THE EUROPEAN
LOTTERIES

FOR THE BENEFIT OF SOCIETY

REPORT ON THE
LOTTERY SECTOR
IN EUROPE
2022

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REPORT

Dear reader,

This is already the seventeenth report on the European Lotteries sector, the most detailed report regarding both EL Members operating in the European Union (EU 27) and EL Members all combined [1,2], with the objective of helping you understand how current Members of the European Lotteries Association (hereinafter the EL) operated and what their contributions to society were in 2022, in comparison to previous years.

This report, traditionally and almost exclusively, relies on primary data sources from EL Members.[1] The report presents only the data that individual members felt comfortable delivering or that they were able to report in terms of their activities. Thus, the breadth of data reported may differ in specific areas and relevant footnotes on this issue are available under the figures and tables when necessary. All monetary figures are calculated in euros using the average exchange rate for 2022.[3]

The report for 2022 consolidates data from all 68 regular and affiliate EL Members and covers 40 European countries.

Table A. Number of EL Members Participating in the 2022 Data Collection Who Provided Data for Individual Years

	2018	2019	2020	2021	2022
EL Members in the EU27	49	49	48	49	50
EL Members outside the EU27	17	17	18	18	18
TOTAL	**66**	**66**	**66**	**67**	**68**

Source: Reporting EL Members.

A key characteristic of the EL Members is that they were founded to **offer a legally controlled set of lottery games that protect the players from illegal operations and the most harmful games and generate money for "good causes"** or the states' budgets.

EL Members operate a variety of game activities, depending on their historical background and local legal and regulatory conditions their position in the market, where EL Member can either hold an exclusive license for specific gaming vertical(s), e.g. lotteries, but have a non-exclusive license in another one, as e.g. sports games.

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[1] *Until 2014, the report had been called "ELISE" report (ELISE = "European Lotteries Information Sharing Extended"), published historically by the EL's ELISE Working Group. Since 2016, this Working Group has been renamed to the Knowledge Sharing Working Group and the report has been renamed to "EL Report on the Lottery Sector in Europe" and since 2019, the Working Group has been renamed again to Data & Research Working Group.*

[2] *A detailed list of the EL Members is given in the Annex.*

[3] *The report presents data from 2018, 2019, 2020, 2021 and 2022. To make figures comparable over time, historical figures provided only by EL Members who participated in this years' data collection process and reported the specific figure for 2021 are shown in this report and, at the same time, all lottery monetary figures from those years in currencies other than the euro have been converted into euros using the average exchange rates for 2021, either from Eurostat, or if not available, from the European Central Bank or the national bank of each country. Thus, looking at previous years' reports, which have used exchange rates from 2018 to 2021, differences appear because of the change in exchange rates and changes in the number of reporting EL Members.*

The report provides KPIs of all reporting EL Members such as consolidated Gross Gaming Revenue (GGR) [4] broken down into five gaming categories:

- Draw Based Games,
- Instant Games,
- Sports Games,[5]
- Electronic Gaming Machines (EGMs) outside casinos,
- All other games.

and consolidated Sales broken down into the first three "Lottery" categories (Draw Based Games, Instant Games, Sports Games).

Table B. Overview of Key Data 2022

	Reporting EL EU Members	All Reporting EL Members
EL Members All member lotteries reporting within the EU/in Europe (100% = 50/ 68)	50	68
Money for Society (Number reporting members: (48/ 64)	€19.8bn	€22.2bn
Direct Full-time Employment [7] Yearly average number of full-time employees (48/ 65)	46.849	51.344
Sales Includes Sales from the three "Lottery" categories (47/ 64)	€88.2bn	€105.9bn
Gross Gaming Revenue Sales minus prizes of the five gaming categories (49/ 66)	€34.5bn	€38.3bn
Online Gross Gaming Revenue (36/ 48)	€3.8bn	€4.7bn

Source: EL Members who took part in the 2022 survey; data being collected and aggregated by Kantar CZ, 2023.

Money Contributed to Society in 2022 €22.2bn

In 2022, the **money contributed to society** by all EL Members (64 reported) amounted to **€22.2bn in 2022, an increase of 11.3% compared to 2021 and of 22.1% compared to 2019.** This marks a significant growth of EL Members' contribution to their local societies. It means that **57.8% of the GGR generated by EL Members went back to society** (not including sponsorships) in the respective countries. The **money for society per capita raised across all EL members averaged €40**, **an increase of 11.02% compared to 2021.** Where the **allocation of the money for society** was concerned, 73.0% of the total went to state budgets (with no reported knowledge of the final allocation), 12.0% went to support social and other societal purposes, 8.8% to support sports, 4.0% to support culture & heritage, 1.8% to support health and 0.4% to education.

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[4] *Sales minus prizes and hereinafter GGR. This key figure reflects the lottery business better than Sales figures.*

[5] *This category contains all Sports Games, including e.g. horse racing or dogs racing betting. The Pari-Mutuel and Fixed Odds wagering, reported until 2018 as two separate categories, were merged into one category from 2019. A detailed definition of the games is given in the Annex.*

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Contribution to Employment
51.344 FTEs
+5% vs. 2021

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EL Members' another important societal contribution is the **contribution to employment** in their respective countries. Here, we can observe **an interesting trend** that despite the Covid impact on retail networks and growing importance of online, **65 reporting EL Members employed 51.344 full-time employees in 2022** [6]**, an increase of 5.2% compared to 2021**

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and of 10.4% compared to 2019.

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Total Sales
€105.9bn
+ 7% YoY
+18% vs. 2019

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Total Sales for the three main "lottery" categories (Draw Based Games, Instant Games, Sports Games) by **all EL Members amounted to €105.9bn** in 2022, resulting in **a year-on-year increase of 6.9% in comparison with 2021 and 17.5% in comparison with 2019.**

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Total GGR
€38.3bn
+ 6% YoY

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In 2022, **total GGR of all gaming categories** (being the sector's key KPI)**, reported by 66 EL Members amounted to €38.3bn, an increase of 6.2% compared with 2021** and an **increase of 3.6% compared with 2019**. Therefore, after a significant drop in 2020, due to the Covid-19 impact, the GGR figures recovered and surpassed the level of pre-Covid year 2019.

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Average GGR per capita across **all EL Members was €69 per capita**. This ranges from Ukraine with €0.1 GGR per capita to Finland with €193 GGR per capita.

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DBGs
largest category
+3% YoY
+6% vs. 2019

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The largest lottery category is **Draw Based Games** with games brand names like Lotto, EuroMillions, Eurojackpot, and Joker. This category of games, reported by 58 EL Members generated **GGR of €20.4bn in 2022, accounting for 53.3% of total GGR. It increased by 3.0% compared with 2021** and, despite the Covid impact and drop in 2020, **6.0% compared with**

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2019. In the five-year trend between 2018 to 2022, it generated a **CAGR of 2.4%**. The Draw Based Games' **average GGR per capita** of the reporting EL Members reached **€39**, ranging from €105 in Norway to below €1 in Ukraine and Kazakhstan.

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Instant Games
2ⁿᵈ largest
+2.0% YoY
+17% vs. 2019

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Instant Games, the second largest category, was offered by 54 reporting EL Members in 33 countries and generated **GGR of €8.7bn** in 2022, representing 22.8% share of their total GGR. It **grew only by 2.0% compared to 2021,** making it **the slowest growing category in 2022** (vs. 3.0% for DBGs above). On country basis, the YoY category GGR change

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ranged from a growth by 36.5% in Romania to a decrease by 13.2% in Ireland. Nevertheless, **compared to** pre-Covid year **2019, it grew by 16.6%**, driven by strong growth in 2021. In the five-year trend between 2018 to 2022, it generated a **CAGR of 5.3%**. The Instant Games' **average GGR per capita** of the reporting EL Members reached **€17** in 2022, ranging from €62 in Portugal to below €1 in few countries.

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Sports Games
2ⁿᵈ fastest growing category mid-term

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The **Sports Games category** was reported by 41 EL Members from 25 countries altogether, operating in a different regulatory environment (ranging from monopolistic positions to a full competitive ones) and generated **GGR of €2.9bn** in 2022, representing **8.5% of EL Members' total GGR**. It **grew by 7.4% compared to 2021 and by 18.1% c**ompared to 2019. In the five-

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year trend between 2018 to 2022, it generated a **CAGR of 6.2%, making it the second fastest**

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[6] *See the complete information on methodology in the Annex.*

growing category within the EL Members base. The **average GGR per capita** of the reporting EL Members reached **€6** in 2022, ranging from €22 in Hungary and Finland to below €1 in few countries.

Non-Gaming Activities	Outside of the gaming activities, 18.8% of EL Members (9 out of 48 who reported this information) operated any **Non-Gaming Activities**, **mostly payment and financial services**, utilizing their broad retail networks, offering to their local societies a better access to payment and financial services and to their retail partners an additional source of revenue.

Online **12% share** **+75% vs. 2019**	**Online growth** was **strengthened by the Covid impact** by a migration of the part of customers' transactions into the online channel during 2020 and 2021, which continued also in 2022. **EL Members** (48 reported the category) generated **online GGR of €4.7bn** in 2022, **representing 12.3% of total GGR, a growth by 9.3% compared to 2021 and 75.5% compared to 2019,**

with a CAGR 2018-2022 of 19.7%.

Retail **+6% YoY** **-2% vs. 2019**	**Retail** also grew in 2022. EL Members generated **retail GGR of €33.6bn**, representing 87.7% of total GGR, **growing by 5.7% in comparison with 2021**, **but being lower by 2.0% in comparison with pre-Covid year 2019**.

We hope that you have enjoyed your reading,

Romana GIRANDON

President of the European Lotteries and Toto Association

&

Hansjörg HÖLTKEMEIER

Member of the Executive Committee of the European Lotteries Association

 & Supervisory Chair of Data & Research Working Group

ANNEXES

Annex A: Methodology Applied

Annex B: List of Figures

Annex C: Explanations of the Data Included in this Report

Annex D: Other Data Sources

Annex A: Methodology Applied

This report, traditionally and almost exclusively, relies on primary data sources from EL Members.[2]

The data gathered covers the results of current regular EL Members in the 2022 calendar year.[3] The report presents only the data that individual members felt comfortable delivering or that they were able to report in terms of their activities. Thus, the breadth of data reported may differ in specific areas and relevant footnotes on this issue are available under the figures and tables when necessary.

An independent third party (Kantar CZ) collected all data from EL Members for 2022.[4] They were responsible for the data collection, consistency, aggregation, and non-disclosure of any detailed data to any party. The data was collected via a secured online questionnaire during spring 2023.

The questionnaire was divided into the two main sections processed in this report: "Key data" on five gaming categories (i.e. Draw Based Games, Instant Games, Sports Games, Electronic Gaming Machines (EGMs) outside casinos and All other games), and "Complimentary Data", involving figures of employment, money for society, money for responsible gaming, information related to the Point of Sales (POS) network and figures related to Diversity & Inclusion and Environment. In the "Key data" section, two types of figures for each gaming category were collected in an aggregated form: Sales and GGR, with a distinction between online and offline results. If an EL Member choose to provide only an overall figure for Sales or GGR without a split by game category, the unspecified amount is attributed to the "Unspecified" game category. GGR, defined as Sales minus prizes, is the best key figure to reflect the results of gaming activities. Nevertheless, this figure represents only the gross income of EL Members. To get to the net profit, further items need to be deducted, such as: taxes and other obligatory charges, retailer commissions, sponsorship payments, money for society, spending on responsible gaming, and typical operational costs.

Data was requested from EL Members in their national currency and figures from the non-euro countries were converted into Euros using the average exchange rates for 2022, either from Eurostat or, if not available, then from the European Central Bank or the national bank of each country.[5] In addition to the data for 2022, data from previous years is also included, namely from the period of 2018–2021.[6,7]

To make the figures comparable over time, historical figures provided only by EL Members who participated in this years' data collection process (hereinafter: Currently Reporting EL Members) are shown in this report and, at the same time, all historical monetary figures from those years in

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[2] *The external sources used have been EUROSTAT, the World Economic Outlook Database for population figures, the European Central Bank's sites for the conversion of exchange rates. For further information, see Annex D: Other Data Sources.*

[3] *This report does not include observer members based in Africa, which are Morocco/ La Marocaine des Jeux et des Sports and Morocco/ Loterie nationale. It also does not include Albania/ Lotaria Kombëtare, Belarus/ CJSC Sport-Pari, Bulgaria/ Eurofootball, Bulgaria/ National Lottery, Kosovo/ Lotaria e Kosoves, Malta/ Maltco Lotteries Ltd., Poland/ Totolotek, Russia/ JSC Technology Company "Center" and Turkey/ Turkish National Lottery Administration which are no longer members. Malta/ National Lottery plc took over the National Lottery in Malta and started operating on 5th July 2022. Therefore, the figures submitted are for the period between 05/07/2022 and 31/12/2022.*

[4] *Kantar CZ, Strossmayerovo nám. 1477/6, 17000 Praha, Czech Republic.*

[5] *Until the 8th edition, the exchange rate closest to the end of the reported period was used (e.g. 2 January 2013 for the 2012 EL report). In the last editions, current customization has been done so as to make the analysis more meaningful.*

[6] *This report includes historical data reported by current EL Members in spring 2023 (figures for 2018, 2019, 2020 and 2021).*

[7] *The decision was made to use two types of comparison starting from the 2014 report: comparison with the previous year, and where possible, within a five-year period.*

currencies other than the Euro have also been converted into Euros using the same average exchange rate for 2022 (in other words, all amounts in this report are reported in the average 2022 Euro value).[8] Thus, looking at the previous years' reports, which have used exchange rates from 2018, 2019, 2020 and 2021 respectively, differences appear because of the change in exchange rates and also because of the change in the number of Currently Reporting EL Members. This approach of using a sole exchange rate across historical periods enables better depiction (and observation), and therefore, better understanding of the trends, freed from local macro-economic influence.

In terms of data processing, the methodology has been quite stable since the very first public report in 2010, except for the above-mentioned exchange rate methodology used.[9] The aim is to provide the regular reader of this report with ease of orientation and with the possibility of comparison. The report consists of two reporting parts: an introduction and appendices, including methodology and supportive tables and figures.[10] The introduction brings a short overview of the results achieved in the respective year (and, in comparison to previous year(s)), major trends descriptions and conclusions, while the supportive tables and figures show the relevant data for all the periods covered.

In the report, the results of the Currently Reporting EL Members are displayed for two groups of members: all EL Members in total and EL Members operating in the EU.[11] To provide the best overview of the results, the data is displayed in aggregated form or broken down into categories or countries, but always with the number of reporting EL Members.[12,13] In the break downs, each game category has its own distinctive colour. In line with previous years, Sales data is presented only for the "Lottery" category (i.e. not including the EGMs and All other games categories).

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[8] *All comparisons in this report, as well as all recalculations of historical monetary figures using the average exchange rates for 2022, have been calculated by Kantar CZ.*

[8] *Changes were made in the employment of an external research agency service, transition to online data collection, exchange rate conversion and setting a fixed rule for involving specific historical data and their reporting in predefined stable periods, see above for further details.*

[10] *The supportive tables and figures were provided by an independent party, Kantar CZ, that independently collected the primary data for the years 2018–2022 via an online questionnaire and analysed them.*

[11] *All members of European Lotteries are further abbreviated as "EL Members" or "EL Members in total" or, where necessary due to a lack of space, "ELM". Members of European Lotteries operating in the EU are further abbreviated as "EL Members in the EU" or "EUM". Affiliation to the group of EL Members in the EU is given by membership in a home country in the EU. Since the 2020 report, the United Kingdom is no longer classified among the EL Members in the EU.*

[12] *Monetary values provided by EL Members are always written without decimals, unless a value without decimal places is zero. In that case, the value is written with the minimum number of decimals necessary for displaying the value other than zero, with the maximum number of decimals being two. Furthermore, if the resultant values shown for a respective country for the individual years 2021 and 2022 had different numbers of decimals in large tables with monetary figures by single countries, the displayed decimals of the resultant yearly figures for the respective country were united at the higher number of decimals. This process does not concern per capita figures and GGR Ratio tables.*

[13] *The method of display may differ according to the space available, however, there is always an explanation present under the figure/table or in the footnote, namely, for the last two years of reporting (2021 and 2022). Additionally, an explanation for possibly unusual trends is available too.*

A comparison with previous results is always available and is within a two- or five-year period, or both. The changes displayed include each Currently Reporting EL Member that reported at least once in the monitored period.[14],[15] All percentage changes between years have been calculated based on the figures in the national currency converted to their Euro value.
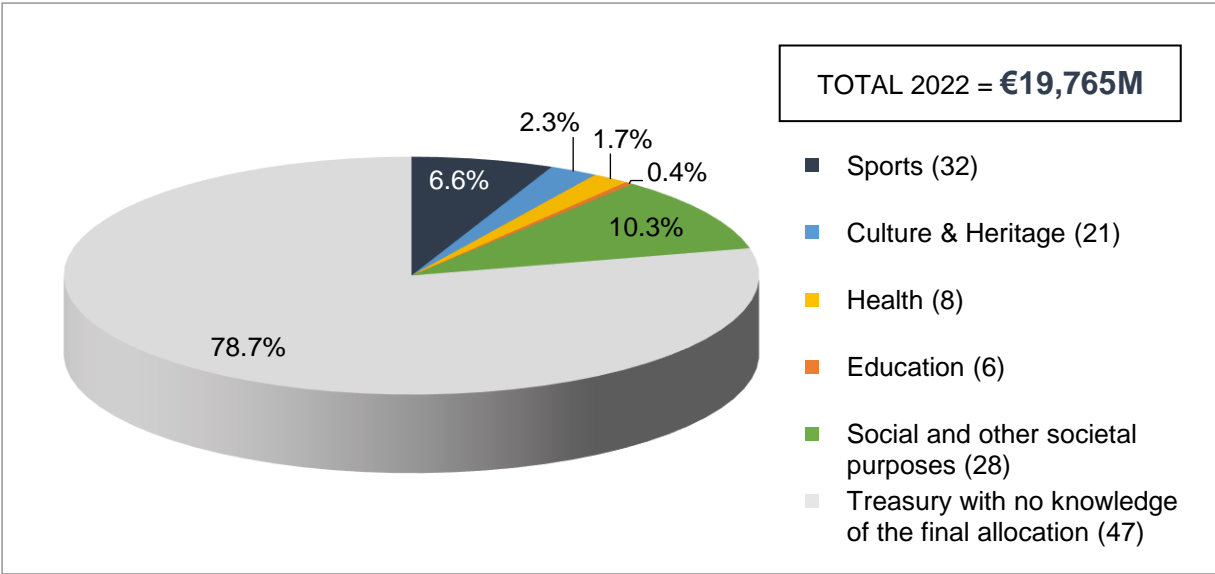
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[14] *In the case of larger tables that show the results of single countries, annual changes are displayed only by countries where the structure of reporting EL Members remained the same in both years/for both categories (i.e. there has not been any change in the number or structure of reporting EL Members from this country); in the opposite case, "n/a" is displayed. Change in 2022–2021 for EL Members in the EU27 and EL Members in total may be influenced by differences in the structure of reporting EL Members.*

[15] *The results of comparisons are always written with one decimal unless the value is zero. If the result of the comparison is other than zero, the value is written with two decimals, and no decimals are shown if the resultant value is truly zero. Negative values are always highlighted in red, and in the case of very small differences (0.00), the colour indicates whether the result of the comparison is less or more than zero.*
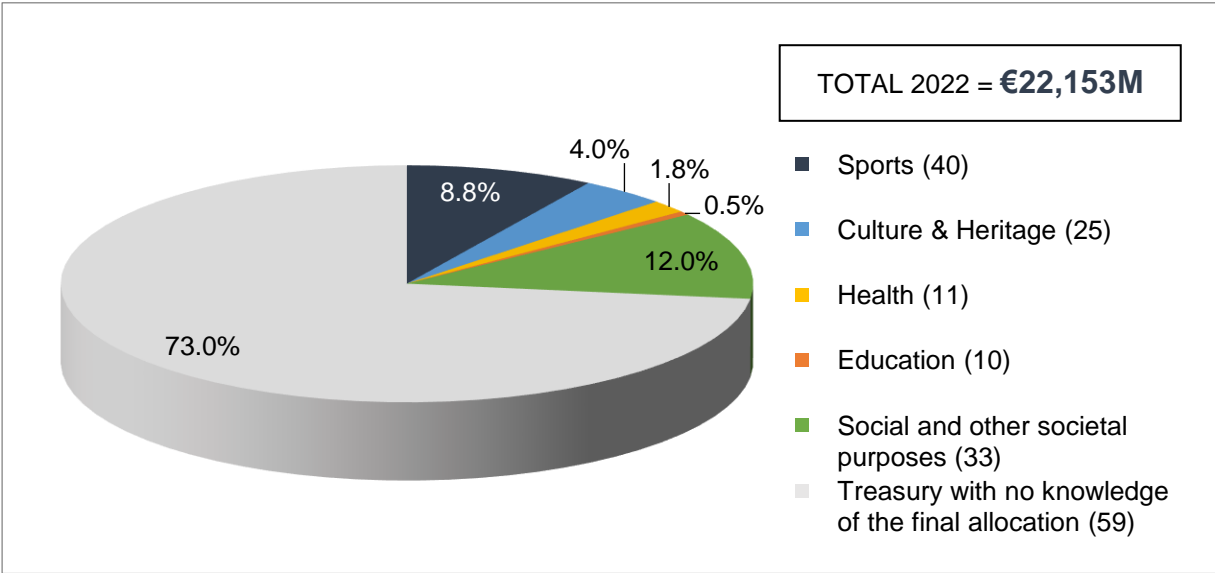
Annex B: List of Figures

Figure 1. EL Members in the EU: Money for Society by Target – 2022 (€M)

TOTAL 2022 = **€19,765M**

- ■ Sports (32)
- ■ Culture & Heritage (21)
- ■ Health (8)
- ■ Education (6)
- ■ Social and other societal purposes (28)
- □ Treasury with no knowledge of the final allocation (47)

2.3% 1.7%
6.6% 0.4%
10.3%
78.7%

Sources: EL Members in the EU reporting figures for their Money for Society for 2022

48 reported (96% of 50 EL Members in the EU)

"Target category" ("Number of reporting EL Members in the EU").

Figure 2. EL Members: Money for Society by Target – 2022 (€M)

TOTAL 2022 = **€22,153M**

- ■ Sports (40)
- ■ Culture & Heritage (25)
- ■ Health (11)
- ■ Education (10)
- ■ Social and other societal purposes (33)
- □ Treasury with no knowledge of the final allocation (59)

4.0% 1.8%
8.8% 0.5%
12.0%
73.0%

Sources: EL Members reporting figures for their Money for Society for 2022

64 reported (94% of 68 EL Members)

"Target category" ("Number of reporting EL Members").

Figure 3. Contribution to Direct Employment – Development 2018–2022
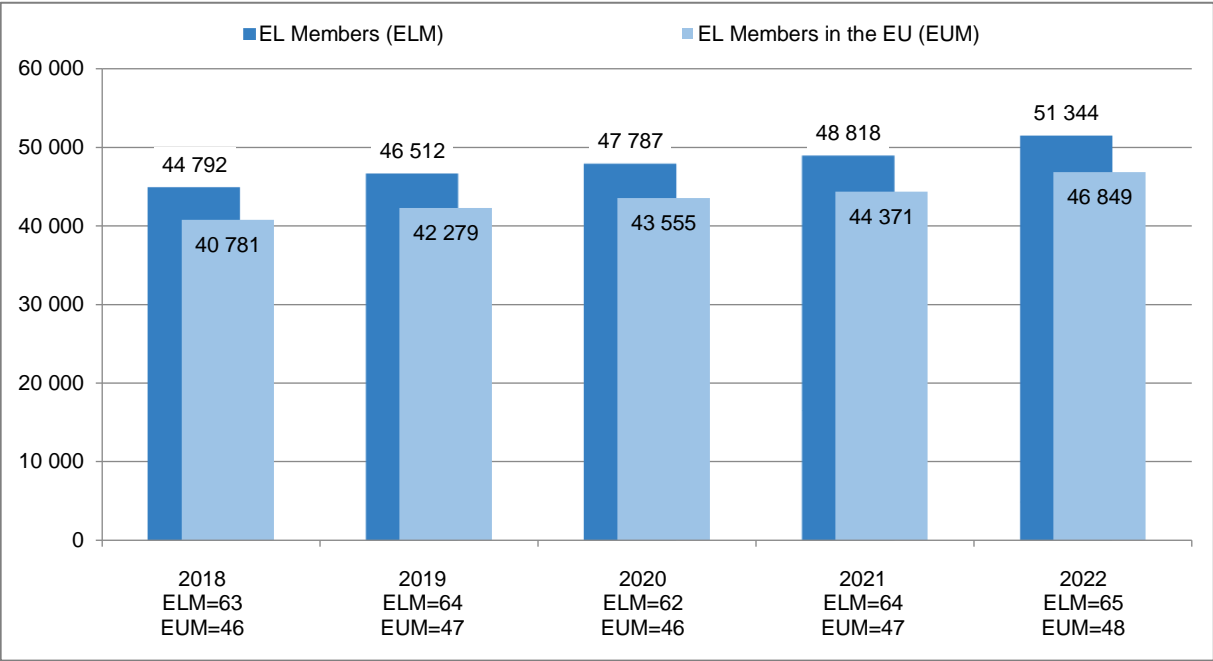
Sources: EL Members reporting the category for 2022

   For 2022: 65 reported (96% of 68 EL Members).

   For 2021: 64 reported (96% of 67 EL Members).

ELM/ EUM = "Number of EL Members/ EL Members in the EU reporting figures in the respective column"

Figure 4. Percentage of Women in Company's Employees – 2022 (%)
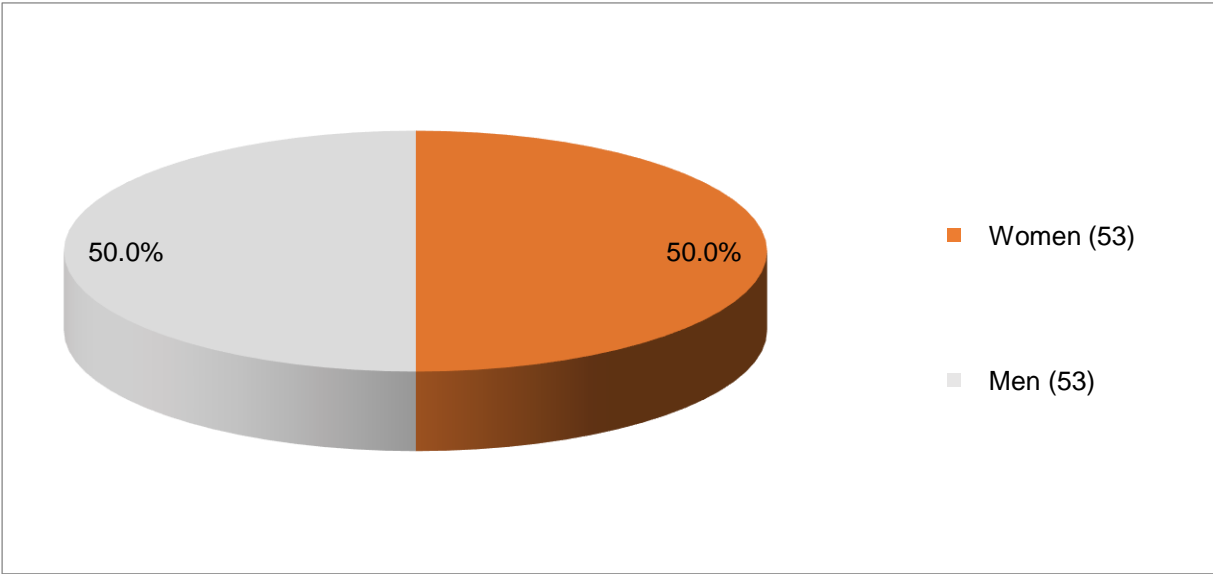
Sources: EL Members reporting percentage of women for 2022

   53 reported (78% of 68 EL Members)

"Target category" ("Number of reporting EL Members").

Figure 5a. EL Members in the EU: Lottery Sales by Game Category – 2022 (€M)

TOTAL 2022 = **€88,234M**

- ■ Instant Games (41)
- ■ Sports Games (31)
- ■ Unspecified* (2)

49.9%
30.3%
11.3%
8.4%
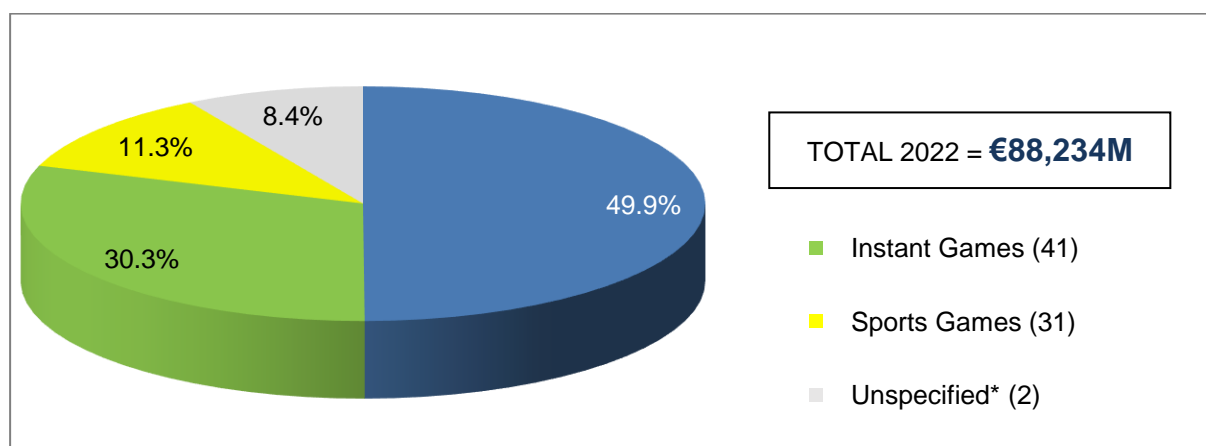
Sources: EL Members in the EU reporting their Lottery Sales for 2022

47 reported (94% of 50 EL Members in the EU)

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

"Game category" ("Number of reporting EL Members in the EU").

Figure 5b. EL Members in the EU: Lottery Sales by Game Category – 2022 (€M)

Game category	Number of EUM reporting Lottery Sales for 2022	EUM: Lottery Sales for 2022 (€M)	Share out of total
Draw Based Games	45	44 047	49.9%
Instant Games	41	26 740	30.3%
Sports Games	31	9 992	11.3%
Unspecified*	2	7 455	8.4%
Total	**47**	**88 234**	**100%**

Sources: EL Members in the EU reporting their Lottery Sales for 2022

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

Figure 6a. EL Members: Lottery Sales by Game Category – 2022 (€M)

TOTAL 2022 = **€105,934M**

- Draw Based Games (59)
- Instant Games (54)
- Sports Games (40)
- Unspecified* (2)

50.5%
30.9%
11.6%
7.0%

Sources: EL Members reporting their Lottery Sales for 2022

   64 reported (94% of 68 EL Members)

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.
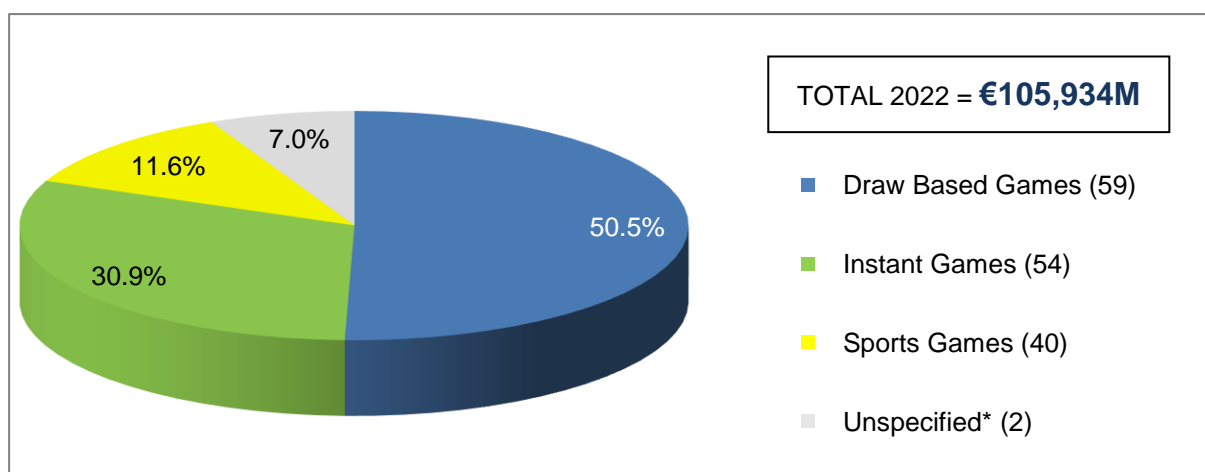
"Game category" ("Number of reporting EL Members").

Figure 6b. EL Members: Lottery Sales by Game Category – 2022 (€M)

Game category	Number of ELM reporting Lottery Sales for 2022	ELM: Lottery Sales for 2022 (€M)	Share out of total
Draw Based Games	59	53 458	50.5%
Instant Games	54	32 735	30.9%
Sports Games	40	12 286	11.6%
Unspecified*	2	7 455	7.0%
Total	**64**	**105 934**	**100%**

Sources: EL Members reporting their Lottery Sales for 2022

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

Figure 7a. EL Members in the EU: Lottery Sales by Game Category – Development 2018–2022 (€M)

Sources: EL Members in the EU reporting their Lottery Sales for 2022

   For 2022: 47 reported (94% of 50 EL Members in the EU).

   For 2021: 46 reported (94% of 49 EL Members in the EU).

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.
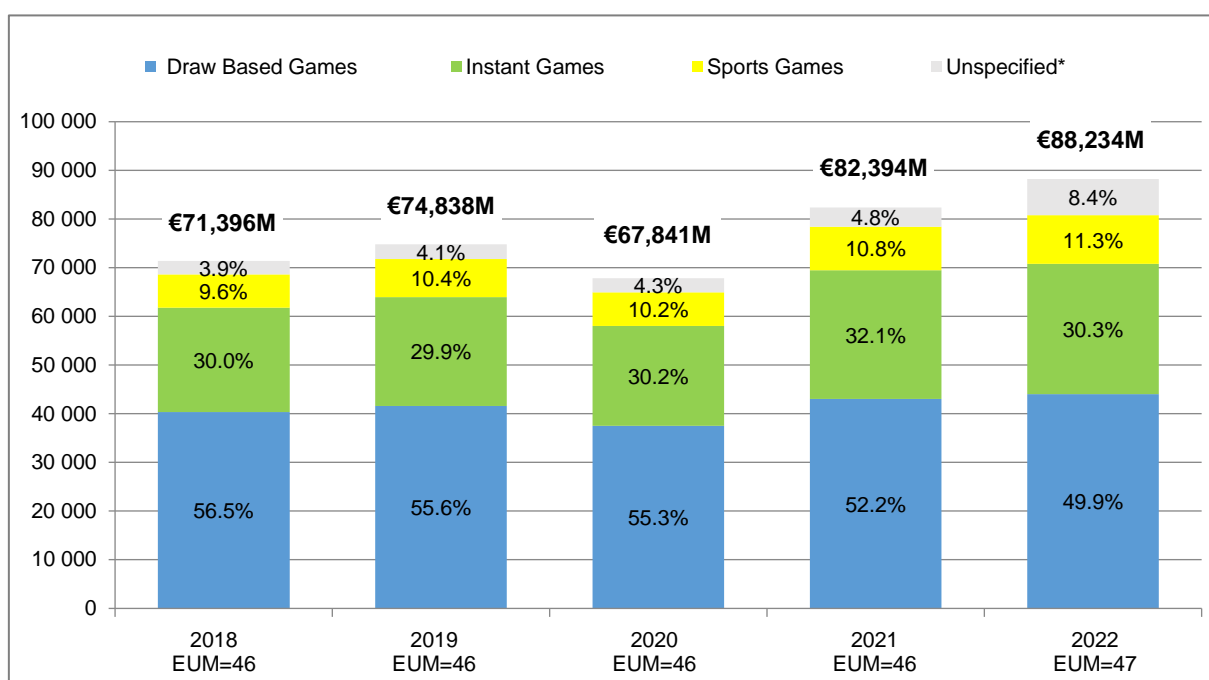
EUM = "Number of EL Members in the EU reporting figures in the respective column"

Figure 7b. EL Members in the EU: Lottery Sales by Game Category – Development 2018–2022 (€M)

Game category	EUM rep. Lottery Sales for 2022	EUM: Lottery Sales for the respective year in €M					Evolution* 2021-2022	CAGR * 2018-2022
		2018 (46)	2019 (46)	2020 (46)	2021 (46)	2022 (47)		
Draw Based Games	45	40 352	41 624	37 525	43 039	44 047	2.3%	2.2%
Instant Games	41	21 424	22 355	20 496	26 452	26 740	1.1%	5.7%
Sports Games	31	6 846	7 790	6 933	8 932	9 992	11.9%	9.9%
Unspecified**	2	2 775	3 069	2 885	3 971	7 455	87.7%	28.0%
Total	**47**	**71 396**	**74 838**	**67 841**	**82 394**	**88 234**	**7.1%**	**5.4%**

Sources: EL Members in the EU reporting their Lottery Sales for 2022

"Year (Number of EL Members in the EU reporting figures in the respective column)"

* YoY and CAGR evolution may be influenced by differences in the structure of EL Members in the EU reporting in the respective category for individual years.

** Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

Figure 8a. EL Members: Lottery Sales by Game Category – Development 2018–2022 (€M)

Sources: EL Members reporting their Lottery Sales for 2022

For 2022: 64 reported (94% of 68 EL Members)

For 2021: 63 reported (94% of 67 EL Members)

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

ELM = "Number of EL Members reporting figures in the respective column"

Figure 8b. EL Members: Lottery Sales by Game Category – Development 2018–2022 (€M)

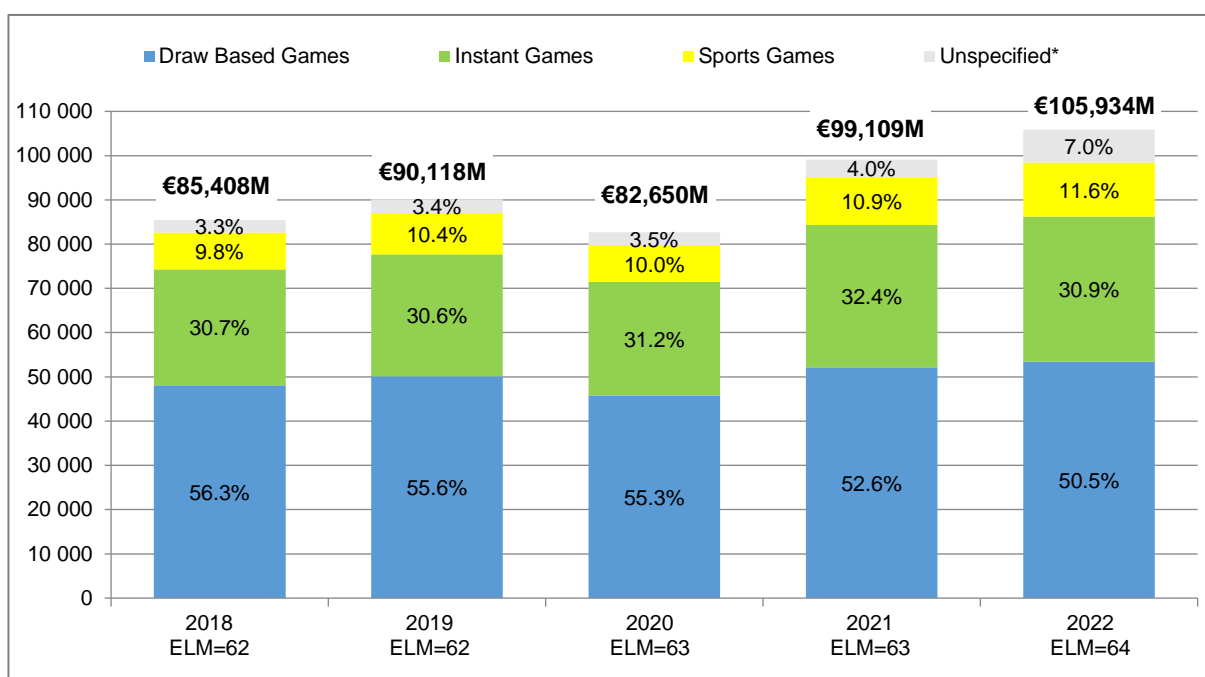| Game category	ELM rep. Lottery Sales for 2022	ELM: Lottery Sales for the respective year in €M					Evolution* 2021-2022	CAGR * 2018-2022
		2018 (62)	2019 (62)	2020 (63)	2021 (63)	2022 (64)		
Draw Based Games	59	48 080	50 141	45 694	52 167	53 458	2.5%	2.7%
Instant Games	54	26 185	27 549	25 769	32 146	32 735	1.8%	5.7%
Sports Games	40	8 365	9 356	8 301	10 825	12 286	13.5%	10.1%
Unspecified**	2	2 777	3 072	2 885	3 971	7 455	87.7%	28.0%
Total	**64**	**85 408**	**90 118**	**82 650**	**99 109**	**105 934**	**6.9%**	**5.5%**

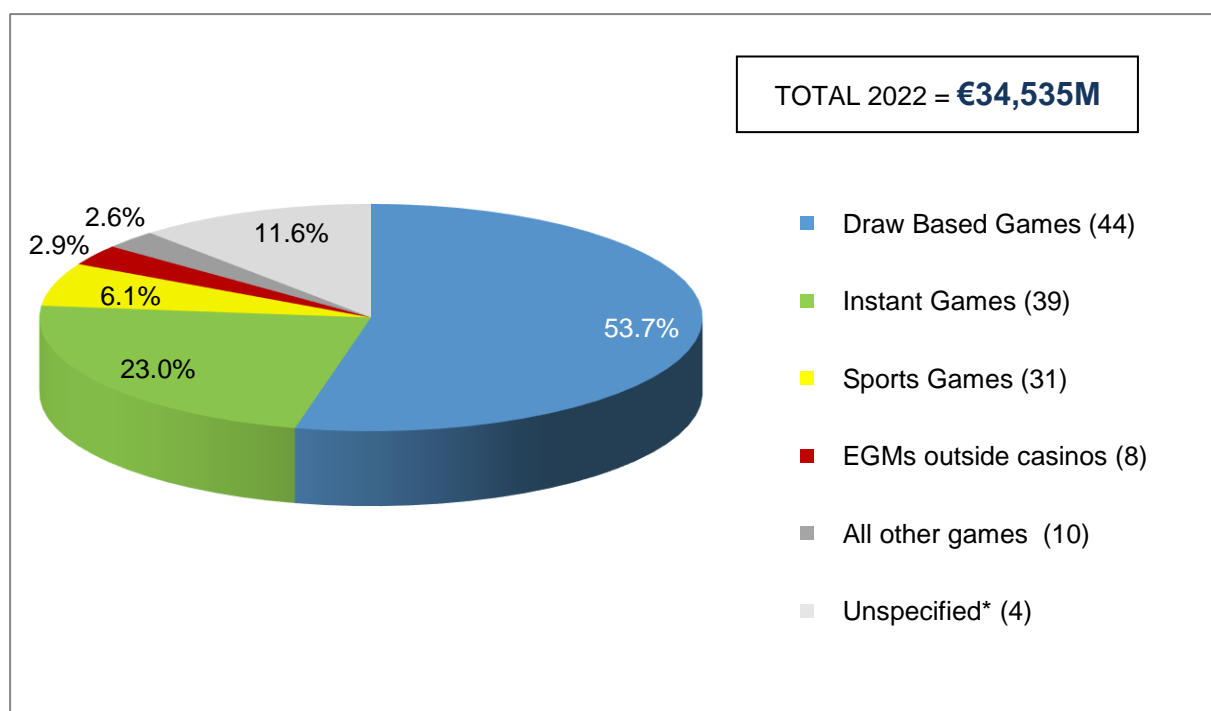Sources: EL Members reporting their Lottery Sales for 2022

"Year (Number of EL Members reporting figures in the respective column)"

* YoY and CAGR evolution may be influenced by differences in the structure of EL Members reporting in the respective category for individual years.

** Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

Figure 9a. EL Members in the EU: GGR by Game Category – 2022 (€M)

TOTAL 2022 = **€34,535M**

- 53.7% / 2.6% / 2.9% / 6.1% / 23.0% / 11.6%

- ■ Draw Based Games (44)
- ■ Instant Games (39)
- ■ Sports Games (31)
- ■ EGMs outside casinos (8)
- ■ All other games (10)
- ■ Unspecified* (4)

Sources: EL Members in the EU reporting their GGR for 2022

   49 reported (98% of 50 EL Members in the EU, i.e. all except for Czech Republic/ Loterie Korunka s.r.o.).

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

 "Game category" ("Number of reporting EL Members in the EU").

Figure 9b. EL Members in the EU: GGR by Game Category – 2022 (€M)

Game category	Number of EUM reporting GGR for 2022	EUM: GGR for 2022 (€M)	Share out of total
Draw Based Games	44	18 538	53.7%
Instant Games	39	7 938	23.0%
Sports Games	31	2 119	6.1%
EGMs outside casinos	8	1 012	2.9%
All other games	10	913	2.6%
Unspecified*	4	4 015	11.6%
Total	**49**	**34 535**	**100%**

Sources: EL Members in the EU reporting their GGR for 2022, see the comment above for information on those EL Members who participated in this data collection but did not report.

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

Figure 10a. EL Members: GGR by Game Category – 2022 (€M)

TOTAL 2022 = **€38,295M**

- Draw Based Games (58)
- Instant Games (52)
- Sports Games (41)
- EGMs outside casinos (12)
- All other games (14)
- Unspecified* (4)

53.3%
22.8%
7.5%
3.1%
2.7%
10.5%

Sources: EL Members reporting their GGR for 2022

66 reported (97% of 68 EL Members)

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

"Game category" ("Number of reporting EL Members").

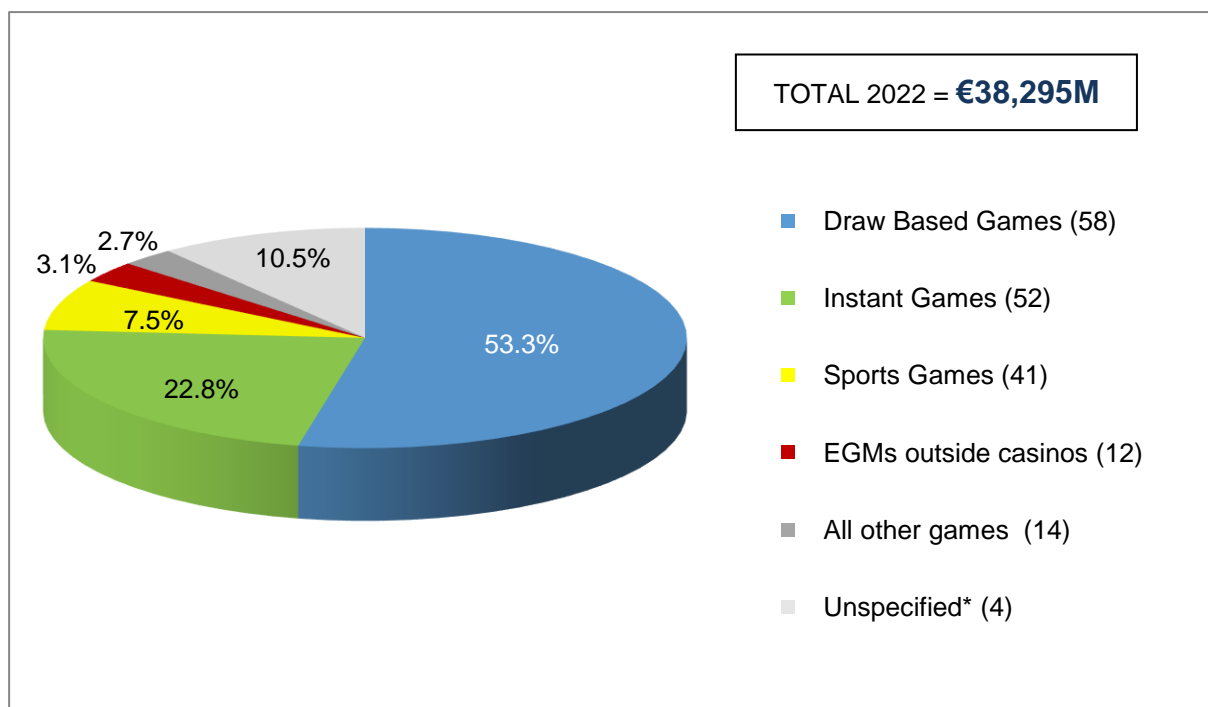**Figure 10b. EL Members: GGR by Game Category – 2022 (€M)**

Game category	Number of ELM reporting GGR for 2022	ELM: GGR for 2022 (€M)	Share out of total
Draw Based Games	58	20 421	53.3%
Instant Games	52	8 746	22.8%
Sports Games	41	2 881	7.5%
EGMs outside casinos	12	1 194	3.1%
All other games	14	1 037	2.7%
Unspecified*	4	4 015	10.5%
Total	**66**	**38 295**	**100%**

Sources: EL Members reporting their GGR for 2022

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

Figure 11a. EL Members in the EU: GGR by Game Category – Development 2018–2022 (€M)

Sources: EL Members in the EU reporting their GGR for 2022

   For 2022: 49 reported (98% of 50 EL Members in the EU)

   For 2021: 48 reported (98% of 49 EL Members in the EU)

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

EUM = "Number of EL Members in the EU reporting figures in the respective column"
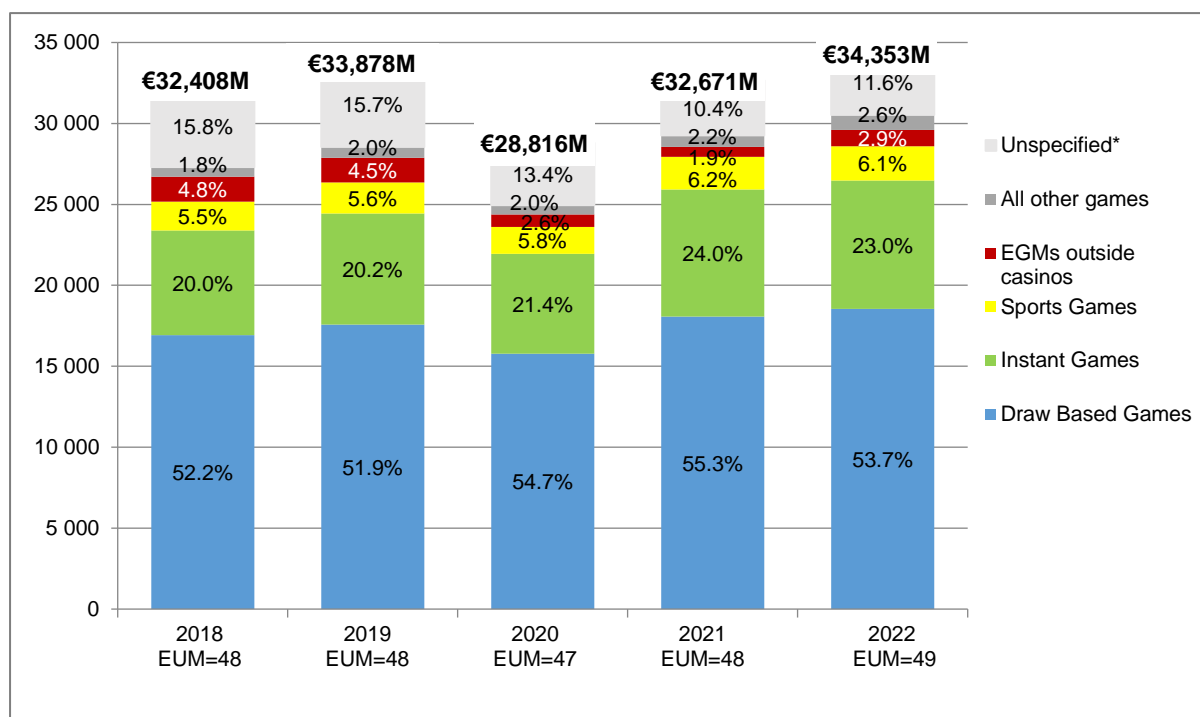
Figure 11b. EL Members in the EU: GGR by Game Category – Development 2018–2022 (€M)

Game category	EUM rep. GGR for 2022	EUM: GGR for the respective year in €M					Evolution* 2021-2022	CAGR * 2018-2022
		2018 (48)	2019 (48)	2020 (47)	2021 (48)	2022 (49)		
Draw Based Games	44	16 916	17 583	15 776	18 061	18 538	2.6%	2.3%
Instant Games	39	6 481	6 858	6 163	7 850	7 938	1.1%	5.2%
Sports Games	31	1 768	1 906	1 676	2 021	2 119	4.9%	4.6%
EGMs outside casinos	8	1 540	1 537	762	610	1 012	65.9%	-10.0%
All other games	10	590	665	582	721	913	26.6%	11.6%
Unspecified**	4	5 113	5 330	3 856	3 408	4 015	17.8%	-5.9%
Total	**49**	**32 408**	**33 878**	**28 816**	**32 671**	**34 535**	**5.7%**	**1.6%**

Sources: EL Members in the EU reporting their GGR for 2022

"Year (Number of EL Members in the EU reporting figures in the respective column)"

* YoY and CAGR evolution may be influenced by differences in the structure of EL Members in the EU reporting in the respective category for individual years.

** Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

Figure 12a. EL Members: GGR by Game Category – Development 2018–2022 (€M)

Sources: EL Members reporting their GGR for 2022

   For 2022: 66 reported (97% of 68 EL Members)

   For 2021: 65 reported (97% of 67 EL Members)

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

ELM = "Number of EL Members reporting figures in the respective column"

Figure 12b. EL Members: GGR by Game Category – Development 2018–2022 (€M)

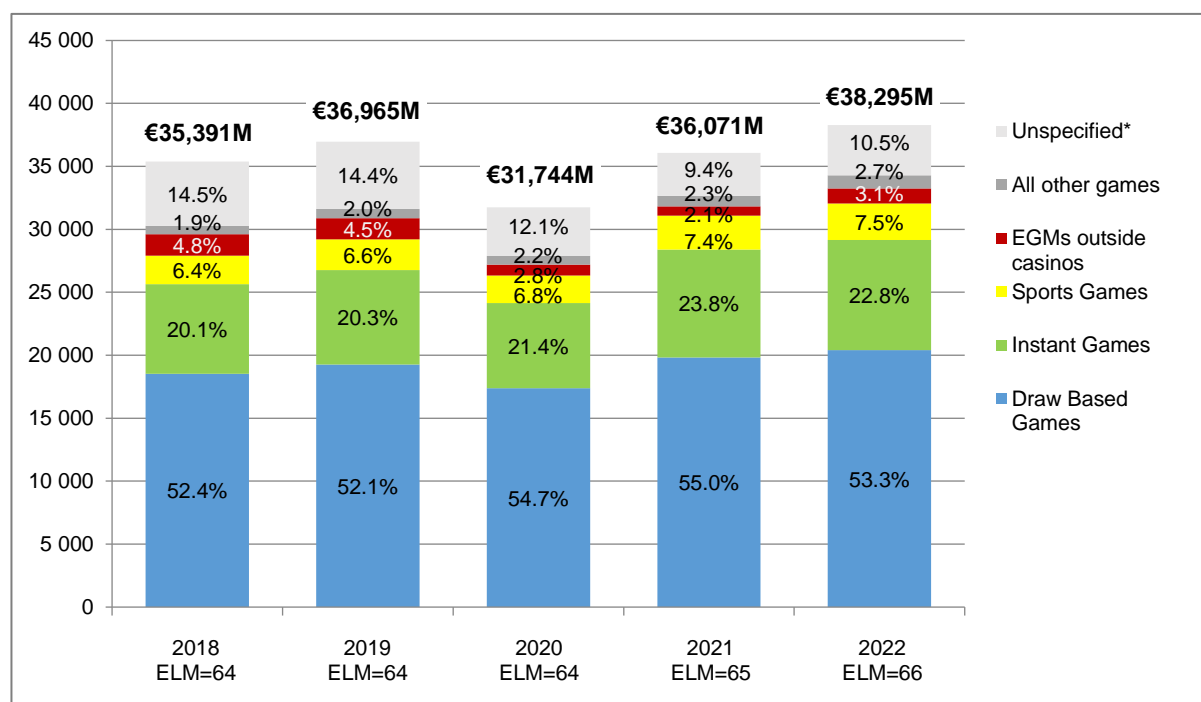| Game category	ELM rep. GGR for 2022	ELM: GGR for the respective year in €M					Evolution* 2021-2022	CAGR * 2018-2022
		2018 (64)	2019 (64)	2020 (64)	2021 (65)	2022 (66)		
Draw Based Games	58	18 538	19 265	17 377	19 828	20 421	3.0%	2.4%
Instant Games	52	7 103	7 498	6 782	8 575	8 746	2.0%	5.3%
Sports Games	41	2 262	2 440	2 161	2 681	2 881	7.4%	6.2%
EGMs outside casinos	12	1 708	1 681	881	749	1 194	59.5%	-8.6%
All other games	14	661	747	687	829	1 037	25.1%	11.9%
Unspecified**	4	5 119	5 334	3 856	3 408	4 015	17.8%	-5.9%
Total	**66**	**35 391**	**36 965**	**31 744**	**36 071**	**38 295**	**6.2%**	**2.0%**

Sources: EL Members reporting their GGR for 2022

"Year (Number of EL Members reporting figures in the respective column)"

* YoY and CAGR evolution may be influenced by differences in the structure of EL Members reporting in the respective category for individual years.

** Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

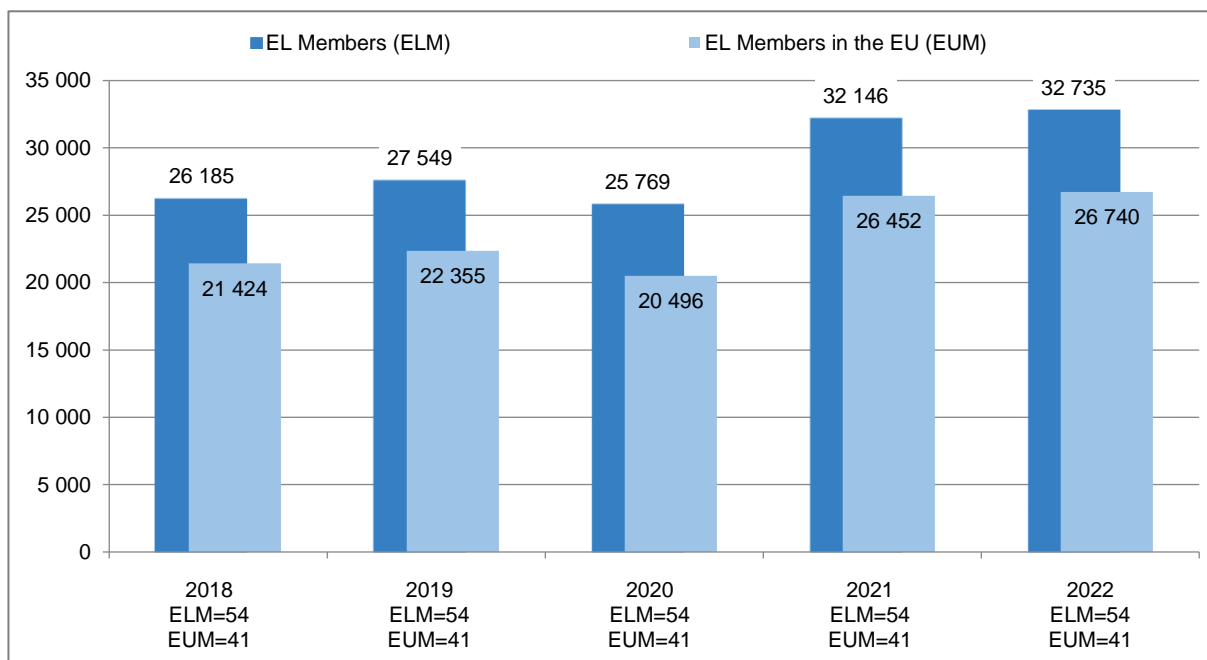**Figure 13. Sales for Draw Based Games – Development 2018–2022 (€M)**
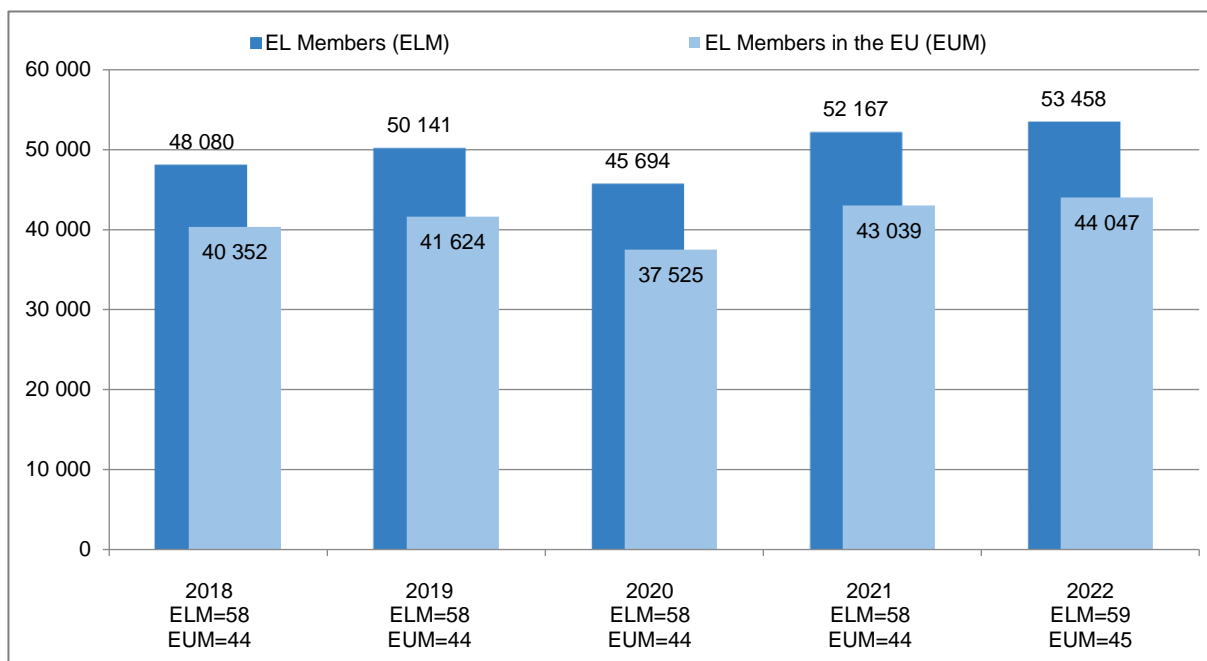
Sources: EL Members reporting the category for 2022

   For 2022: 65 EL Members (96% of 68 EL Members) offer this game category and 59 (91% of 65) provided the figures

   For 2021: 64 EL Members (96% of 67 EL Members) offer this game category and 58 (91% of 64) provided the figures

ELM/ EUM = "Number of EL Members/ EL Members in the EU reporting figures in the respective column"

Figure 14. Sales for Instant Games – Development 2018–2022 (€M)

Sources: EL Members reporting the category for 2022

   For 2022: 60 EL Members (88% of 68 EL Members) offer this game category and 54 (90% of 60 provided the figures

   For 2021: 60 EL Members (90% of 67 EL Members) offer this game category and 54 (90% of 60 provided the figures

ELM/ EUM = "Number of EL Members/ EL Members in the EU reporting figures in the respective column"

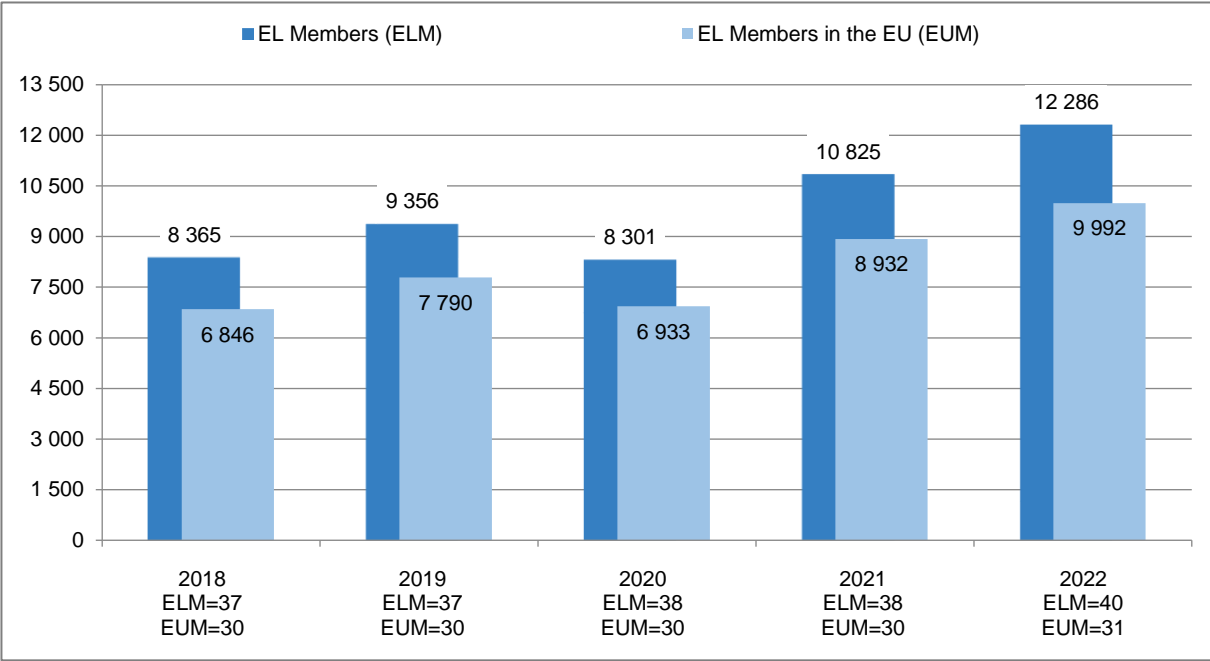**Figure 15. Sales for Sports Games – Development 2018–2022 (€M)**
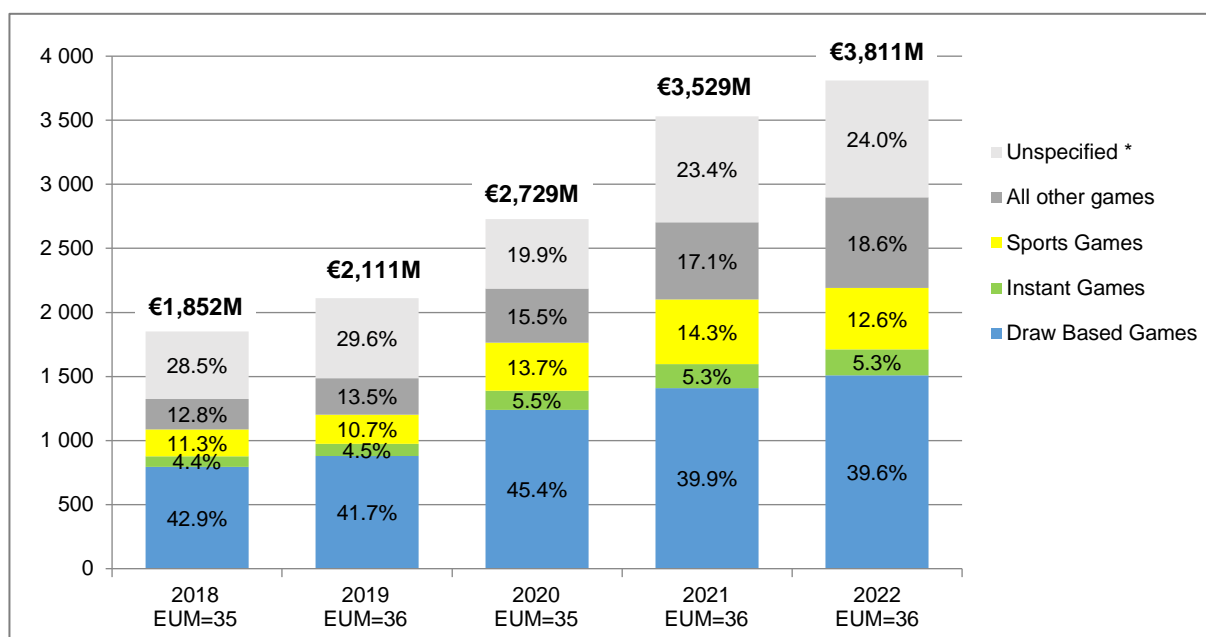

Sources: EL Members reporting the category for 2022

   For 2022: 46 EL Members (68% of 68 EL Members) offer this game category and 40 (87% of 46) provided the figures

   For 2021: 45 EL Members (67% of 67 EL Members) offer this game category and 38 (84% of 45) provided the figures

ELM/ EUM = "Number of EL Members/ EL Members in the EU reporting figures in the respective column"

Figure 16a. EL Members in the EU: Online GGR by Game Category – Development 2018–2022 (€M)

Sources: EL Members in the EU reporting their Online GGR for 2022

   For 2022: 44 EL Members in the EU (88% of 50) offer online games and 36 (82% of 44) provided the figures

   For 2021: 44 EL Members in the EU (90% of 49) offer online games and 36 (82% of 44) provided the figures

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

EUM = "Number of EL Members in the EU reporting figures in the respective column"

Figure 16b. EL Members in the EU: Online GGR by Game Category – Development 2018–2022 (€M)

Game category	EUM rep. online GGR for 2022	EUM: Online GGR for the respective year in €M					Evolution* 2021-2022	CAGR * 2018-2022
		2018 (35)	2019 (36)	2020 (35)	2021 (36)	2022 (36)		
Draw Based Games	33	795	880	1 239	1 409	1 509	7.1%	17.4%
Instant Games	25	82	95	150	188	202	7.7%	25.3%
Sports Games	17	210	227	374	504	480	-4.8%	23.0%
All other games	7	237	285	423	602	707	17.4%	31.4%
Unspecified	3	528	624	543	827	914	10.5%	14.7%
Total	36	1 852	2 111	2 729	3 529	3 811	8.0%	19.8%

Sources: EL Members in the EU reporting their Online GGR for 2022

"Year (Number of EL Members in the EU reporting figures in the respective column)"

* YoY and CAGR evolution may be influenced by differences in the structure of EL Members in the EU reporting in the respective category for individual years.

Figure 17a. EL Members: Online GGR by Game Category – Development 2018–2022 (€M)

Sources: EL Members reporting their Online GGR for 2022

   For 2022: 59 EL Members (87% of 68) offer online games and 48 (81% of 59) provided the figures

   For 2021: 59 EL Members (88% of 67) offer online games and 48 (81% of 59) provided the figures

* Unspecified – Amount provided by EL Members who reported only the overall figure without a split by game category.

ELM = "Number of EL Members reporting figures in the respective column"

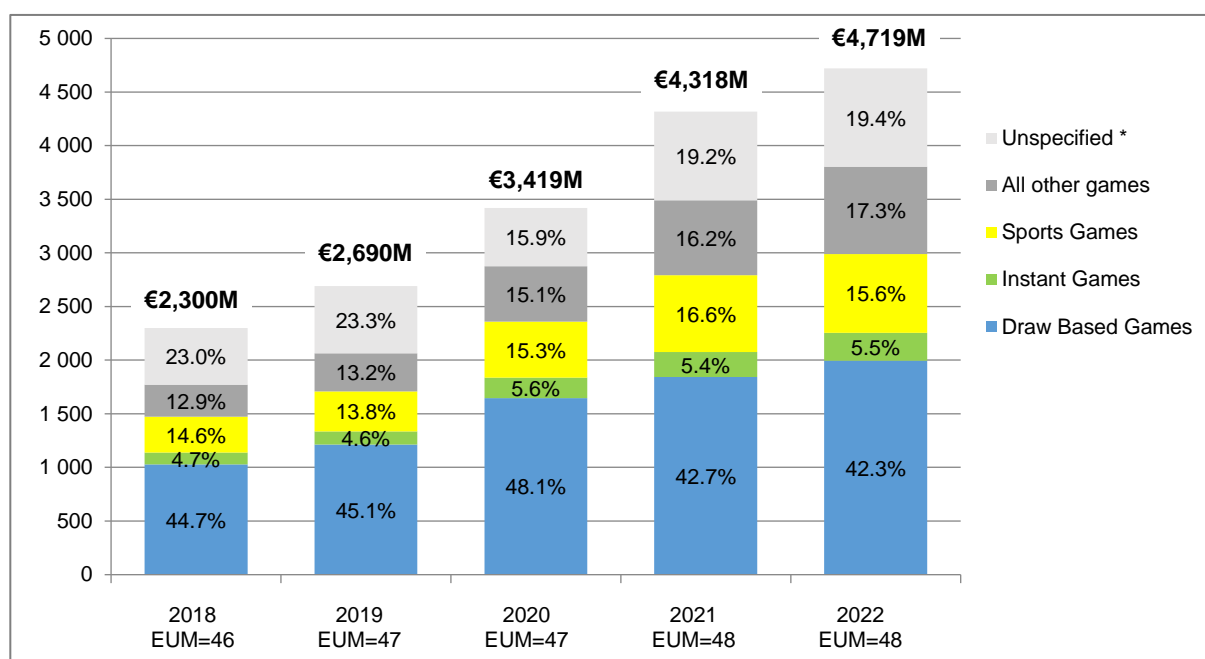**Figure 17b. EL Members: Online GGR by Game Category – Development 2018–2022 (€M)**

Game category	ELM rep. online GGR for 2022	ELM: Online GGR for the respective year in €M					Evolution* 2021-2022	CAGR * 2018-2022
		2018 (46)	2019 (47)	2020 (47)	2021 (48)	2022 (48)		
Draw Based Games	42	1 029	1 213	1 645	1 843	1 996	8.3%	18.0%
Instant Games	32	109	122	192	232	258	11.2%	24.0%
Sports Games	25	336	372	522	718	736	2.5%	21.7%
All other games	9	298	355	517	699	816	16.8%	28.7%
Unspecified	3	529	626	543	827	914	10.5%	14.6%
Total	**48**	**2 300**	**2 690**	**3 419**	**4 318**	**4 719**	**9.3%**	**19.7%**

Sources: EL Members reporting their Online GGR for 2022

"Year (Number of EL Members reporting figures in the respective column)"

* YoY and CAGR evolution may be influenced by differences in the structure of EL Members reporting in the respective category for individual years.

Figure 18. Overview of Reporting Activity of Members by Country – 2018–2022

Country	Number of Currently Reporting ELM who provided data for individual years				
	2018	2019	2020	2021	2022
Austria	1	1	1	1	1
Belgium	1	1	1	1	1
Bulgaria	1	1	1	1	1
Croatia	1	1	1	1	1
Cyprus	1	1	1	1	1
Czech Republic	2	2	2	2	2
Denmark	1	1	1	1	1
Estonia	1	1	1	1	1
Finland	1	1	1	1	1
France	1	1	1	1	1
Germany	17	17	17	17	17
Greece	1	1	1	1	1
Hungary	1	1	1	1	1
Ireland	1	1	1	1	1
Italy	2	2	2	2	2
Latvia	1	1	1	1	1
Lithuania	2	2	2	2	2
Luxembourg	1	1	1	1	1
Malta	0	0	0	0	1
Netherlands	2	2	2	2	2
Poland	1	1	1	1	1
Portugal	1	1	1	1	1
Romania	1	1	1	1	1
Slovakia	1	1	1	1	1
Slovenia	2	2	2	2	2
Spain	3	3	3	3	3
Sweden	1	1	1	1	1
EL Members in the EU27	**49**	**49**	**49**	**49**	**50**
Azerbaijan	2	2	2	2	2
Bosnia and Herzegovina	2	2	2	2	2
Iceland	2	2	2	2	2
Israel	2	2	2	2	2
Kazakhstan	1	1	1	1	1
Norway	1	1	1	1	1
Republic of North Macedonia	1	1	2	2	2
Serbia	1	1	1	1	1
Switzerland	2	2	2	2	2
Ukraine	2	2	2	2	2
United Kingdom	1	1	1	1	1
EL Members in total	**66**	**66**	**67**	**67**	**68**

Sources: EL Members who took part in the 2023 survey collecting data for 2018–2022.

Annex C: Explanations of the Collected Data Included in This Report

Country	The lotteries' country of origin.
Lottery	The lottery name needed to be confirmed.
Contact person	The following details of a contact person were requested: name, email address and phone number.
National currency	EL Members were asked to fill in all data in their national currency. The AGENCY team used the yearly average exchange rates from 2021 provided by Eurostat, or, if these were not available, the yearly average exchange rates from the European Central Bank and the national banks of each country.
Sales	Sales (or turnover) should be in your national currency. Do not deduct anything from Sales – not prizes, not commissions for retailers, nor anything else. The amount should reflect the gross amount players pay buying lottery products. If you do not operate games in a category, just leave the field blank. If players also pay a tax on top of the price of the lottery product, please include this tax on top of the Sales figure. Include Sales of the lottery and its subsidiaries from all channels, such as retail, own shops, the Internet, mobiles, tablets, and interactive TVs. The Sales figures should correspond to the figures provided in the audited reports, if available.
Gross Gaming Revenue (GGR)	Gross Gaming Revenue (GGR) is equal to Sales minus prizes. For each game, GGR should be equal to Sales multiplied by 100% – the payout rate as a percentage. If, for example, you sell €50 of instant tickets with a payout of 58% in prizes for players, the GGR is equal to 50*(100%-58%) = 21. There may be a slight difference between the theoretical prize payout percentage and the actual payout, as some players never collect their prizes. However, for this study, the difference does not matter. Thus, you can use the theoretical payout rates to calculate GGR from Sales figures as shown above. GGR also equals the amount kept by the operator after prizes to cover all costs, retail commissions, taxes, money for good causes and profit. You should include GGR for all channels, including retail, own shops, the Internet, mobiles, tablets, and interactive TVs. The GGR figures should correspond to the figures provided in the audited reports, if available.
Sales via the Internet/ mobiles	Sales via the Internet/mobiles should include and reflect the same content as total Sales data, however, only from channels such as the Internet, mobiles, tablets, and interactive TVs.
Sales generated via mobile devices	Mobile sales generated through all mobile devices, this typically includes tablets and smartphones. If you don't have an exact figure for historical numbers, please provide the best estimate for the mobile sales share.
Gross Gaming Revenue via the Internet/ mobiles	GGR via Internet/mobiles should include and reflect the same content as the total GGR data, however, only from channels such as the Internet, mobiles, tablets, and interactive TVs.

Draw Based Games	All nationwide games based on numbers or letters, and thus, typical lottery games with both pari-mutuel and fixed prizes. For example, Lotto, Pick 3, Euro Millions, Joker, Spiel, Draw, Class lotteries, Keno (both daily and fast draw), and Bingo. Do not include EGMs or Instant Games based on numbers in this category.
Instant Games	All instant or scratch games and pull-tab games - the so-called pre-drawn lotteries.
Sports Games *(incl. Horse Racing Games)*	All pari-mutuel betting games AND all fixed odds betting games, including betting on sports events, horse racing, e-sports and all novelty bets (e.g. weather, song contests, political events, etc.)
EGMs outside casinos	Electronic Gaming Machines located outside licensed brick-and-mortar casinos. For example, slot machines outside casinos, VLTs and EILs.
All other games	Typically, the category includes casino games or poker or virtual games. The category DOES NOT INCLUDE activities other than gaming (for example, financial services) and SALES figures are not required.
Average number of full-time employees	The average number of lottery employees over the year calculated on a full-time basis. Do not include employees of service providers or retailers.
Diversity & Inclusion *percentage of women in company's employees (not including the board)*	The percentage of representation of women in company's employees (not including the board). Employee (GRI 405): individual in an employment relationship with the organization, according to national law or its application.
percentage of women in company's top-level management	The percentage of representation of women in company's top-level management (not including the board). Considered top-level management are: CEOs, Presidents, Vice-Presidents and all C-level positions below executive board OR executive management (i.e. B-1).
percentage of women on Board of Directors	The percentage of representation of women on company's board. Board (GRI 405): committee or board responsible for the strategic guidance of the organization, the effective monitoring of management, and the accountability of management to the broader organization and its stakeholders.
Mandatory Money for Society (Tax/ Duties/ Good Causes)	Include everything your lottery contributes to society in the form of mandatory taxes/levies (local and national, company tax, license fee) and mandatory payments allocated to good causes such as sports, culture, the environment, education, etc. The entry in this field should reflect the total money your lottery contributes to society as mandatory payments. For this study, the total amount your lottery contributes to society as mandatory payments is broken down into four categories:
of which goes to sport	• Sports: this covers mandatory payments allocated to sports. Include all amounts in national currency your lottery provides for sports purposes that you pay it directly to sports associations/institution. Do NOT Include money you pay for sponsorships of sports.
of which goes to culture and heritage	• Heritage: this covers the mandatory payment allocated to culture and heritage where you are certain of the end allocation and includes all amounts your lottery provides for culture and heritage purposes that you pay directly to arts, cultural and heritage organisations/ associations/foundations, etc.
of which goes	

to health and well-being *of which goes* *to education* *of which goes* *to social and other societal* *purposes* *of which goes* *to the treasury* *(with no knowledge of the* *final allocation, i.e. taxes,* *duties)*	• Health and well-being: this covers the mandatory payment allocated to health and well-being where you are certain of the end allocation and includes all amounts your lottery provides for health and wellness purposes that you pay directly to health- and well-being-related organisations/associations/foundations, etc. • Education: this covers the mandatory payment allocated to education where you are certain of the end allocation and includes all amounts your lottery provides for educational purposes that you pay directly to organisations/associations/foundations, etc. • Social and other societal purposes: this covers the mandatory payment allocated to social and other societal purposes where you are certain of the end allocation and includes all amounts your lottery provides for social and other societal purposes that you pay directly to charities/organisations/associations/foundations, etc. • Treasury: this group covers mandatory payments with no knowledge of the final allocation. Include all amounts in national currency for all taxes and duties (local and national, company tax, license fee) and any tax paid on prizes. If your profit or part of it goes to Treasury, it must also be included. Do NOT include sponsorships or other Non-mandatory payments.
Sponsorships or patronage of sports	Some lotteries use sponsorships and/ or patronage as marketing and public relations tools. Please include the cost for any such sponsorship and/ or patronage.
Total spending on measures to prevent problem gambling	EL has established a programme of Responsible Gaming Certification. This entry is meant to support evidence that lotteries are fully aware of the obligations to promote responsible gaming. You should report the amount in national currency that was used for measures to prevent problem gaming - covering all 11 elements of the EL Responsible Gaming Standards. It should include costs for prevention, research and treatment of problem gaming supported by your lottery. Also include costs for information material; stakeholder engagement and costs associated with helpline support; education of staff and retailers and costs for employees directly involved in such activities.

Number of Points of Sale (POS)	The number of physical points of sale where your lottery products (DBGs, Instants and/ or sports betting) are sold.
	Do NOT include POS where EGMs are the only lottery product sold.
	
	The following categories of POS are identified:
	I. Exclusive POS (Lottery/ Sports Betting/ EGM)
	   • Owned POS - the number of POS owned by your lottery.
	   • Third-party POS (franchise partners) - the number of POS that are not owned by your lottery, but with lottery products the dominant activity (no competitive products may be sold, e.g. "franchise" concept).
	II. Third-party POS with another predominant product portfolio - the number of Third-party POS where products offered by your lottery are sold based on a contract with the owner of the POS; however, where the dominant products/ services are different from lotteries; products offered by competitive lotteries can also be sold there.
	   • Tobacco/News agents - Third-party POS where lottery products are sold, but Tobacco/Newspapers are the main activity.
	   • Petrol Station - Third-party POS where lottery products are sold, but petrol sale is the main activity.

	• Food Retail - Third-party POS where lottery products are sold, but food retail is the main activity. • Public Services (post offices, railway, etc.) - Third-party POS where lottery products are sold, but Public Services is the main activity. • HoReCa (Pubs, Bars, Restaurants, etc.) - Third-party POS where lottery products are sold, but HoReCa is the main activity. • Other or Unspecified - Third-party POS where lottery products are sold, but that do not fall into those specified above.
Number of members with retail loyalty programme **Number of members with online loyalty programme**	A loyalty program is a system of structured rewards given to customers, usually in exchange for desired behaviours, with the goals of increasing customer loyalty and collecting customer data.
Base of online customers as of 31.12. of the respective year	An active player is defined as one who has realized a bet during the past 12 months (i.e. during the respective calendar year).
Number of members with non-gaming activities	Non-gaming activities are services not directly related to gambling, like financial/ payment services, mobile phone recharging, sales of event tickets, etc.

Source: EL, 2022

Annex D: Other Data Sources

Eurostat (2023). *Euro/ ECU exchange rates – annual data*, from
https://ec.europa.eu/eurostat/databrowser/view/ERT_BIL_EUR_A/default/table?lang=en

Eurostat (2023). *Population on 1 January*, from
https://ec.europa.eu/eurostat/databrowser/view/tps00001/default/table?lang=en