

NATIONAL LOTTERY
COMMISSION

REPORT ON PARTICIPATION,
EXPENDITURE AND
ATTITUDES

Kerry Sproston

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1 INTRODUCTION

This is the third in the National Lottery Commission's series of social research reports. The Commission has a statutory responsibility to protect the interests of players, and the programme of social research has been developed with this in mind.

This report presents the results of an NOP Omnibus survey of adults aged 16 years and over in Great Britain. The survey involved interviews with 2023 individuals, and fieldwork took place between the 15th and 20th August, 2002. Interviews were carried out in-home, face-to-face, using Computer Assisted Personal Interviewing (CAPI). Respondents were selected according to a random location method, with sampling points selected by probabilistic methods, and individuals in each sampling point selected by quota. Quotas were set in terms of age and sex and within working status.

Previous NLC surveys have focused on participation and expenditure in the various National Lottery games. The aim of this most recent study was to explore people's attitudes towards the different National Lottery games, as well as looking at their rates of participation. This report is structured such that results on participation and expenditure are presented first, in Section 2, followed by the findings on attitudes towards existing and new National Lottery games in Section 3. Each of these sections is preceded by a summary of key findings. Rates of participation and expenditure are analysed by demographic factors such as social class and income. However, results are only presented for these analyses where differences were found.

Where possible, and appropriate, comparisons are made with the most recent National Lottery Commission research report.¹ However, a shift in emphasis towards attitudinal data, as well as definitional changes within the participation and expenditure questions, mean that monitoring change over time is not feasible. Instead, the results of this survey should be seen as baseline data against which to compare future findings, in the light of changes such as the introduction of new games and modifications to gambling legislation. Notably, it will be interesting to monitor people's attitudes towards new games, and new ways of accessing National Lottery products and to look at the extent to which their hypothetical views map on to the reality once these games are introduced.

A note on the tables in this report

- The sample was weighted to bring it into line with national population profiles. All tables present **weighted** data. Both weighted and unweighted bases are shown at the foot of each table.
- Due to rounding, column percentages do not always sum to 100%.
- The following conventions have been used.
 - * signifies a positive value of less than 0.5%.
 - signifies a zero value.

2 PARTICIPATION AND EXPENDITURE IN NATIONAL LOTTERY GAMES

Respondents were asked broad questions about their participation and expenditure in National Lottery games. Since the aim of the study was to focus more on attitudinal questions, the information on participation and expenditure was less detailed than that collected in previous years. Another change from previous surveys was that the questions focused on the individual respondent, rather than their household, as it was felt that people would be more likely to answer accurately about their own expenditure (as opposed to that of their household). Therefore, comparisons with data from previous years are not valid, though some broad differences are highlighted.

2.1 Summary of key findings

- In the current survey, the proportion of individuals who had played *any* National Lottery game was 67%. There was very little difference between the sexes in terms of rates of participation.
- About four in ten respondents (41%) played National Lottery games regularly (at least every week).
- Young people were the least likely to play National Lottery games (17% of those aged 16-24 played regularly compared with around half of those aged 35 years and over).
- Less than a quarter of people (23%) said that they had ever played Instants. The youngest group were the most likely to have played (53%) and were also the most likely to play regularly (7% compared with 3% overall).
- Individual mean expenditure in the most recent Saturday Lotto draw was £2.60 (men: £2.90; women: £2.30). In the most recent Wednesday Lotto, mean expenditure was £2.20 (men: £2.50; women: £2.00).
- The youngest and oldest groups spent the least on the Saturday Lotto (both £2.30) and the youngest group also spent the least on the Wednesday Lotto (£1.90).
- Respondents in the lowest income categories spent least, on average, on both the Saturday and the Wednesday draws.
- Almost three quarters (72%) of the sample use regular numbers whenever they play Lotto. Older people were more likely than younger people to have regular numbers.

2.2 Frequency of participation

2.2.1 Any National Lottery games

Respondents were asked about the frequency of their participation in any of the National Lottery games (including Lotto, Thunderball, Hotpicks, Extra and Instants). The distribution of answers was skewed towards both ends of the spectrum, with the largest groups of people playing either every week, or not at all. Two thirds of the sample (67%) reported having played at least one of these games at some point, two in five (41%) played one at least once a week, 7% two or three times a month and a third (33%) said that they never played any of them. There was very little difference between men and women in the rates of participation, but levels of weekly play did increase with age (see below).

Participation in National Lottery games seems to have decreased since the last survey, although this decrease could be explained by the fact that the current survey asked about *individual* participation, while the previous survey asked about the *household* as a whole. Two thirds (67%) of the current sample of individuals reported having played at least one National Lottery game, compared with 73% of households in 2001.

Table 2.1 Participation in any National Lottery game

	Men	Women	All
	%	%	%
Every week	42	39	41
Two or three times a month	7	7	7
Once a month	6	7	6
Less often than once a month	12	13	13
Never	33	34	33
Don't know	*	-	*
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

Levels of participation differed markedly between the age groups, and were lowest in the younger groups. Almost half (47%) of those aged between 16 and 24 reported *never* playing any of the National Lottery games compared with around a third (or less) of the other age groups. The increase in rates of participation was particularly noticeable between the first three age groups. Similarly, the proportion of people playing National Lottery games on a weekly basis increased with age from around a sixth (17%) of the youngest group, and just under a third of those aged 25 to 34, to around half of those in the older age groups.

Table 2.2 Participation in any National Lottery game, by age

	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
Every week	17	31	47	50	49	47
Two or three times a month	8	7	8	7	10	4
Once a month	10	9	5	5	3	5
Less often than once a month	19	21	10	12	9	7
Never	47	32	30	27	30	37
Don't know	-	-	-	*	-	-
<i>Unweighted base</i>	278	400	380	316	255	394
<i>Weighted base</i>	275	379	381	331	260	398

Participation was associated with social class, with those in the highest social class being the least likely to play (a result that was also found in the British gambling prevalence study²). Similarly, those in the lowest two social classes were the most likely to play on a regular basis.

Table 2.3 Participation in any National Lottery game, by social class

	ab	c1	c2	de
	%	%	%	%
Every week	31	37	49	44
Two or three times a month	5	6	7	9
Once a month	6	6	8	5
Less often than once a month	15	18	9	9
Never	42	33	26	34
Don't know	-	-	-	*
<i>Unweighted base</i>	367	578	430	647
<i>Weighted base</i>	344	580	456	643

2.2.2 *Instants*

Respondents were asked how often, in general, they bought and scratched National Lottery Instants. Over three quarters said that they never bought Instants, while 14% did so once a month and only 3% once a week. When asked how many Instants they had bought and scratched in the last seven days, 95% of the sample said 'none', 3% had bought two, and less than 2% had bought three or more Instants.

Table 2.4 National Lottery Instants

	Men %	Women %	All %
Every week	3	3	3
Two or three times a month	2	2	2
Once a month	4	3	4
Less often than once a month	12	16	14
Never	78	76	77
Don't know	*	*	*
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

In contrast with overall participation in *any* of the National Lottery games (with low rates among younger people), playing Instants was more common among younger compared with older respondents. Analysis by age showed that the youngest respondents were slightly more likely than the middle age groups to buy Instants, and they were also the most likely to buy Instants on a weekly basis.

Table 2.5 National Lottery Instants, by age

	16-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %
Every week	7	2	5	2	2	3
Two or three times a month	2	3	2	2	2	1
Once a month	7	5	3	2	4	2
Less often than once a month	13	17	17	16	13	9
Never	71	73	74	78	80	85
Don't know						
<i>Unweighted base</i>	278	400	380	316	255	394
<i>Weighted base</i>	275	379	381	331	260	398

As with the other National Lottery games, playing of Instants was associated with social class. The proportion of people who had ever played Instants was lowest among the highest social class and highest among those in the lowest class. Similarly, those in the lowest two groups were most likely to play regularly.

Table 2.6 National Lottery Instants, by social class

	ab	c1	c2	de
	%	%	%	%
Every week	3	3	5	8
Two or three times a month	-	2	3	5
Once a month	4	5	6	7
Less often than once a month	22	23	18	22
Never	71	67	69	58
Don't know	-	*	*	1
<i>Unweighted base</i>	198	391	342	430
<i>Weighted base</i>	211	386	321	429

2.3 Expenditure

2.3.1 Saturday Lotto

Respondents were asked about their own expenditure on the most recent Saturday Lotto draw. Over half of the sample had not bought any Lotto tickets (53%), roughly equal numbers had spent £1 and £2 (16% and 15% respectively) while only around 7% had spent £5 or more.

Table 2.7 Saturday Lotto

	Men	Women	All
	%	%	%
Nothing	52	53	53
£1	13	19	16
£2	16	14	15
£3	7	7	7
£4	3	2	3
£5	4	3	4
£6-£10	4	2	3
£11 or more	1	*	*
Don't know	*	1	*
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

For those who had played the most recent Saturday Lotto, a mean expenditure was calculated, in order to analyse differences between sub-groups of the population. At the interview, expenditure of £6 and above was collected in banded categories. In the calculation of the mean, the mid point of these categories was used. For example, the category 'between £6 and £10' was substituted with £8. The highest category, £11 or more, was simply substituted with £11. This is likely, therefore, to slightly underestimate the true mean value.

The overall mean expenditure, among those who had participated in the most recent Saturday draw, was £2.60 (£2.90 for men, £2.30 for women). This is lower than the 2001 survey, a difference that might be accounted for by the fact that the previous survey asked about *household* rather than *individual* expenditure (and averaged at £3.90).

Analysis by age showed an inverted 'U' shape in the distribution of expenditure, with the value being highest in the middle age groups and then dropping again in the oldest group.

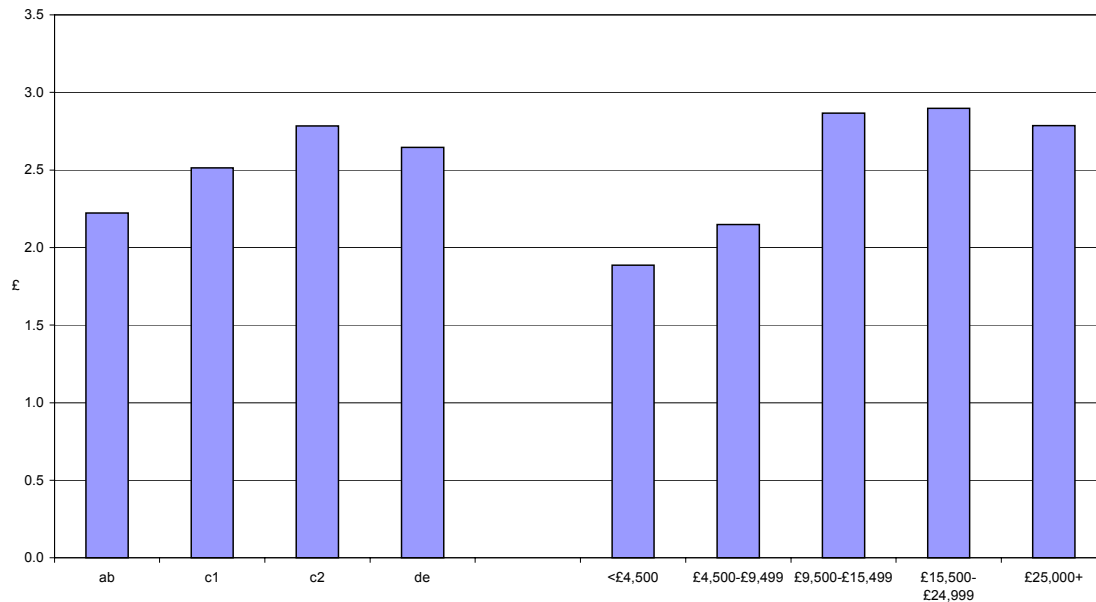
Table 2.8 Mean expenditure on Saturday Lotto

Base = those who played the most recent Saturday draw	Mean £
16 to 24	2.30
25 to 34	2.50
35 to 44	2.80
45 to 54	2.80
55 to 64	2.70
65 and over	2.30
All	2.60
<i>Unweighted base</i>	
16-24	72
25-34	155
35-44	203
45-54	175
55-64	143
65+	206
<i>Weighted base</i>	
16-24	72
25-34	144
35-44	201
45-54	178
55-64	147
65+	206

Mean expenditure in the most recent Saturday draw varied a little with social class, and more markedly with household income. Among those who had played, expenditure was highest among people in social class C2, and lowest among those in class AB. Thus, the lower class groups are more likely both to play National Lottery games, and, to spend more money on Lotto.

In contrast, expenditure among players was found to increase along with household income, from £1.90 among those in the lowest income group, up to £2.90 among those with an income of between £9,500 and £24,999, dropping only slightly in the highest income band. This pattern is contrary to what might be expected if social class and income were perfectly correlated which is, of course, not the case.

Chart 2.1: Saturday Lotto expenditure, by social class and income



2.3.2 Wednesday Lotto

Levels of participation in the most Wednesday draw appear to have decreased somewhat since last year's survey, although again this could be accounted for by the fact that the current survey asked about individuals, while the 2001 survey asked about households.

Around a quarter of respondents (27%) had bought tickets in the current survey, compared with over a third (around 38%) in 2001. The overall mean expenditure, among those who had participated in the most recent Wednesday draw, was £2.20 (£2.50 for men, £2.00 for women).

Table 2.9 **Wednesday Lotto**

	Men	Women	All
	%	%	%
Nothing	71	75	73
£1	10	10	10
£2	9	9	9
£3	4	3	4
£4	1	1	1
£5	3	1	2
£6-£10	2	*	1
£11 or more	*	-	*
Don't know	*	1	*
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

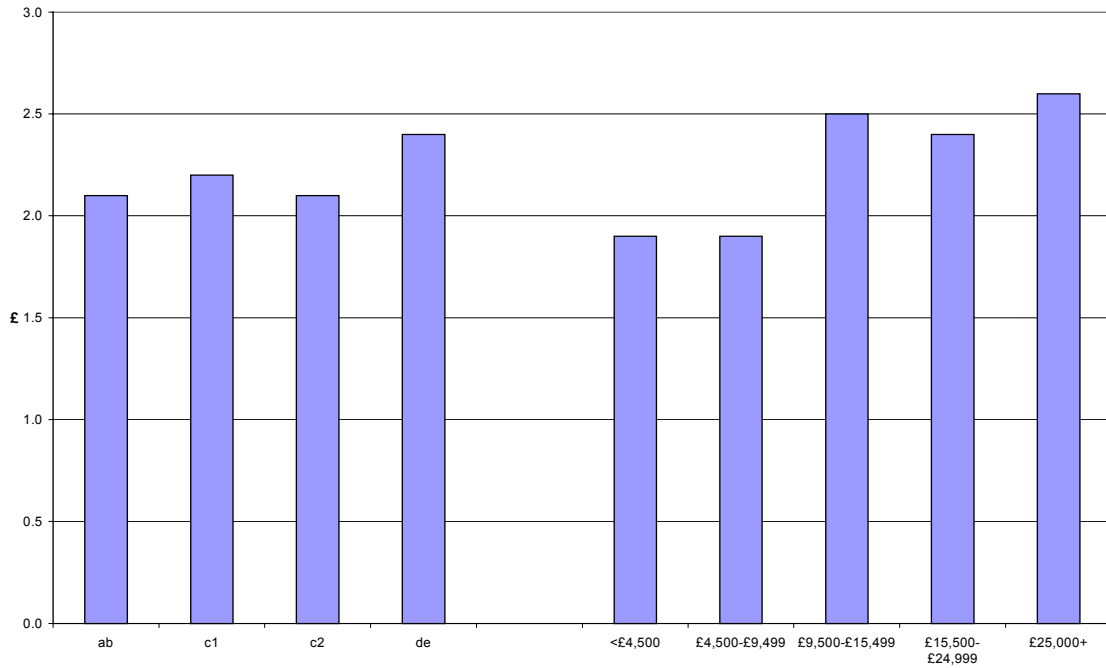
Again, expenditure showed an inverted 'U' shaped distribution, with the middle age groups spending most on the Wednesday draw.

Table 2.10 Mean expenditure on Wednesday Lotto

Base = those who played the most recent Wednesday draw	Mean £
16 to 24	1.90
25 to 34	2.30
35 to 44	2.40
45 to 54	2.30
55 to 64	2.20
65 and over	2.10
All	2.20
<i>Unweighted base</i>	
16-24	35
25-34	72
35-44	112
45-54	100
55-64	100
65+	116
<i>Weighted base</i>	
16-24	36
25-34	79
35-44	112
45-54	97
55-64	94
65+	116

Expenditure in the Wednesday draw was lowest among those in social classes AB and C2, and highest among those in the lowest social class. As with the Saturday draw, there was the contrasting finding that outlay tended to increase along with income, from £1.90 among those with an income of less than £9,500 up to £2.60 among those with the highest household income.

Chart 2.2: Wednesday Lotto expenditure, by social class and income



2.4 Numbers chosen

The survey results suggest that it is common for people to select the same Lotto numbers whenever they play, despite only a minority believing that doing so increases their chances of winning (see Section 3.2). Respondents who had played the most recent Saturday Lotto were asked how many of the numbers they had chosen were the same lines of numbers that they always choose. Almost three quarters of the sample said that at least one of the lines was the same line of numbers that they always choose.

Table 2.11 Numbers chosen in Saturday Lotto

Base = those who played the most recent Saturday draw	Men	Women	All
	%	%	%
None	28	27	28
One	26	31	28
Two	19	22	21
Three	9	10	10
Four	3	1	2
Five	6	3	4
Six	3	1	2
Seven	1	*	1
Eight to ten	2	2	2
Eleven or more	1	*	*
Don't know	3	1	2
<i>Unweighted base</i>	456	505	961
<i>Weighted base</i>	470	486	956

The tendency to choose the same lines of numbers differed markedly with age – between the youngest age group, of whom less than half chose (at least some of) the same numbers each week, and the other age groups, among whom around three quarters did so.

Table 2.12 Numbers chosen in Saturday Lotto, by age

Base = those who played the most recent Saturday draw	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
None	53	25	28	22	26	25
One	21	30	22	34	25	32
Two	13	22	23	17	23	23
Three	1	7	14	11	11	8
Four	-	6	2	2	1	2
Five	5	1	4	5	6	3
Six	-	2	3	1	2	2
Seven	-	2	3	1	2	2
Eight to ten	1	1	2	2	2	1
Eleven or more	-	2	-	3	1	1
Don't know	5	3	2	1	1	2
<i>Unweighted base</i>	73	157	204	177	144	206
<i>Weighted base</i>	73	146	202	181	148	206

The results for the Wednesday draw were very similar. Again, almost three quarters said that they chose at least some of the same numbers whenever they play, and again this pattern varied with age, being more common among those aged 25 years and above.

Table 2.13 Numbers chosen in Wednesday Lotto

Base = those who played the most recent Wednesday draw	Men	Women	All
	%	%	%
None	29	26	27
One	29	34	31
Two	21	26	23
Three	7	8	8
Four	2	1	2
Five	6	*	3
Six	2	-	1
Seven	-	1	-
Eight to ten	1	-	1
Eleven or more	1	*	1
Don't know	1	3	2
<i>Unweighted base</i>	277	267	544
<i>Weighted base</i>	287	259	546

Table 2.14 Numbers chosen in Wednesday Lotto, by age

Base = those who played the most recent Wednesday draw	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
None	42	26	30	24	26	25
One	23	35	27	36	28	35
Two	23	17	25	20	29	22
Three	3	10	11	4	7	8
Four	4	1	1	2	1	3
Five	-	2	4	5	3	2
Six	-	4	1	1	1	1
Seven	-	-	-	-	-	-
Eight to ten	-	-	-	1	2	2
Eleven or more	-	2	1	3	-	-
Don't know	6	3	1	1	2	2
<i>Unweighted base</i>	37	82	115	99	95	116
<i>Weighted base</i>	36	75	115	103	101	116

2.5 The TV draw

The survey results suggest that watching Lotto draw live on television is not particularly common among the general public as a whole, though the proportion doing so does increase with age. Respondents were asked how often they watched Saturday and Wednesday Lotto draws live on television. The majority of people (59%) reported that they never watched the Saturday draw, and an even higher proportion (79%) said that they never watched the Wednesday draw. Just over one in ten people (11%) watched the Saturday draw on a weekly basis, and one in twenty (5%) watched the Wednesday draw every week. The proportion of people watching the Saturday draw on TV increased markedly with age, from 4% of those in the youngest age group through to almost a quarter (23%) of those aged 65 and over. A similar pattern was found for the Wednesday draw, from 1% of the youngest age group through to 10% of the oldest.

Table 2.15 Watch Saturday draw live on TV

	Men	Women	All
	%	%	%
Every week	9	13	11
Two or three times a month	8	9	9
Once a month	6	7	6
Less often than once a month	14	14	14
Never	63	56	59
Don't know	*	1	*
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

Table 2.16 Watch Saturday draw live on TV, by age

	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
Every week	4	8	9	9	12	23
Two or three times a month	6	8	6	11	10	12
Once a month	5	4	9	5	9	6
Less often than once a month	17	14	16	12	11	14
Never	67	65	60	63	58	45
Don't know	-	*	1	*	*	*
<i>Unweighted base</i>	278	400	380	316	255	394
<i>Weighted base</i>	275	378	380	332	261	396

Table 2.17 Watch Wednesday draw live on TV

	Men	Women	All
	%	%	%
Every week	4	6	5
Two or three times a month	3	5	4
Once a month	3	4	4
Less often than once a month	9	8	8
Never	80	78	79
Don't know	*	*	*
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

Table 2.18 Watch Wednesday draw live on TV, by age

	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
Every week	1	4	3	4	6	10
Two or three times a month	2	3	3	3	5	7
Once a month	4	3	3	2	6	4
Less often than once a month	6	10	9	9	9	7
Never	86	80	80	81	75	71
Don't know	-	1	1	*	*	*
<i>Unweighted base</i>	278	400	380	316	255	394
<i>Weighted base</i>	275	378	380	332	261	396

3 ATTITUDES TO NATIONAL LOTTERY GAMES

As previously stated, there was an interest this year in finding out more about people's attitudes towards National Lottery games. The NLC survey series has indicated that rates of participation have been steadily decreasing since the National Lottery was first introduced. There was also an interest, in this survey, in exploring the impact of the new National Lottery games on the general public, and on rates of participation in the original Lottery draw. So, in addition to the more 'objective' questions on participation and expenditure, respondents were asked a series of questions which aimed at tapping into their views concerning National Lottery games. It should be noted when reading this section that questions concerning new games and new ways of playing are, by definition, hypothetical. A discrepancy between intentions and subsequent reality is commonly found in such research.

3.1 Summary of key findings

- People's responses to the attitudinal questions suggest resistance to change and to new games, and a feeling that there are too many National Lottery products available (62% agreed with this statement).
- Only around a third of those who had played any National Lottery games (34%) reported having played anything apart from Lotto. Such resistance to new products was most marked among the older groups.
- Of those who had played games apart from Lotto, 69% had played Thunderball, 31% had played Extra and 46% had played Hotpicks.
- Of those who had played these other games, only 13% overall said that they preferred these games to the original Lotto. The most common reasons for preferring Lotto were to do with the prizes, and the fact that it is seen to be less complicated. The main reason for preferring the other games was that the chances of winning are perceived to be better.
- There was also a reluctance to purchase Lotto tickets in innovative ways. Only 7% of those who have ever played a National Lottery game stated that they would be interested in being able to buy tickets over the telephone or via the internet.
- Decreasing participation rates in Lotto do not appear to be related to the price of tickets. Almost three quarters (73%) felt that £1 for a Lotto ticket is value for money. Nevertheless, 59% did say that they would not continue to play if tickets increased in price.

3.2 Views on National Lottery games

Respondents were asked to indicate their views concerning the number of National Lottery games available. The majority (62%) reported that they felt there were too many games available, 15% believed that there were about the right amount, and only 2% felt that there should be more games available. There was no clear pattern of association with age, with the proportion who believed that there were too many games increasing from 59% among the youngest, through to 68% of those aged between 45 and 54, and then decreasing again to 57% of those in the oldest age group.

Table 3.1 **Number of games**

	Men %	Women %	All %
Too many different games	60	63	62
About the right number of games	17	14	15
Not enough different games	2	1	2
Don't know	21	21	21
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

Interestingly, players of National Lottery games were more likely than non-players to think that there are too many different games available. Almost seven in ten (69%) people who had ever played a National Lottery game at some believed that there are too many different games, compared with less than half (48%) of those who said that they had never played. Perhaps not surprisingly, non-players were far more likely than players to say that they didn't know.

Table 3.2 **Number of games, by whether plays**

	Players %	Non-players %
Too many different games	69	48
About the right number of games	21	9
Not enough different games	1	2
Don't know	9	41
<i>Unweighted base</i>	1360	663
<i>Weighted base</i>	1222	677

Respondents were asked whether or not they believed the National Lottery and Instants to be a 'form of gambling'. The vast majority of the sample (almost nine in ten) believed that both activities were a form of gambling. The proportion who believed the National Lottery to be a form of gambling increased steadily with age, from 79% of the youngest through to 91% of the oldest age group. The pattern was less marked for Instants.

Table 3.3 Whether National Lottery/Instants are a form of gambling

	Men	Women	All
	%	%	%
National Lottery is a form of gambling	88	87	87
Instants are a form of gambling	89	88	89
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

Respondents who had played any of the National Lottery games were asked to indicate whether they agreed with a number of attitudinal statements relating to Lotto and other National Lottery games. The percentage who agreed with each of the statements is presented in the table below.

A very small proportion (3%) felt that playing National Lottery games improved their financial situation, while over four in ten (44%) said that playing them had been 'pleasure and fun'. The proportion agreeing with the latter statement was highest among the oldest age group (53%). Two fifths of the sample (40%) believed that the money raised goes to good causes, and this figure decreased with age from 45% of those in the youngest group down to 36% of the oldest respondents. Less than half of the sample (47%) said that they play Lotto more now than they did when it first came out, and again this decreased with age, from around half of those aged under 65 down to only a third of those aged 65 and over. One in five people (21%) believed that the chances of winning on Lotto are improved if the same numbers are used each week. Interestingly, this proportion was highest among the youngest age group (30%) whereas this group were less likely than the other age groups to say that they chose the same numbers each week (see section 2.4). The majority of people (73%) felt that Lotto tickets are value for money and this proportion did not vary with age. Interestingly, there was very little difference between the income groups in terms of views on whether £1 for a Lotto ticket is value for money – although those in the lowest income group were the most likely to agree with this statement (80% - table not shown)

Table 3.4 Views on National Lottery games (players)

Those who have played any NL game	Men %	Women %	All %
Playing NL games has helped me financially	4	2	3
Playing NL games has given me pleasure and fun	45	43	44
In the last 12 months I have lost more than I have won on NL games	85	86	85
On the whole, the money from NL games goes to good causes	42	38	40
I play Lotto more than I did when it first came out	47	47	47
I think people are more likely to win on Lotto if they use the same numbers each week	20	21	21
£1 for Lotto ticket is value for money	72	74	73
<i>Unweighted base</i>	641	720	1361
<i>Weighted base</i>	666	682	1348

Table 3.5 Views on National Lottery games, by age

Those who have played any NL game	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
Playing NL games has helped me financially	5	2	2	4	2	4
Playing NL games has given me pleasure and fun	42	42	42	41	42	53
In the last 12 months I have lost more than I have won on NL games	78	83	86	89	89	84
On the whole, the money from NL games goes to good causes	45	40	44	39	38	36
I play Lotto more than I did when it first came out	52	57	48	47	48	34
I think people are more likely to win on Lotto if they use the same numbers each week	30	19	19	15	19	24
£1 for Lotto ticket is value for money	73	72	76	73	75	72
<i>Unweighted base</i>	150	279	271	233	176	252
<i>Weighted base</i>	147	258	268	242	183	251

Survey respondents who reported never playing any National Lottery game were also asked a series of attitude statements to indicate why they did not participate. The statement most commonly agreed with (65%) was that 'the chances of winning are so small'. Over a third (39%) believed that 'gambling can be harmful' - this was more common among women (43%) than men (34%) and increased with age from 29% of those in the youngest group to over 40% of those aged 35 years and over. Two in ten people (22%) said that the reason was because there are too many games to choose from, and this proportion was higher among women (26%) than men (18%). Seventeen per cent of people said that they didn't play National Lottery games because they are 'too expensive' with this figure being highest (32%) in the youngest age group. Perhaps not surprisingly, this figure was also higher among the lower income groups - 23% of those earning less than £4,500 compared with 7% of those earning £25,000 or more (table not shown). Less than half of the sample (45%) agreed that Lotto tickets are value for money, perhaps not surprisingly a smaller proportion than that among those who reported playing National Lottery games (see above table).

Table 3.6 Reasons for not playing National Lottery games

Those who never play any NL game	Men %	Women %	All %
Too expensive	14	19	17
Chances of winning are so small	65	64	65
Don't know where to buy the tickets	3	4	3
Money does not go to good causes	34	38	36
Too complicated	5	11	8
Too many different games to choose from	18	26	22
Gambling can be harmful	34	43	39
I think people are more likely to win on Lotto if they use the same numbers each week	18	18	18
£1 for Lotto ticket is value for money	40	49	45
<i>Unweighted base</i>	300	362	662
<i>Weighted base</i>	322	354	675

Table 3.7 Reasons for not playing National Lottery games, by age

Those who never play any NL game	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
Too expensive	32	25	29	13	12	22
Chances of winning are so small	72	70	61	71	60	56
Don't know where to buy the tickets	2	4	1	4	6	4
Money does not go to good causes	32	33	37	38	50	38
Too complicated	4	7	10	6	9	13
Too many different games to choose from	19	24	21	25	18	23
Gambling can be harmful	29	38	40	42	46	41
I think people are more likely to win on Lotto if they use the same numbers each week	30	20	13	11	14	16
£1 for Lotto ticket is value for money	51	42	45	40	41	45
<i>Unweighted base</i>	278	400	380	316	255	394
<i>Weighted base</i>	275	378	380	332	261	396

3.3 Comparisons between Lotto and other National Lottery games

Respondents who reported playing any of the National Lottery games, were asked whether or not they had played any of the other games, apart from Lotto. Around a third (34%) said that they had played other games. There was no clear pattern with age although the oldest respondents were the least likely to have tried other games (28%).

Table 3.8 Games apart from Lotto

Those who have played any NL game	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
% who had played games apart from Lotto	36	36	42	29	31	28
<i>Unweighted base</i>	150	279	271	233	176	252
<i>Weighted base</i>	147	258	268	242	183	251

Respondents who said that they had played any of the other games were asked to indicate which one(s) they had played. Thunderball was the most popular (69%) followed by Hotpicks (46%) and then Extra (31%).

Table 3.9 Which games

Those who have played other games	Men %	Women %	All %
Thunderball	71	68	69
Extra	38	24	31
Hotpicks	45	47	46
<i>Unweighted base</i>	209	252	461
<i>Weighted base</i>	222	234	456

Thunderball was most popular among the older age groups (77% among those aged 55 and over) and least common among the youngest age group (62%). Extra was most popular among the middle groups (between 25 and 54) and least common among the oldest group. Hotpicks was most popular among those aged between 45 and 54 and least common among those aged 65 and over.

Table 3.10 Which games, by age

Those who have played other games	16-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %
Thunderball	62	68	69	64	77	77
Extra	25	38	39	35	24	17
Hotpicks	48	37	51	54	46	38
<i>Unweighted base</i>	51	100	116	72	51	71
<i>Weighted base</i>	52	93	112	71	56	71

Respondents who had played National Lottery games other than Lotto were then asked about their relative preferences in terms of Lotto compared with the other games. Almost half (46%) said that they preferred Lotto, while 13% said that they preferred the other games, and 39% indicated no preference.

Table 3.11 Game preference

Those who have played other games	Men %	Women %	All %
Prefer other games	11	15	13
Prefer Lotto	48	45	46
No preference	41	37	39
Don't know	1	3	2
<i>Unweighted base</i>	186	220	406
<i>Weighted base</i>	199	204	404

The proportion who preferred the original Lotto tended to increase with age, from a third (33%) of the youngest respondents through to over half of those aged 55 and over. The proportion indicating no preference decreased with age, from half (50%) of the youngest through to around a third of the oldest respondents.

Table 3.12 Game preference, by age

Those who have played other games	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
Prefer other games	15	12	13	14	15	10
Prefer Lotto	33	44	47	50	52	51
No preference	50	43	37	36	33	36
Don't know	2	1	2	-	-	4
<i>Unweighted base</i>	43	88	105	66	46	58
<i>Weighted base</i>	44	83	102	64	51	59

The reasons for preference were explored. Among those who preferred Lotto, the most commonly cited reasons were that the prizes are better (39%), and that Lotto is less complicated than the other games (30%). Among those who stated that they preferred the other games, the overwhelming reason was the belief that the chances of winning are better. Very few people cited the price of the tickets as a reason for their preference.

Table 3.13 Reasons for preference

Those who have played NL games apart from Lotto	Prefers Lotto	Prefers other games
	%	%
Prizes/jackpot are better	39	17
More exciting	2	2
Less complicated/easier to understand	30	2
Involve more skill	1	-
Involve less skill	2	-
Better chance of winning	12	80
Tickets cost less/are better value	2	-
Other reason	10	-
<i>Unweighted base</i>	190	56
<i>Weighted base</i>	188	52

Respondents who play Lotto were asked whether they would continue to play if the price of the tickets increased. The majority (59%) said that they would stop playing, 17% said that they would continue to play, while a quarter (24%) said that it would depend on the price. The proportion who said that they would continue to play tended to decrease with age, from 20% of the youngest down to 12% of the oldest age group.

Table 3.14 Whether would continue to play if price of tickets increased

Those who play Lotto	Men %	Women %	All %
Would continue to play	19	14	17
Would not continue to play	52	66	59
Depends	28	20	24
<i>Unweighted base</i>	524	571	1095
<i>Weighted base</i>	541	536	1077

Table 3.15 Whether would continue to play if price of tickets increased, by age

Those who play Lotto	16-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %
Would continue to play	20	16	20	15	17	12
Would not continue to play	56	60	57	61	57	64
Depends	24	24	23	23	26	24
<i>Unweighted base</i>	108	229	222	196	144	196
<i>Weighted base</i>	105	212	218	201	150	192

Respondents who said that they would continue to play Lotto if the tickets went up in price were asked to indicate how that would affect their purchase. A third (34%) said that they would spend more money and buy the same number of tickets, while the majority (61%) said that they would continue to spend the same amount of money, but would buy less tickets.

Table 3.16 Whether would buy same amount of tickets

Those who would continue to play Lotto	Men %	Women %	All %
Same number of tickets for more money	30	41	34
Same amount of money and less tickets	65	55	61
Depends/not sure	5	4	5
<i>Unweighted base</i>	99	83	182
<i>Weighted base</i>	104	74	179

The proportion who would spend more money and buy the same number of tickets decreased markedly with age from over a half (57%) of the youngest age group down to around a quarter of those aged 55 and over.

Table 3.17 Whether would buy same amount of tickets, by age

Those who would continue to play Lotto	16-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %
Same number of tickets for more money	57	41	27	35	24	28
Same amount of money and less tickets	43	56	67	63	62	69
Depends/not sure	-	3	5	2	15	3
<i>Unweighted base</i>	21	37	43	31	24	26
<i>Weighted base</i>	21	34	43	31	26	24

3.4 New National lottery games

Respondents were asked to indicate where they first heard about new National Lottery games when they come onto the market. The most common source was the television (72%) followed by other media (14%). There were no associations with age in these results.

Table 3.18 Where tickets are purchased

	Men %	Women %	All %
Through the place where buy NL products	7	7	7
Through the TV	71	72	72
Through other media	15	12	14
Through other people	6	8	7
Other	4	3	3
Don't know	13	13	13
<i>Unweighted base</i>	941	1082	2023
<i>Weighted base</i>	987	1036	2023

Respondents were asked whether or not, when a new National Lottery game comes out, they would try it straight away. One in ten respondents said that they would (11% of men and 9% of women). This proportion tended to decrease with age from 18% of those aged 16-24 down to 6% of those aged 65 and over.

Those who did NOT say that they would try a new game immediately were asked to indicate what they would do, according to a number of statements. A third (34%) said that they would find out more information through advertising before playing a new game, a quarter (25%) said that they would wait to hear what other people thought of it, and less than a quarter (23%) said that they would end up trying the new game. The proportion who said that they would bother trying the game at all decreased with age from 29% of those aged 16-24 down to 16% of those in the oldest age group.

Table 3.19 Behaviour on launch of new game

	Men %	Women %	All %
Those who would not try a new game straight away			
Find out more information through advertising before playing it	34	35	34
Wait to hear what other people think before playing it	26	24	25
% who would try it	24	22	23
<i>Unweighted base</i>	573	647	1220
<i>Weighted base</i>	595	619	1214

Table 3.20 Behaviour on launch of new game, by age

Those who would not try a new game straight away	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
Find out more information through advertising before playing it	36	41	35	29	34	31
Wait to hear what other people think before playing it	34	34	27	15	23	21
% who would try it	29	28	25	21	22	16
<i>Unweighted base</i>	122	251	242	209	159	237
<i>Weighted base</i>	121	231	241	221	164	236

Respondents were asked whether or not they would be interested in being able to buy Lotto tickets over the telephone or via the Internet. A very small proportion (7%) answered yes to this question (men: 9%, women: 5%). Not surprisingly, this figure decreased with age, from 15% of the youngest down to 1% of the oldest respondents.

Table 3.21 Whether interested in purchasing via telephone/Internet, by age

Those who have played any NL game	16-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%
Yes	15	11	6	8	3	1
No	84	88	92	91	96	99
Don't know	2	2	2	1	1	*
<i>Unweighted base</i>	150	279	271	233	176	252
<i>Weighted base</i>	147	258	268	242	183	251

¹ National Lottery Commission Social Research Programme. Report No. 1 – May 1999.

² Sproston, K, Erens B & Orford J. Gambling behaviour in Britain: Results from the British Gambling Prevalence Survey (2000). National Centre for Social Research.