Context

Possible channels

Measuring changes

Possible outcomes*

Regulated lotteries market

The National Lottery (TNL)

Large society lotteries (SLs)

Small society lotteries

Wider market

sales limit

Changing

Policy lever:

Gambling: terrestrial and remote betting and gaming, gaming machines, bingo, pools

Prize draws

Consumer demand

Lottery features: rollover size, frequency of draws, likelihood of winning, scratchcard v. draw-based, advertising, online or faceto-face, day of week

Donating to charity

Macroeconomic conditions

Demographics – age, income, education

Consumer decision-making

Substitute between lotteries (TNL and a SL, and / or between two SLs)

v.

Treat lotteries as complementary

Competition

Increased competition between lotteries (cannibalisation)

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No effect on competition

Market size

Both lotteries grow

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Both lotteries grow but one at a slower rate

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One lottery shrinks, the other grows

Gambling Commission metrics

Good cause donations

Sales

Prizes

Licence numbers

Expenditure (incl. advertising)

Transparency

Qualitative insights

Experience of past policy changes

Proximity to current sales limits

TNL benefits

Investment allocated through 12 distributors, supporting arts, sport, heritage, and health, education, environment and charitable causes

Lottery Duty revenue

Funding for projects

SL benefits

Spans a vast range of charitable organisations / purposes

Funds for particular charities or branded lotteries

Wider charitable impacts: unrestricted funding, long-term support

TNL disbenefits

Lost market share and reduced project investment

SL disbenefits

Crowding out of smaller regulated SLs and their funding

Consumer disbenefits

Potential to exacerbate gambling harm issues

^{*}Outcomes are dependent on which channel is followed