



**THE EUROPEAN  
LOTTERIES**

FOR THE BENEFIT OF SOCIETY

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**REPORT ON THE  
LOTTERY SECTOR  
IN EUROPE  
2021**

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# REPORT SUMMARY

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Dear reader,

This is already the sixteenth report on the European Lotteries sector with the objective of helping you understand how current Members of the European Lotteries Association (hereinafter the EL) worked and what their contributions to society were in 2021.

## 1. Introduction

This is the most detailed report regarding both EL Members operating in the European Union (EU 27) and EL Members all combined.<sup>1,2</sup> The report covers key descriptive statistics about current EL Members operating in Europe in 2021 and includes, where appropriate, comparative statistics for the years 2017 – 2021.

### **The EL Members share the following common characteristics as they:**

- 1) are **located in Europe**,
- 2) **hold state licenses** from the country in which they operate, or are directly controlled by the state,
- 3) **return a large part of their earnings** in the form of taxes or a different type of contribution to the state and/or **to good causes** in the area of sports, education and culture.
- 4) **provide lottery games in a responsible way** according to the requirements defined by the licensor and only within the area of their respective jurisdiction, and they provide complete coverage of the said area.

EL Members operate a variety of game activities, depending on historical background, local legal conditions, and/or their position in the market. Therefore, the emphasis placed on particular gaming activities may differ from one member to another – an EL Member can either hold an exclusive license for lotteries, or be a public company, or be privately owned, or be a company focused solely on sports-betting and online gaming, or a company with a completely different gaming orientation.

**The report for 2021 consolidates the activities of all reporting EL Members and thus covers 40 European countries and represents data from 69 regular and affiliate EL Members.**

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<sup>1</sup> *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.*

<sup>2</sup> *A detailed list of the EL Members is given in the Annex.*

**Table A. Number of EL Members Participating in the 2021 Data Collection Who Provided Data for Individual Years**

	2017	2018	2019	2020	2021
<b>EL Members in the EU27</b>	49	50	50	49	50
<b>EL Members outside the EU27</b>	18	18	18	19	19
<b>TOTAL</b>	<b>67</b>	<b>68</b>	<b>68</b>	<b>68</b>	<b>69</b>

Source: Reporting EL Members.

The data for this report was collected during May and June 2021 and subsequently aggregated by an independent third party, Kantar CZ, responsible for the data collection, consistency, data aggregation and non-disclosure of detailed data to any party.

All monetary figures are calculated in euros using the average exchange rate for 2021.<sup>3</sup>

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

- Draw Based Games,
- Instant Games,
- Sports Games,<sup>5</sup>
- 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).

It is important to mention that the Covid-19 pandemic has negatively impacted, similarly to the previous year, the year 2021 results, in many cases limiting EL Member’s operations by enforced retail network limitations or full retail network closures.

<sup>3</sup> The report presents data from 2017, 2018, 2019, 2020 and 2021. 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 2020 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 2017 to 2020, differences appear because of the change in exchange rates and also changes in the number of reporting EL Members.

<sup>4</sup> Sales minus prizes and hereinafter GGR. This key figure reflects the lottery business better than Sales figures.

<sup>5</sup> 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.

The tables and charts in Annex B are accompanied with explanatory footnotes covering data from the last two years and comments on significant changes, otherwise, they are left uncommented to serve as a basis for readers' own analysis.<sup>6</sup>

**Table B. Overview of Key Data 2021**

	Reporting EL EU Members	All Reporting EL Members
<b>EL Members</b> All member lotteries reporting within the EU/in Europe	50	69
<b>Money for Society</b>	€17.9bn	€20.0bn
<b>Direct Full-time Employment <sup>7</sup></b> Yearly average number of full-time employees	44.689	49.567
<b>Sales</b> Includes Sales from the three "Lottery" categories (see introduction)	€89.7bn	€105.9bn
<b>Gross Gaming Revenue</b> Sales minus prizes of the five gaming categories	€32.8bn	€36.0bn
<b>Online Gross Gaming Revenue</b>	€3.6bn	€4.4bn

Source: EL Members who took part in the 2021 survey; data being collected and aggregated by Kantar CZ, 2022.

Enjoy your reading,

Hansjörg HÖLTKEMEIER

President of the European Lotteries and Toto Association

&

Robert CHVÁTAL

Member of the Executive Committee of the European Lotteries and Toto Association

& Chair of Data & Research Working Group

<sup>6</sup> See the complete information on methodology in the Annex.

<sup>7</sup> The figure includes salespeople employed by Spain/ Organización Nacional de Ciegos Españoles – ONCE who were reported to be persons with disabilities selling the tickets and considered as full-time employees.

## 2. Covid-19 impact on the EL Member activities in 2021

**Also, the year 2021 has been influenced by the Covid-19 as non-standard event**, which has negatively influenced the EL Members' performance and long-term trends monitored by this annual report, even though less than in 2020.

Starting from March 2020, all European countries have experienced, to different level of intensity, an **outbreak of the Covid-19** based on which their governments started to regulate the physical movement of the citizens in public places, including, amongst other things, the **retail network access limitations or even full closures** of retail points of sales providing non-essential to life goods or services, and such a trend has partially, eventhough with a smaller impact, affected also the year 2021.

**Despite the retail network limitations in some countries** where five EL Members have reported network limitations longer than 10 weeks and five reported more than 50% of their network closed, such as Cyprus, Greece and Malta were not fulfilling their original plans, overall the EL Members in the EU (37 reported) had an average of 104% fulfilment of their total GGR planned for 2021, while their planed retail GGR was fulfilled on average at 101% and their planed online GGR was fulfilled on average at 108%. In total, across **All EL Members (53 reported) there was an average of 102% fulfilment of their total GGR planned for 2021**, while their planed retail GGR was fulfilled on average 99% and their planed online GGR was fulfilled on average 108%.

Overall, after a significant total GGR decrease of 14.3% in 2020 compared with 2019 (based on 68 reporting EL Members), despite the partial Covid-19 impact, the year **2021 delivered total GGR growth of 13.3%** compared with 2020, but still **ending below the 2019 level by 2.9%**. Therefore, **please read this report and its trends bearing in mind this non-standard impact**.

Nevertheless, despite this unfavourable situation, **EL Members have increased their efforts to help the impacted societies** and delivered the contributions to the society **higher by 5.1% in 2021 compared to the pre-Covid period of 2019**.

## 3. Specific Member Activities in the EU and Rest of Europe in 2021

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 harmful games**. As a side effect of their operations, and regulated via their respective licenses, they generate money for "good causes" or the states' budgets.

In 2021, the **money contributed to society by 49 EL Members in the EU** (representing 96% of all EL Members in the EU have reported their contributions) **amounted to €17.9bn, more by 12.6% compared to 2020 and more by 10.6% compared to 2019**. All EL Members reporting the category (67 in total), their **contributions to society amounted to €20.0bn in 2021, an increase of 13.0% compared to 2020 and of 10.0% compared to 2019**. It means that **55.6% of the GGR generated by EL Members** (not including sponsorships) **went back to society** in the respective countries. The largest EU member states, where the amounts provided by EL Members to society exceeded €2.0bn were the following: France with €3.8bn, Spain with €3.6bn and Germany with €3.2bn. The **money for society per capita raised in**

**the EU averaged €40** (across the 27 EU member states that reported) and ranged from single digit amounts for instance in Bulgaria, Croatia, Lithuania and Romania, to €139 in Finland. **Across All EL members money for society per capita averaged €31**, the highest non-EU state being Norway with €121. Where the allocation of the money for society was concerned, 71.7% of the total went to state budgets (with no reported knowledge of the final allocation), 12.5% went to support social and other societal purposes, 9.0% to support sports, 4.3% to support culture & heritage, 1.9% to support health and 0.6% to education.

Another important contribution of the EL Members is the **contribution to employment** in their respective countries. In 2021, the 48 EL Members operating in the EU directly employed 44,689 full-time employees, with **all 68 reporting EL Members employed 49,567 full-time employees**, out of which women represented 50.0%.

As **responsible gaming activities are an integral part of the EL Members' business**, the EL Members continued to emphasise and spend on measures to prevent problem gambling also in 2021.

## 4. Specific Gaming Activities

**Sales for the three main "Lottery" categories** (Draw Based Games, Instant Games, Sports Games) by EL Members in the EU amounted to €89.7bn in 2021, and showing a significant increase compared to Covid-impacted 2020 of 25.5% and 12.7% in comparison with 2019. This trend was similar when considering **all EL Members in total**, where **total Sales amounted to €105.8bn**, resulting in a **year-on-year increase of 23.1% in comparison with 2020 and 11.8% in comparison with 2019**.

In 2021, the **total GGR** (being the sector's key KPI) **of the three "Lottery" categories** reported by EL Members operating in the EU, still partially impacted by the Covid restrictions, was €30.3bn and presented a increase of 17.6% compared with 2020 and increase of 4.7% compared with 2019, while **all 67 reporting EL Members** reported their **total GGR of €33,3bn**, **a increase of 17.2% compared with 2020 and increase of 4.6% compared with 2019**. Therefore, after a significant drop in 2020, due to the Covid-19 impact, the GGR figures recovered and even overpassed the level of pre-Covid year 2019. As for the 50 EL Members operating in the EU, who reported their GGR, the GGR spending per capita ranged from €5 in Romania to more than €100 in Finland, Greece, Italy, Netherlands, Portugal and Austria. **Average GGR per capita** across EL EU Members **reached €73**. The corresponding figure for **all EL Members was €56 per capita**. This ranges from Turkey with €0.02 GGR per capita to Finland with €199 GGR per capita.

**The largest lottery category** of EL Members was comprised of **Draw Based Games** with brand names like Lotto, EuroMillions, Eurojackpot and Joker. This category of games, offered by EL Members in 27 EU states, had Sales of €45.5bn. Their GGR of €19.6bn accounted for almost 59.8% of total GGR, increasing 13.8% compared with 2020 and 1.5% compared with 2019. **All EL Members** had a total **Sales of €54.3bn**. Their **GGR of €21.3bn accounted for almost 59.1% of total GGR**, increasing 13.1% compared with 2020 and 1.1% compared with 2019. The Draw Based Games GGR per capita reported by EL Members in EU countries ranged widely from single digit to €97 in Finland with an average of €44. The non-EU EL Members countries generated smaller figures two thirds of whom generated a GGR per capita of €5 or less; however, Norway, Iceland, Israel and Switzerland generated GGR per capita of

€50 and more. The average Draw Based Games GGR per capita reported by all EL Members reached €33.

**The second largest category was Instant Games**, offered by EL Members in 26 EU countries and 11 non-EU countries, showing a continuous Sales and GGR increase for the last eight years until 2019. **The EL Members in the EU** (43 reported the category) had Instant Games **Sales of €26.9 bn** in 2021. They generated **GGR of €8.1 bn** (43 reported), representing 24.7% of their total GGR, an increase by 27.1% in comparison with 2020 and by 14.0% in comparison with pre-Covid year 2019. **All EL Members** (57 reported the category) had a **total Sales of €32.5bn**. **Their GGR** (57 reported the category) **was €8.8bn**, representing **24.4% of their total GGR, an increase by 26.2% compared to 2020 and by 13.9% compared to pre-Covid year 2019**. Instant Games in EU countries generated GGR per capita ranging from €0.4 in Romania to €20 and more in France, Ireland, Italy and Portugal. Whereas most of the non-EU countries did not exceed €1, three EL Member countries (Israel, Norway and Switzerland) had GGR per capita above €10. Overall, Italy became the largest Instant Games market with GGR of €3.2bn, followed by France with €2.7bn.

The **Sports Games category** was reported by the least number of EL members (34 EL Members from 22 EU countries, 43 EL Members from 30 countries altogether, operating in a different regulatory environment (ranging from monopolistic positions to a full competitive ones). **The EL Members in the EU generated GGR of €2.6bn**, representing 7.9% of their total GGR and a increase by 28.1% compared to 2019. **All EL Members generated a total GGR of €3.2bn, representing 8.9% of their total GGR, an increase by 29.6% compared to 2020 and by 13.1% compared to 2019**. Despite the Sports Games category decline in 2020, driven by Covid impact on professional sport events closure and retail limitation, Sports Games GGR succeeded to overpass the pre-Covid year 2019 level in 2021.

**The fourth category, EGMs outside casinos**, included slot machines, Video Lottery Terminals, and Electronic Instant Lotteries located outsides of casinos. Only 9 EL Members in the EU reported operating in this category, generating a GGR of €0.8bn, representing on average 2.5% of their total GGR and a drop by 16.1% compared to 2020 and by 55.8% compared to 2019, driven mainly by Austrian, Finish, Italian and Greek markets. From all EL Members, 13 Members generated GGR of €1.0bn, representing on average 2.7% of their total GGR, a decrease by 16.1% compared to 2020 and by 52.3% compared to 2019, driven by Covid retail network closures in 2020 and partially in 2021.

**Growth of online was strengthened by the Covid impact** and migration of the part of customers' transaction into the online channel **in 2020 and 2021**. **The EL Members in EU states** (38 reported the category) generated **GGR from online activities of €3.6bn, representing 11.0% of total GGR, a growth of 29.4% compared to 2020 and 66.4% compared to 2019**. **All EL Members** (51 reported the category) **generated online GGR of €4.4bn, representing 12.2% of total GGR**. The main component of the online GGR was Draw Based Games with 46.2% share of the total, complemented by All other games with 25.6%, Sports Games with 22.1% and Instant Games with 6.1%.



# **APPENDIXES TO THE REPORT**

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**Annex A: Methodology Applied**

**Annex B: Charts and Tables**

**Annex C: Explanations of the Collected Data Included in this Report**

**Annex D: Other Data Sources**

## Annex A: Methodology Applied

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This report, traditionally and almost exclusively, relies on primary data sources from EL Members.<sup>1</sup>

The data gathered covers the results of current regular EL Members in the 2021 calendar year.<sup>2</sup> 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 2021.<sup>3</sup> 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 2022.

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 2021, either from Eurostat or, if not available, then from the European Central Bank or the national bank of each country.<sup>4</sup> In addition to the data for 2021, data from previous years is also included, namely from the period of 2017- 2020.<sup>5,6</sup>

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

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<sup>1</sup> The external sources used have been EUROSTAT, the World Economic Outlook Database for population figures, the European Central Bank’s sites, Worldbank’s sites and some local banks’ sites as information sources for the conversion of exchange rates. For further information, see Annex D: Other Data Sources.

<sup>2</sup> This report does not include observer members, which are Belarus/ CJSC Sport-Pari, Morocco/ La Marocaine des Jeux et des Sports and Morocco/ Loterie nationale. It also does not include Bulgaria/ Eurofootball, Bulgaria/ National Lottery, Kosovo/ Lotaria e Kosoves, Poland/ Totolotek, Russia/ JSC Technology Company “Center” which are no longer members.

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

<sup>4</sup> Until the 8<sup>th</sup> 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 six editions, current customization has been done so as to make the analysis more meaningful.

<sup>5</sup> This report includes historical data reported by current EL Members in spring 2022 (figures for 2017, 2018, 2019 and 2020).

<sup>6</sup> 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.

those years in currencies other than the Euro have also been converted into Euros using the same average exchange rate for 2021 (in other words, all amounts in this report are reported in the average 2021 Euro value).<sup>7</sup> Thus, looking at the previous years' reports, which have used exchange rates from 2017, 2018, 2019 and 2020 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.<sup>8</sup> 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.<sup>9</sup> 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.<sup>10</sup> 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.<sup>11,12</sup> 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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<sup>7</sup> All comparisons in this report, as well as all recalculations of historical monetary figures using the average exchange rates for 2021, have been calculated by Kantar CZ.

<sup>8</sup> 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.

<sup>9</sup> The supportive tables and figures were provided by an independent party, Kantar CZ, that independently collected the primary data for the years 2017–2021 via an online questionnaire and analysed them.

<sup>10</sup> 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.

<sup>11</sup> 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 2020 and 2021 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.

<sup>12</sup> 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 (2020 and 2021). 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.<sup>13,14</sup> 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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<sup>13</sup> 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 2021–2020 for EL Members in the EU27 and EL Members in total may be influenced by differences in the structure of reporting EL Members.

<sup>14</sup> 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.

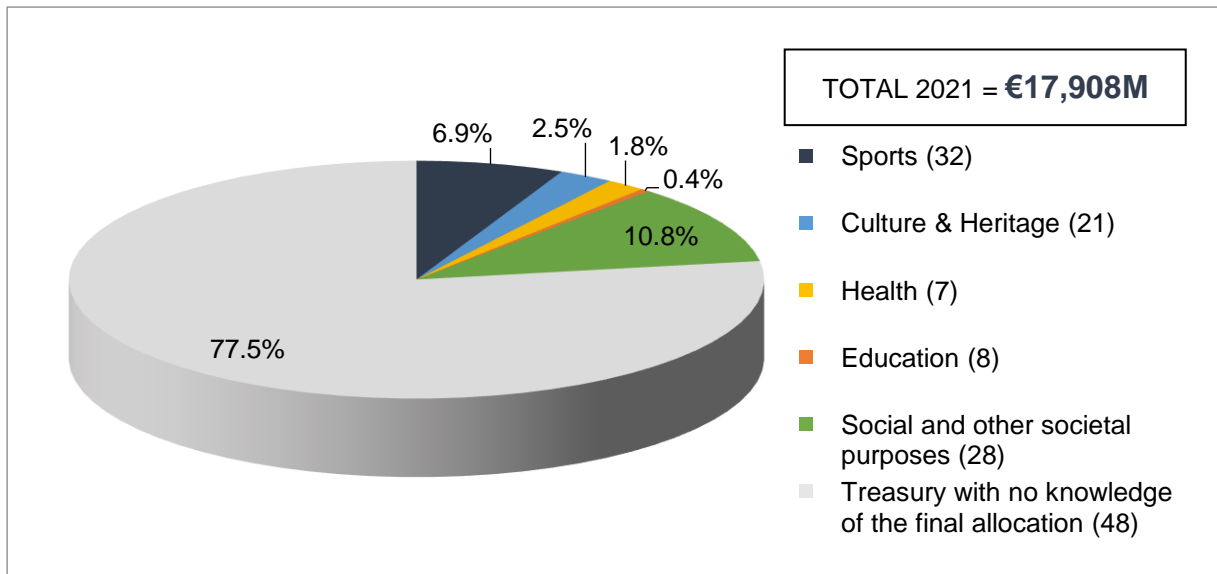
# Annex B: Charts and Tables

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**Figure 1. EL Members in the EU: Money for Society by Target – 2021 (€M)**

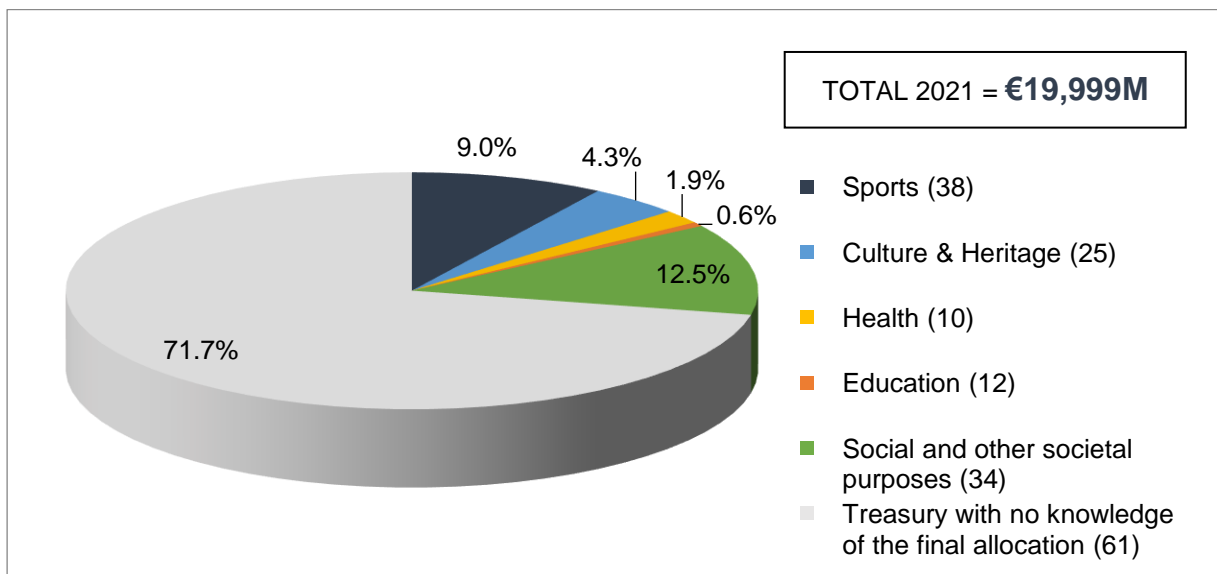


Sources: EL Members in the EU reporting figures for their Money for Society for 2021

49 reported (98% of 50 EL Members in the EU, i.e. all except for Italy/ IGT Lottery SpA).

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

**Figure 2. EL Members: Money for Society by Target – 2021 (€M)**

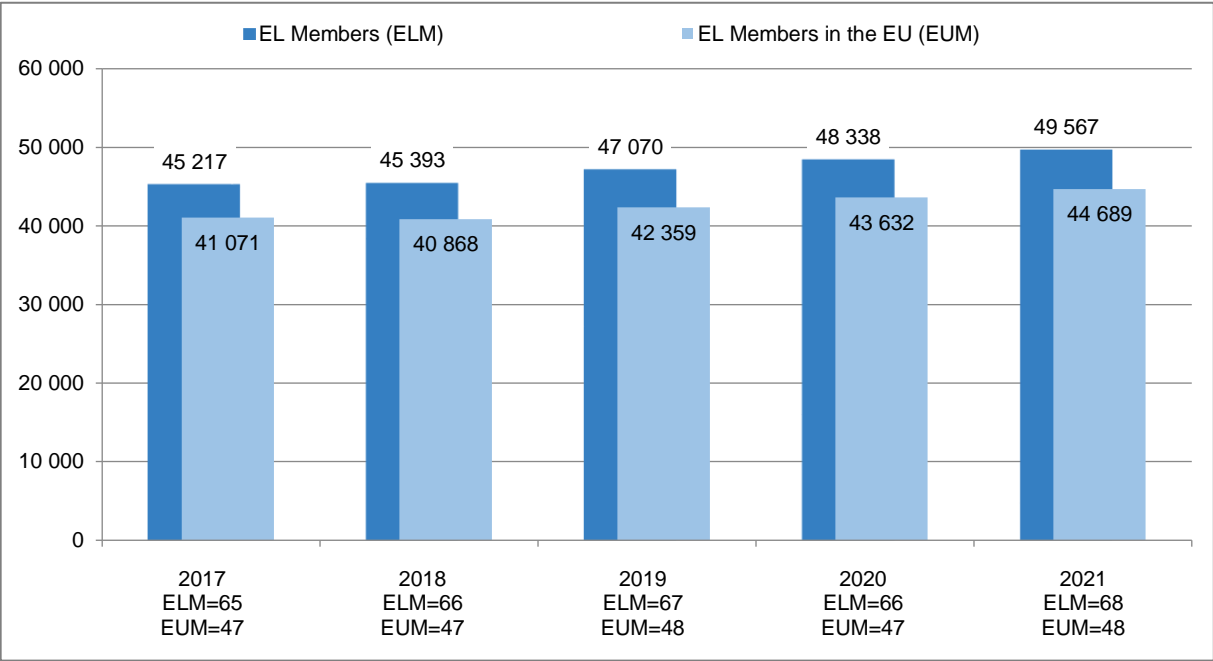


Sources: EL Members reporting figures for their Money for Society for 2021

67 reported (96% of 70 EL Members, i.e. all except for Italy/ IGT Lottery SpA, Republic of North Macedonia/ National Lottery of Macedonia, United Kingdom/ Camelot UK Lotteries Ltd.)

“Target category” (“Number of reporting EL Members”).

**Figure 3. Contribution to Direct Employment – Development 2017–2021**



Sources: EL Members reporting the category for 2021

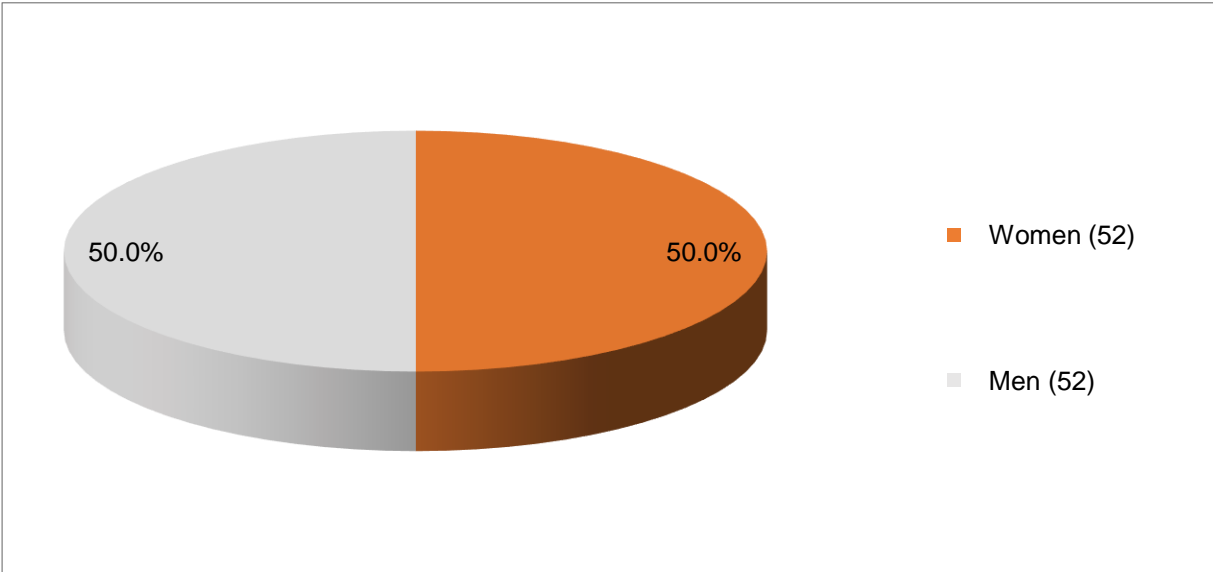
For 2021: 68 reported (97% of 70 EL Members, i.e. all except for Denmark/ Danske Spil a/s, Italy/ IGT Lottery SpA).

For 2020: 66 reported (94% of 70 EL Members, i.e. all except for Denmark/ Danske Spil a/s, Germany/ Verwaltungsgesellschaft Lotto & Toto in Mecklenburg-Vorpommern mbH, Italy/ IGT Lottery SpA, Republic of North Macedonia/ National Lottery of Macedonia).

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

The figure for Spain includes salespeople from Spain/ Organización Nacional de Ciegos Españoles – ONCE, who are also full-time employees.

**Figure 4. Percentage of Women in Company’s Employees – 2021 (%)**

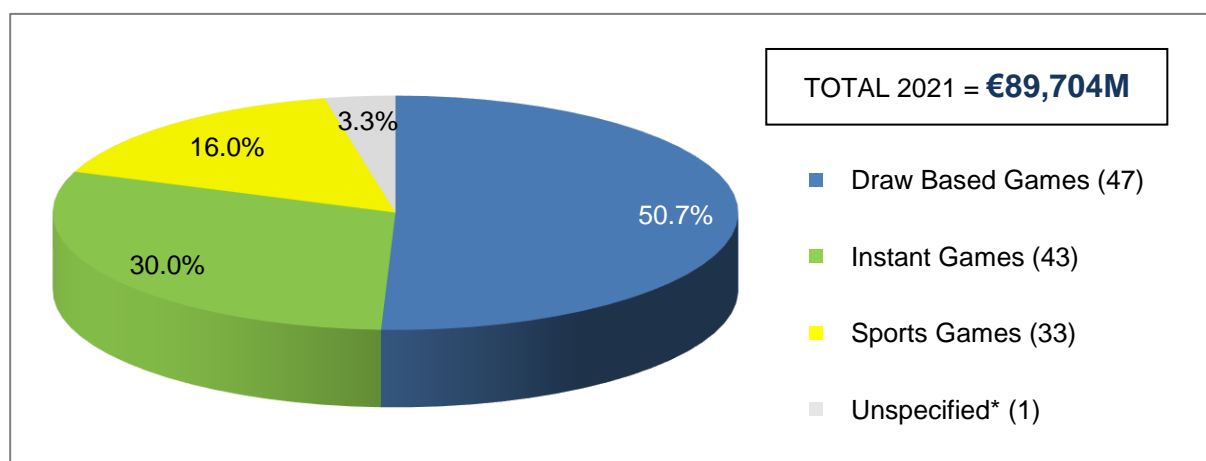


Sources: EL Members reporting percentage of women for 2021

52 reported (74% of 70 EL Members.)

“Target category” (“Number of reporting EL Members”).

**Figure 5a. EL Members in the EU: Lottery Sales by Game Category – 2021 (€M)**



Sources: EL Members in the EU reporting their Lottery Sales for 2021

48 reported (96% of 50 EL Members in the EU, i.e. all except for Austria/ Austrian Lotteries, Sweden/ AB Svenska Spel).

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

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

**Figure 5b. EL Members in the EU: Lottery Sales by Game Category – 2021 (€M)**

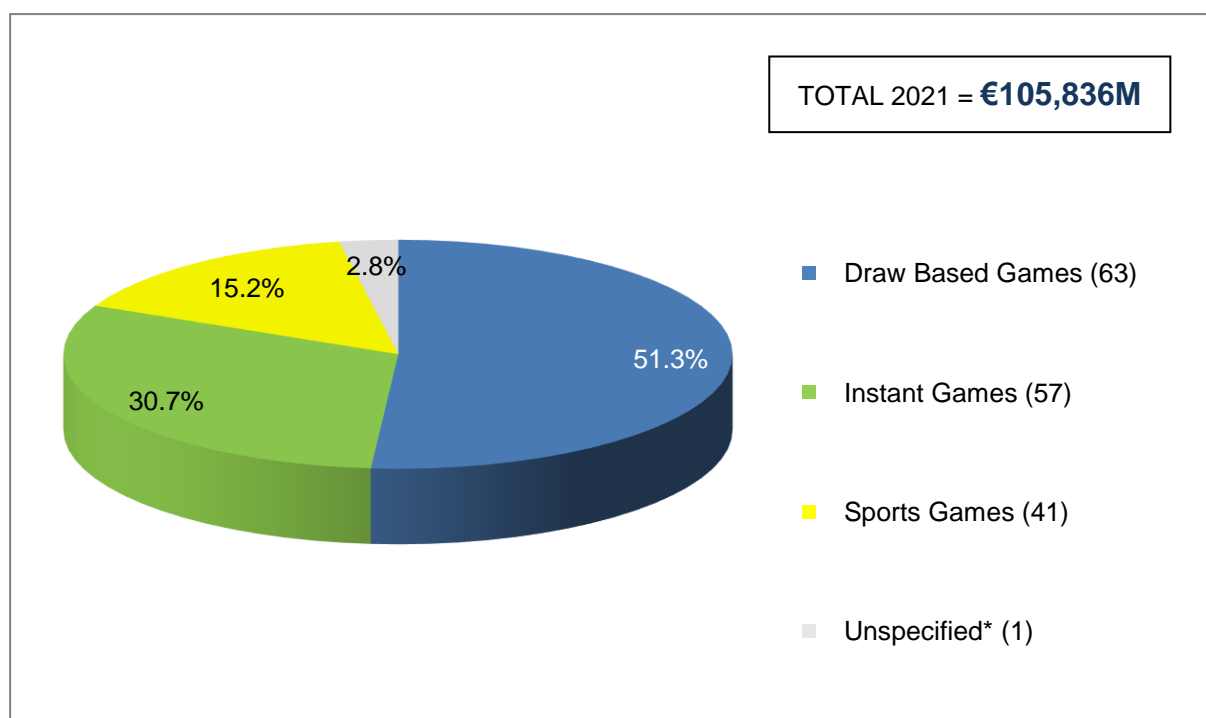
Game category	Number of EUM reporting Lottery Sales for 2021	EUM: Lottery Sales for 2021 (€M)	Share out of total
Draw Based Games	47	45 454	50.7%
Instant Games	43	26 916	30.0%
Sports Games	33	14 341	16.0%
Unspecified*	1	2 993	3.3%
<b>Total</b>	<b>48</b>	<b>89 704</b>	<b>100%</b>

Sources: EL Members in the EU reporting their Lottery Sales for 2021, 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 6a. EL Members: Lottery Sales by Game Category – 2021 (€M)**



Sources: EL Members reporting their Lottery Sales for 2021

67 reported (96% of 70 EL Members, i.e. all except for Austria/ Austrian Lotteries, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie).

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

“Game category” (“Number of reporting EL Members”).

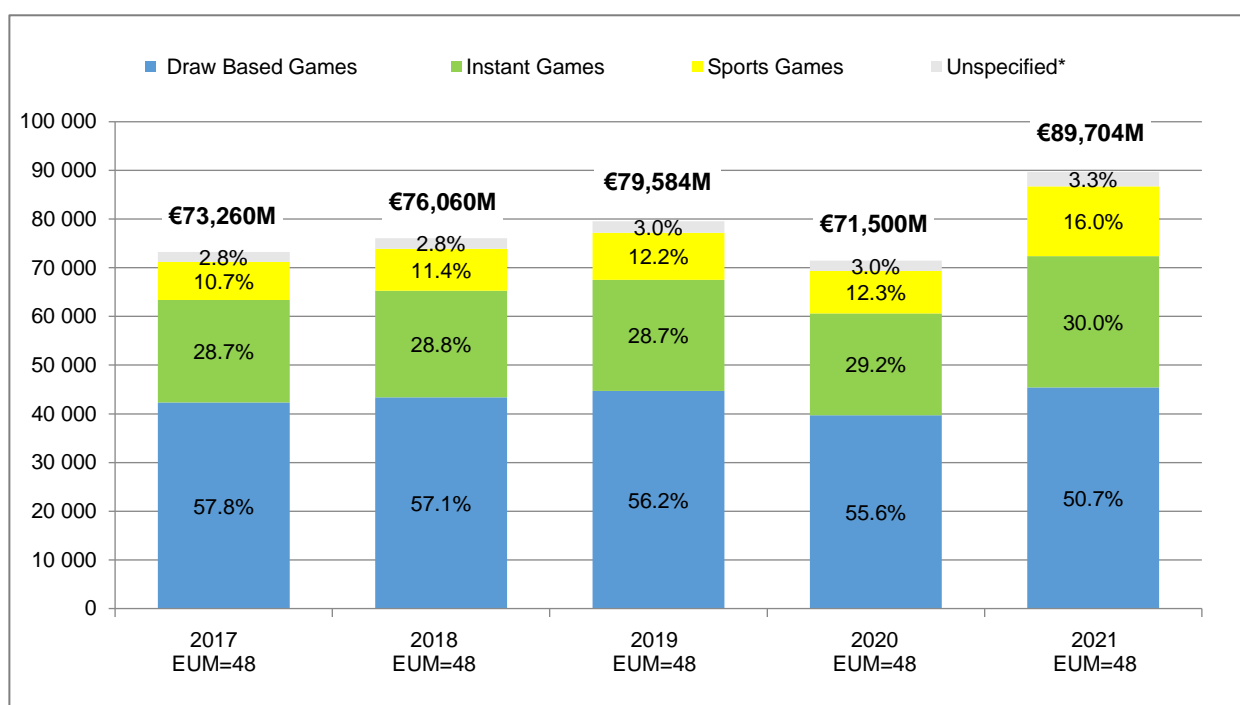
**Figure 6b. EL Members: Lottery Sales by Game Category – 2021 (€M)**

Game category	Number of ELM reporting Lottery Sales for 2021	ELM: Lottery Sales for 2021 (€M)	Share out of total
Draw Based Games	63	54 301	51.3%
Instant Games	57	32 458	30.7%
Sports Games	41	16 084	15.2%
Unspecified*	1	2 993	2.8%
<b>Total</b>	<b>67</b>	<b>105 836</b>	<b>100%</b>

Sources: EL Members reporting their Lottery Sales for 2021, 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 in the EU: Lottery Sales by Game Category – Development 2017–2021 (€M)**



Sources: EL Members in the EU reporting their Lottery Sales for 2021

For 2021 and 2020: 48 reported (96% of 50 EL Members in the EU, i.e. all except for Austria/ Austrian Lotteries, Sweden/ AB Svenska Spel).

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

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 2017–2021 (€M)**

Game category	EUM rep. Lottery Sales for 2021	EUM: Lottery Sales for the respective year in €M					Evolution* 2021-2020	CAGR * 2021-2017
		2017 (48)	2018 (48)	2019 (48)	2020 (48)	2021 (48)		
Draw Based Games	47	42 325	43 398	44 693	39 735	45 454	14.4%	1.8%
Instant Games	43	21 051	21 873	22 856	20 872	26 916	29.0%	6.3%
Sports Games	33	7 820	8 633	9 672	8 769	14 341	63.5%	16.4%
Unspecified**	1	2 063	2 156	2 364	2 124	2 993	40.9%	9.7%
<b>Total</b>	<b>48</b>	<b>73 260</b>	<b>76 060</b>	<b>79 584</b>	<b>71 500</b>	<b>89 704</b>	<b>25.5%</b>	<b>5.2%</b>

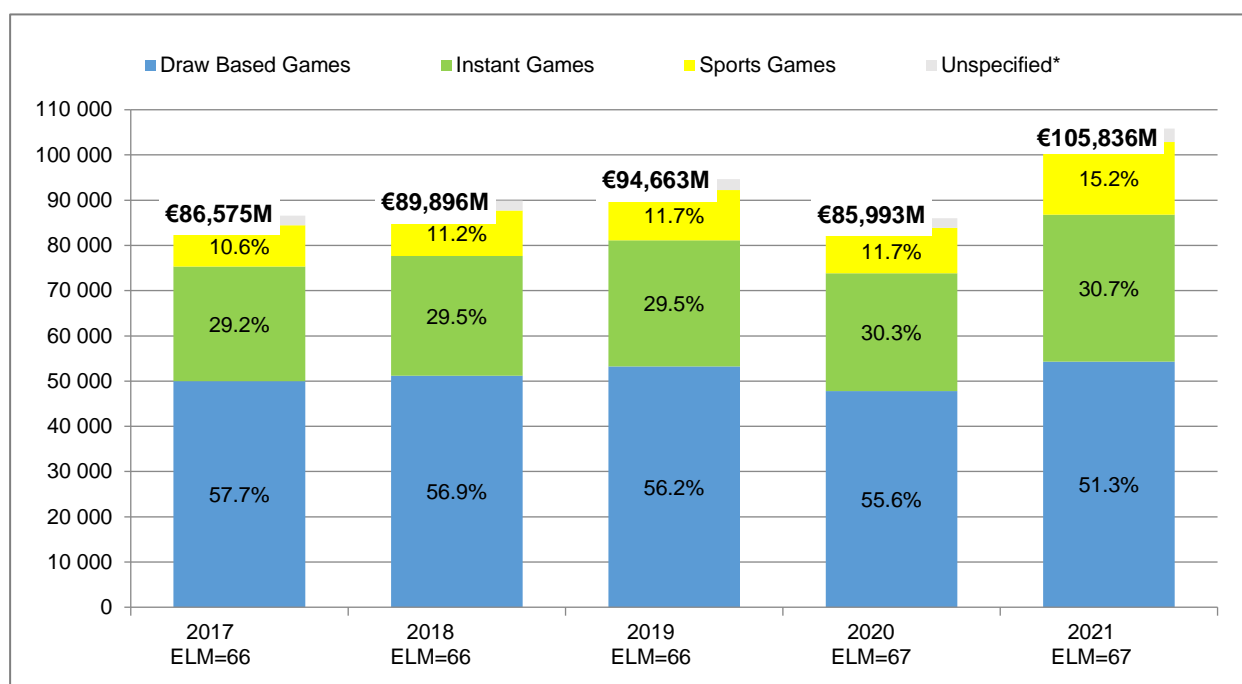
Sources: EL Members in the EU reporting their Lottery Sales for 2021, see the comment above for information on those EL Members in the EU who participated in this data collection but did not report the category for the individual years of 2020 and 2021.

"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.

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

**Figure 8a. EL Members: Lottery Sales by Game Category – Development 2017–2021 (€M)**



Sources: EL Members reporting their Lottery Sales for 2021

For 2021 and 2020: 67 reported (96% of 70 EL Members, i.e. all except for Austria/ Austrian Lotteries, Sweden/ AB Svenska Spel, Switzerland/ Swisslos Interkantonale Landeslotterie).

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

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

**Figure 8b. EL Members: Lottery Sales by Game Category – Development 2017–2021 (€M)**

Game category	ELM rep. Lottery Sales for 2021	ELM: Lottery Sales for the respective year in €M					Evolution* 2021-2020	CAGR * 2021-2017
		2017 (66)	2018 (66)	2019 (66)	2020 (67)	2021 (67)		
Draw Based Games	63	49 990	51 179	53 242	47 810	54 301	13.6%	2.1%
Instant Games	57	25 315	26 504	27 916	26 020	32 458	24.7%	6.4%
Sports Games	41	9 181	10 027	11 110	10 029	16 084	60.4%	15.0%
Unspecified**	1	2 089	2 186	2 395	2 132	2 993	40.4%	9.4%
<b>Total</b>	<b>67</b>	<b>86 575</b>	<b>89 896</b>	<b>94 663</b>	<b>85 993</b>	<b>105 836</b>	<b>23.1%</b>	<b>5.2%</b>

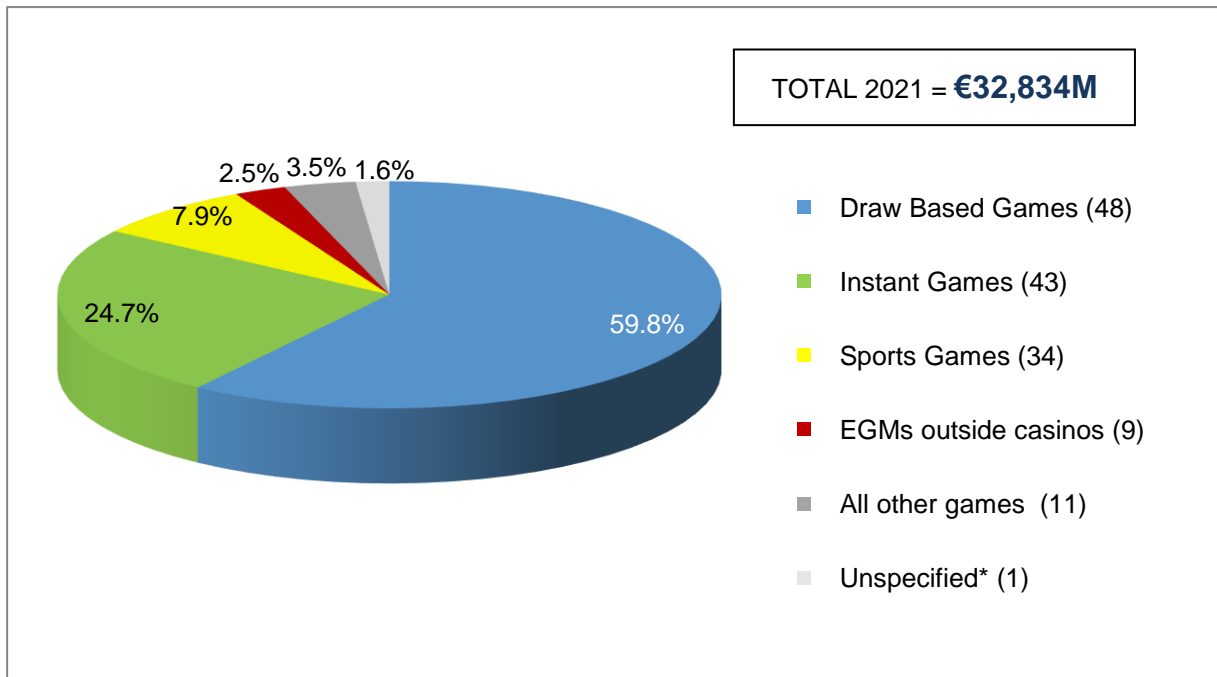
Sources: EL Members reporting their Lottery Sales for 2021, see the comment above for information on those EL Members who participated in this data collection but did not report the category for the individual years of 2020 and 2021.

"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.

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

**Figure 9a. EL Members in the EU: GGR by Game Category – 2021 (€M)**



Sources: EL Members in the EU reporting their GGR for 2021

50 reported (100% of 50 EL Members in the EU).

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

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

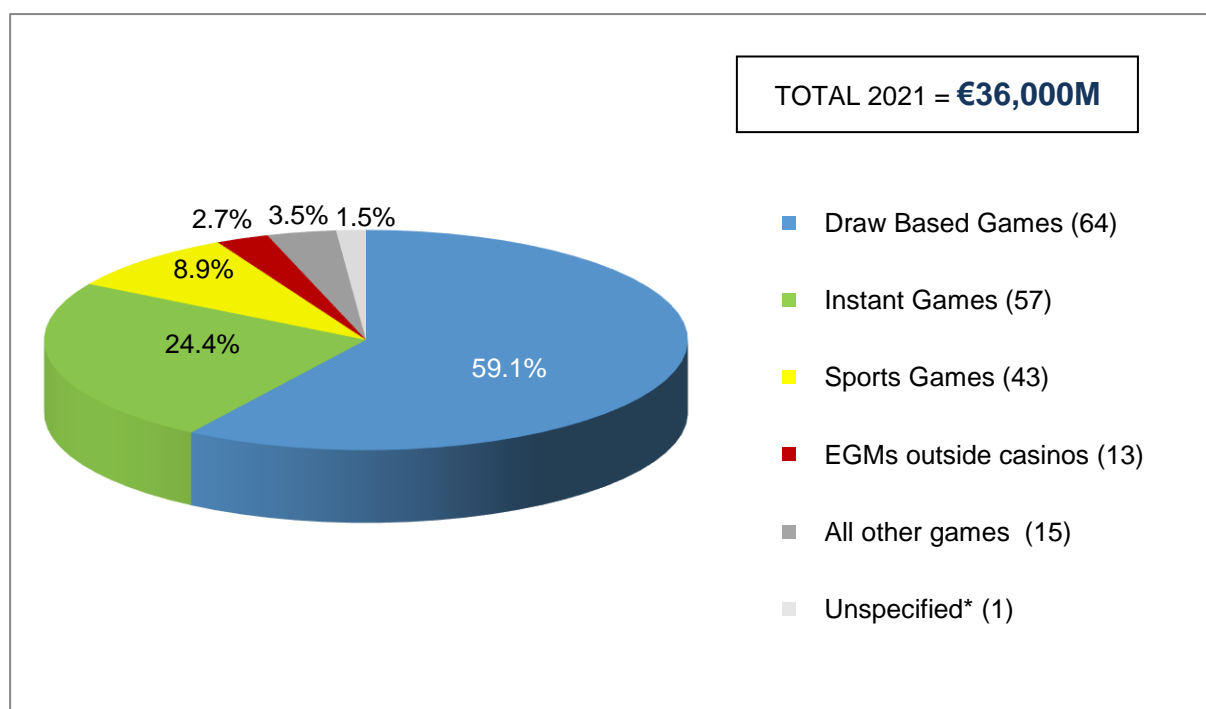
**Figure 9b. EL Members in the EU: GGR by Game Category – 2021 (€M)**

Game category	Number of EUM reporting GGR for 2021	EUM: GGR for 2021 (€M)	Share out of total
Draw Based Games	48	19 629	59.8%
Instant Games	43	8 100	24.7%
Sports Games	34	2 591	7.9%
EGMs outside casinos	9	832	2.5%
All other games	11	1 146	3.5%
Unspecified*	1	536	1.6%
<b>Total</b>	<b>50</b>	<b>32 834</b>	<b>100%</b>

Sources: EL Members in the EU reporting their GGR for 2021, 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 10a. EL Members: GGR by Game Category – 2021 (€M)**



Sources: EL Members reporting their GGR for 2021

69 reported (99% of 70 EL Members, i.e. all except for United Kingdom/ Camelot UK Lotteries Ltd.)

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

“Game category” (“Number of reporting EL Members”).

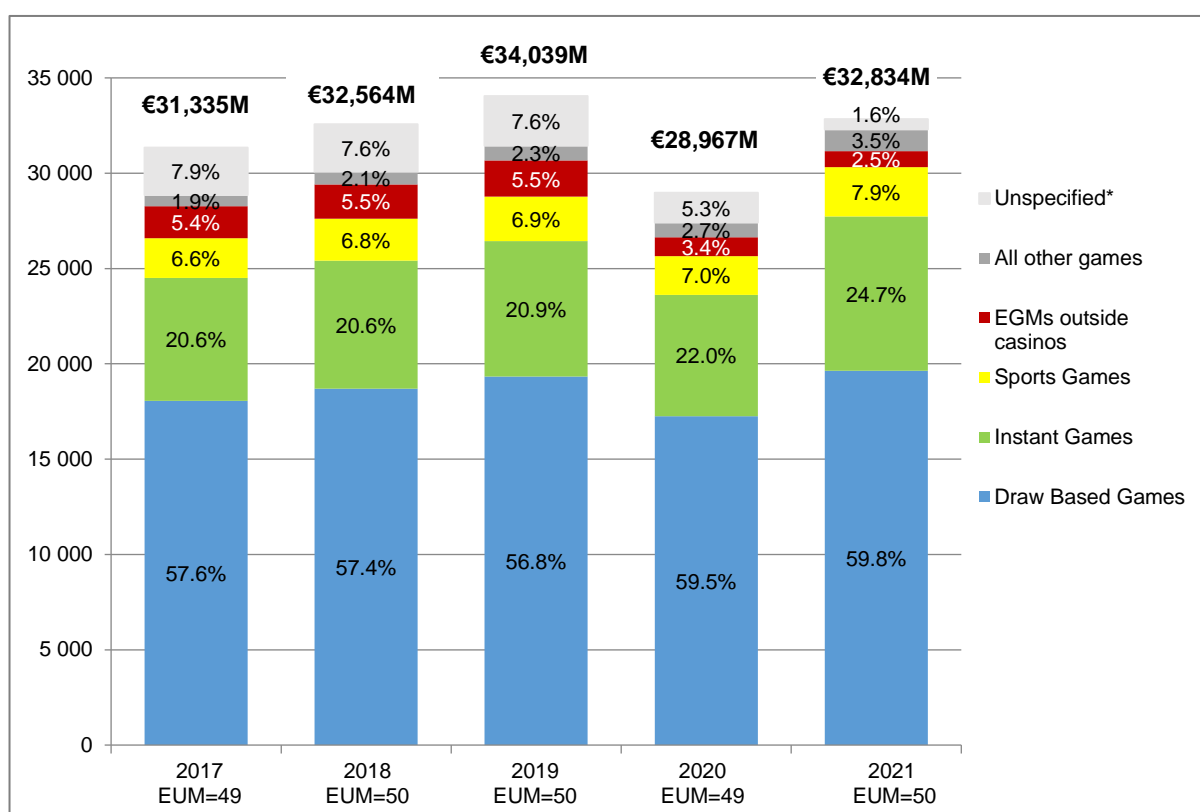
**Figure 10b. EL Members: GGR by Game Category – 2021 (€M)**

Game category	Number of ELM reporting GGR for 2021	ELM: GGR for 2021 (€M)	Share out of total
Draw Based Games	64	21 287	59.1%
Instant Games	57	8 769	24.4%
Sports Games	43	3 197	8.9%
EGMs outside casinos	13	958	2.7%
All other games	15	1 253	3.5%
Unspecified*	1	536	1.5%
<b>Total</b>	<b>69</b>	<b>36 000</b>	<b>100%</b>

Sources: EL Members reporting their GGR for 2021, 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 in the EU: GGR by Game Category – Development 2017–2021 (€M)**



Sources: EL Members in the EU reporting their GGR for 2021

For 2021: 50 reported (100% of 50 EL Members in the EU).

For 2020: 49 reported (98% of 50 EL Members in the EU, i.e. all except for Germany/ Lotto-Toto GmbH Sachsen-Anhalt).

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

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 2017–2021 (€M)**

Game category	EUM rep. GGR for 2021	EUM: GGR for the respective year in €M					Evolution* 2021-2020	CAGR * 2021-2017
		2017 (49)	2018 (50)	2019 (50)	2020 (49)	2021 (50)		
Draw Based Games	48	18 061	18 696	19 333	17 249	19 629	13.8%	2.1%
Instant Games	43	6 454	6 711	7 108	6 374	8 100	27.1%	5.8%
Sports Games	34	2 069	2 209	2 339	2 022	2 591	28.1%	5.8%
EGMs outside casinos	9	1 677	1 795	1 883	993	832	-16.3%	-16.1%
All other games	11	602	679	785	779	1 146	47.1%	17.5%
Unspecified**	1	2 473	2 474	2 591	1 550	536	-65.4%	-31.8%
<b>Total</b>	<b>50</b>	<b>31 335</b>	<b>32 564</b>	<b>34 039</b>	<b>28 967</b>	<b>32 834</b>	<b>13.4%</b>	<b>1.2%</b>

Sources: EL Members in the EU reporting their GGR for 2021, 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 2020 and 2021.

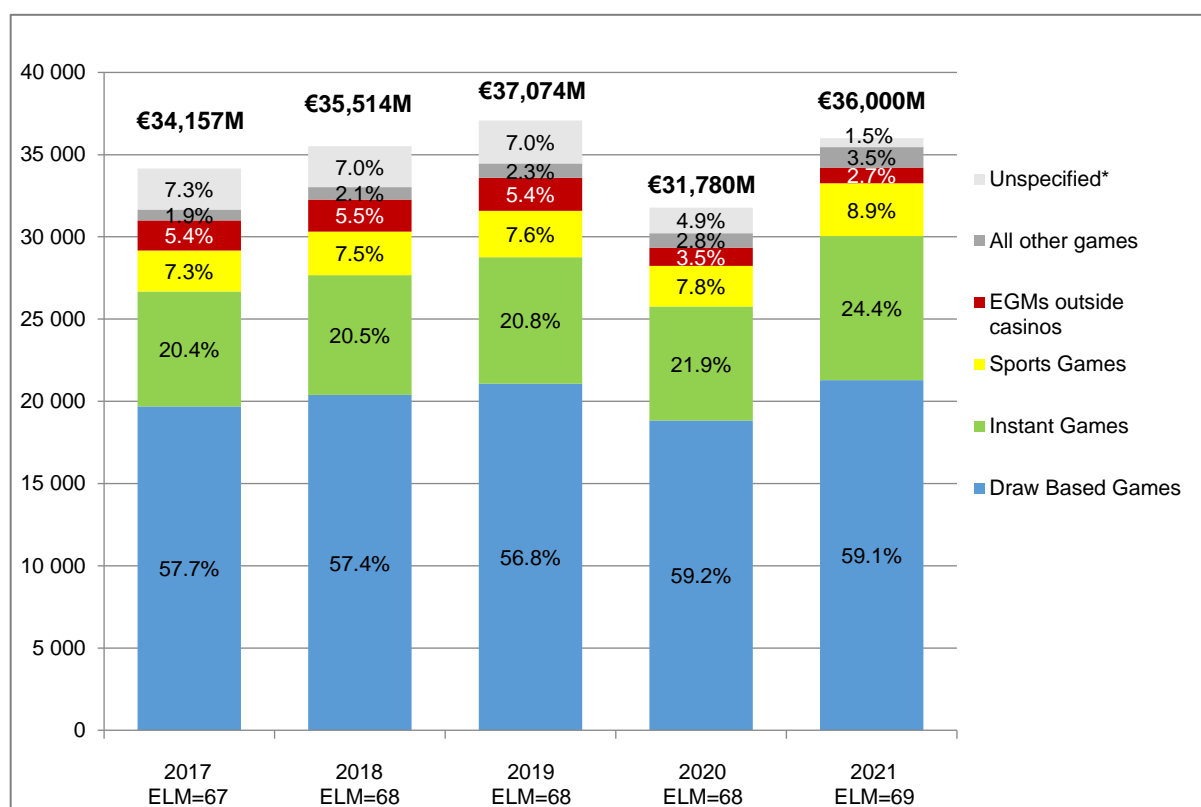
The annual increase in 2017 concerning GGR for EGMs and All other games categories is driven by Finland, which saw a merge of three Finnish companies and consequent change in the product portfolio structure.

"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.

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

**Figure 12a. EL Members: GGR by Game Category – Development 2017–2021 (€M)**



Sources: EL Members reporting their GGR for 2021

For 2021: 69 reported (99% of 70 EL Members, i.e. all except for United Kingdom/ Camelot UK Lotteries Ltd.)

For 2020: 68 reported (97% of 70 EL Members, i.e. all except for Germany/ Lotto-Toto GmbH Sachsen-Anhalt and United Kingdom/ Camelot UK Lotteries Ltd.)

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

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

**Figure 12b. EL Members: GGR by Game Category – Development 2017–2021 (€M)**

Game category	ELM rep. GGR for 2021	ELM: GGR for the respective year in €M					Evolution* 2021-2020	CAGR * 2021-2017
		2017 (67)	2018 (68)	2019 (68)	2020 (68)	2021 (69)		
Draw Based Games	64	19 698	20 385	21 066	18 827	21 287	13.1%	2.0%
Instant Games	57	6 973	7 284	7 698	6 947	8 769	26.2%	5.9%
Sports Games	43	2 503	2 660	2 828	2 468	3 197	29.6%	6.3%
EGMs outside casinos	13	1 833	1 944	2 008	1 102	958	-13.1%	-15.0%
All other games	15	662	750	867	883	1 253	42.0%	17.3%
Unspecified**	1	2 489	2 491	2 607	1 553	536	-65.5%	-31.9%
<b>Total</b>	<b>69</b>	<b>34 157</b>	<b>35 514</b>	<b>37 074</b>	<b>31 780</b>	<b>36 000</b>	<b>13.3%</b>	<b>1.3%</b>

Sources: EL Members reporting their GGR for 2021, 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 2020 and 2021.

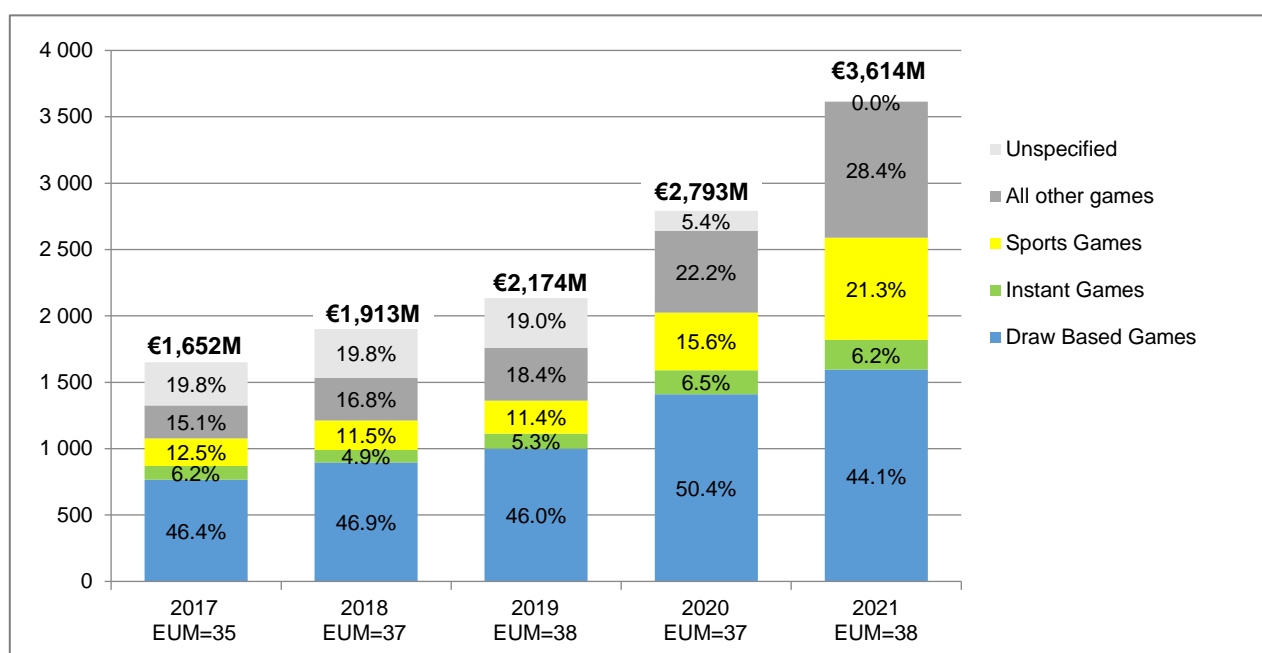
The annual increase in 2017 concerning GGR for EGMs and All other games categories is driven by Finland, which saw the merge of three Finnish companies and consequent change in the product portfolio structure.

"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.

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

**Figure 13a. EL Members in the EU: Online GGR by Game Category – Development 2017–2021 (€M)**



Sources: EL Members in the EU reporting their Online GGR for 2021

For 2021: 45 EL Members in the EU (90% of 50) offer online games and 38 (84% of 45) provided the figures (i.e. all except for France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Staatliche Lotterieverwaltung (LOTTO Bayern), Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Sächsische Lotto-GmbH, Malta/ Maltco Lotteries Ltd., Netherlands/ Nederlandse Loterij, Republic of North Macedonia/ National Lottery of Macedonia, Switzerland/ Swisslos Interkantonale Landeslotterie, United Kingdom/ Camelot UK Lotteries Ltd.)

For 2020: 45 EL Members in the EU (90% of 50) offer online games and 37 (82% of 45) provided the figures (i.e. all except for France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Staatliche Lotterieverwaltung (LOTTO Bayern), Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Sächsische Lotto-GmbH, Germany/ Lotto-Toto GmbH Sachsen-Anhalt, Malta/ Maltco Lotteries Ltd., Netherlands/ Nederlandse Loterij, Switzerland/ Swisslos Interkantonale Landeslotterie, United Kingdom/ Camelot UK Lotteries Ltd.)

In previous years, Italy/ IGT Lottery SpA and Sweden/ AB Svenska Spel provided the overall figure for Online GGR without a split by game category. For 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 13b. EL Members in the EU: Online GGR by Game Category – Development 2017–2021 (€M)**

Game category	EUM rep. online GGR for 2021	EUM: Online GGR for the respective year in €M					Evolution* 2021-2020	CAGR * 2021-2017
		2017 (35)	2018 (37)	2019 (38)	2020 (37)	2021 (38)		
Draw Based Games	38	766	897	999	1 409	1 595	13.2%	20.1%
Instant Games	27	103	94	114	181	224	23.7%	21.5%
Sports Games	20	207	221	247	435	770	77.2%	38.8%
All other games	10	249	321	399	619	1 025	65.7%	42.5%
Unspecified	0	327	380	414	150	0	-100.0%	-100.0%
<b>Total</b>	<b>38</b>	<b>1 652</b>	<b>1 913</b>	<b>2 174</b>	<b>2 793</b>	<b>3 614</b>	<b>29.4%</b>	<b>21.6%</b>

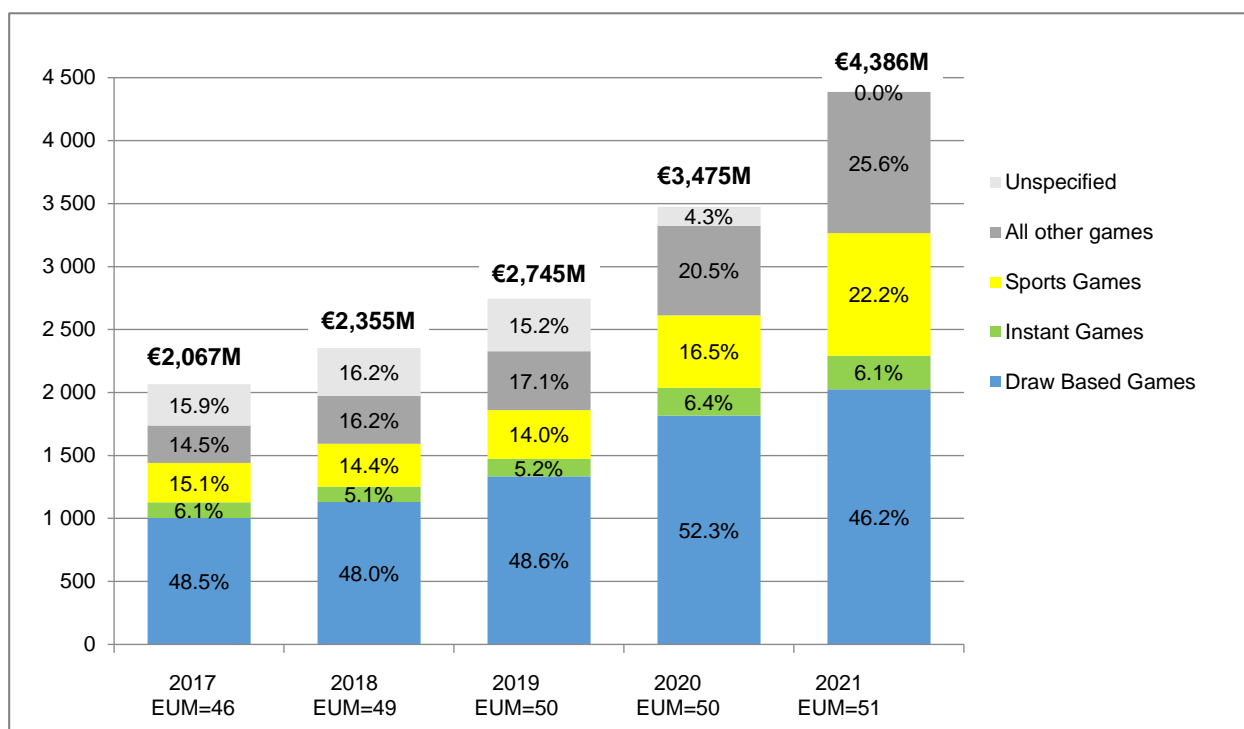
Sources: EL Members in the EU reporting their Online GGR for 2021, see the comment above for information on those who participated in this data collection but did not report the category for the individual years of 2020 and 2021 and on those who provided only the overall figure without a split by game category (being assigned to Unspecified).

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

\* 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 14a. EL Members: Online GGR by Game Category – Development 2017–2021 (€M)**



Sources: EL Members reporting their Online GGR for 2021

For 2021: 61 EL Members (87% of 70) offer online games and 51 (84% of 61) provided the figures (i.e. all except for France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Staatliche Lotterieverwaltung (LOTTO Bayern), Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Sächsische Lotto-GmbH, Malta/ Maltco Lotteries Ltd., Netherlands/ Nederlandse Loterij, Republic of North Macedonia/ National Lottery of Macedonia, Switzerland/ Swisslos Interkantonale Landeslotterie, United Kingdom/ Camelot UK Lotteries Ltd.)

For 2020: 60 EL Members (86% of 70) offer online games and 50 (83% of 60) provided the figures (i.e. all except for France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Staatliche Lotterieverwaltung (LOTTO Bayern), Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Sächsische Lotto-GmbH, Germany/ Lotto-Toto GmbH Sachsen-Anhalt, Malta/ Maltco Lotteries Ltd., Netherlands/ Nederlandse Loterij, Switzerland/ Swisslos Interkantonale Landeslotterie, United Kingdom/ Camelot UK Lotteries Ltd.).

In previous years, Bosnia and Herzegovina/ Lottery of Bosnia & Herzegovina, Italy/ IGT Lottery SpA, Sweden/ AB Svenska Spel and Ukraine/ Ukrainian National Lottery, provided only the overall figure for Online GGR without a split by game category. For this table, the whole amount is assigned to Online GGR: Unspecified.

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

**Figure 14b. EL Members: Online GGR by Game Category – Development 2017–2021 (€M)**

Game category	ELM rep. online GGR for 2021	ELM: Online GGR for the respective year in €M					Evolution* 2021-2020	CAGR * 2021-2017
		2017 (46)	2018 (49)	2019 (50)	2020 (50)	2021 (51)		
Draw Based Games	48	1 003	1 131	1 333	1 817	2 026	11.5%	19.2%
Instant Games	33	126	121	141	222	267	20.4%	20.6%
Sports Games	27	311	340	386	575	972	69.2%	32.9%
All other games	12	299	381	469	712	1 121	57.4%	39.2%
Unspecified	0	328	381	416	150	0	-100.0%	-100.0%
<b>Total</b>	<b>51</b>	<b>2 067</b>	<b>2 355</b>	<b>2 745</b>	<b>3 476</b>	<b>4 386</b>	<b>26.2%</b>	<b>20.7%</b>

Sources: EL Members reporting their Online GGR for 2021, 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 2020 and 2021 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)"

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

**Figure 15. Overview of Reporting Activity of Members by Country – 2017–2021**

Country	Number of Currently Reporting ELM who provided data for individual years				
	2017	2018	2019	2020	2021
Austria	1	1	1	1	1
Belgium	1	1	1	1	1
Bulgaria	3	3	1	1	1
Croatia	1	1	1	1	1
Cyprus	1	1	1	1	1
Czech Republic	1	1	1	1	1
Denmark	2	2	2	2	2
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	1	1	1	1	1
Netherlands	2	2	2	2	2
Poland	2	2	2	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
<b>EL Members in the EU27</b>	<b>53</b>	<b>53</b>	<b>51</b>	<b>50</b>	<b>50</b>
Albania	1	1	1	1	1
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	2	2	2	2	2
Serbia	1	1	1	1	1
Switzerland	2	2	2	2	2
Turkey	1	1	1	1	1
Ukraine	2	2	2	2	2
United Kingdom	1	1	1	1	1
<b>EL Members in total</b>	<b>73</b>	<b>73</b>	<b>71</b>	<b>70</b>	<b>70</b>

Sources: EL Members who took part in the 2021 survey collecting data for 2017–2021.

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

<b>Country</b>	The lotteries' country of origin.
<b>Lottery</b>	The lottery name needed to be confirmed.
<b>Contact person</b>	The following details of a contact person were requested: name, email address and phone number.
<b>National currency</b>	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.
<b>Sales</b>	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.
<b>Gross Gaming Revenue (GGR)</b>	Gross Gaming Revenue (GGR) is equal to Sales minus prizes. For each game, GGR should be equal to Sales multiplied by 100% – the pay-out rate as a percentage. If, for example, you sell €50 of instant tickets with a pay-out 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 pay-out percentage and the actual pay-out, 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 pay-out 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.
<b>Sales via the Internet/ mobiles</b>	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.
<b>Sales generated via mobile devices</b>	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.
<b>Gross Gaming Revenue via the Internet/ mobiles</b>	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.

<b>Draw Based Games</b>	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.
<b>Instant Games</b>	All instant or scratch games and pull-tab games - the so-called pre-drawn lotteries.
<b>Sports Games</b> <i>(incl. Horse Racing Games)</i>	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.)
<b>EGMs outside casinos</b>	Electronic Gaming Machines located outside licensed brick-and-mortar casinos. For example, slot machines outside casinos, VLTs and EILs.
<b>All other games</b>	Typically, the category includes casino games or poker or virtual games. The category DOES NOT INCLUDE activities other than gaming (e.g. financial services) and SALES figures are not required.
<b>Average number of full-time employees</b>	The average number of lottery employees over the year calculated on a full-time basis. Do not include employees of service providers or retailers.
<b>Diversity &amp; Inclusion</b>  <i>percentage of women in company's employees (not including the board)</i>  <i>percentage of women in company's top-level management</i>  <i>percentage of women on Board of Directors</i>	<p>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.</p> <p>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).</p> <p>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.</p>
<b>Mandatory Money for Society (Tax/ Duties/ Good Causes)</b>  <i>of which goes to sport</i>  <i>of which goes to culture and heritage</i>	<p>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.</p> <p>For this study, the total amount your lottery contributes to society as mandatory payments is broken down into four categories:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>

<p><i>of which goes to health and well-being</i></p> <p><i>of which goes to education</i></p> <p><i>of which goes to social and other societal purposes</i></p> <p><i>of which goes to the treasury (with no knowledge of the final allocation, i.e. taxes, duties)</i></p>	<ul style="list-style-type: none"> <li>• Health and well-being: this cover 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.</li> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> </ul>
<p><b>Sponsorships or patronage of sports</b></p>	<p>Some lotteries use sponsorships and/ or patronage as marketing and public relations tools. Please include the cost for any such sponsorship and/ or patronage.</p>
<p><b>Total spending on measures to prevent problem gambling</b></p>	<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>
<p><b>Number of Points of Sale (POS)</b></p>	<p>The number of physical points of sale where your lottery products (DBGs, Instants and/or sports betting) are sold.</p> <p>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"> <li>• Owned POS - the number of POS owned by your lottery.</li> <li>• 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).</li> </ul> <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"> <li>• Tobacco/News agents - Third-party POS where lottery products are sold, but Tobacco/Newspapers are the main activity,</li> <li>• Petrol Station - Third-party POS where lottery products are sold, but petrol sale is the main activity,</li> </ul>

	<ul style="list-style-type: none"> <li>• Food Retail - Third-party POS where lottery products are sold, but food retail is the main activity,</li> <li>• Public Services (post offices, railway, etc.) - Third-party POS where lottery products are sold, but Public Services is the main activity,</li> <li>• HoReCa (Pubs, Bars, Restaurants, etc.) - Third-party POS where lottery products are sold, but HoReCa is the main activity,</li> <li>• Other or Unspecified - Third-party POS where lottery products are sold, but that do not fall into those specified above.</li> </ul>
<b>Number of members with retail loyalty programme</b>  <b>Number of members with online loyalty programme</b>	<p>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.</p>
<b>Base of online customers as of 31.12. of the respective year</b>	<p>An active player is defined as one who has realized a bet during the past 12 months (i.e. during the respective calendar year).</p>
<b>Number of members with non-gaming activities</b>	<p>Non-gaming activities are services not directly related to gambling, like financial/ payment services, mobile phone recharging, sales of event tickets, etc.</p>

Source: EL, 2021

## Annex D: Other Data Sources

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Central Bank of the Republic of Azerbaijan (2021). *Official average exchange rates of AZN*, from <https://www.cbar.az/page-42/monetary-indicators>

Eurostat (2021). *Population*, from <https://ec.europa.eu/eurostat/databrowser/view/tps00001/default/table?lang=en>

Eurostat (2021). *Euro/ ECU exchange rates – annual data*, from [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ert\\_bil\\_eur\\_a&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ert_bil_eur_a&lang=en)

International Monetary Fund (2021). *Population in World Economic Outlook Database April 2021*, from <https://www.imf.org/en/Publications/WEO/weo-database/2021/April>

National Bank of Kazakhstan (2021). *Official Foreign Exchange Rates on average for the period (2021)*, from <https://nationalbank.kz/en/news/oficialnye-kursy>

National Bank of Ukraine (2021). *Official hryvnia exchange rate against foreign currencies (period average)*, from <https://bank.gov.ua/en/statistic/sector-external/data-sector-external>



# **THE EUROPEAN LOTTERIES**

FOR THE BENEFIT OF SOCIETY