

Lotteries - UK - March 2013

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

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"The newcomer's 'single cause' focus is an interesting approach that taps in to many players' interest in closer connections to the charities their ticket buying supports, although the extent to which it does so could become a thorny subject under the forthcoming government consultation on the sector beyond the National Lottery."

– David Walmsley, Senior Leisure Analyst

In this report we answer the key questions:

- Has the Health Lottery damaged other games?
- What will be the impact of the £2 Lotto ticket?
- Which is more important: Jackpots or winning?
- Do consumers care about the causes lotteries support?
- Why do lotteries trail other gambling sectors online?
- Is the lottery sector's 'year of mobile' anywhere in sight?

The UK lotteries market has proved the most resilient of all gambling sectors in the continuing difficult economic climate, with the launch of the Health Lottery, new products and modes of play helping lift sales to an expected £7 billion-plus in 2012/13.

However, it has been far less successful in developing its online segment (with mobile so far virtually untouched), faces questions over the revenue share it allocates to good causes and is about to see its major player, the National Lottery, take a gamble of its own by doubling the price of tickets for its most popular draw.

This report assesses UK consumers' lottery-playing habits, examines their attitudes towards draw-based games and identifies ways in which the sector can respond to the themes, challenges and opportunities emerging.

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