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## Navigating the New Holiday Shopper: Trends, Challenges, and Opportunities for Lottery

The holiday season is in full swing, and many consumers are facing financial pressure, heightened stress, and increased decision fatigue compared to past years. Shoppers are trying to balance tighter budgets with an expanding array of online and in-store options. As a result, they are making more deliberate choices about how and where they spend their money.

For lotteries, it is essential to understand these changing behaviors. This season requires supporting retailers, promoting easy gift options, and helping shoppers make fast, confident decisions during the busiest time of the year. Fortunately, improved access to actionable data and advanced technologies that simplify the purchase journey position lotteries to meet these challenges head-on.

### Holiday Gifting Challenges

#### Value-Conscious Shoppers

Economic caution is shaping 2025 holiday behavior. Shoppers are looking for ways to maximize value on every purchase, often trading down to more affordable brands or products. The Deloitte 2025 Holiday Retail Survey shows a clear rise in consumers trading down to less expensive alternatives as they work to stay within tighter budgets.<sup>1</sup> At the same time, shoppers are relying more on loyalty or rewards programs to help stretch their holiday dollars.

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*Deloitte's survey reports that 26% of shoppers plan to use loyalty points to pay for gifts this season, up from 20% in 2024, signaling a stronger reliance on earned rewards to cover rising costs.<sup>1</sup>*

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Budget discipline influences not only what people buy but also how they plan their shopping. Deloitte finds that shoppers expect to spend 56% of their holiday retail budget online and 44% in stores.<sup>1</sup> As spending becomes more intentional, retailers are challenged to deliver convenience, value, and frictionless in-person experiences. Shoppers are planning earlier, comparing more options, and looking for compelling reasons to choose one retailer or gift over another.

## **Overwhelmed and Out of Time**

Financial pressure is only part of the story. Holiday gifting itself has become increasingly overwhelming. According to Deloitte, 58% of consumers say holiday shopping is stressful, and 77% report frustration while shopping online.<sup>1</sup>

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*Much of this frustration stems from unclear product differences, delivery uncertainty, and difficulty narrowing choices. In response, about 68% of U.S. shoppers plan to use digital tools, such as social media, gen AI, and chatbots, to assist with holiday shopping this year.<sup>1</sup>*

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Shoppers are also gravitating toward destinations that make holiday shopping easier. Department stores, supermarkets, and discount retailers remain top choices because they offer convenience and value in one stop. These environments help shoppers avoid multiple trips, simplify comparison shopping, and complete their lists more efficiently.



## How can lotteries help holiday shoppers?

### Value-Focused Holiday Gifting

Lottery products offer an easy, affordable gift option at a time when shoppers are watching every dollar. Holiday-themed scratch tickets are experiential, convenient, and fit naturally into cards, stockings, and small gift bundles. Many instant tickets fall in the \$10–\$30 range, making them accessible while still feeling special.

As shoppers look for high-value, low-effort gifts, lotteries can enhance that perceived value in several ways:

- Developing holiday products with prize structures designed specifically for gifting— such as better odds or frequent small wins— to elevate the gift-giving experience.
- Using loyalty programs to reinforce value through achievement challenges, digital rewards, or bonus entries.
- Offering second-chance promotions that extend the entertainment experience beyond the initial play, giving both gifters and recipients more reasons to enjoy the product.



## Simplifying Holiday Shopping

Time-pressed holiday shoppers are looking for fast, convenient solutions—and lottery meets them where they already shop. Grocery stores, one of the highest-spend retail categories this season, offer immediate visibility and convenience for instant ticket purchases. Lotteries can make the buying process even more seamless by:

- Delivering personalized digital messages through CRM tools that guide customers quickly to the right product.
- Launching last-minute gifting campaigns that reinforce instant tickets as a fast, stress-free option.
- Using AI-driven product recommendations on vending machines to cut through retail clutter and deliver an easy, curated shopping experience.
- Using retail technologies, like SCiQ, to ensure games stay in stock and are easily shoppable through dynamic digital menu boards.

## Final Word

The holidays are quickly approaching! But lotteries still have last-minute opportunities to make a meaningful impact:

- Ensure holiday games are fully stocked and prominently displayed.
- Run quick digital reminders that position instant tickets as easy stocking stuffers.
- Activate short-term loyalty or second-chance incentives to enhance value.

These rapid, tactical actions align with current consumer behaviors and can drive incremental holiday sales, even this late in the 2025 holiday shopping season.

Sources:

1. Deloitte Holiday Retail Survey: [deloitte.com/us/en/insights/industry/retail-distribution/holiday-retail-sales-consumer-survey.html](https://deloitte.com/us/en/insights/industry/retail-distribution/holiday-retail-sales-consumer-survey.html)
2. National Retail Foundation 2025 October Holiday Consumer Survey, conducted by Proper Insights & Analytics: [nrf.com/research-insights/holiday-data-and-trends/winter-holidays](https://nrf.com/research-insights/holiday-data-and-trends/winter-holidays)
3. Scientific Games December 2025 Holiday Spending and Behavior Report

**Editor's Note:** The November 19, 2025, edition of Data in Motion included an incorrect figure in the long-range lottery sales chart. Instant game sales were listed as \$67.1 billion; the correct figure is \$61.7 billion. We apologize for the error.

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