw games played, November 2020

- **Set For Life draw solving National Lottery's age problem**

Figure 30: Participation in lottery draws among 18-34 year olds, November 2020

### METHODS OF PLAY

- **Younger players lead online growth**

Figure 31: Methods of purchasing National Lottery draw tickets, November 2020

- **Retail restrictions damage smaller society sales**

Figure 32: Methods of purchasing other lottery draw tickets, November 2020

### ATTITUDES TOWARDS ONLINE PLAY

- **Quick and easy digital draws put shops in the shade**

Figure 33: Benefits of buying lottery draw tickets online, November 2020

### MOTIVES FOR PLAY

- **Appeal of cash proves biggest not always best**

Figure 34: Motives for playing lottery games, November 2020

- **Good causes an opportunity to give back to society lotteries**

Figure 35: Participation in lottery games to support good causes, by lottery draws played, November 2020

- **Instant-win seekers more calculating online**

Figure 36: Motives for playing lottery games, by past-year scratchcard and IWG play, November 2020

### IMPACT OF COVID-19 ON PLAYING HABITS

- **Younger players most at risk**

Figure 37: Changes in lottery-playing habits during the COVID-19 outbreak, November 2020

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

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

- **Crisis brings lottery community together**

Figure 38: Attitudes towards lotteries during the COVID-19 outbreak, November 2020

#### APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

#### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

#### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

#### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.