



**THE EUROPEAN
LOTTERIES**

FOR THE BENEFIT OF SOCIETY

Report on the Lottery Sector in Europe 2024

In 2024 the European Lottery Sector returned a record €29.4 billion to society

European lotteries operate with a clear mission: to generate funding for society while upholding the highest sector standards of consumer protection and responsible gaming. Together, these principles form the foundation of the positive societal impact created by European lotteries.

The nineteenth edition of this report provides a comprehensive overview of developments in the lottery sector in 2024. It offers valuable insights for anyone interested in the sector and aims to support the recognition and protection of the important societal role that lotteries fulfil.

Data from EL Members plays a crucial role in enabling the Association to represent the sector effectively. Reliable information on the size, structure, and evolution of the sector supports evidence-based advocacy towards a wide range of stakeholders, and supports the development of clear, fact-based policy proposals.

Sharing and processing this data requires a collective investment of time and resources from EL Members. However, this effort is essential to better understand the needs and challenges facing the sector. By contributing their data, EL Members help strengthen the collective voice of the sector.

When combined, the data allows us to identify key market trends, which are essential for EL Members to benchmark their performance and develop better-informed decisions and strategies at their level. Sector-wide data helps identify common challenges and opportunities, ensuring EL Members are better prepared for the future.

The report for 2024 consolidates data from 67 EL Lottery Members and covers 37 countries.

Table A. Number of EL Members Participating in the 2024 Data Collection

| | 2020 | 2021 | 2022 | 2023 | 2024 |
|------------------------------------|------|------|------|------|------|
| EL Members in the EU27 | 47 | 48 | 49 | 49 | 50 |
| EL Members outside the EU27 | 17 | 17 | 17 | 18 | 17 |
| Total | 64 | 65 | 66 | 67 | 67 |

Source: Reporting EL Members.

In a year marked by further digitalisation and evolving consumer habits, the sector has demonstrated sustainable growth:

Lottery sales have climbed to **€109.9 billion**, **Gross Gaming Revenue (GGR)** has reached **€46.1 billion**, and the sector's **contribution to society** now stands at an impressive **€29.4 billion**. These figures are more than just numbers – they reflect a sector that is thriving, adapting, and supporting public benefit.

The main trends are described on the following pages.

Draw-Based Games (DBGs) continued to anchor the lottery sector, remaining the largest segment.

With sales rising by 3.7% and GGR up 5.7% compared to 2023, DBGs accounted for nearly 45% of all sales and 46% of total GGR. Their enduring popularity reflects both player trust and the sector's ability to adapt classic formats for modern audiences.

Instant Games played a major role in the sector's growth.

Sales climbed by 6.1% and GGR by 5.9%, now representing almost 29% of sales and over 21% of GGR. The appeal of instant gratification and innovative game formats continues to attract new demographics.

Sports Games stood out as the fastest-growing segment.

Sales soared by 12.9% and GGR by 9.1%, with sports games now making up 12.5% of sales and nearly 7% of GGR. This surge is driven by the growing enthusiasm for sports betting and the sector's investment in digital platforms that make participation more accessible taking into account growing competitive situations.

EGMs and Other Games presented a mixed picture.

Electronic Gaming Machines (EGMs) outside casinos saw a slight dip in GGR (-1.7%), yet the "All Other Games" category experienced a remarkable 21.5% growth in GGR, highlighting the sector's capacity for innovation and diversification.

Retail plays the central role in sector activities.

Retail, with its 298,000 points of sale across Europe in 2024, remained the sector's backbone. These familiar outlets, corner shops, kiosks, and supermarkets continued to anchor the lottery experience for millions. Retail GGR grew by 3.9%, reaching €39.9 billion. This steady growth reflects the enduring trust and accessibility that retail channels offer, even as consumer habits evolve.

Digital is becoming an increasingly important part of the sector.

The most striking development came from the digital pillar. Online GGR surged to €6.2 billion in 2024, marking a remarkable 19% increase over the previous year. Online GGR now accounts for 13.4% of total GGR, up from 11.9% in 2023—a clear signal that digital channels are no longer a niche, but a driving force in the sector's growth. This momentum is powered by user-friendly platforms, mobile accessibility, and the sector's commitment to responsible, secure play.

A record €29.4 billion was returned to society.

The true impact of the lottery sector extends far beyond financial performance. In 2024, more than 62% of all GGR was returned to society—supporting state budgets, social programs, sports, culture, health, and education. On average, this translated to a per capita contribution of approximately €47, making the lottery not just a game of chance, but a powerful engine for public good.

Beyond generating funds for society, the lottery sector supports prosperity, gender equality and sustainability.

Employment continued its upward trend, with more than 55,000 full-time jobs sustained across Europe. Women and men are equally represented among employees of member organisations. Approximately one-third of top-level management and board positions are held by women. More than half of members now calculate their greenhouse gas emissions, reflecting a growing focus on environmental responsibility.

Table B. Overview of Key Data 2024

| | Reporting EL EU Members | All Reporting EL Members |
|--|----------------------------|-----------------------------|
| EL Members All member lotteries reporting within the EU/in Europe (100% = 50/ 68) | 50 | 67 |
| Money for Society (Number reporting members: (49/65)) | €23.9bn | €29.4bn |
| Direct Full-time Employment 6 Yearly average number of full-time employees (49/66) | 50.918 | 55.602 |
| Sales Includes Sales from the three "Lottery" categories (46/60) | €93.8bn | €109.9bn |
| Gross Gaming Revenue Sales minus prizes of the five gaming categories (49/66) | €38.2bn | €46bn |
| Online Gross Gaming Revenue (41/48) | €5.1bn | €5.3bn |

Source: EL Members who took part in the 2024 survey; data being collected and aggregated by Kantar CZ, 2025.

Finally, we would like to thank all members for providing the information, as well as the members of the Data & Research Working Group for their careful and thorough review of the data presented. All of this has helped make this report a reliable reference document.

We hope you enjoy reading this report.

Piet Van Baeveghem, EL Secretary General and Gregory Maes, Executive Chair of the EL Data & Research Working Group

Annexes

Annex A: Methodology Applied

Annex B: Figures & Tables

Annex C: Explanations of the Collected 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.¹

The data gathered covers the results of current regular EL Members in the 2024 calendar year.² 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 2024.³ 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 2025.

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 and responsible gaming restrictions, advertising restrictions, loyalty programs, size of player base, 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 2024 from Eurostat.⁴ In addition to the data for 2024, data from previous years is also included, namely from the period of 2020–2023.^{5,6}

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 currencies other than the Euro have also been converted into Euros using the same average exchange rate for 2024 (in other words, all amounts in this report are reported in the average 2024 Euro value).⁷ Thus, looking at the previous years’ reports, which have used exchange rates from 2020, 2021, 2022 and 2023 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.

¹ The external sources used: EUROSTAT for the exchange rates; EUROSTAT, the World Economic Outlook Database and United Nations Population Data Portal for population figures. For further information, see Annex D: Other Data Sources.

² This report does not include observer members, which are Morocco/ La Marocaine des Jeux et des Sports, Morocco/ Loterie nationale and Ghana/National Lottery Authority. It also does not include Albania/ Lotaria Kombëtare, Azerbaijan/ Caspian Tech CJSC, Belarus/ CJSC Sport-Pari, Bulgaria/ Eurofootball, Bulgaria/ National Lottery, Denmark/ Danske Klasselotteri, 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 for 2022 are for the period between 05/07/2022 and 31/12/2022. United Kingdom/ Allwyn UK became the operator of the UK National Lottery on 1 February 2024; therefore, the figures submitted for 2024 cover the period between 01/02/2024 and 31/12/2024.

³ Kantar CZ, Strossmayerovo nám. 1477/6, 17000 Praha, Czech Republic.

⁴ 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.

⁵ This report includes historical data reported by current EL Members in spring 2025 (figures for 2020, 2021, 2022 and 2023).

⁶ 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.

⁷ All comparisons in this report, as well as all recalculations of historical monetary figures using the average exchange rates for 2024, have been calculated by Kantar CZ.

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.⁸ 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.⁹ 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.¹⁰ 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.^{11,12} 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).

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.^{13,14} All percentage changes between years have been calculated based on the figures in the national currency converted to their Euro value.

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.

⁹ The supporting tables and figures were provided by an independent party, Kantar CZ, that independently collected the primary data for the years 2020–2024 via an online questionnaire and analysed them.

¹⁰ All members of European Lotteries are further abbreviated as "EL Members" or "EL Members in total" or, where necessary due to 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.

¹¹ 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 to display a 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 2023 and 2024 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.

¹² 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 (2023 and 2024). Additionally, explanations for possibly unusual trends are available too.

¹³ 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 2024–2023 for EL Members in the EU27 and EL Members in total may be influenced by differences in the structure of reporting EL Members.

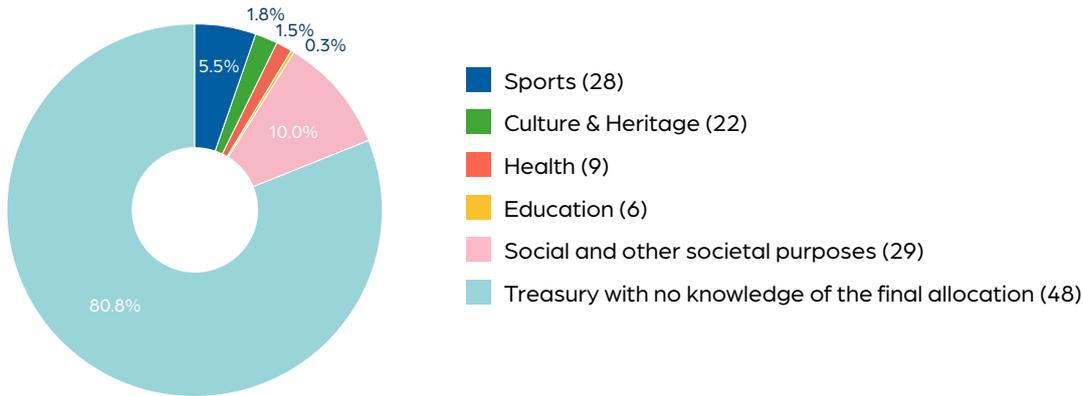
¹⁴ The results of comparisons are always written with one decimal unless the value is zero. If the result of the comparison is other than zero, the value is written with two decimals, and no decimals are shown if the resultant value is truly zero. Negative values are always highlighted in red, and in 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 – 2024 (€M) | 10 |
| Figure 2. | EL Members: Money for Society by Target – 2024 (€M) | 10 |
| Figure 3. | Contribution to Direct Employment – Development 2020–2024 | 11 |
| Figure 4. | Average percentage of women in company's employees – 2024 (%) | 11 |
| Figure 5. | Average percentage of members calculating greenhouse gas emissions – 2024 (%) | 12 |
| Figure 6a. | EL Members in the EU: Lottery Sales by Game Category – 2024 (€M) | 12 |
| Figure 6b. | EL Members in the EU: Lottery Sales by Game Category – 2024 (€M) | 13 |
| Figure 7a. | EL Members: Lottery Sales by Game Category – 2024 (€M) | 13 |
| Figure 7b. | EL Members: Lottery Sales by Game Category – 2024 (€M) | 13 |
| Figure 8a. | EL Members in the EU: Lottery Sales by Game Category – Development 2020–2024 (€M) | 14 |
| Figure 8b. | EL Members in the EU: Lottery Sales by Game Category – Development 2020–2024 (€M) | 14 |
| Figure 9a. | EL Members: Lottery Sales by Game Category – Development 2020–2024 (€M) | 15 |
| Figure 9b. | EL Members: Lottery Sales by Game Category – Development 2020–2024 (€M) | 15 |
| Figure 10a. | EL Members in the EU: GGR by Game Category – 2024 (€M) | 16 |
| Figure 10b. | EL Members in the EU: GGR by Game Category – 2024 (€M) | 16 |
| Figure 11a. | EL Members: GGR by Game Category – 2024 (€M) | 17 |
| Figure 11b. | EL Members: GGR by Game Category – 2024 (€M) | 17 |
| Figure 12a. | EL Members in the EU: GGR by Game Category – Development 2020–2024 (€M) | 18 |
| Figure 12b. | EL Members in the EU: GGR by Game Category – Development 2020–2024 (€M) | 18 |
| Figure 13a. | EL Members: GGR by Game Category – Development 2020–2024 (€M) | 19 |
| Figure 13b. | EL Members: GGR by Game Category – Development 2020–2024 (€M) | 19 |
| Figure 14. | Sales for Draw Based Games – Development 2020–2024 (€M) | 20 |
| Figure 15. | Sales for Instant Games – Development 2020–2024 (€M) | 20 |
| Figure 16. | Sales for Sports Games – Development 2020–2024 (€M) | 21 |
| Figure 17a. | EL Members in the EU: Online GGR by Game Category – Development 2020–2024 (€M) | 22 |
| Figure 17b. | EL Members in the EU: Online GGR by Game Category – Development 2020–2024 (€M) | 22 |
| Figure 18a. | EL Members: Online GGR by Game Category – Development 2020–2024 (€M) | 23 |
| Figure 18b. | EL Members: Online GGR by Game Category – Development 2020–2024 (€M) | 23 |
| Figure 19. | Overview of Reporting Activity of Members by Country – 2020–2024 | 23 |

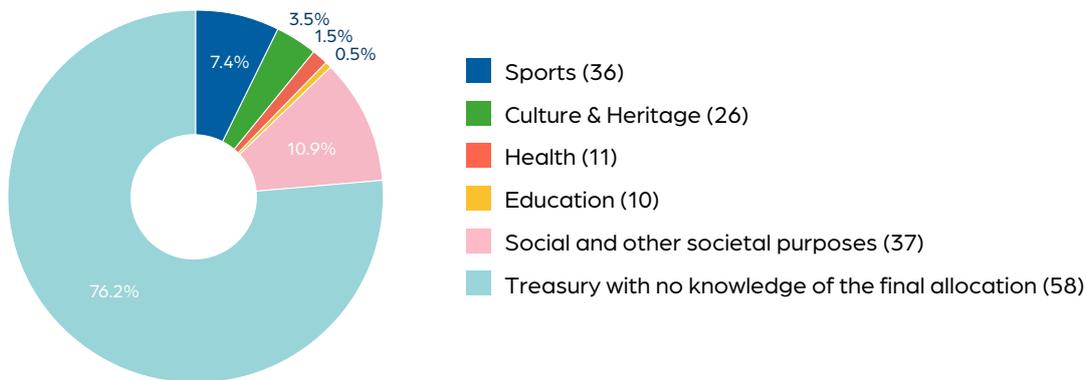
Figure 1. EL Members in the EU: Money for Society by Target – 2024 (€M)



Total 2024 = **€23 957M**

Sources: EL Members in the EU reporting figures for their Money for Society for 2024.
 49 reported (98% of 50 EL Members in the EU, i.e. all except for Czech Republic/Loterie Maxa s.r.o.).
 "Target category" ("Number of reporting EL Members in the EU").

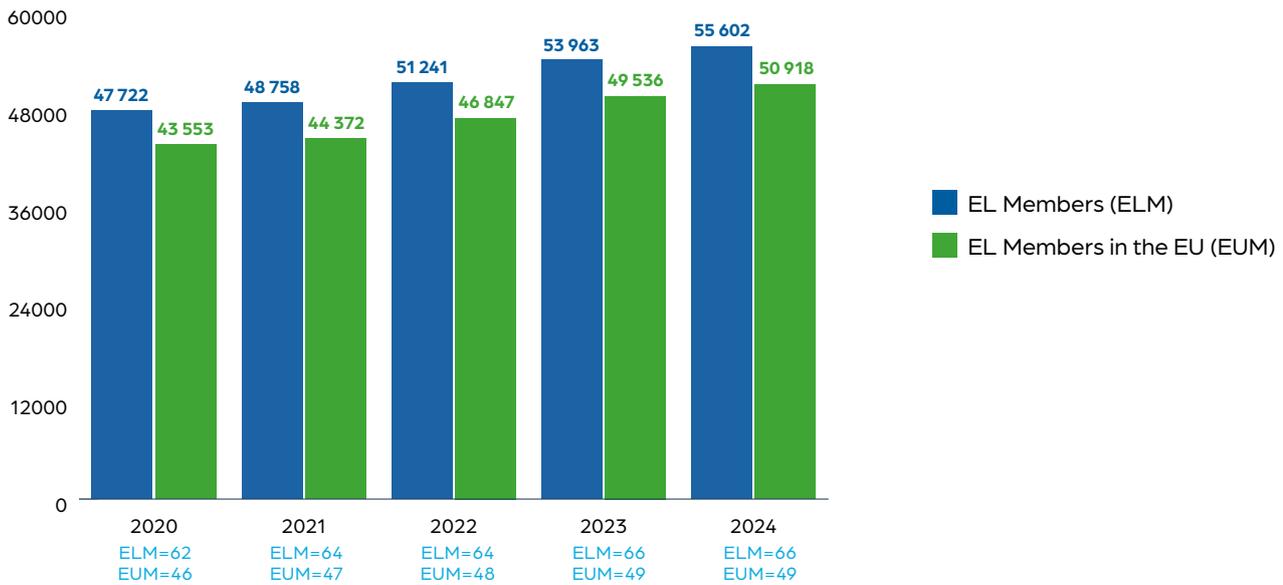
Figure 2. EL Members: Money for Society by Target – 2024 (€M)



Total 2024 = **€29 389M**

Sources: EL Members reporting figures for their Money for Society for 2024.
 65 reported (97% of 67 EL Members, i.e. all except for Czech Republic/ Loterie Maxa s.r.o., Ukraine/MSL).
 "Target category" ("Number of reporting EL Members").

Figure 3. Contribution to Direct Employment – Development 2020–2024



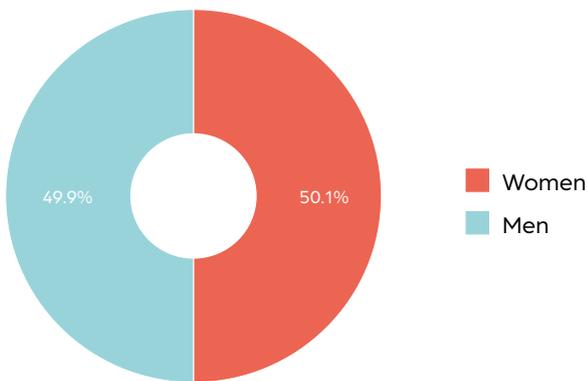
Sources: EL Members reporting the category for 2024

For 2024: 66 reported (99% of 67 EL Members, i.e. all except for Italy/ Brightstar Lottery SpA).

For 2023: 66 reported (99% of 67 EL Members, i.e. all except for Italy/ Brightstar Lottery SpA.)

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

Figure 4. Average percentage of women in company's employees – 2024 (%)

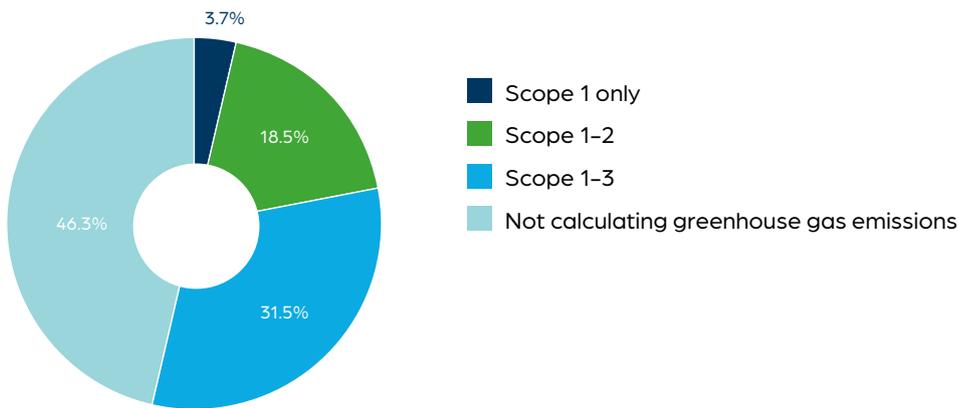


Sources: EL Members reporting percentage of women for 2024

55 reported (82% of 67 EL Members, i.e. all except for Bosnia and Herzegovina/ Lutrija Bosne i Hercegovine, Germany/ LOTTO Hessen GmbH, Germany/ Lotto Rheinland-Pfalz GmbH, Germany/ Sächsische Lotto-GmbH, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Westdeutsche Lotterie GmbH & Co. OHG, Italy/ Brightstar Lottery SpA, Italy/ Sisal SpA, Republic of North Macedonia/ National Lottery, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft, United Kingdom/ Allwyn UK).

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

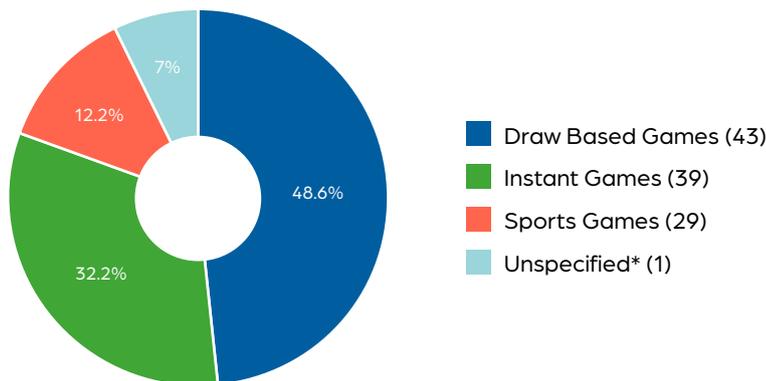
Figure 5. Average percentage of members calculating greenhouse gas emissions – 2024 (%)



Sources: EL Members reporting whether they calculate greenhouse gas emissions for 2024

54 reported (81% of 67 EL Members, i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Bosnia and Herzegovina/ Lutrija Bosne i Hercegovine, Republic of North Macedonia/ National Lottery, Germany/ GKL Gemeinsame Klassenlotterie der Länder, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ LOTTO Hessen GmbH, Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Westdeutsche Lotterie GmbH & Co. OHG, Germany/ Lotto Rheinland-Pfalz GmbH, Germany/ Sächsische Lotto-GmbH, Italy/ Sisal Italia SpA, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft, United Kingdom/ Allwyn UK).

Figure 6a. EL Members in the EU: Lottery Sales by Game Category – 2024 (€M)



Total 2024 = €93 769M

Sources: EL Members in the EU reporting their Lottery Sales for 2024

44 reported (88% of 50 EL Members in the EU, i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Sweden/ AB Svenska Spel).

* Netherlands/ Nederlandse Loterij provided only the overall figure for Lottery Sales without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.

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

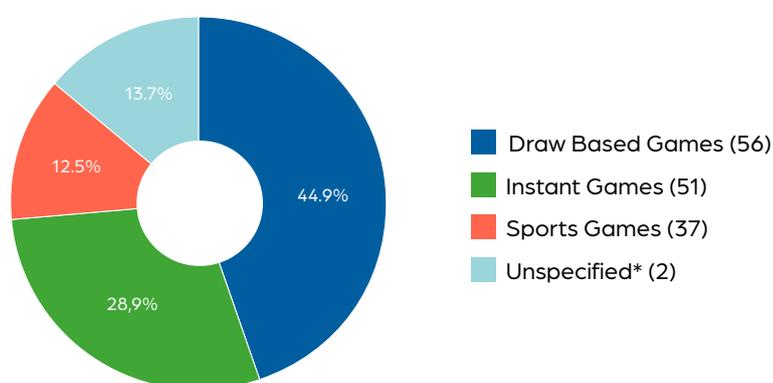
Figure 6b. EL Members in the EU: Lottery Sales by Game Category – 2024 (€M)

| Game Category | Number of EUM report Lottery Sales for 2024 | EUM Lottery Sales for 2024 (€M) | Share out of total |
|------------------|---|---------------------------------|--------------------|
| Draw Based Games | 43 | 45 544 | 48.6% |
| Instant Games | 39 | 30 214 | 32.2% |
| Sports Games | 29 | 11 404 | 12.2% |
| Unspecified* | 1 | 6 607 | 7.0% |
| Total | 44 | 93 769 | 100% |

Sources: EL Members in the EU reporting their Lottery Sales for 2024, see the comment above for information on those EL Members who participated in this data collection but did not report.

* See the comment above for information on the reported "Unspecified" category.

Figure 7a. EL Members: Lottery Sales by Game Category – 2024 (€M)



Total 2024 = €109 902M

Sources: EL Members reporting their Lottery Sales for 2024

60 reported (90% of 67 EL Members, i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft).

* Netherlands/ Nederlandse Loterij, United Kingdom/ Allwyn UK provided only the overall figure for Lottery Sales without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.

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

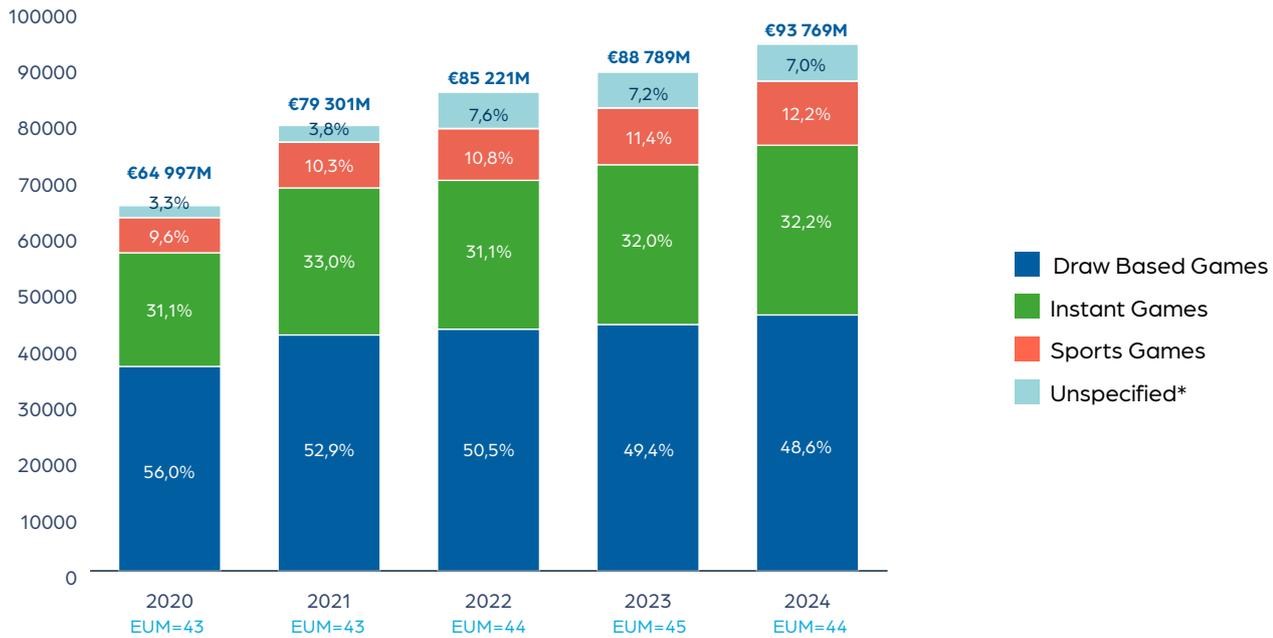
Figure 7b. EL Members: Lottery Sales by Game Category – 2024 (€M)

| Game Category | Number of ELM report Lottery Sales for 2024 | ELM Lottery Sales for 2024 (€M) | Share out of total |
|------------------|---|---------------------------------|--------------------|
| Draw Based Games | 56 | 49 327 | 44.9% |
| Instant Games | 51 | 31 811 | 28.9% |
| Sports Games | 37 | 13 721 | 12.5% |
| Unspecified* | 2 | 15 043 | 13.7% |
| Total | 60 | 109 902 | 100% |

Sources: EL Members reporting their Lottery Sales for 2024, see the comment above for information on those EL Members who participated in this data collection but did not report.

* See the comment above for information on the reported "Unspecified" category.

Figure 8a. EL Members in the EU: Lottery Sales by Game Category – Development 2020–2024 (€M)



Sources: EL Members in the EU reporting their Lottery Sales for 2024

For 2024: 44 reported (88% of 50 EL Members in the EU, i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Sweden/ AB Svenska Spel).

For 2023: 44 reported (88% of 50 EL Members in the EU, i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Sweden/ AB Svenska Spel).

* Netherlands/ Nederlandse Loterij provided only the overall figure for Lottery Sales without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.

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

Figure 8b. EL Members in the EU: Lottery Sales by Game Category – Development 2020–2024 (€M)

| Game category | EUM rep. Lottery Sales | EUM: Lottery Sales for the respective year in €M | | | | | Evolution 2024–2023 | CAGR 2024–2020 |
|---|------------------------|--|-----------|-----------|-----------|-----------|---------------------|----------------|
| | | for 2024 | 2020 (43) | 2021 (43) | 2022 (43) | 2023 (43) | | |
| Draw Based Games | 42 | 36 390 | 41 982 | 42 978 | 43 752 | 45 451 | 3.9% | 5.7% |
| Instant Games | 38 | 20 222 | 26 181 | 26 491 | 28 438 | 30 209 | 6.2% | 10.6% |
| Sports Games | 28 | 6 260 | 8 144 | 9 178 | 10 024 | 11 328 | 13.0% | 16.0% |
| Unspecified * | 1 | 2 125 | 2 994 | 6 504 | 6 404 | 6 607 | 3.2% | 32.8% |
| Sub-total | 43 | 64 997 | 79 301 | 85 152 | 88 618 | 93 594 | 5.6% | 9.5% |
| EU Members who did not report for all five-years** | 1 | 0 (0) | 0 (0) | 69 (1) | 171 (1) | 174 (1) | | |
| Total | 44 | 64 997 | 79 301 | 85 221 | 88 789 | 93 769 | | |

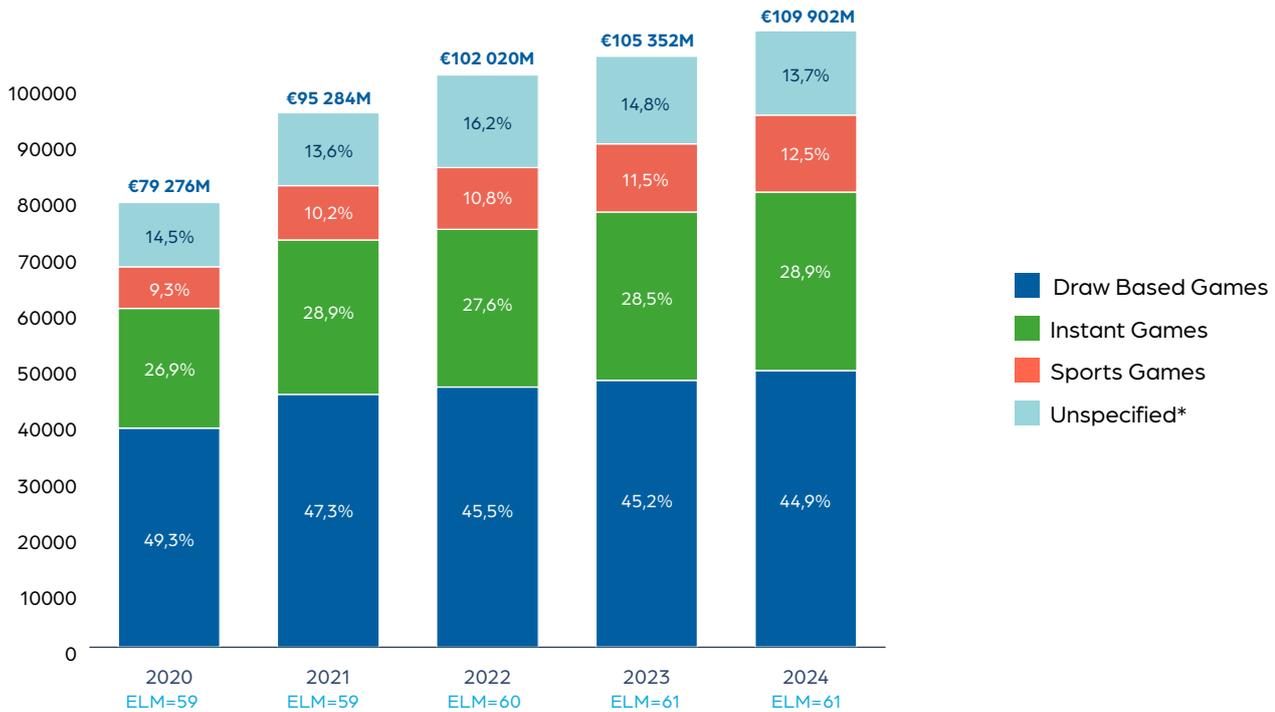
Sources: EL Members in the EU reporting their Lottery Sales for 2024, see the comment above for information on those EL Members in the EU who participated in this data collection but did not report the category for the individual years of 2023 and 2024.

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

* See the comment above for information on the reported "Unspecified" category.

** For the sake of correct calculation of the evolution trends (YoY, CAGR), the EL Members who did not report for all of the five-year reporting period are reported separately.

Figure 9a. EL Members: Lottery Sales by Game Category – Development 2020–2024 (€M)



Sources: EL Members reporting their Lottery Sales for 2024

For 2024: 60 reported (90% of 67 EL Members, i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft).

For 2023: 60 reported (90% of 67 EL Members, i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft).

* Netherlands/ Nederlandse Loterij, United Kingdom/ Allwyn UK provided only the overall figure for Lottery Sales without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.

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

Figure 9b. EL Members: Lottery Sales by Game Category – Development 2020–2024 (€M)

| Game category | ELM rep. Lottery Sales for 2024 | ELM: Lottery Sales for the respective year in €M | | | | | Evolution 2024–2023 | CAGR 2024–2020 |
|---|---------------------------------|--|-----------|-----------|-----------|-----------|---------------------|----------------|
| | | 2020 (58) | 2021 (58) | 2022 (58) | 2023 (58) | 2024 (58) | | |
| Draw Based Games | 55 | 39 062 | 45 064 | 46 302 | 47 461 | 49 200 | 3.7% | 5.9% |
| Instant Games | 50 | 21 316 | 27 465 | 27 829 | 29 795 | 31 599 | 6.1% | 10.3% |
| Sports Games | 35 | 7 409 | 9 680 | 10 818 | 11 739 | 13 251 | 12.9% | 15.6% |
| Unspecified* | 2 | 11 463 | 12 998 | 16 508 | 15 616 | 15 043 | -3.7% | 7.0% |
| Sub-total | 58 | 79 249 | 95 207 | 101 458 | 104 611 | 109 093 | 4.3% | 8.3% |
| EL Members who did not report for all five years** | 2 | 27 (1) | 76 (1) | 562 (2) | 741 (2) | 809 (2) | | |
| Total | 60 | 79 276 | 95 284 | 102 020 | 105 352 | 109 902 | | |

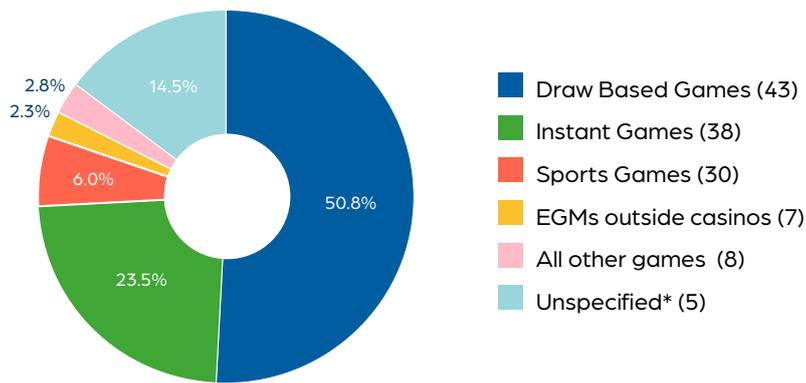
Sources: EL Members reporting their Lottery Sales for 2024, see the comment above for information on those EL Members who participated in this data collection but did not report the category for the individual years of 2023 and 2024.

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

* See the comment above for information on the reported "Unspecified" category.

** For the sake of correct calculation of the evolution trends (YoY, CAGR), the EL Members who did not report for all of the five-year reporting period are reported separately.

Figure 10a. EL Members in the EU: GGR by Game Category – 2024 (€M)



Total 2024 = €38 277M

Sources: EL Members in the EU reporting their GGR for 2024

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

* Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ Sazka, Finland/ Veikkaus Oy, Greece/ OPAP S.A., Netherlands/ Nederlandse Loterij provided only the overall figure for GGR without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.

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

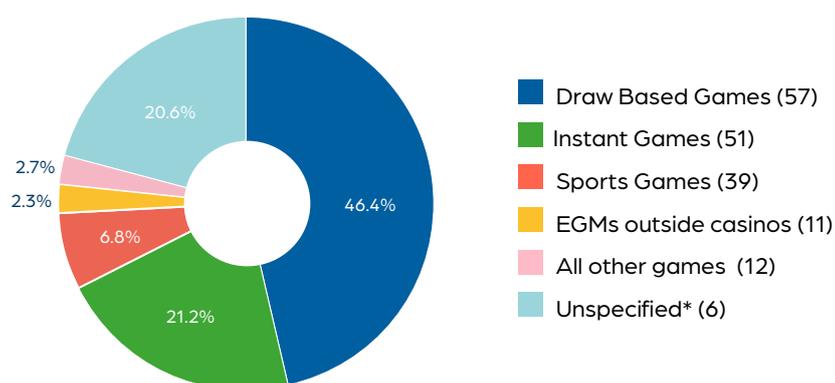
Figure 10b. EL Members in the EU: GGR by Game Category – 2024 (€M)

| Game category | Number of EUM reporting GGR for 2024 | EUM: GGR for 2024 (€M) | Share out of total |
|----------------------|--------------------------------------|------------------------|--------------------|
| Draw Based Games | 43 | 19 452 | 50.8% |
| Instant Games | 38 | 8 994 | 23.5% |
| Sports Games | 30 | 2 310 | 6.0% |
| EGMs outside casinos | 7 | 888 | 2.3% |
| All other games | 8 | 1 090 | 2.8% |
| Unspecified* | 5 | 5 544 | 14.5% |
| Total | 49 | 38 277 | 100% |

Sources: EL Members in the EU reporting their GGR for 2024, see the comment above for information on those EL Members who participated in this data collection but did not report.

* See comment above for information on the reported "Unspecified" category.

Figure 11a. EL Members: GGR by Game Category – 2024 (€M)



Total 2024 = **€46 051M**

Sources: EL Members reporting their GGR for 2024

66 reported (99% of 67 EL Members, i.e. all except for Czech Republic/ Loterie Maxa s.r.o.).

* Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ Sazka, Finland/ Veikkaus Oy, Greece/ OPAP S.A., Netherlands/ Nederlandse Loterij, United Kingdom/ Allwyn UK provided only the overall figure for GGR without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.

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

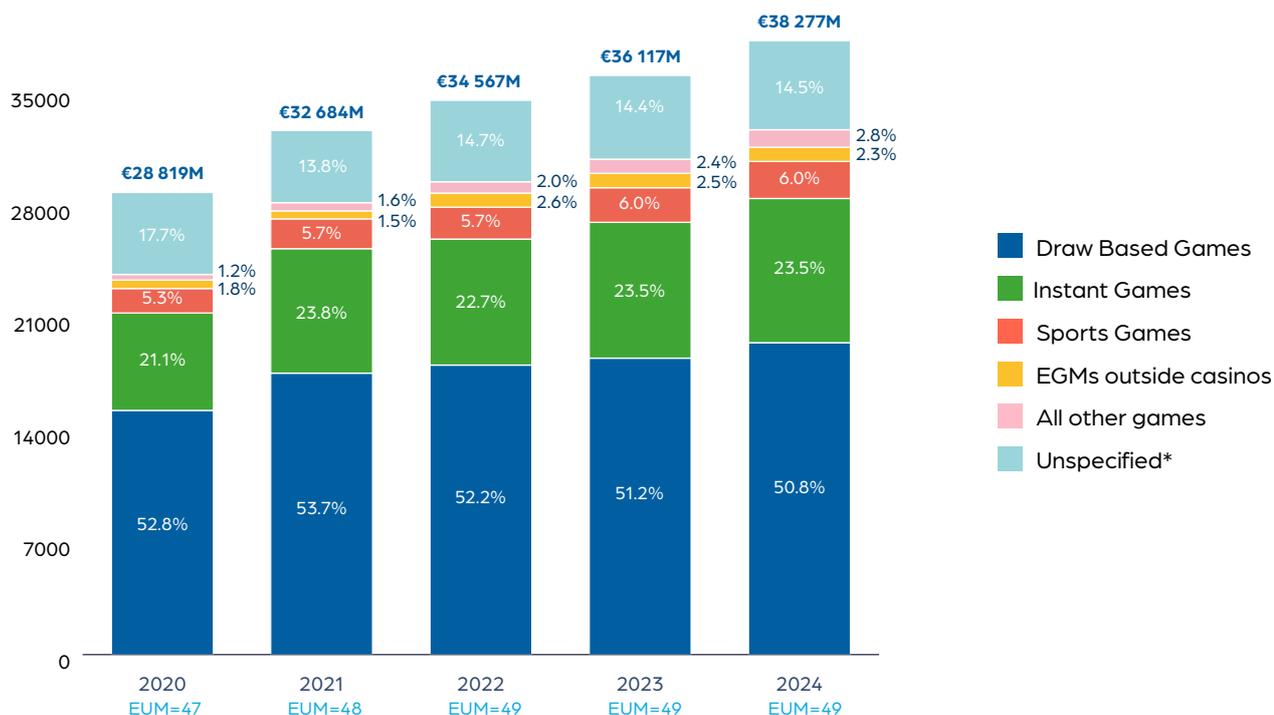
Figure 11b. EL Members: GGR by Game Category – 2024 (€M)

| Game category | Number of ELM reporting GGR for 2024 | ELM: GGR for 2024 (€M) | Share out of total |
|-----------------------------|--------------------------------------|------------------------|--------------------|
| Draw Based Games | 57 | 21 370 | 46.4% |
| Instant Games | 51 | 9 770 | 21.2% |
| Sports Games | 39 | 3 130 | 6.8% |
| EGMs outside casinos | 11 | 1 063 | 2.3% |
| All other games | 12 | 1 226 | 2.7% |
| Unspecified* | 6 | 9 493 | 20.6% |
| Total | 66 | 46 051 | 100% |

Sources: EL Members reporting their GGR for 2024, see the comment above for information on those EL Members who participated in this data collection but did not report.

* See comment above for information on the reported "Unspecified" category.

Figure 12a. EL Members in the EU: GGR by Game Category – Development 2020–2024 (€M)



Sources: EL Members in the EU reporting their GGR for 2024

For 2024: 49 reported (98% of 50 EL Members in the EU, i.e. all except for Czech Republic/ Loterie Maxa s.r.o.).

For 2023: 49 reported (98% of 50 EL Members in the EU, i.e. all except for Czech Republic/ Loterie Maxa s.r.o.).

* Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ Sazka, Finland/ Veikkaus Oy, Greece/ OPAP S.A., Netherlands/ Nederlandse Loterij provided only the overall figure for GGR without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.

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

Figure 12b. EL Members in the EU: GGR by Game Category – Development 2020–2024 (€M)

| Game category | EUM rep. GGR | EUM: GGR for the respective year in €M | | | | | Evolution 2024–2023 | CAGR 2024–2020 |
|---|--------------|--|----------------|----------------|----------------|----------------|---------------------|----------------|
| | | for 2024 | 2020 (47) | 2021 (47) | 2022 (47) | 2023 (47) | | |
| Draw Based Games | 41 | 15 230 | 17 457 | 17 942 | 18 352 | 19 314 | 5.2% | 6.1% |
| Instant Games | 36 | 6 074 | 7 755 | 7 852 | 8 461 | 8 983 | 6.2% | 10.3% |
| Sports Games | 28 | 1 526 | 1 858 | 1 979 | 2 146 | 2 296 | 7.0% | 10.7% |
| EGMs outside casinos | 6 | 533 | 500 | 883 | 891 | 880 | -1.2% | 13.4% |
| All other games | 8 | 347 | 512 | 706 | 885 | 1 090 | 23.2% | 33.1% |
| Unspecified* | 5 | 5 109 | 4 499 | 5 077 | 5 217 | 5 544 | 6.3% | 2.1% |
| Sub-total | 47 | 28 819 | 32 580 | 34 439 | 35 952 | 38 106 | 6.0% | 7.2% |
| EU Members who did not report for all five years** | 2 | 0 (0) | 104 (1) | 128 (2) | 164 (2) | 171 (2) | | |
| Total | 49 | 28 819 | 32 684 | 34 567 | 36 117 | 38 277 | | |

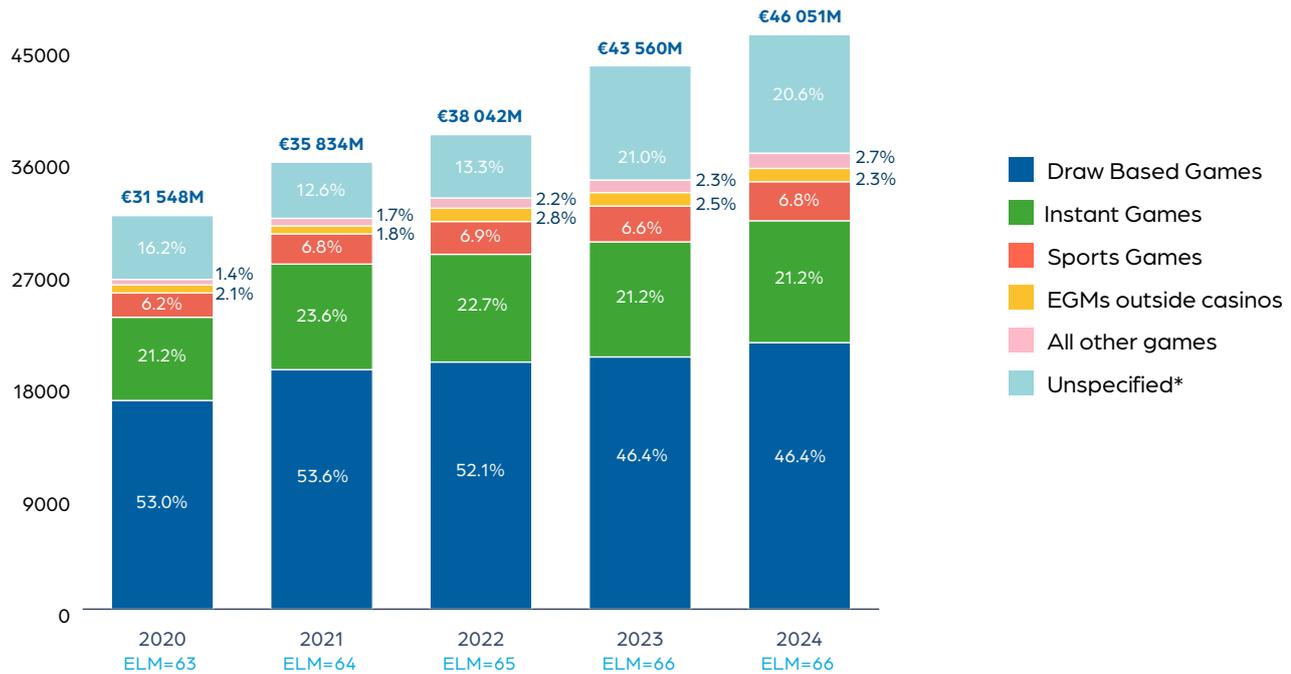
Sources: EL Members in the EU reporting their GGR for 2024, see the comment above for information on those EL Members who participated in this data collection but did not report the category for the individual years of 2023 and 2024.

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

* See the comment above for information on the reported "Unspecified" category.

** For the sake of correct calculation of the evolution trends (YoY, CAGR), the EL Members who did not report for all of the five-year reporting period are reported separately.

Figure 13a. EL Members: GGR by Game Category – Development 2020–2024 (€M)



Sources: EL Members reporting their GGR for 2024

For 2024: 66 reported (99% of 67 EL Members, i.e. all except for Czech Republic/ Loterie Maxa s.r.o.)

For 2023: 66 reported (99% of 67 EL Members, i.e. all except for Czech Republic/ Loterie Maxa s.r.o.)

* Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ Sazka, Finland/ Veikkaus Oy, Greece/ OPAP S.A., Netherlands/ Nederlandse Loterij, United Kingdom/ Allwyn UK provided only the overall figure for GGR without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.

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

Figure 13b. EL Members: GGR by Game Category – Development 2020–2024 (€M)

| Game category | ELM rep GGR | ELM: GGR for the respective year in €M | | | | | Evolution 2024–2023 | CAGR 2024–2020 |
|---|-------------|--|----------------|----------------|------------------|------------------|---------------------|----------------|
| | | for 2024 | 2020 (62) | 2021 (62) | 2022 (62) | 2023 (62) | | |
| Draw Based Games | 55 | 16 724 | 19 100 | 19 687 | 20 069 | 21 223 | 5.8% | 6.1% |
| Instant Games | 49 | 6 667 | 8 428 | 8 531 | 9 156 | 9 690 | 5.8% | 9.8% |
| Sports Games | 36 | 1 947 | 2 423 | 2 595 | 2 790 | 3 015 | 8.1% | 11.6% |
| EGMs outside casinos | 10 | 650 | 637 | 1 065 | 1 075 | 1 055 | -1.9% | 12.9% |
| All other games | 12 | 440 | 609 | 819 | 1 009 | 1 226 | 21.5% | 29.2% |
| Unspecified* | 6 | 5 109 | 4 499 | 5 077 | 5 217 | 5 544 | 6.3% | 1.8% |
| Sub-total | 62 | 31 536 | 35 697 | 37 774 | 39 316 | 41 753 | 6.2% | 7.3% |
| EL Members who did not report for all five years** | 4 | 12 (1) | 136 (2) | 268 (3) | 4 243 (4) | 4 299 (4) | | |
| Total | 66 | 31 548 | 35 834 | 38 042 | 43 560 | 46 051 | | |

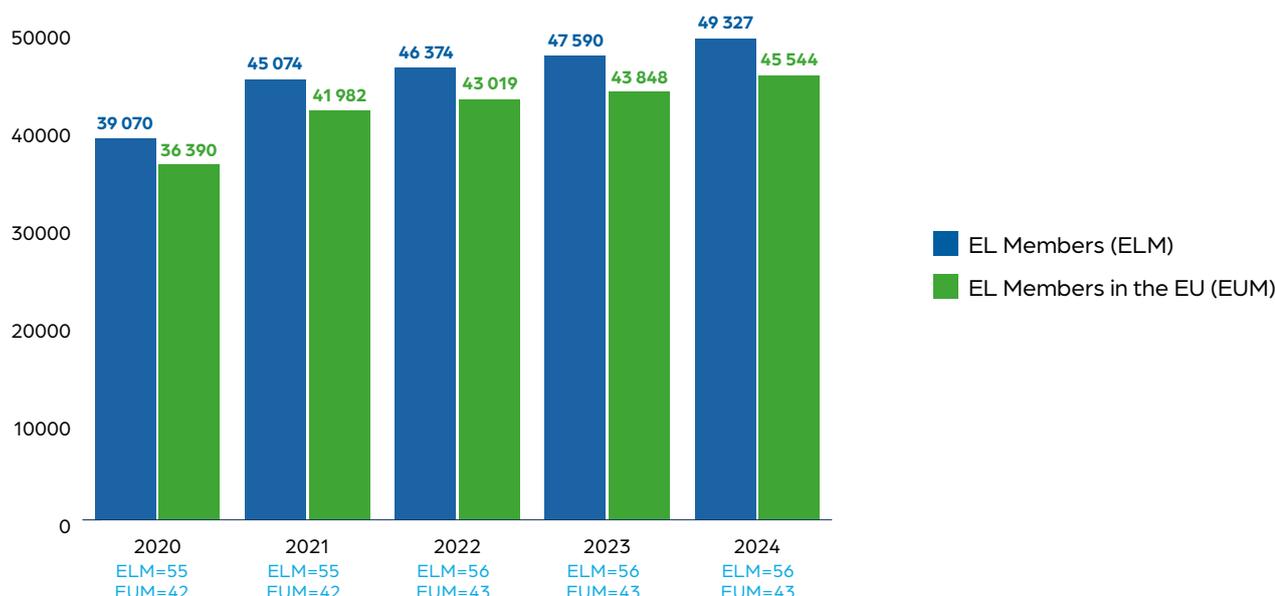
Sources: EL Members reporting their GGR for 2024, see the comment above for information on those EL Members who participated in this data collection but did not report the category for the individual years of 2023 and 2024.

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

* See the comment above for information on the reported "Unspecified" category.

** For the sake of correct calculation of the evolution trends (YoY, CAGR), the EL Members who did not report for all of the five-year reporting period are reported separately.

Figure 14. Sales for Draw Based Games – Development 2020–2024 (€M)



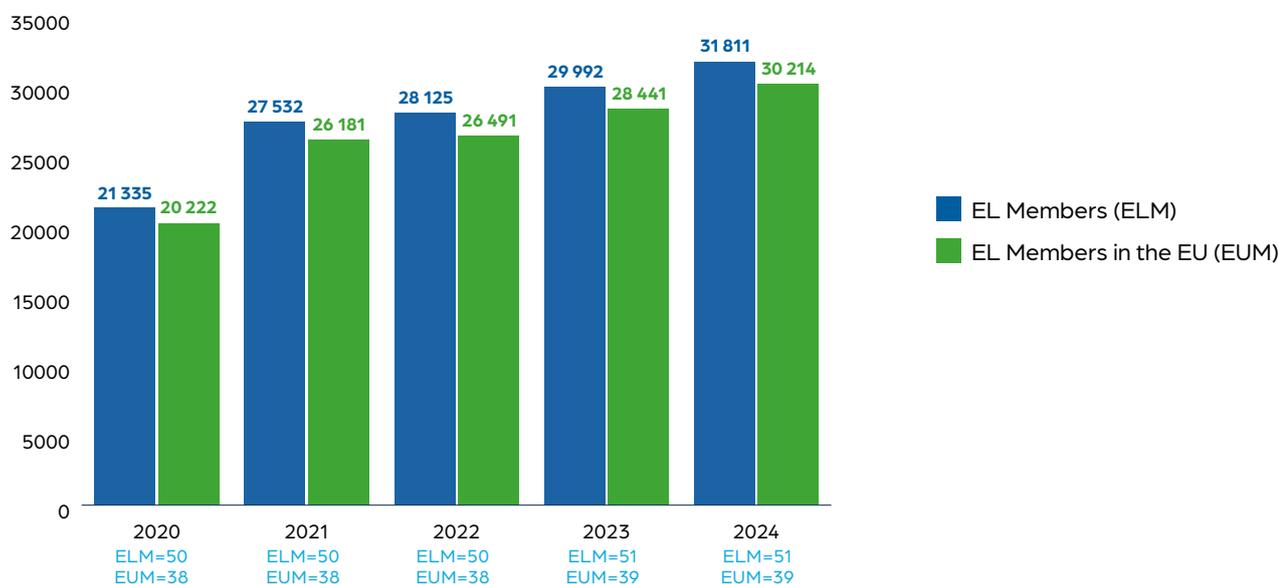
Sources: EL Members reporting the category for 2024

For 2024: 65 EL Members (97% of 67 EL Members) offer this game category and 56 (86% of 65) provided the figures (i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Netherlands/ Nederlandse Loterij, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft, United Kingdom/ Allwyn UK).

For 2023: 65 EL Members (97% of 67 EL Members) offer this game category and 56 (86% of 65) provided the figures (i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Netherlands/ Nederlandse Loterij, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft, United Kingdom/ Allwyn UK).

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

Figure 15. Sales for Instant Games – Development 2020–2024 (€M)



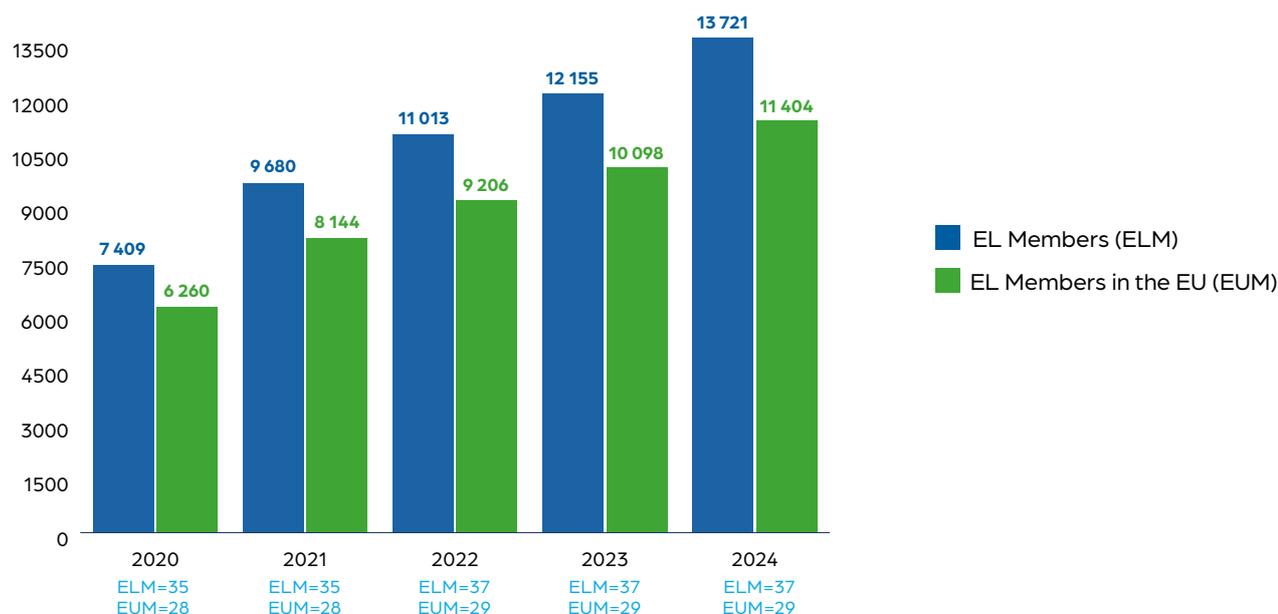
Sources: EL Members reporting the category for 2024

For 2024: 60 EL Members (90% of 67 EL Members) offer this game category and 51 (85% of 60) provided the figures (i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Netherlands/ Nederlandse Loterij, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft, United Kingdom/ Allwyn UK).

For 2023: 61 EL Members (91% of 67 EL Members) offer this game category and 51 (84% of 61) provided the figures (i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Netherlands/ Nederlandse Loterij, Slovenia/ Športna Loterija d.d., Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft, United Kingdom/ Allwyn UK).

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

Figure 16. Sales for Sports Games – Development 2020–2024 (€M)



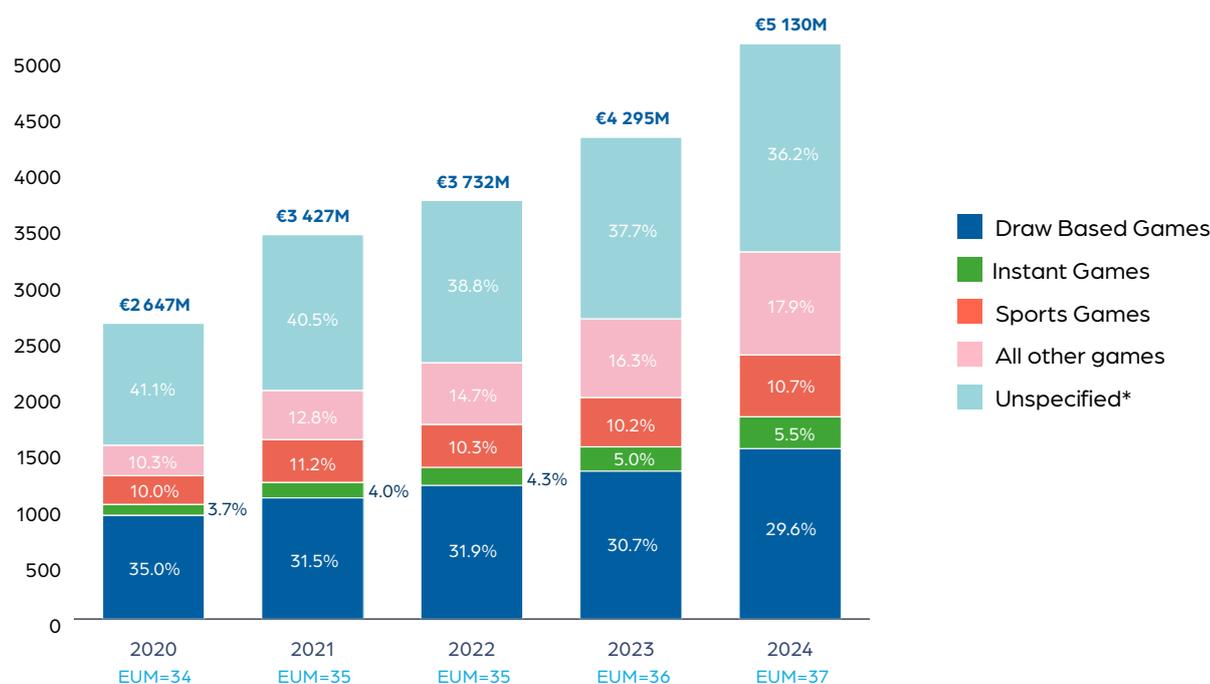
Sources: EL Members reporting the category for 2024

For 2024: 46 EL Members (69% of 67 EL Members) offer this game category and 37 (80% of 46) provided the figures (i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Netherlands/ Nederlandse Loterij, Republic of North Macedonia/ National Lottery, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft).

For 2023: 46 EL Members (69% of 67 EL Members) offer this game category and 37 (80% of 46) provided the figures (i.e. all except for Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ SAZKA a.s., Finland/ Veikkaus Oy, Greece/ OPAP S.A., Luxembourg/ Loterie Nationale, Netherlands/ Nederlandse Loterij, Republic of North Macedonia/ National Lottery, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft).

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

Figure 17a. EL Members in the EU: Online GGR by Game Category – Development 2020–2024 (€M)



Sources: EL Members in the EU reporting their Online GGR for 2024

For 2024: 46 EL Members in the EU (92% of 50) offer online games and 37 (88% of 46) provided the figures (i.e. all except for Czech Republic/ Loterie Maxa s.r.o., France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Sächsische Lotto-GmbH, Ireland/ Premier Lotteries Ireland, Netherlands/ Nederlandse Loterij, Romania/ C.N. Loteria Romana SA, Spain/ ONCE).

For 2023: 46 EL Members in the EU (92% of 50) offer online games and 36 (78% of 46) provided the figures (i.e. all except for Czech Republic/ Loterie Maxa s.r.o., France/ La Française des Jeux, Germany/ Sächsische Lotto-GmbH, Germany/ Staatliche Lotterie- und Spielbankverwaltung (LOTTO Bayern), Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Toto-Lotto Niedersachsen GmbH, Ireland/ Premier Lotteries Ireland, Netherlands/ Nederlandse Loterij, Romania/ C.N. Loteria Romana SA, Spain/ ONCE).

* Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ Sazka, Finland/ Veikkaus Oy and Greece/ OPAP S.A. provided the overall figure for Online GGR without a split by game category. For the purpose of this table, the whole amount is assigned to Online GGR: Unspecified.

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

Figure 17b. EL Members in the EU: Online GGR by Game Category – Development 2020–2024 (€M)

| Game category | EUM rep. online GGR | EUM: Online GGR for the respective year in €M | | | | | Evolution 2024–2023 | CAGR 2024–2020 |
|---|---------------------|---|--------------|--------------|--------------|--------------|---------------------|----------------|
| | | for 2023 | 2019 (35) | 2020 (35) | 2021 (35) | 2022 (35) | | |
| Draw Based Games | 31 | 925 | 1,074 | 1,185 | 1,311 | 1,510 | 15.2% | 13.0% |
| Instant Games | 23 | 97 | 137 | 160 | 215 | 281 | 30.7% | 30.5% |
| Sports Games | 16 | 265 | 382 | 383 | 440 | 551 | 25.4% | 20.0% |
| All other games | 7 | 272 | 438 | 550 | 701 | 919 | 31.1% | 35.5% |
| Unspecified* | 4 | 1,087 | 1,389 | 1,447 | 1,619 | 1,856 | 14.6% | 14.3% |
| Sub-total | 34 | 2,647 | 3,421 | 3,725 | 4,286 | 5,118 | 19.4% | 17.9% |
| EU Members who did not report for all five years** | 3 | 0 (0) | 7 (1) | 7 (1) | 9 (2) | 12 (3) | | |
| Total | 37 | 2,647 | 3,427 | 3,732 | 4,295 | 5,130 | | |

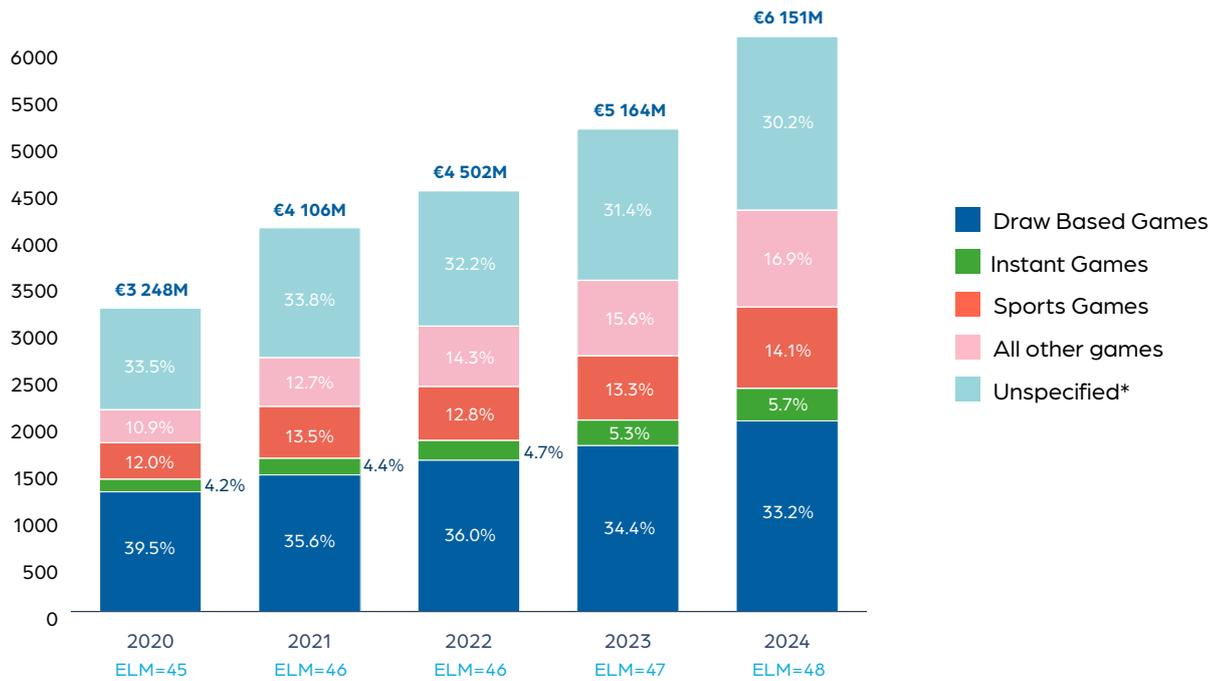
Sources: EL Members in the EU reporting their Online GGR for 2024, see the comment above for information on those who participated in this data collection but did not report the category for the individual years of 2023 and 2024 and on those who provided only the overall figure without a split by game category (being assigned to Unspecified).

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

* See comment above for information on the reported "Unspecified"

** For the sake of correct calculation of the evolution trends (YoY, CAGR), the EL Members who did not report for all of the five-year reporting period are reported separately.

Figure 18a. EL Members: Online GGR by Game Category – Development 2020–2024 (€M)



Sources: EL Members reporting their Online GGR for 2024

For 2024: 60 EL Members (90% of 67) offer online games and 48 (80% of 60) provided the figures (i.e. all except for Czech Republic/ Loterie Maxa s.r.o., France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Sächsische Lotto-GmbH, Ireland/ Premier Lotteries Ireland, Netherlands/ Nederlandse Loterij, Republic of North Macedonia/ National Lottery, Romania/ C.N. Loteria Romana SA, Spain/ ONCE, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft, United Kingdom/ Allwyn UK).

For 2023: 60 EL Members (90% of 67) offer online games and 47 (78% of 60) provided the figures (i.e. all except for Czech Republic/ Loterie Maxa s.r.o., France/ La Française des Jeux, Germany/ Sächsische Lotto-GmbH, Germany/ Staatliche Lotterie- und Spielbankverwaltung (LOTTO Bayern), Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Toto-Lotto Niedersachsen GmbH, Ireland/ Premier Lotteries Ireland, Netherlands/ Nederlandse Loterij, Republic of North Macedonia/ National Lottery, Romania/ C.N. Loteria Romana SA, Spain/ ONCE, Switzerland/ Swisslos Interkantonale Landeslotterie Genossenschaft, United Kingdom/ Allwyn UK).

* Austria/ Österreichische Lotterien GmbH (Austrian Lotteries), Czech Republic/ Sazka, Finland/ Veikkaus Oy and Greece/ OPAP S.A. provided the overall figure for Online GGR without a split by game category. For the purpose of this table, the whole amount is assigned to Online GGR: Unspecified.

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

Figure 18b. EL Members: Online GGR by Game Category – Development 2020–2024 (€M)

| Game category | ELM rep. online GGR for 2024 | ELM: Online GGR for the respective year in €M | | | | | Evolution 2024–2023 | CAGR 2024–2020 |
|---|------------------------------|---|--------------|--------------|--------------|--------------|---------------------|----------------|
| | | for 2023 | 2019 (46) | 2020 (46) | 2021 (46) | 2022 (46) | | |
| Draw Based Games | 40 | 1,282 | 1,456 | 1,611 | 1,764 | 2,023 | 14.7% | 12.1% |
| Instant Games | 29 | 135 | 178 | 211 | 269 | 344 | 27.8% | 26.2% |
| Sports Games | 23 | 389 | 555 | 553 | 630 | 777 | 23.3% | 18.9% |
| All other games | 9 | 354 | 522 | 645 | 807 | 1,037 | 28.4% | 30.8% |
| Unspecified* | 4 | 1,089 | 1,388 | 1,447 | 1,619 | 1,856 | 14.6% | 14.3% |
| Sub-total | 44 | 3,248 | 4,099 | 4,468 | 5,090 | 6,037 | 18.6% | 16.8% |
| EL Members who did not report for all five years** | 4 | 0 (1) | 7 (2) | 34 (2) | 74 (3) | 114 (4) | | |
| Total | 48 | 3,248 | 4,106 | 4,502 | 5,164 | 6,151 | | |

Sources: EL Members reporting their Online GGR for 2024, see the comment above for information on those who participated in this data collection but did not report the category for the individual years of 2023 and 2024 and on those who provided only the overall figure without a split by game category (being assigned to Unspecified).

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

* See comment above for information on the reported "Unspecified" category.

** For the sake of correct calculation of the evolution trends (YoY, CAGR), the EL Members who did not report for all of the five-year reporting period are reported separately.

Member Activities Data

Figure 19. Overview of Reporting Activity of Members by Country – 2020–2024 23

| Country | Number of Currently Reporting ELM who provided data for individual years | | | | |
|-------------------------------|--|-----------|-----------|-----------|-----------|
| | 2020 | 2021 | 2022 | 2023 | 2024 |
| 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 | 2 | 2 | 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 | 1 | 1 | 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 | 50 | 50 | 50 | 50 | 50 |
| Albania | 1 | 1 | 0 | 0 | 0 |
| Azerbaijan | 2 | 2 | 2 | 2 | 1 |
| 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 | 2 | 2 | 2 | 2 | 2 |
| Serbia | 1 | 1 | 1 | 1 | 1 |
| Switzerland | 2 | 2 | 2 | 2 | 2 |
| Turkey | 1 | 1 | 0 | 0 | 0 |
| Ukraine | 2 | 2 | 2 | 2 | 2 |
| United Kingdom | 1 | 1 | 1 | 1 | 1 |
| EL Members in total | 70 | 70 | 68 | 68 | 67 |

Sources: EL Members who took part in the 2025 survey collecting data for 2020–2024.

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 2023 provided by Eurostat. |
| 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 $50 \times (100\% - 58\%) = 21$. 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 the purpose of 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 organisation 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 | <ul style="list-style-type: none"> • 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/institutions. Do NOT include money you pay for sponsorships of sports. |
| of which goes to culture and heritage | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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. |
| of which goes to education | <ul style="list-style-type: none"> • 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. |
| of which goes to social and other societal purposes | <ul style="list-style-type: none"> • 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. |
| of which goes to the treasury (with no knowledge of the final allocation, i.e. taxes, duties) | <ul style="list-style-type: none"> • 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 | <p>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.</p> |
| Number of Points of Sale (POS) | <p>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.</p> <p>The following categories of POS are identified:</p> <p>I. Exclusive POS (Lottery/ Sports Betting/ EGM)</p> <ul style="list-style-type: none"> • 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). <p>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.</p> <ul style="list-style-type: none"> • 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 | <p>A loyalty programme 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.</p> |
| Base of online customers as of 31.12. of the respective year | <p>An active player is defined as one who has realised a bet during the past 12 months (i.e. during the respective calendar year).</p> |
| Number of members with non-gaming activities | <p>Non-gaming activities are services not directly related to gambling, like financial/ payment services, mobile phone recharging, sales of event tickets, etc.</p> |
| Number of members with advertising restrictions | <p>Advertising restrictions such as time or amount limits; bans on key words or the featuring of minors, etc.</p> |
| Number of members with responsible gaming restrictions | <p>Responsible gaming restrictions applied and the offering of self-set responsible gaming limits.</p> |

Source: EL, 2024

Annex D:

Other Data Sources

Eurostat (2024). Euro/ ECU exchange rates – annual data, from https://ec.europa.eu/eurostat/databrowser/view/ert_bil_eur_a__custom_11948747/default/table?lang=en

Eurostat (2024). Population on 1 January, from <https://ec.europa.eu/eurostat/databrowser/view/tps00001/default/table?lang=en>

International Monetary Fund (2024). Population of Bosnia and Herzegovina, Israel, Kazakhstan and United Kingdom in World Economic Outlook Database April 2024, from <https://www.imf.org/en/Publications/WEO/weo-database/2024/April>

United Nation Population Data Portal (2024). Population of Ukraine in World population dashboard, from <https://www.unfpa.org/data>

About The European Lotteries (EL)

The European Lotteries Association (EL) is the European umbrella organisation of entities operating national lotteries and other games of chance, including sports betting. The members of EL are operating their services for the public benefit.

EL is the largest and most representative lottery and gambling sector's organisation in Europe, present in 41 European countries with a total of 71 members, including all EU member states (50 members are in the EU and 21 non-EU member states). EL stands for the sound and sustainable activity model for the benefit of society, based on the values of forward-thinking, sustainability and integrity.

EL members only operate in those jurisdictions in which they are licensed by the state and where they comply with the legal requirements (e. g. anti-money laundering, responsible gaming policies, etc), and act as the most responsible operators in each jurisdiction.

Further questions? Feel free to contact us!

 www.european-lotteries.org

 info@european-lotteries.org

 [@EuropeLotteries](https://twitter.com/EuropeLotteries)

 [The European Lotteries](https://www.linkedin.com/company/the-european-lotteries)

The European Lotteries (EL)
Avenue de Nerviens 9-31
1040 Brussels, Belgium

Registration on EU Transparency Register: 97609783845-15



**THE EUROPEAN
LOTTERIES**

FOR THE BENEFIT OF SOCIETY