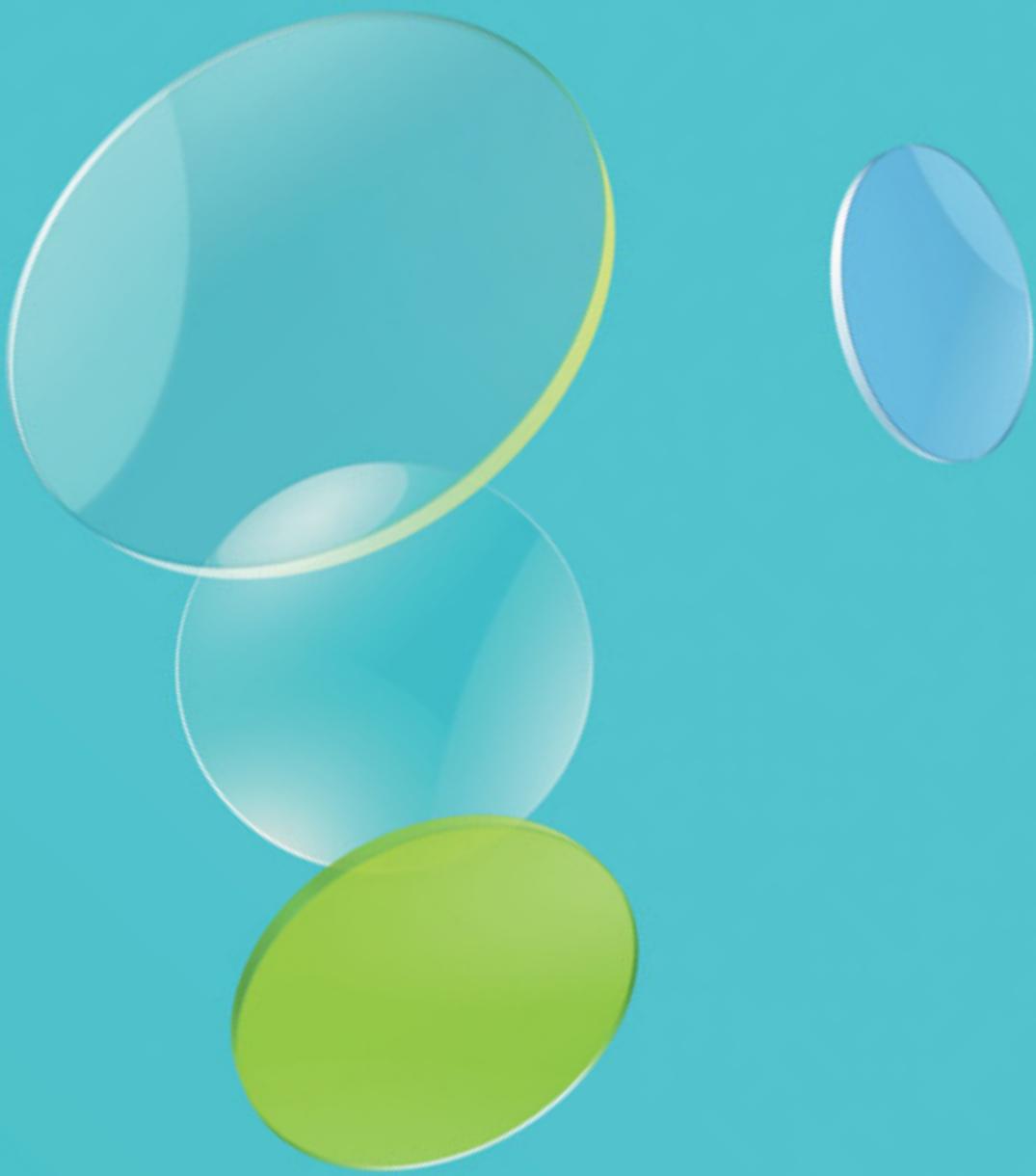


A New Way to Play



2026

 **allwyn**

Foreword

As a society, we're experiencing a major transformation in the way we interact.

Mainstream entertainment is evolving at lightning speed, fuelled by technological leaps and the dynamic changes to the way in which younger – and, increasingly, older – generations connect. Play is at the heart of The National Lottery and, to stay ahead, Allwyn UK is working to transform this great institution, to create interactive and innovative experiences that ensure players continue to enjoy The National Lottery in a responsible way. In over 20 years in the entertainment business, I haven't experienced a more innovative or exciting time to be a part of this industry.

We've made a commitment to bring the magic back to The National Lottery. We're working hard to better understand our current, and new players, so we can continue to grow and future-proof The National Lottery. This will shape our plans to create more engaging games, attract new players, produce more winners, and deliver on our ambition to double returns to Good Causes by the end of the 10-year licence.

Our "A New Way to Play" report dives into the gaming economy's rapid evolution, especially focusing on Gen Z¹ – the trailblazers redefining play – and explores how this insight fundamentally changes the way we operate.

In over 20 years in the entertainment business, I haven't experienced a more innovative or exciting time to be a part of this industry.

Underpinning this report is an extensive UK-wide study conducted in partnership with leading data and market research consultancy, Savanta. The consumer research conducted uncovered societal trends, which are pivotal to delivering better gaming experiences across all genres of entertainment from computer games themselves to Saturday night television game shows, to interactive in-person experiences. As physical and digital worlds converge, we explore themes like social gaming, AI-driven realms, and entertainment fusion, combining in-house expertise with expert third-party insight.

Over four comprehensive chapters, A New Way to Play identifies a series of societal trends that are key to understanding how to meet player needs as gaming becomes further embedded into TV, radio and everyday culture. Our report ends with three clear observations that will help us ensure all generations can continue to enjoy playing responsibly, and on their own terms.

01

Connecting Through Play:

The desire for connection in an increasingly contentious world, driven by Gen Z's evolving approach to socialising, where both virtual and in-person interaction play an essential role.

02

The Power of Nostalgia:

Bringing old and new together, as technology drives more meaningful multi-generational experiences based in fond memories and playing together.

03

New Worlds to Play In:

The immersive power of technology – new ways to play which are pushing boundaries of immersion, interaction and reward.

These insights are already shaping The National Lottery's modernisation. Since February 2024, Allwyn has invested over £400 million in upgrading operations and technology.

As a global leader in our industry, we strive for deeper conversation and debate about the opportunities and challenges that transformation brings, driven by the significant societal changes we're witnessing. That includes tackling issues like regulation around player participation on key platforms. From TV and radio competitions – which are a good example of the gamification of entertainment that is guided only by the loosest of rules currently – to protecting players as new routes to engagement evolve. It's in our hands to deliver improved, innovative and rewarding experiences for all who take part in The National Lottery – and now is the time to do it.

The appetite I see daily to deliver the very best for our players, fills me with pride and optimism for an industry that is central to human interaction. I would love to hear your thoughts around the thrilling future of play – the possibilities are boundless, and we're just getting started.

Andria Vidler
CEO, Allwyn

Chapter 1

Connecting Through Play

The instinct to play is an intrinsic part of human nature, often the gateway into connection and interaction, making it a powerful force for building relationships and delivering progress. From education to the workplace, to family and friends, play shapes our world.

However, play is evolving at a pace previously unseen. As digital and physical worlds continue to blend, new technologies and fundamental shifts in human behaviour are emerging that enable us to connect in new ways. They are making the possibilities endless for the gaming and leisure industry to both capitalise and guide how entertainment provides opportunities for people to play together in new ways now, and over the coming years.

At the heart of this change is social gaming. It has become a mainstay of popular culture. Blending with entertainment sectors like TV and sports to make play more connected than ever, it is now a social and technological phenomenon, regarded as a mainstream hobby for all ages, especially as the first "Xbox generation" reaches middle age.

"Myself and my friends have busy lives where we work and sometimes struggle to meet up in person, the online aspect allows us to 'meet' and socialise without actually being there."

Male, 23, North West

Savanta A New Way to Play research focus group

Influenced by their socialising choices, shifting modes of play are being driven by Generation Z. This impact extends beyond a single group, fostering multi-generational engagement and bridging physical and social divides. Gaming – reaching across all genres – builds and sustains social ties, allowing people to maintain friendships across distances, time zones, and busy schedules. Unlike traditional in-person meet-ups which require physical proximity, gaming facilitates staying in touch with friends and family regardless of location. While gaming will never replace human interaction – and in-person connection remains vital for all generations – our A New Way to Play research shows it is increasingly valued for maintaining and developing relationships.

Gaming – helping build the connections of the future

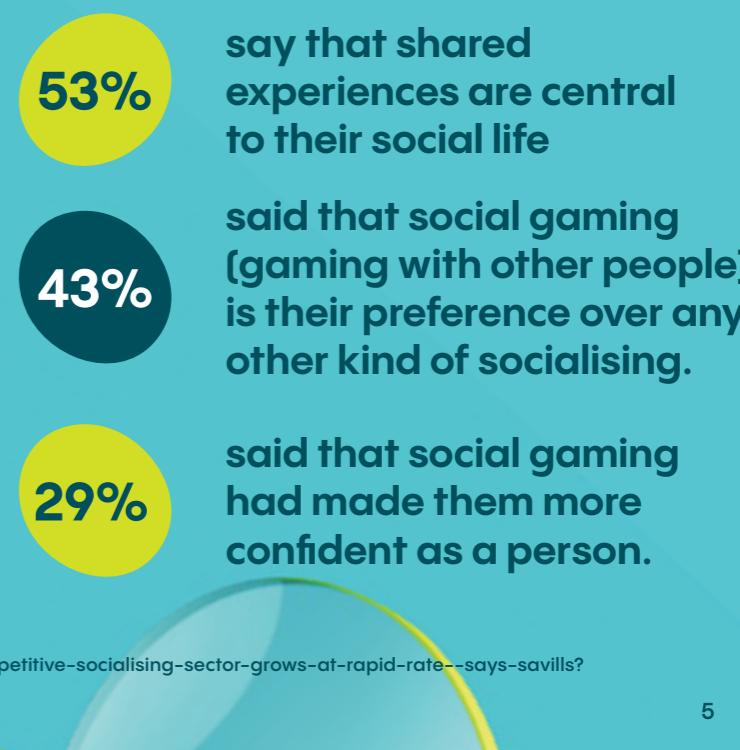
Our research highlights how the exponential rise of social gaming (in-person or virtually with others) is one of the trends re-defining social connections as Gen Z, in particular, turn to active, community-led experiences as a core way to build confidence, create memories and bond with each other. Over half (53%) say that shared experiences are central to their social life, while almost as many (49%) are equally as likely to socialise online as they are in person. For four in ten (43%), social gaming (gaming with other people) is their preference over any other kind of socialising.¹

A step change in UK city nightlife evidences this growing trend, such as London-based venue – the "Knight Club" – which combines chess games with live DJ sets, aiming to create a social space for people, particularly younger generations. Players range from novices to chess pros, but the common theme amongst visitors is how they value the experience for making new friends and social connections.

In Manchester, the city centre's Boom Battle Bar – a venue described as a multi-activity "competitive socialising" bar – is positioned as "a night out" with games embedded in the experience. Both examples demonstrate how competitive socialising has grown in the UK, with a 38% uptick in venues offering in-person experiences and leisure activities between 2018 to 2023.² This is reflective, in particular, of Gen Z's desire to make every moment count and enjoy entertainment on their own terms.

More traditional in-person games are still the most popular across all age groups, with board and card games played most often (35%). However mobile games with social features (34%) (i.e. games with functions that allow players to interact with each other) are hot on their heels, and are likely to overtake as Gen Alpha – the first digital-native generation to grow up with AI, typically born between 2010 and 2025 – become adults.³

These trends also play out across broadcast entertainment, where many high-rating shows include an element of social play or interaction, whether that's voting on BBC's Strictly Come Dancing, playing along at home on ITV's 1% Club app, or listeners calling in to be involved on a Magic FM giveaway. The desire to connect and be a part of something bigger, is influencing the shape of culture across every single channel.

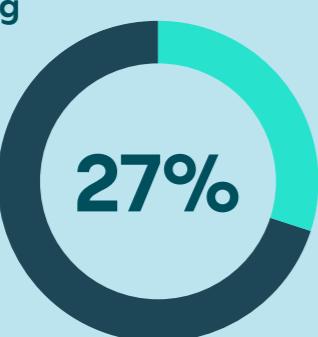


This fundamental change in play provides both opportunities and challenges for the entertainment and leisure industry. It must provide the experiences that many participants are increasingly demanding at the speed they want them, while ensuring the protection of those players in a complex environment, as technology develops at breakneck speed. It also raises important questions around regulation and the need for parity across different platforms, particularly where there is less guidance on participation. The recent DCMS Voluntary Code of Good Practice for Prize Draw Operators provides a positive opportunity for change, but there is still a way to go to ensure the highest level of player protection, as well as ensuring Good Causes revenue is not impacted.

Our research shows clearly that if social elements from games and play are missing, the audience may be lost. While, unsurprisingly, socialising or bonding with others are cited as the main benefits of collective play (35%), a quarter of all those questioned (24%) said entertainment doesn't hold their attention unless there is a play or competitive element included.⁴

Almost half (46%) say social gaming keeps them far more engaged in any form of game, while interestingly, almost a third of all respondents (29%) also said that social gaming had made them more confident as a person.⁵

Gen Z are more likely to use social gaming to plan, build, and support both their professional and personal lives.



So, far from painting a picture of isolation which is often associated⁶ with younger people and their pastimes, Gen Z are clear that social gaming and play brings them together more than any other activity, with others citing mental wellbeing, stronger personal relationships and deepened personal fulfilment as key benefits.⁷ According to recent research from leading consumer research company GWI, Gen Z are also 27% more likely than other age groups to use social gaming to build and plan from games such as Minecraft, using it to bolster their professional lives, as well as personal.⁸

In fact, the use of gaming in self-development is a huge growth area, and a habit that has become embedded into global daily life. Whether it's taking on Wordle every morning, the introduction of Zip on LinkedIn or even learning a language through gamification on Duolingo – which is used by over 600 million people worldwide – the use of play to educate, enhance and empower has expanded exponentially across platforms in the last few years, influencing professional lives, as well as personal.

^{4, 5} Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)
⁶ <https://ukonward.com/reports/age-of-alienation-loneliness-young-people/>

⁷ Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)
⁸ <https://www.gwi.com/blog/generation-z-characteristics#:~:text=11.,shaping%20the%20real%20world%20too>

Games – from products to social networks

Social gaming is no longer a niche hobby, it's a key influencer of UK cultural trends and behavioural norms. Play has permanently shifted – woven into the fabric of daily life as a key way to socialise, build community and collaborate.

Our research also delved into the behaviours of over 1,700 self-identified social gamers, highlighting the pastime's importance and how in-game socialising is crucial for engagement, retention, and recruiting others to join. One third (34%) said they met more friends through online gaming than they have in person and a significant 49% said it doesn't matter if they are playing with friends or a stranger when online, suggesting it is the act of human-to-human connection that matters more than who that connection is with.⁹

This is down to the sense of belonging that play can bring, with half (50%) of those questioned – and rising to 58% for Gen Z – stating that it enables them to feel part of a community.¹⁰ Almost a third (31%) said they would never start playing a game without social features while over a third (37%) said they spend the majority of their free time social gaming.¹¹ The recent State of Community report by Archrival and Tumblr confirms how important community is, particularly to young people; with 85% of Gen Zs saying it's important for brands to create a sense of community (compared to 79% of Millennials – those born between 1981 and 1996).¹² Dr Keith O'Brien, GAABS accredited Behavioural Science Consulting Director, points to the global COVID-19 pandemic as creating this seismic shift, alongside rapid technology advances. "Social connection is becoming more important, especially following the pandemic, and games now frequently feature leaderboards, chat functions, and visible participation to foster community."

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^{9, 10, 11} Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)
¹² <https://thestateofcommunity.tumblr.com/>

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Over a third of respondents surveyed for our A New Way to Play report (38%) said that they think social gaming will become the main way to interact with others in future, nodding to its growing influence on interpersonal relationships in the wake of AI, VR and new technologies.¹³

With the fundamental principles of social gaming and play shifting; the global entertainment industry must listen to its audiences and ensure play becomes even more collaborative and rewarding, across all entertainment platforms and catering for all ages. One participant in our research describes gaming as: "all the best bits of life" seen as a core way to bond, escape and create shared memories, with people increasingly choosing experiences that offer connection, convenience and emotional reward.

With this evolution comes the need for operators – including Allwyn UK – to continue to develop their games portfolio with not only innovation, but also connection in mind. "Authentic social experiences should be prioritised above simplistic reward schemes," comments Dr O'Brien. "There is a need to focus on balancing instant gratification with more meaningful engagement."



Chapter 2

The Power of Nostalgia

The resurgence of retro gaming has captivated audiences across multiple generations, bringing an intriguing blend of nostalgia and novelty to the entertainment landscape, including the return and rise of old favourites from Monopoly to Mario Brothers. Each generation has its own take on what retro means to them, but its power never fades, particularly as brands and organisations continue to use it to influence and engage their audiences. The global 'nostalgia economy' is a proven gateway to improved player loyalty, engagement and participation.

Nostalgia creates deeper bonds and emotional value, and retro play is now a core driver of shared memories and connection. It can fuel social interaction, enhance wellbeing and bring adults of all ages together, reshaping play for all involved. This ability to bridge both digital advancements and offer the comfort of formative experiences ensures that groups can continue to collectively play on terms that mean all parties are interested and engaged. 61% of participants in our research agree that playing games was a big part of childhood, rising to almost three quarters (74%) of Gen Z.¹⁴

Retro – the antidote to a complex world

Compared to newer games, retro favourites stand out for the emotional connection rather than the graphics or features. People tend to return to these games as adults because they feel familiar and fun, rather than because of cutting-edge technology; almost half (49%) say they often play the same games to recreate happy memories, rising to almost two thirds (63%) of Gen Z respondents.¹⁵

And this power translates into significant financial gains. According to analysis in February 2025, the unique and niche global retro video game market alone is worth approximately \$2.5 billion USD¹⁶, contributing to the wider global video games industry which is set to grow by 13% by 2027, reaching over \$700 billion USD by 2034¹⁷. In the first half of 2023 alone, YouTube announced that there were 1,000 times more videos about retro games uploaded to the platform compared to the same period in 2007.¹⁸

Particularly pertinent to this group who exist in a fast-moving, digital-first world, Gen Z find retro gaming offers simplicity and a direct contrast to the more sophisticated technology they are used to. The pixelated graphics and straightforward gameplay can provide a refreshing escape from the complexities of modern games and create a calmer space for them to relax. Familiarity is a huge draw for all, but particularly important for these younger audiences who seemingly seek out the comfort that 'pick up and play' games offer. Almost seven in 10 (69%) of Gen Z say they get more enjoyment from retro games that they're familiar with (compared to 65% of all respondents).¹⁹

49%

say they often play the same games to recreate happy memories

50%

still play older retro games, even with newer games available

"Cosy games are getting real popular now especially since lockdown... these are chilled games where there's not much pressure or fast action... people like them 'cos they help with stress and are good for relaxing... it shows how gaming can be about comfort as well as fun."

Male, 28, North West
Savanta A New Way To Play research focus group

For older generations, retro play provides a nostalgic journey back to a simpler time, reconnecting them with cherished memories, as well as being an easy way to interact with younger family or friends. Anecdotal evidence from the research suggests an upward trend in blending classic consoles and old favourites with modern digital formats, finding comfort in the past while exploring new ways to connect.²⁰ In a world where 62% of people say stress affects their daily life, 'cosy play' can provide not only escapism, but space for a cognitive reset and calm in an otherwise complex world.²¹

While the explosion of retro gaming – both at home, and through immersive experiences bringing people together in physical spaces – isn't new, it has taken on new resonance with Gen Z. A way to break down barriers of communication, it provides the perfect setting where families, friends, colleagues and even strangers can exist together and connect. Half (50%) of those questioned still play older retro games, even with newer games available, showing the staying power of classics which continue to have lasting appeal for players from all age groups.²²

¹⁵ Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)

¹⁶ <https://www.marketreportanalytics.com/reports/retro-video-games-76465#>

¹⁷ [Video Game...or By 2034]

¹⁸ <https://www.youtube.com/trends/articles/retrogaming-community-1000x-growth/>

¹⁹ Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)

²⁰ <https://www.ipso.com/en-uk/one-two-young-people-have-missed-work-last-year-because-stress-new-global-survey-ipso>

²¹ <https://www.ipso.com/en-us/news-polls/world-mental-health-day-monitor-2022>

²² Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)



The past and future combine to deepen engagement

Perhaps the most fascinating thing about the revival of retro, is that the past is being made more impactful by the future, as today's technology brings old favourites to life in new ways. This is important for engaging Gen Z, who want to make the most of every experience and ensure its relevant to their everyday lives.

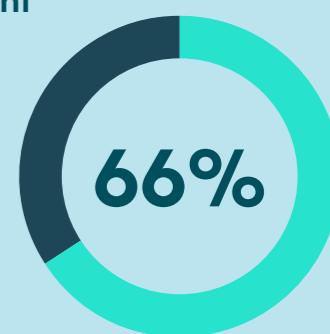
Our research showed a strong agreement (66%) that the gaming landscape has changed over the past five years.²³ On a macro level, one example is its evolution from a hobby to a cultural movement; a recent and seismic example being the 2021 opening of Super Nintendo World in Osaka, Japan costing \$575 million USD, with other parks following in the US, including the addition to Universal's Epic Universe this year.²⁴ Guests flock to these carefully-curated experiences to be truly immersed in these familiar virtual worlds, interacting with much-loved characters including Super Mario Brothers and Donkey Kong.

While the social benefits and overall ease of virtual connections is clear, these developments are indicative of the human need to make gaming experiences more social, tangible and ultimately 'real'.

The demand for this kind of entertainment starts at home, as new technology facilitates more immersive experiences which are then replicated on a much more elaborate scale. Ensuring cultural references and memories are the foundation, innovative entertainment then ensures that everyone has a relevant touchpoint.

With AI and cloud streaming making gaming more personalised, efficient and accessible, players can choose when and where they play. This, in turn, is raising the standard for all digital entertainment, while reflecting persistent human needs for real-world contact.

Our research showed a strong agreement that the gaming landscape has changed over the past five years.



Virtual Reality (VR) has been a core driver of this change, gradually transforming gaming from a purely visual and auditory experience into a truly immersive one, combining sophisticated technology with physical touch, which can then be replicated at scale. This fluidity allows players to interact with virtual environments, offering new dimensions of play and engagement. The tactile nature of VR adds depth to the retro gaming experience, allowing players to relive classic games with a modern twist. Data confirms that it's not just younger people using VR either; 25-44 year-olds make up 61% of all VR-engaged cohorts globally.²⁵

This convergence of physical and digital play is then redefining how we perceive gaming spaces, with retro references and experiences bringing more people in. Physical spaces are being transformed into immersive gaming environments across the UK, where players can engage with others in real-time, leading to the creation of cafes, arcades, and events where enthusiasts can come together to celebrate their shared love for retro games, such as Monopoly Lifesized, Human Foosball, Khaos Karts and Lifesized CandyLand. These spaces offer a communal experience that enhances the social aspect of gaming, fostering connections among players from different backgrounds and age groups.

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cohorts globally.

Retro isn't going anywhere – its influence will only increase as the world becomes more fractured. The desire to revisit happy places and memories creates a sweet spot for play, games and experiences that resonate and bring comfort, or joy to adults of all ages. The multi-generational sharing of moments such as the Oasis gigs of summer 2025, where all ages came together to discuss, play and share memories in-person and on social media, show the power of entertainment to bring families together.

The power of nostalgia and innovation cannot be underestimated as a driver of participation and social connection.



Chapter 3

New Worlds to Play In

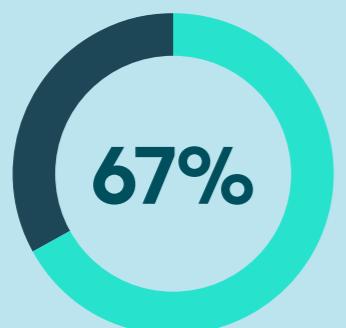
Rapid tech innovation is at the heart of the distinctive shift in the way people play. The growth of mobile gaming, which now accounts for half the market, has largely been fuelled by hyper-casual mechanics and short-loop play cycles, mastered by games like 2048 and Candy Crush.²⁶

Meanwhile, dedicated gamers – those who treat gaming as a serious hobby or passion, rather than a casual pastime – expect ever-greater levels of personalisation, immersion and complexity, with titles like Baldur's Gate III catering for players' demand for deep storytelling.

But among these very different gamer archetypes, there are commonalities – the most important of which are a thirst for further innovation.

The National Lottery is not immune to these rising expectations. In fact, National Lottery players are more attuned to tech advances in gaming than the national average, with our survey finding that 67% of players agree that "the gaming landscape has changed over the last five years" vs 62% of the population as a whole.²⁷

67% of players agree that "the gaming landscape has changed over the last five years" [TNL players]



As a result, 37% say they want The National Lottery to offer innovative game mechanics, and 30% expect The National Lottery to reflect advances in technology. For Gen Z adults, these figures rise to 51% and 39% respectively.²⁸

Yet many technological innovations have promised a lot but have done little to actually change the direction of the industry. For example, non-fungible tokens (NFTs) flopped and VR remains niche so-far. So, which tech trends will have the biggest impact on the way people play games in the future?

Collaborative digital spaces and cross-platform accessibility

The network effect of enabling the entire world to play together, on any device will unleash even more creativity and innovation than GenAI tools.

Increasingly powerful cloud computing, higher bandwidth networks and common application programming interfaces (APIs), protocols and databases are making new levels of player interaction possible.

A long-term trend resulting from this is the convergence of streaming experiences, community interaction, time-limited modes linked to cultural experiences, and the integration of real-world data. Games like Madden NFL are increasingly mixed-mode experiences, with fans playing together, watching Twitch hosts, setting each other challenges and speculating on upcoming fixtures.

Generative AI

Generative AI is allowing developers to build vastly larger and more detailed worlds, expand player customisation and centre the gaming experience around the player. As well as being more immersive, this level of player-centricity will make gaming more personal and meaningful, with quests linked to people's personal values and ambitions, which could include links to real world outcomes, such as social fundraising.

Perhaps the biggest impact of the Gen AI revolution will be how it levels the playing field, allowing indie developers to create games with AAA-level quality, or individuals to build prototypes by simply describing their ideas to large language models. Together, this could prompt a new boom which provides players with access to a huge range of fresh games and experiences.

37%

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30%

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Mixed Reality

While collaborative platforms are bringing people together in new ways, a raft of technologies, including augmented reality, virtual reality, haptics, spatial audio and wearables, which create more immersive sensory experiences and measure the player's movements, are bringing the physical and digital worlds together to create unique gaming environments.

Cultural destinations have been quick to adopt mixed reality technologies, to offer visitors new layers of experience and new opportunities to share and contribute. For example, the Porthcurno Telegraph Museum in Cornwall – an attraction that has received National Lottery funding – is working with Falmouth University's Games Academy to experiment with hand-tracking to simulate the experience of using Victorian machinery.

Mixed reality technology is also helping the digital world to bleed into the physical world, to help players imagine their homes in new ways. The Metaverse in Seoul began as a virtual services hub, before becoming a way to visit the city and access help digitally. The SuperWorld Global Map is a virtual world mapped onto the real world so that players can personalise the planet with content and events.

Mixed reality applications are becoming more accessible, exemplified by titles like Track Craft, which allows players to build gravity-defying digital racetracks around their homes using AR and hand-tracking tech. As the technology becomes more user-friendly, it will scale fast to create mixed reality hang-outs and challenges.

In future, lottery players may be able to play with friends, on location at a digital recreation of their favourite Good Cause, and watch a simulated version of the draw happen in real time, from the perspective of their chosen balls, as they travel down the draw tubes. And if they win in real life, their digital avatar will experience the winning feeling too.

This kind of innovation will require a platform built for interoperability, social connection and player protection. Most importantly, like all technological change, it will require careful thought about appropriate regulatory and practical measures for responsible and secure play, with companies like Allwyn working in partnership with policy makers, regulators and the games industry to ensure that technological innovation serves the player and society at large.

Chapter 4

The Power of Play

According to PwC's Global Entertainment & Media Outlook 2024, the entertainment economy is now worth over £100bn in the UK alone.²⁹ While this figure recognises the industry's potential to shape cultural and societal norms, it also shows that how we consume entertainment has evolved significantly over the past three decades since the dot-com era, as entertainment and play has become a daily habit, available at our fingertips.

In particular, sizeable investment into the entertainment sector over the last 12 months clearly shows that the way content is produced, funded, and consumed globally is in flux. On a macro level, high profile deals and acquisitions amongst entertainment giants reflect how the industry is moving towards fewer, larger 'super-platforms', which control more of how digital media – whether games, film, or television – is made, sold, and consumed. And on a micro level, brands are pivoting the way they reach viewers and new customers in light of how the majority (84%) of those in the UK spend their time perpetually scrolling, due to the sheer volume of content now available to them.³⁰

One of the fundamental purposes of play is as a leisure pursuit, with 60% of players in our research highlighting a sense of achievement as one of the most important features, and two thirds pointing to entertainment value.³¹ But our A New Way to Play research also shows a trend towards much deeper sentiments around the social value of play, reinforcing how it has become anything other than one-dimensional. Our own Allwyn proprietary research on Gen Z clearly shows that the journey to the sense of achievement, and the moments created within that journey, are often as important as the outcome itself.



How much does social value underpin play?

Key to players' relationship with entertainment and gaming is the relationship with social value; i.e. the positive impact on people, communities, and the environment beyond the direct delivery of a service or product.

Half of those polled are clear that creating social value through gaming is moving away from being a 'nice to have', with 50% of gamers agreeing that involving an element of Good Causes increases the feel-good factor when playing. 46% said it reduces feelings of disappointment if they lose because they know their money is going towards a good cause.³²

When it comes to The National Lottery, which has been synonymous with Good Causes since its inception in 1994, over two thirds (64%) of people say they are more likely to choose to play this over other types of gaming due to the organisation's position on philanthropy; an example of how new technologies and emerging trends may be changing the interface of play, but core values have stood the test of time.³³

said it reduces feelings of disappointment if they lose because they know their money is going towards a good cause.

46%

64%

say they are more likely to choose to play this over other types of gaming due to the organisation's position on philanthropy

Trust, integrity, and commitment to social purpose are foundational in an increasingly complex and polarised world. PWC's aforementioned research showed that we are willing to pay more for community contributions in entertainment.³⁴

Considering the importance that both parties place on social value when it comes to play, there is a case to be made for increased communication around what the intersection of societal impact and entertainment looks like in practice, and ultimately, what the ripple effects are when players decide to engage.

For those questioned, Good Causes storytelling is therefore a powerful engagement tool. Entertainment leaders must therefore balance commercial goals with player interest in social value and impact.

Gamers agree that involving an element of Good Causes increases the feel-good factor when playing.

50%

29 <https://www.pwc.co.uk/industries/technology-media-and-telecommunications/insights/entertainment-media-outlook.html>
 30 <https://www.uswitch.com/broadband/studies/online-streaming-statistics/>

31 Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)

32, 33 Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)
 34 https://www.ey.com/en_id/insights/tmt/nine-top-drivers-shaping-the-future-of-fun-in-media-and-entertainment

The psychological drivers of play

While gaming has evolved in line with new technologies and behavioural trends, one of the resounding questions which remains the same is 'why' we choose to initially engage and the factors that retain players over the long term.

Dr. Keith O'Brien points to the role of positive reinforcement as one of the primary drivers. He explains how games are designed to offer rewards, challenges, and achievements that prompt feelings of accomplishment and satisfaction, whereby this reinforcement loop keeps players engaged, encouraging them to return for more.

Reflecting on the dot-com era highlights how psychological drivers have become more complex. Where the main focus during the advent of online gaming was novelty and exploration – with players eager to experience the new digital frontier – the modern gaming landscape places a greater emphasis on social interaction, narrative depth, and emotional engagement. Digital platforms brought new dimensions to gaming such as customisability, avatar creation/ personification of players, upgrading options or even self-induced limits to spending.

"Different games stimulate different areas of the brain in ways that a typical day would not."

Female, 24, North West

62%

used personalisation or customisation features in digital gaming platforms

30%

players seek more interaction, their 'win belief'... with 30% of those questioned agreeing that there are more chances to win than there were 10 years ago

These features led to heightened perception of self-control/game-control as well as psychological ownership of the game and the incentives (virtual or otherwise). Research on younger players found that 62% used personalisation or customisation features in digital gaming platforms, which are essential for the creation of a "this is mine" effect – a gratifying feeling in its own right – leading to increased engagement, and retention.³⁵

Now, games are not just about completing levels or achieving high scores; they are about storytelling and collaboration. In fact, our A New Way to Play research shows that as players seek more interaction, their 'win belief' is also increasing, with 30% of those questioned agreeing that there are more chances to win than there were 10 years ago, and a quarter (25%) saying they believe that the incorporation of new technologies (e.g., AR, AI, VR) will increase their chances of winning.³⁶

Gen Z's belief that they can make their own luck also marks a step change from past generations who dreamed of catching a lucky break, with 78% believing that fate is influenced by action. An overarching mindset change is at play here. It includes the act of manifestation – a belief that luck is a mindset, and that through positive energy and action, the individual makes good things happen. It is so prevalent amongst the younger demographic that 'manifest' became the Cambridge Dictionary' 2024's word of the year. However, the growing prevalence of new technologies cannot be understated.³⁷

Younger generations raised in an environment of on-demand content, rapid scrolling, and algorithm-driven feedback are more used to instant gratification, with half of those aged 18-34 stating this is important to them in gaming and play – dropping to 36% of 35-54 year-olds and 17% of those aged 55 and over.³⁸ This tendency often influences the types of entertainment and games that audiences prefer, with younger players favouring experiences that offer quick results and minimal friction. However, in this context, lotteries provide a unique case study.

³⁵ https://www.researchgate.net/publication/348911511_Exploring_the_effects_of_psychological_ownership_gaming_motivations_and_primarysecondary_control_on_online_game_addiction#:~:text=Findings%20show%20that%20the%20motivations,toward%20a%20virtu-al%20gaming%20environment

³⁷ Allwyn survey of 1800 Gen Z UK/US/CZE

³⁸ Savanta research, Allwyn UK 'A New Way to Play' (commissioned July 2025)

The majority (59%) of 18–34-year-olds agree that lotteries are the only games where they don't mind waiting for results. 66% of the same age group say that they enjoy the anticipation and suspense that playing the lottery possesses.³⁹ So while traditional lottery games require a level of patience – generating anticipation and hope – they can still resonate with younger demographics who are more accustomed to quick outcomes.

59%

66%

However, our research clearly shows an appetite for The National Lottery to offer more personalisation (59%) and more social and community features (58%).⁴⁰ Successful games are therefore characterised by essential features that resonate with the way particular audiences process information, sparking emotional and physiological responses. Knowing that Gen Z's focus is as much on the journey as the outcome, stories need to be compelling from the moment of engagement, to capture and resonate with younger players.

Alex Hern, a journalist with over 15 years' experience writing on technology and gaming for national UK publications, says that on a psychological level, gaming is valued as an affordable, rewarding form of entertainment. In particular, multiplayer games are highlighted for their ability to facilitate social connection and shared achievement, whilst the sense of mastery, progress, and time well spent is considered a major draw.

18–34-year-olds agree that lotteries are the only games where they don't mind waiting for results.

of the same age group say that they enjoy the anticipation and suspense that playing the lottery possesses.

Consumption habits around entertainment, whatever its form, reflect broader societal changes in how we live and interact. The digital age has facilitated on-demand access to a vast array of content, from streaming services to interactive games, but none are at the expense of social connection which prevails for all respondents of the research.

As a result, entertainment has become more than just a pastime; it is a vital component of our daily routines, offering a multi-faceted platform for socialising and self-expression.



In conclusion

Our report finds that play is being transformed by three fundamental forces, that will continue to shift the rules of engagement.

01

Connecting Through Play:

The desire for connection in an increasingly fractured world. This is in part driven by Gen Z's evolving approach to socialising, where both virtual and in-person interaction play an essential role.

02

The Power of Nostalgia:

The enduring desire to revisit childhood memories and celebrate simplicity, bringing old and new together, as technology drives more meaningful multi-generational experiences based in fond memories, while creating new ones.

03

New Worlds to Play In:

The immersive power of technology – new ways to play are pushing the boundaries of immersion, interaction and reward.

These trends bring a wealth of opportunities and challenges for the industry and other entertainment genres, as they balance players' demand for innovation at pace, all while keeping players protected as they participate.

Against a challenging societal backdrop, the need for community and social return from play is paramount, and the desire to find connection is deeper than ever, across all generations.

As Allwyn UK begins its next chapter of transformation for The National Lottery, we are looking to the future of play. As the convergence of digital and physical realms continues to redefine how we connect, engage, and derive value from entertainment, our ambition is to create even more dynamic, collaborative and rewarding experiences for our millions of players.

Glossary

Generation Z (Gen Z)

Term used to describe people born during the late 1990s and early 2000s. Some sources give the specific year range of 1997–2012, although the years spanned are sometimes contested or debated because generations and their zeitgeists are difficult to delineate. Generation Z follows the millennial generation, sometimes called Generation Y, which followed Generation X, the first generation to be assigned a letter.

Generation Alpha (Gen Alpha)

Term used to describe the generation of people born between 2010 and 2025. Some researchers, however, consider slightly different ranges. The term was introduced by Australian social researcher Mark McCrindle in a 2008 report on the subject. Generation Alpha is often linked with the millennial generation (also called Generation Y), as most members of Generation Alpha have millennial parents, and they are sometimes called “mini millennials.”

Millennials

Term used to describe a person typically born between 1981 and 1996, though different sources can vary by a year or two. Millennials are the cohort between Gen X (defined as those born between 1965 and 1980) and Gen Z; defined as those born from about 1997 to the early 2010s).

Gaming

Gaming includes luck-based games such as lottery, scratchcards or instant win, as well as other entertainment-based games like video games, board games, role playing games that people play in person or online. We are not including gambling or casino-based games in our definition.”

Social Gaming

Gaming with other people.

Research Overview

For this research, Savanta employed a multi-method approach to understand behaviours and trends in gaming. Fieldwork included a 5-day qualitative online community with 23 regular gamers, recruited to ensure a diverse mix of gaming frequency and demographic backgrounds, where participants completed tasks, diary entries, and media uploads. Insights from the community were further explored in a 1.5-hour qualitative focus group with six gamers chosen to represent key behaviours and audience segments.

To supplement these findings, one-hour expert interviews were conducted with four professionals from PR, media, strategy, journalism, and academia, to examine future industry trends from a top-down perspective. Quantitative validation was also provided through a 15-minute online survey among a nationally representative sample of 2,093 UK respondents, which included 1,786 gamers and 1,128 National Lottery players, covering major trends, social and technological drivers, and industry outlook.



