

# Lotteries – UK – 2022

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## This report looks at the following areas:

- The continuing impact of the COVID-19 pandemic on the lotteries market.
- Performance of draw games versus instant-wins.
- The implications for retail of rapid digital growth.
- The threat of prize draws to the society lottery model.
- The role of smartphones in the channel mix.
- The potential of experiential and other non-cash prizes.

The 43% increase in digital revenues the National Lottery experienced during 2020/21 looks to be sustainable rather than a pandemic spike, with the resulting new level of online sales now a baseline for the market's next normal.

Money may not be everything in the next generation of lotteries as 68% of online adults are now open to playing games that offer non-cash prizes, with experiential and life-enhancing (rather than life-changing) jackpots particularly popular among younger people.

The market has remained resilient throughout the second year of the pandemic, generating record sales in 2020/21 and the first half of 2021/22.

The principal threat to current performance is not the COVID-19 pandemic but an inflation-led reduction in consumer spending power that would be likely to reduce players' willingness to buy.

The market's biggest immediate opportunity is growing smartphone use, which can not only attract younger players but looks to have major potential to strengthen the engagement and participation of people who play this way too.



"Lottery play has remained resilient throughout the pandemic and can grow into the medium term through new opportunities for innovation in game formats, distribution channels and non-cash prize structures."

**- David Walmsley, Senior Leisure Analyst**

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