DATA IN MOTION
SCIENTIFIC GAMES

October 21, 2026

The Holiday Shopper is Changing: Four Consumer Trends Shaping Lottery Opportunities in 2026

The holiday season remains one of the most important moments of the year for consumer spending. It's a time when traditions, expectations, and spending decisions converge. In 2026, economic pressures continue to shape when, where, and how consumers shop.

Consumers are entering the 2026 holiday season cautiously. They are watching prices, looking for value, and planning purchases carefully. But they are not giving up holiday gifts and traditions. Instead, they are shopping throughout the fall, expecting greater value, and moving seamlessly between digital and physical shopping.

For lotteries, the opportunity goes beyond having products available during the holidays. It's about offering products that are easy to buy, feel worth the spend, and creating memorable moments for adult recipients.

Value Is Being Redefined

Last year's *Data in Motion* holiday edition focused on budget pressure and shopping stress, including the ways consumers were trading down and stretching tight budgets. In 2026, shoppers have adapted to higher prices by becoming more strategic in their planning rather than simply cutting spending. PwC found that eight in 10 consumers plan to use a budgeting strategy during holiday shopping, and 79% say deals and discounts affect when they shop.[1]

2025 Holiday Shopping Trends	2026 Holiday Shopping Trends
Managing shopping stress	Planning purchases earlier
Seeking lower-priced alternatives	Maximizing value
Prioritizing convenience	Shopping across channels
Favoring simplicity	Using AI to guide gift discovery

Sources: PwC[1]; McKinsey & Company[2]; Data in Motion, December 2025

Takeaway: For lotteries, value should be communicated as more than price. Holiday instant games combine an affordable gift with a memorable entertainment experience. Loyalty rewards, digital game enhancements that extend the play experience, second-chance promotions, and gifting-focused prize structures can reinforce that value, provided the benefits are clear and easy for players to understand.

Holiday Shopping Starts Well Before Black Friday

The holiday shopping calendar continues to expand as consumers research products earlier, compare more options, and plan purchases around promotions. McKinsey found that 45% expect to begin holiday shopping by the end of October. Another 24% plan to start in November before Black Friday, compared with only 12% who plan to begin during Black Friday weekend.[2]

69% of Consumers Plan to Start Holiday Shopping before Black Friday[2]

Takeaway: Holiday marketing should not wait until November. Lotteries can introduce holiday products earlier and sustain interest throughout the season with coordinated CRM, loyalty and retail messaging, followed by last-minute gifting campaigns that drive urgency in December.

Digital Natives Are Seeking Offline Experiences

One of the most unexpected trends of 2026 is the renewed interest in screen-free experiences. PwC found that 64% of consumers are drawn to nostalgic, screen-free gifts, and this figure rises to 78% among Gen Z.[1] This preference extends beyond just gift-giving.

Eighty-one percent of Gen Z say they are prioritizing offline, in-person activities, while 63% say a shared meal matters more than a physical present.[1]

More than half of consumers expect to visit stores to decide what to give, and 60% expect to purchase gifts in-store. Among Gen Z, 71% say they enjoy browsing in person.[1]

Takeaway: The renewed interest in nostalgia, shared experiences, and in-store shopping is highly relevant for lotteries. Instant tickets featuring familiar brands can evoke memories and emotional connections, while the tradition of giving tickets as holiday gifts and scratching them together can create a shared experience. As consumers continue to browse and purchase gifts in stores,

strategic placement and strong visibility in grocery and other retail locations can help ensure lottery products are seen and considered during the holiday shopping journey.

AI Is Changing How Shoppers Discover Gifts

AI is becoming a more common holiday shopping tool, particularly for research and comparison shopping. PwC found that 29% of consumers plan to use AI during holiday shopping, up from 22% in 2025.[1] McKinsey found that likely AI users plan to use it primarily to compare products and prices, find deals, and generate gift ideas.[2]



Takeaway: The opportunity is not simply to add more AI, but to use technology to make decisions easier. That starts with creating distinct products and communicating the unique value of each. CRM, personalized offers, and product recommendation engines can then help connect players with relevant products and simplify the path to purchase.

Final Word: Where the Opportunity Comes Together

The 2026 holiday shopper is looking for value, starting to shop earlier, choosing products that create meaningful moments, and using technology to make decisions. For lotteries, four priorities emerge:

- **Start earlier.** Introduce holiday products and awareness campaigns before the traditional shopping surge.
- **Make value visible.** Communicate the entertainment, gifting and promotional value, along with the compelling prizes.
- **Design for connection.** Position holiday games as experiences adults can give and enjoy together.
- **Simplify discovery.** Use retail presentation, CRM and personalization to help shoppers identify the right gift or game.

The 2026 holiday opportunity sits at the intersection of value, convenience, and connection. Lotteries that make product choices easier and position holiday games as entertaining, accessible experiences can remain relevant to consumers who are becoming more intentional about what—and how—they give.

Sources:
[1] PwC, *2026 Holiday Outlook*
[2] McKinsey & Company, *The State of the US Consumer*, 2026

© 2026 Scientific Games, LLC. All Rights Reserved.

Editor & Design: Claire Browne

The information contained herein is for the intended consumption by Scientific Games employees and other authorized parties. This information is not compiled or otherwise made available for public dissemination or as a marketing, selling or other reference point for outside or other 3rd parties without the express written consent of Scientific Games.



SCIENTIFIC GAMES

© 2026 Scientific Games
This information in this email is intended only for the addressee. It contains the confidential and proprietary information of Scientific Games and may be privileged. If you are not the intended recipient, any use, review, reproduction or further distribution is prohibited. If you are not the intended recipient, please delete this email and its contents and notify the sender.