

# Lotteries - UK - 2023

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## This report looks at the following areas:

- The impact of the cost-of-living crisis on lottery play.
- Changes in participation habits emerging from the COVID-19 pandemic.
- Implications of the shifting balance between retail and digital play.
- Performance of draw games versus instant-wins.
- Opportunities to incentivise in-person lottery play.
- Consumer preferences for the good causes lotteries support.

The National Lottery was set up to prioritise good causes in sport, the arts and heritage. However, the public today is now most keen to see draw proceeds benefit healthcare, foodbanks and support services for the elderly.

Lottery spending is considered to be linked to the health of the wider economy and is therefore exposed to the negative effects of the cost-of-living crisis, which is already impacting levels and patterns of play.

Beyond the income squeeze, the biggest long-term threat the market faces stems from younger demographics' relatively low interest in participation, in draw games especially.

Growth opportunities for the National Lottery should emerge from changes in the next licence that will enable new operator Allwyn to innovate, while society lotteries could gain some indirect benefits from forthcoming revisions to gambling laws.



“The popularity of big-jackpot opportunities is the sector’s best hope of limiting the impact of the cost-of-living crisis until the next National Lottery licence gives its new operator more scope to innovate through digital technology especially.”

- David Walmsley, Senior Leisure Analyst, January 2023

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