



**THE EUROPEAN
LOTTERIES**

FOR THE BENEFIT OF SOCIETY

Report on the Lottery Sector in Europe 2023

Report

Dear reader,

This is already the eighteenth report on the European Lotteries sector, the most detailed report regarding both EL Members operating in the European Union (EU 27) and EL Members (ELM) all combined with the objective of helping you understand how current Members of the European Lotteries Association (hereinafter the EL) operated and what their contributions to society were in 2023, in comparison to previous years.

This report, traditionally and almost exclusively, relies on primary data sources from EL Members. The report presents only the data that individual members felt comfortable delivering or that they were able to report in terms of their activities. Thus, the breadth of data reported may differ in specific areas and relevant footnotes on this issue are available under the figures and tables when necessary. All monetary figures are calculated in euros using the average exchange rate for 2022.³

The report for 2023 consolidates data from all 67 regular EL Members and covers 38 European countries.

Table A. Number of EL Members Participating in the 2023 Data Collection

	2019	2020	2021	2022	2023
EL Members in the EU27	48	47	48	49	49
EL Members outside the EU27	16	17	17	17	18
Total	64	64	65	66	67

Source: Reporting EL Members who provided data for individual years

EL Members operate a variety of game activities, depending on their historical background and local legal and regulatory conditions in their market.

The report provides KPIs of all reporting EL Members such as consolidated Gross Gaming Revenue (GGR)¹ broken down into five gaming categories: Draw Based Games, Instant Games, Sports Games², Electronic Gaming Machines (EGMs) outside casinos and All other games; and consolidated Sales broken down into the first three "Lottery" categories (Draw Based Games, Instant Games, Sports Games).

Major Trends

- **Sector is in good health, steadily growing overall, and contributing to the society €22.0bn in 2023, a similar amount as in 2022.**
- **DBGs are still by far the largest game segment and continued to grow by 2,1% compared with 2022.**
- **Instants are the second largest game segment and grew by 6,5% compared with 2022.**
- **Both are complemented by quickly growing Sports Betting and Other Games segment, growth being fuelled, depending on markets, by regulatory melt-down and ELM broadening their product portfolio.**
- **Retail is still the majority sales channel, its GGR growing by 2.4% compared to 2022. ELM typically have one of the largest or even the largest retail networks in their countries, offering their customers an increased range of products, incl. the non-gaming ones and contributing significantly to the employment.**
- **Online is representing 12.3% of total GGR, growing by 14.0% compared to 2022.**
- **Continued digitalisation/ online growth is driven by mobile devices penetration and younger generations demand.**

¹ Sales minus prizes and hereinafter GGR. This key figure reflects the lottery business better than Sales figures.

² This category contains all Sports Games, including e.g. horse racing or dogs racing betting.

Table B. Overview of Key Data 2023

	Reporting EL EU Members	All Reporting EL Members
EL Members All member lotteries reporting within the EU/in Europe (100% = 50/68)	49	67
Money for Society (Number reporting members: 48/63)	€19.7bn	€22.0bn
Direct Full-time Employment 6 Yearly average number of full-time employees (49/66)	49.537	53.964
Sales Includes Sales from the three "Lottery" categories (45/61)	€89.9bn	€97.8bn
Gross Gaming Revenue Sales minus prizes of the five gaming categories (49/67)	€36.1bn	€43.6bn
Online Gross Gaming Revenue (38/50)	€4.4bn	€5.3bn

Source: EL Members who took part in the 2023 survey; data being collected and aggregated by Kantar CZ, 2024.

Also in 2023, European society had huge benefits thanks to lottery business

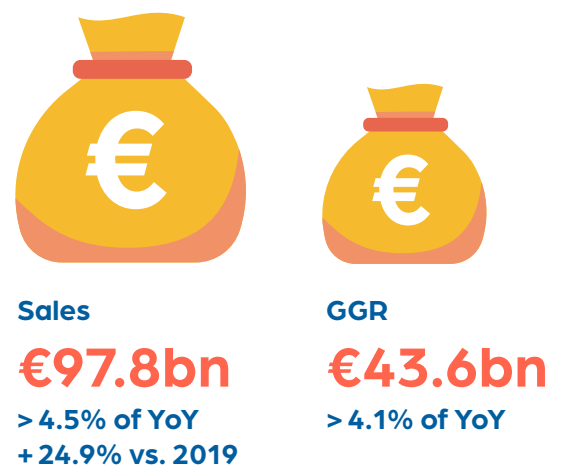
In 2023, the money contributed to society by all EL Members (63 reported) amounted to €22.0bn, remained stable compared to 2022, and an increase of 22.7% compared to 2019. This marks a significant EL Members' contribution to their local societies. It means that 50.5% of the GGR generated by EL Members went back to society (not including sponsorships) in the respective countries. The money for society per capita raised across all EL members averaged €40, at the level of 2022. Where the allocation of the money for society was concerned, 72.3% of the total went to state budgets (with no reported knowledge of the final allocation), 12.8% went to support social and other societal purposes, 8.6% to support sports, 3.9% to support culture & heritage, 1.9% to support health and 0.5% to education.



Lottery games continue their sustainable growth

Total Sales for the three main "lottery" categories (Draw Based Games, Instant Games, Sports Games) by all EL Members amounted to €97.8bn in 2023, resulting in a year-on-year increase of 4.5% in comparison with 2022 and 24.9% in comparison with 2019.

In 2023, 67 EL Members reported total GGR of all gaming categories amounting to €43.6bn, an increase of 4.1% compared with 2022 and an increase of 7.6% compared with 2019. Average GGR per capita across all EL Members was €70 per capita. This ranges from Ukraine with €0.2 GGR per capita to Greece with €200 GGR per capita.



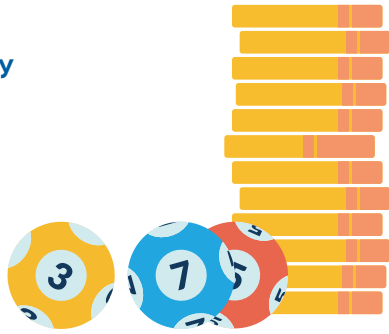
Draw Based Games: the foundation of our business, more solid than ever

The largest lottery category is Draw Based Games with games brand names like Lotto, EuroMillions, Eurojackpot, and Joker. This category of games, reported by 57 EL Members generated GGR of €20.1bn in 2023, accounting for 50.9% of total GGR. It increased by 2.0% compared to 2022. Compared to pre-Covid year 2019, it grew by CAGR of 2.1%.

DBGs

€20.1bn

**Largest category
only +2% YoY
+9% vs. 2019**



Sport Games: the second fastest growing category, + 8% in 2023

Sports Games category was reported by 41 EL Members from 25 countries altogether, operating in a different regulatory environment (ranging from monopolistic positions to a fully competitive ones, impacting also the sales channels) and generated GGR of €3.0bn in 2023, representing 9.2% of EL Members' total GGR (vs 7.6% in 2022). It grew by 7.7% compared to 2022. On country basis, the YoY category GGR change ranged from a growth by 195.8% in Malta to a decrease by 5.6% in Finland. Compared to 2019, it grew by 25.9%. In the five-year trend between 2019 to 2023, it generated a CAGR of 5.9%, making it the second fastest growing category within the EL Members base.

Sports Games

€3.0bn

**2nd fastest growing
+8% YoY
+26% vs. 2019**



Instant Games: the second largest category growing by 7% in 2023

Instant Games, the second largest category, was offered by 54 reporting EL Members in 32 countries and generated GGR of €9.2bn in 2023, representing 23.3% share of their total GGR. It grew by 6.8% compared to 2022 and compared to pre-Covid year 2019, it grew by 24.9%, driven by strong growth namely in 2023, and in the five-year trend between 2019 to 2023, it generated a CAGR of 5.7%.



Instant Games

€9.2bn

**2nd largest
+7% YoY
+25% vs. 2019**

Online reached 12% share

Online growth, strengthened by the Covid impact, continued also in 2023. EL Members (50 reported the category) generated online GGR of €5.3bn in 2023, representing 12.3% of total GGR, a growth by 13.8% compared to 2022, with a CAGR 2019-2023 of 19.0%.



Online

€5.3bn

**+12% share
+101% vs. 2019**

Retail grew by 2% in 2023

Retail also continued to grow in 2023. EL Members generated retail GGR of €38.2bn, representing 87.7% of total GGR, growing by 2.4% in comparison with 2022, and reaching the same level in comparison with pre-Covid year 2019. Interesting evolution continued also in the retail network structure. Despite the Covid and the growth of online, the total number of points of sales (64 ELM reported) continued to increase to 367,390 in 2023, a 1.3% growth vs. 2022.

Retail

€38.2bn

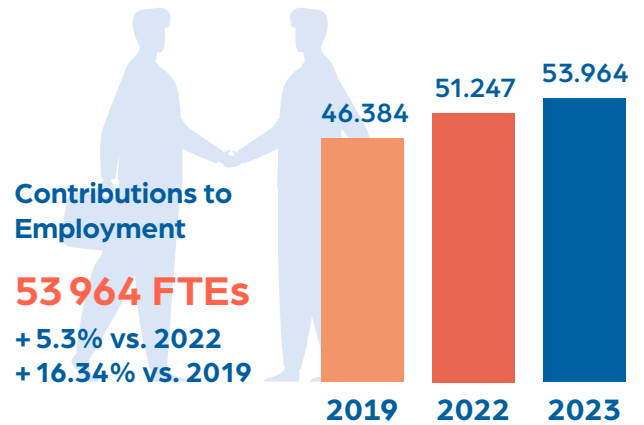
**Still 88% share
+2% YoY
+0% vs. 2019**



Contribution to employment & environment: our positive impact goes beyond funding

EL Members' another important societal contribution is the contribution to employment in their respective countries. In 2023, 66 reporting EL Members employed 53.964 full-time employees in 2023⁶. Despite the Covid impact on retail networks and growing importance of online, the employment of EL Members increases by 5.3% compared to 2022 and of 16.34% compared to 2019.

As ESG area concerns, 42% of EL Members already calculated greenhouse gas emissions in 2023, out of which Scope 1 only was reported by 3.8% of EL Members, Scope 1-2 was reported by 11.3% and Scope 1-3 was reported by 26.4% of them. This is a major improvement in comparison with 2022.



We hope that you have enjoyed your reading.

Romana GIRANDON

President of the European Lotteries and Toto Association

Hansjörg HÖLTKEMEIER

Member of the Executive Committee of the European Lotteries Association & Supervisory Chair of Data & Research Working Group

Annexes

- Annex A:** Methodology Applied
- Annex B:** List of Figures
- Annex C:** Explanations of the Data Included in this Report
- Annex D:** Other Data Sources

Annex A:

Methodology Applied

This report, traditionally and almost exclusively, relies on primary data sources from EL Members².

The data gathered covers the results of current regular EL Members in the 2022 calendar year³. 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 2022⁴. They were responsible for the data collection, consistency, aggregation, and non-disclosure of any detailed data to any party. The data was collected via a secured online questionnaire during spring 2023.

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

Data was requested from EL Members in their national currency and figures from the non-euro countries were converted into Euros using the average exchange rates for 2022, either from Eurostat or, if not available, then from the European Central Bank or the national bank of each country⁵. In addition to the data for 2022, data from previous years is also included, namely from the period of 2018–2021.^{6,7}

To make the figures comparable over time, historical figures provided only by EL Members who participated in this years' data collection process (hereinafter: Currently Reporting EL Members) are shown in this report and, at the same time, all historical monetary figures from those years in currencies other than the Euro have also been converted into Euros using the same average exchange rate for 2022 (in other words, all amounts in this report are reported in the average 2022 Euro value).⁸ Thus, looking at the previous years' reports, which have used exchange rates from 2018, 2019, 2020 and 2021 respectively, differences appear because of the change in exchange rates and also because of the change in the number of Currently Reporting EL Members. This approach of using a sole exchange rate across historical periods enables better depiction (and observation), and therefore, better understanding of the trends, freed from local macro-economic influence.

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

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

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

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

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

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

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

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

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

A comparison with previous results is always available and is within a two- or five-year period, or both. The changes displayed include each Currently Reporting EL Member that reported at least once in the monitored period.^{14, 15} All percentage changes between years have been calculated based on the figures in the national currency converted to their Euro value.

⁹ Changes were made in the employment of an external research agency service, transition to online data collection, exchange rate conversion and setting a fixed rule for involving specific historical data and their reporting in predefined stable periods, see above for further details.

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

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

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

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

¹⁴ In the case of larger tables that show the results of single countries, annual changes are displayed only by countries where the structure of reporting EL Members remained the same in both years/for both categories (i.e. there has not been any change in the number or structure of reporting EL Members from this country); in the opposite case, "n/a" is displayed. Change in 2022–2021 for EL Members in the EU27 and EL Members in total may be influenced by differences in the structure of reporting EL Members.

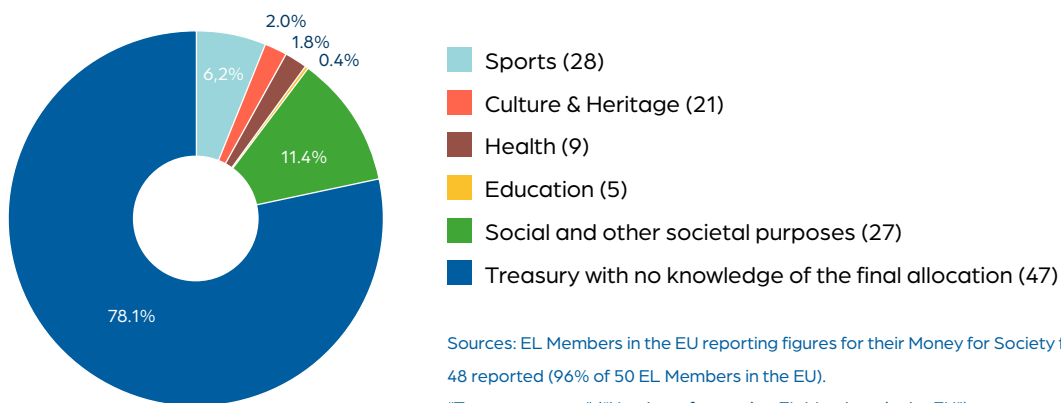
¹⁵ The results of comparisons are always written with one decimal unless the value is zero. If the result of the comparison is other than zero, the value is written with two decimals, and no decimals are shown if the resultant value is truly zero. Negative values are always highlighted in red, and in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

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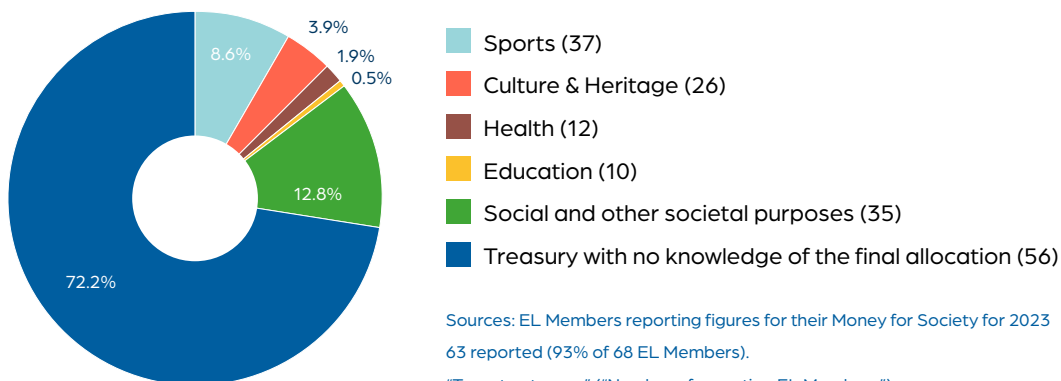
Figure 1. EL Members in the EU: Money for Society by Target – 2023 (€M)



Total 2023 = **€19 652M**

Sources: EL Members in the EU reporting figures for their Money for Society for 2023
 48 reported (96% of 50 EL Members in the EU).
 "Target category" ("Number of reporting EL Members in the EU").

Figure 2. EL Members: Money for Society by Target – 2023 (€M)



Total 2023 = **€21 969M**

Sources: EL Members reporting figures for their Money for Society for 2023
 63 reported (93% of 68 EL Members).
 "Target category" ("Number of reporting EL Members").

Figure 3. Contribution to Direct Employment – Development 2019–2023

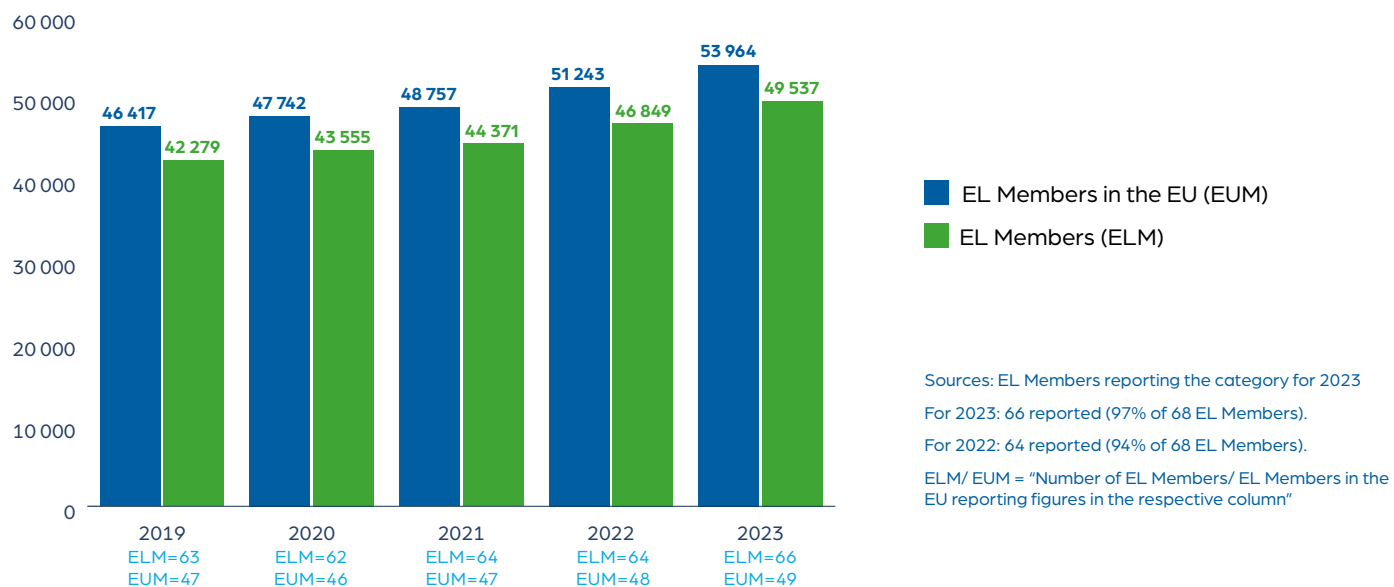


Figure 4. Average percentage of women in company's employees – 2023 (%)

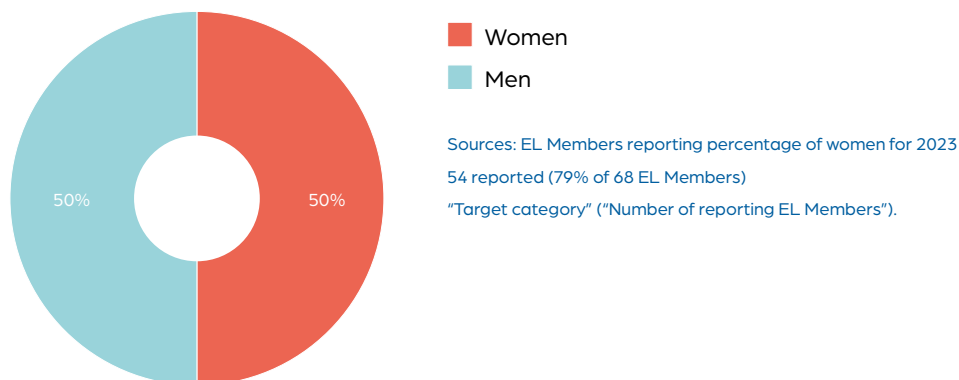


Figure 5. Average percentage of members calculating greenhouse gas emissions – 2023 (%)

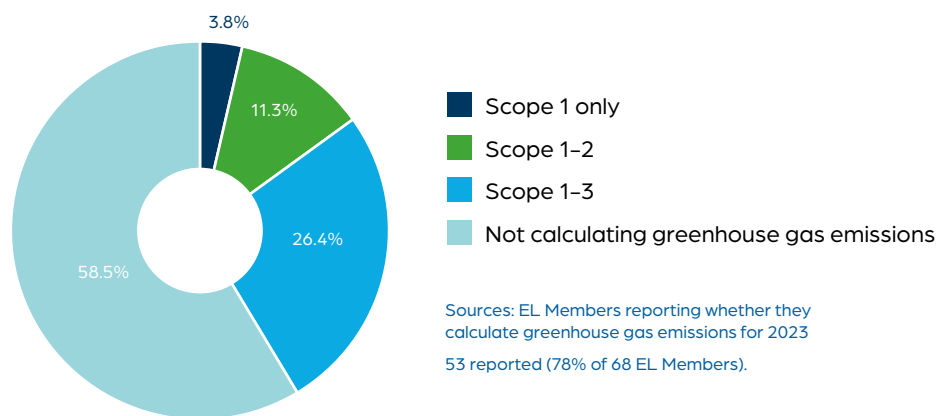


Figure 6a. EL Members in the EU: Lottery Sales by Game Category – 2023 (€M)

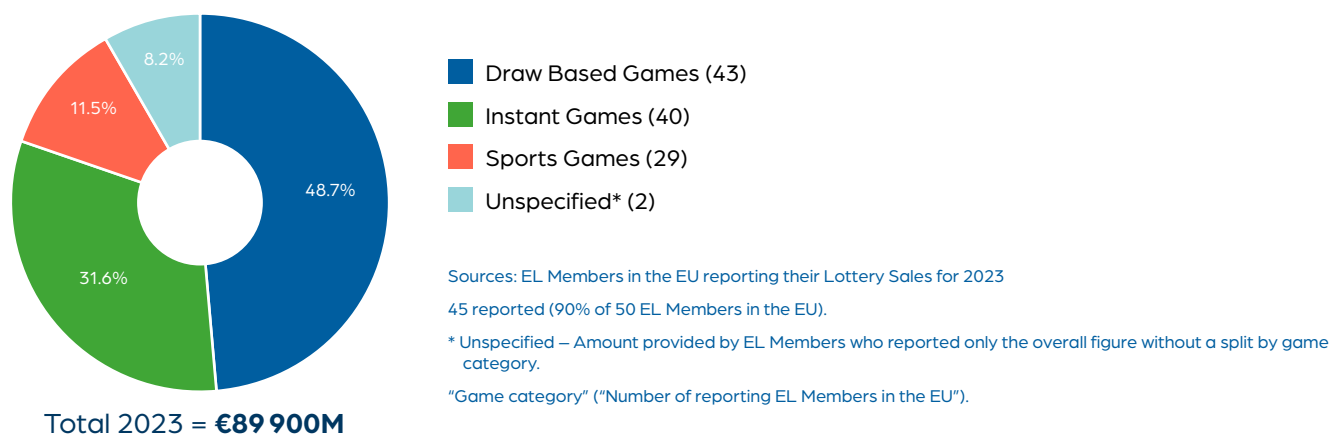


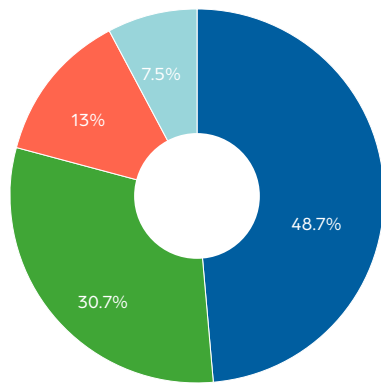
Figure 6b. EL Members in the EU: Lottery Sales by Game Category – 2023 (€M)

Game category	Number of EUM reporting Lottery Sales for 2023	EUM: Lottery Sales for 2023 (€M)	Share out of total
Draw Based Games	43	43 797	48.7%
Instant Games	40	28 425	31.6%
Sports Games	29	10 298	11.5%
Unspecified*	2	7 380	8.2%
Total	45	89 900	100%

Sources: EL Members in the EU reporting their Lottery Sales for 2023.

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

Figure 7a. EL Members: Lottery Sales by Game Category – 2023 (€M)



- Draw Based Games (56)
- Instant Games (52)
- Sports Games (38)
- Unspecified* (2)

Sources: EL Members reporting their Lottery Sales for 2023
61 reported (90% of 68 EL Members).

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

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

Total 2023 = **€97 799M**

Figure 7b. EL Members: Lottery Sales by Game Category – 2023 (€M)

Game category	Number of ELM reporting Lottery Sales for 2023	ELM: Lottery Sales for 2023 (€M)	Share out of total
Draw Based Games	56	47 674	48.7%
Instant Games	52	29 993	30.7%
Sports Games	38	12 752	13.0%
Unspecified*	2	7 380	7.5%
Total	61	97 799	100%

Sources: EL Members reporting their Lottery Sales for 2023.

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

Figure 8a. EL Members in the EU: Lottery Sales by Game Category – Development 2019–2023 (€M)

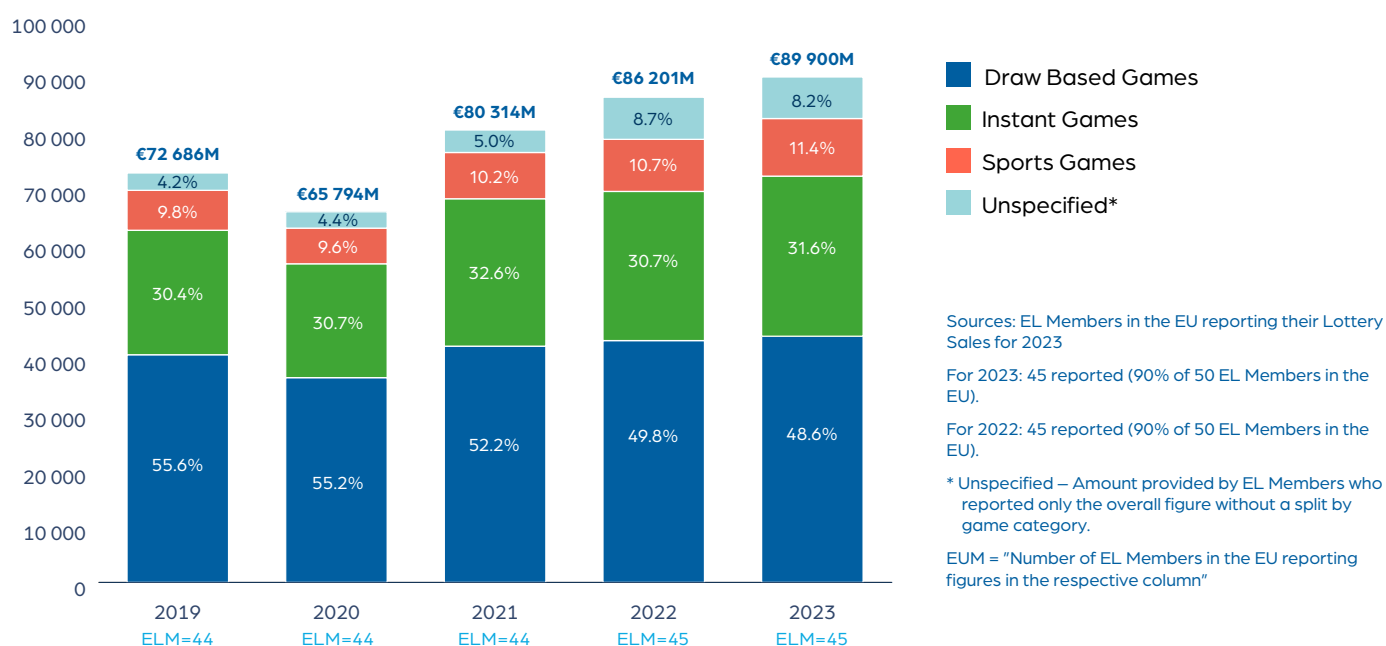


Figure 8b. EL Members in the EU: Lottery Sales by Game Category – Development 2019–2023 (€M)

Game category	EUM rep. Lottery Sales	EUM: Lottery Sales for the respective year in €M					Evolution* 2023–2022	CAGR* 2023–2019
		for 2023	2019 (44)	2020 (44)	2021 (44)	2022 (44)		
Draw Based Games	42	40 418	36 350	41 937	42 929	43 701	1.8%	2.0%
Instant Games	39	22 094	20 216	26 172	26 479	28 423	7.3%	6.5%
Sports Games	28	7 089	6 325	8 211	9 246	10 224	10.6%	9.6%
Unspecified**	2	3 085	2 903	3 994	7 477	7 380	-1.3%	24.4%
Sub-total	44	72 686	65 794	80 314	86 131	89 728	4.2%	5.4%
EU Members who did not report for all five-years***	1	0 (0)	0 (0)	0 (0)	69 (1)	171 (1)		
Total	45	72 686	65 794	80 314	86 201	89 900		

Sources: EL Members in the EU reporting their Lottery Sales for 2023.

"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 reporting in the respective category for individual years.

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

*** 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 2019–2023 (€M)

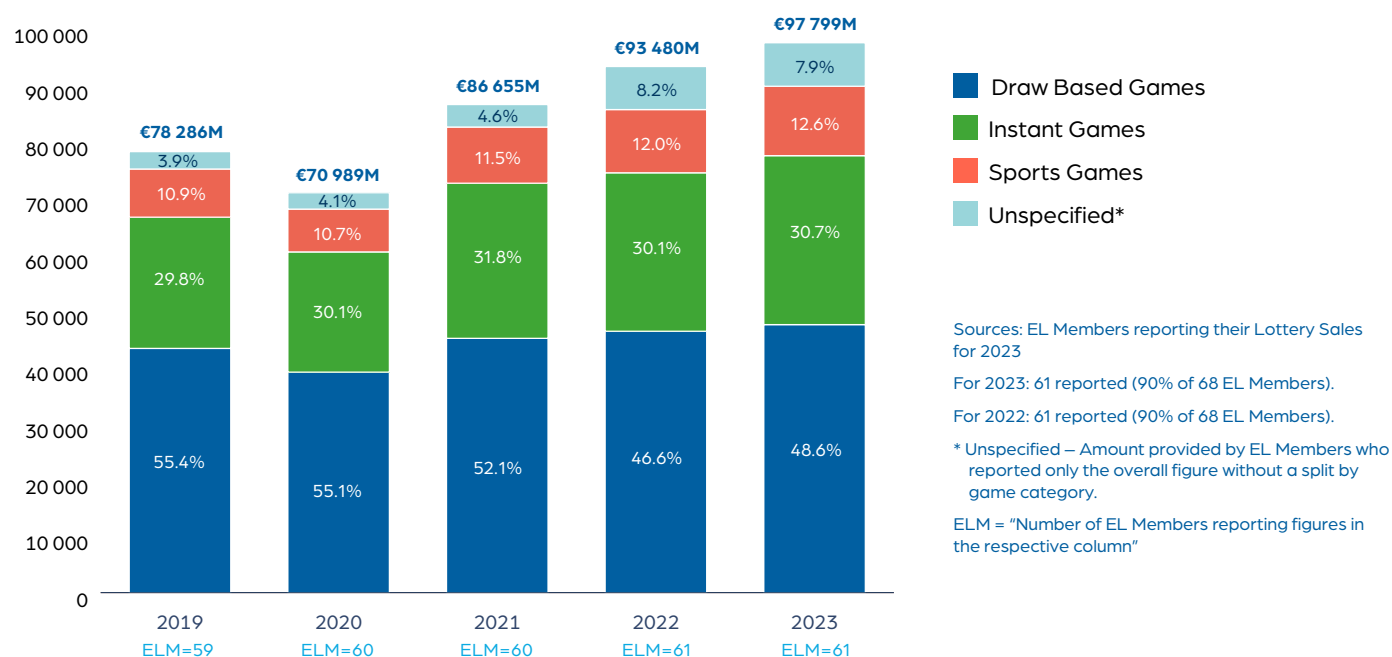


Figure 9b. EL Members: Lottery Sales by Game Category – Development 2019–2023 (€M)

Game category	ELM rep. Lottery Sales	ELM: Lottery Sales for the respective year in €M					Evolution* 2023–2022	CAGR* 2023–2019
		for 2023	2019 (59)	2020 (59)	2021 (59)	2022 (59)		
Draw Based Games	55	43 354	39 141	45 141	46 400	47 578	2.5%	2.4%
Instant Games	51	23 294	21 343	27 537	28 129	29 991	6.6%	6.5%
Sports Games	35	8 550	7 597	9 973	11 225	12 321	9.8%	9.6%
Unspecified **	2	3 088	2 903	3 994	7 643	7 721	1.0%	25.7%
Sub-total	59	78 286	70 985	86 645	93 397	97 612	4.5%	5.7%
EU Members who did not report for all five-years ***	2	0 (0)	4 (1)	10 (1)	83 (2)	188 (2)		
Total	61	78 286	70 989	86 655	93 480	97 799		

Sources: EL Members reporting their Lottery Sales for 2023.

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

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

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

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

Figure 10a. EL Members in the EU: GGR by Game Category – 2023 (€M)

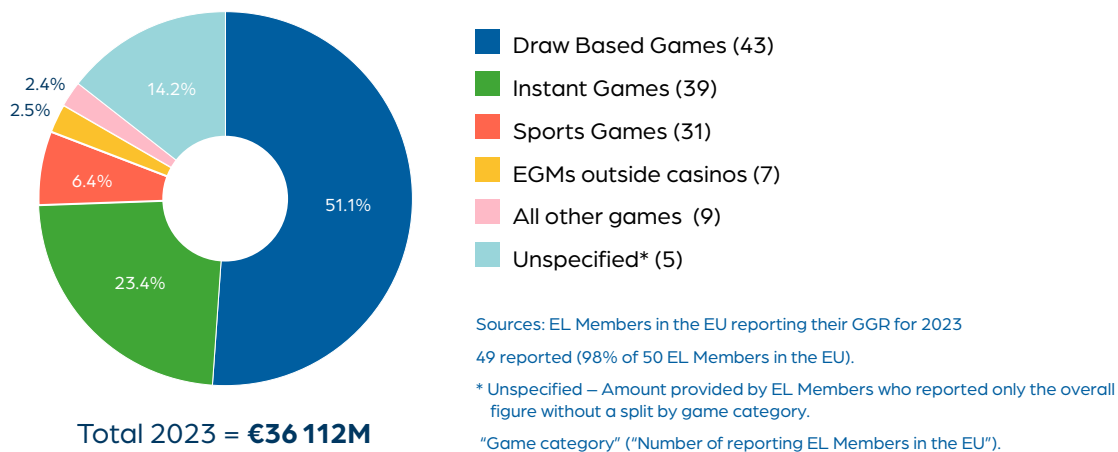


Figure 10b. EL Members in the EU: GGR by Game Category – 2023 (€M)

Game category	Number of EUM reporting GGR for 2023	EUM: GGR for 2023 (€M)	Share out of total
Draw Based Games	43	18 462	51.1%
Instant Games	39	8 461	23.4%
Sports Games	31	2 307	6.4%
EGMs outside casinos	7	893	2.5%
All other games	9	866	2.4%
Unspecified*	5	5 122	14.2%
Total	49	36 112	100%

Sources: EL Members in the EU reporting their GGR for 2023.

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

Figure 11a. EL Members: GGR by Game Category – 2023 (€M)

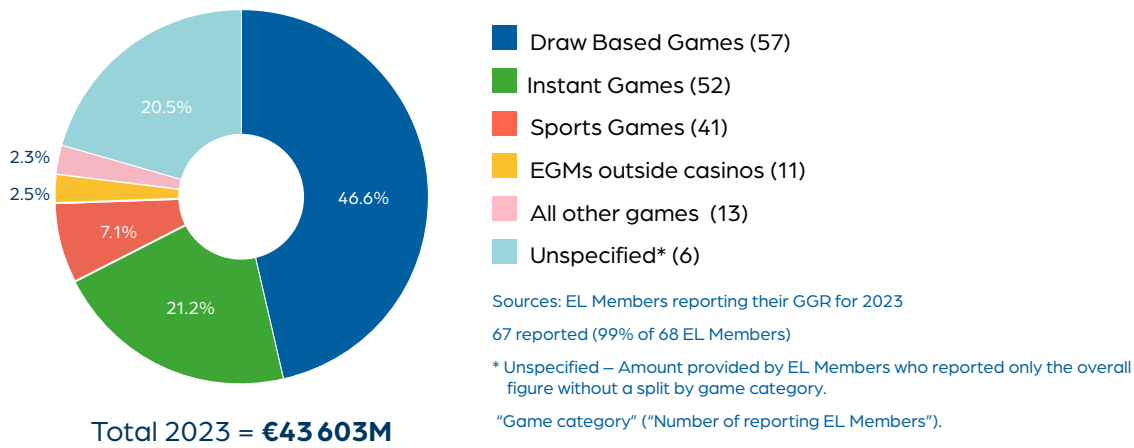


Figure 11b. EL Members: GGR by Game Category – 2023 (€M)

Game category	Number of ELM reporting GGR for 2023	ELM: GGR for 2023 (€M)	Share out of total
Draw Based Games	57	20 243	46.4%
Instant Games	52	9 223	21.2%
Sports Games	41	3 102	7.1%
EGMs outside casinos	11	1 078	2.5%
All other games	13	1 002	2.3%
Unspecified*	6	8 954	20.5%
Total	67	43 603	100%

Sources: EL Members reporting their GGR for 2023.

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

Figure 12a. EL Members in the EU: GGR by Game Category – Development 2019–2023 (€M)

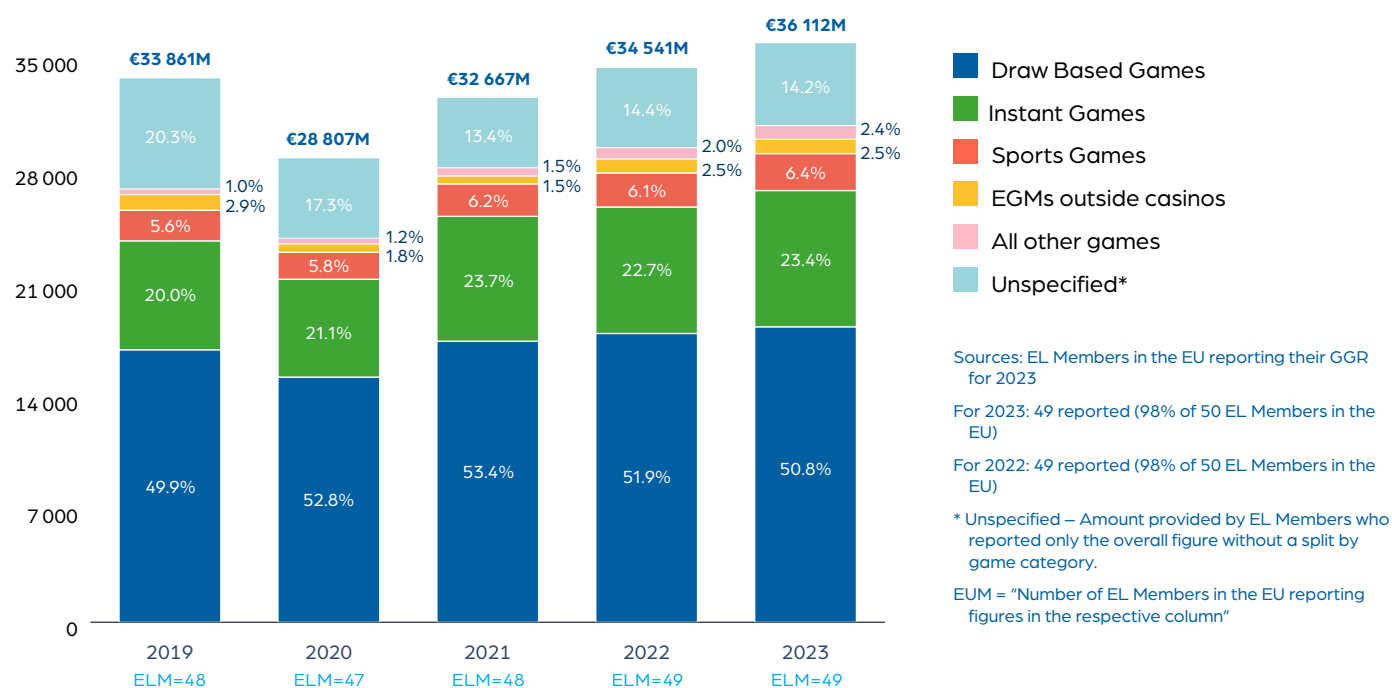


Figure 12b. EL Members in the EU: GGR by Game Category – Development 2019–2023 (€M)

Game category	EUM rep. GGR	EUM: GGR for the respective year in €M					Evolution* 2023–2022	CAGR* 2023–2019
		for 2023	2019 (47)	2020 (47)	2021 (47)	2022 (47)		
Draw Based Games	41	16 902	15 207	17 430	17 912	18 327	2.3%	2.0%
Instant Games	37	6 758	6 069	7 748	7 845	8 452	7.7%	5.7%
Sports Games	29	1 896	1 669	2 013	2 110	2 293	8.7%	4.9%
EGMs outside casinos	6	978	532	499	880	887	0.7%	-2.4%
All other games	7	351	343	503	691	851	23.1%	24.8%
Unspecified**	5	6 880	4 987	4 370	4 974	5 138	3.3%	-7.0%
Sub-total	47	33 764	28 807	32 564	34 413	35 948	4.5%	1.6%
EU Members who did not report for all five-years***	2	97 (1)	0 (0)	104 (1)	128 (2)	164 (2)		
Total	49	33 861	28 807	32 667	34 541	36 112		

Sources: EL Members in the EU reporting their GGR for 2023.

"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 reporting in the respective category for individual years.

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

*** 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 2019–2023 (€M)

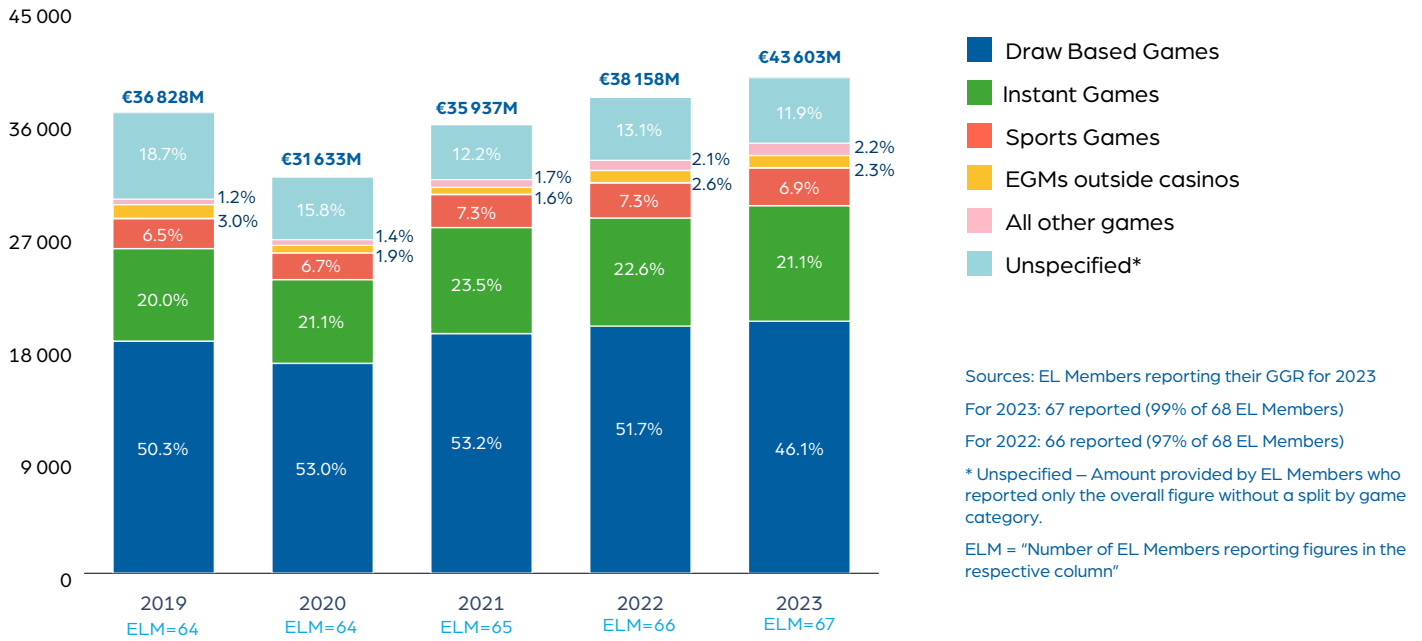


Figure 13b. EL Members: GGR by Game Category – Development 2019–2023 (€M)

Game category	ELM rep. GGR	ELM: GGR for the respective year in €M					Evolution * 2023–2022	CAGR * 2023–2019	
		for 2023	2019 (63)	2020 (63)	2021 (63)	2022 (63)			2023 (63)
Draw Based Games	55		18 521	16 752	19 125	19 716	20 108	2.0%	2.1%
Instant Games	50		7 377	6 672	8 452	8 627	9 213	6.8%	5.7%
Sports Games	37		2 397	2 126	2 638	2 803	3 019	7.7%	5.9%
EGMs outside casinos	9		1 121	614	577	992	993	0.1%	-3.0%
All other games	10		432	443	605	807	979	21.2%	22.7%
Unspecified**	6		6 884	4 987	4 370	5 004	5 205	4.0%	-6.8%
Sub-total	63		36 731	31 593	35 767	37 950	39 517	4.1%	1.8%
EU Members who did not report for all five-years***	4		97 (1)	40 (1)	171 (2)	209 (3)	4 086 (4)		
Total	67		36 828	31 633	35 937	38 158	43 603		

Sources: EL Members reporting their GGR for 2023, 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 2022 and 2023.

"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.

*** 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 2019–2023 (€M)

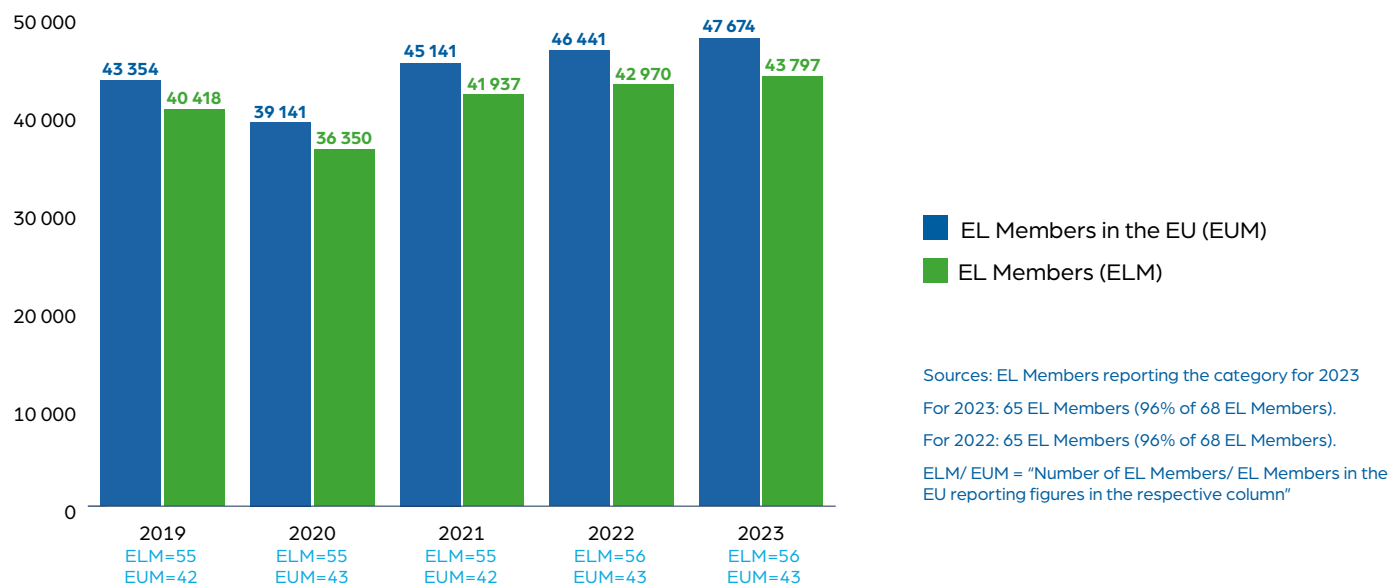


Figure 15. Sales for Instant Games – Development 2019–2023 (€M)

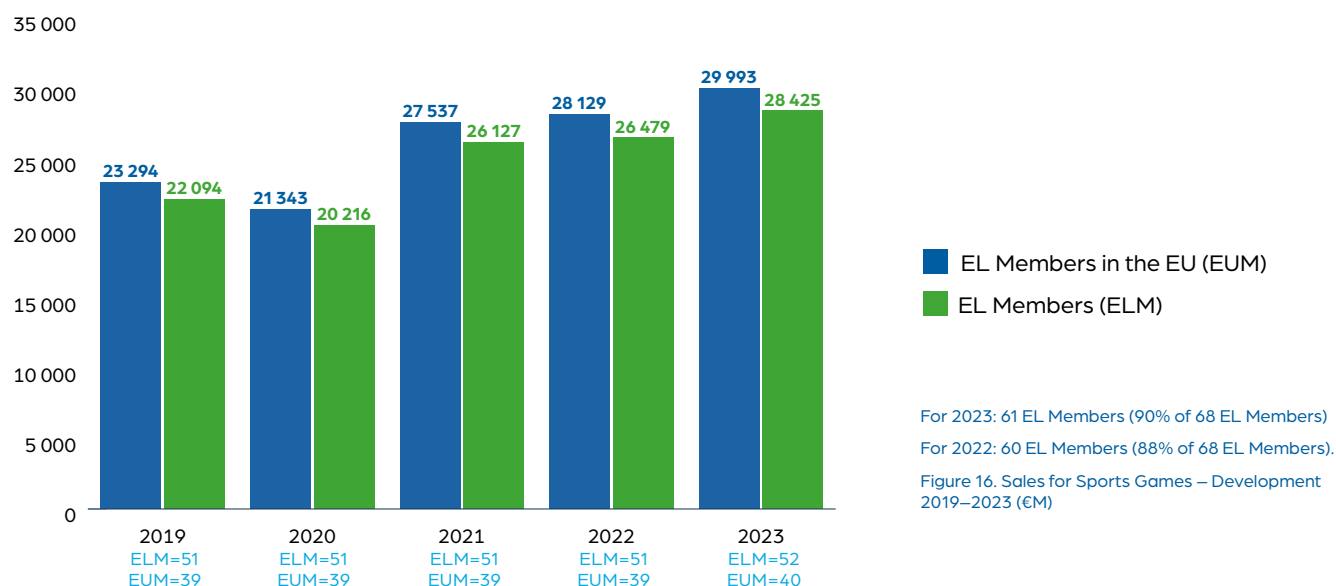


Figure 16. Sales for Sports Games – Development 2019–2023 (€M)

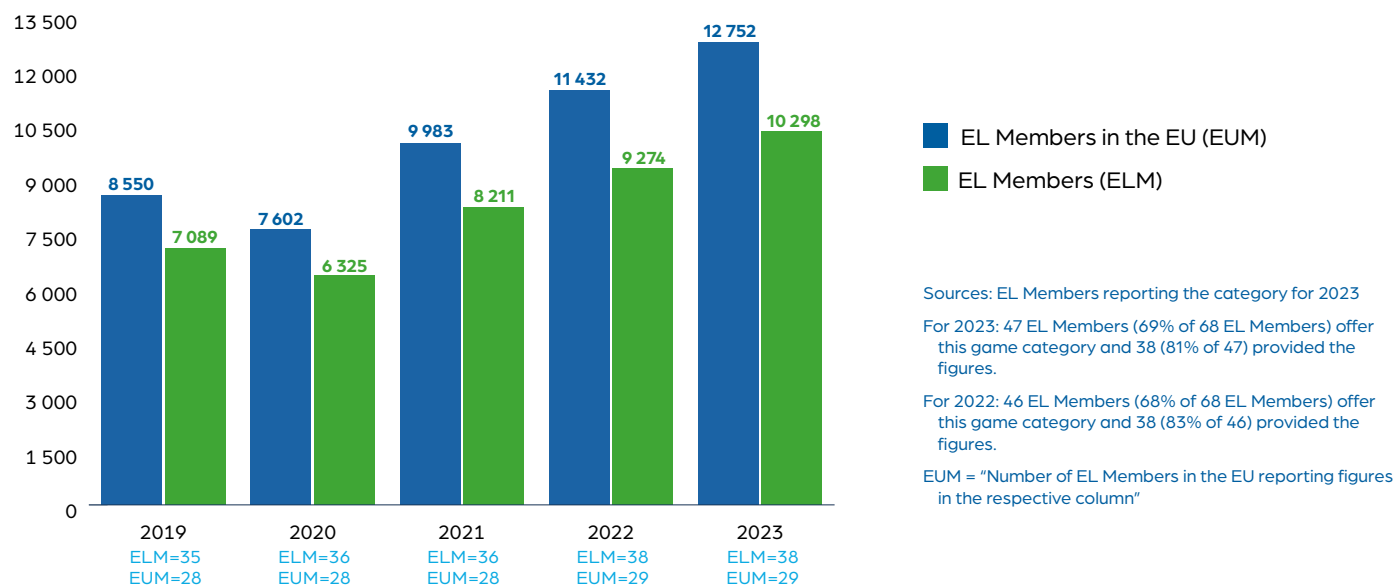


Figure 17a. EL Members in the EU: Online GGR by Game Category – Development 2019–2023 (€M)

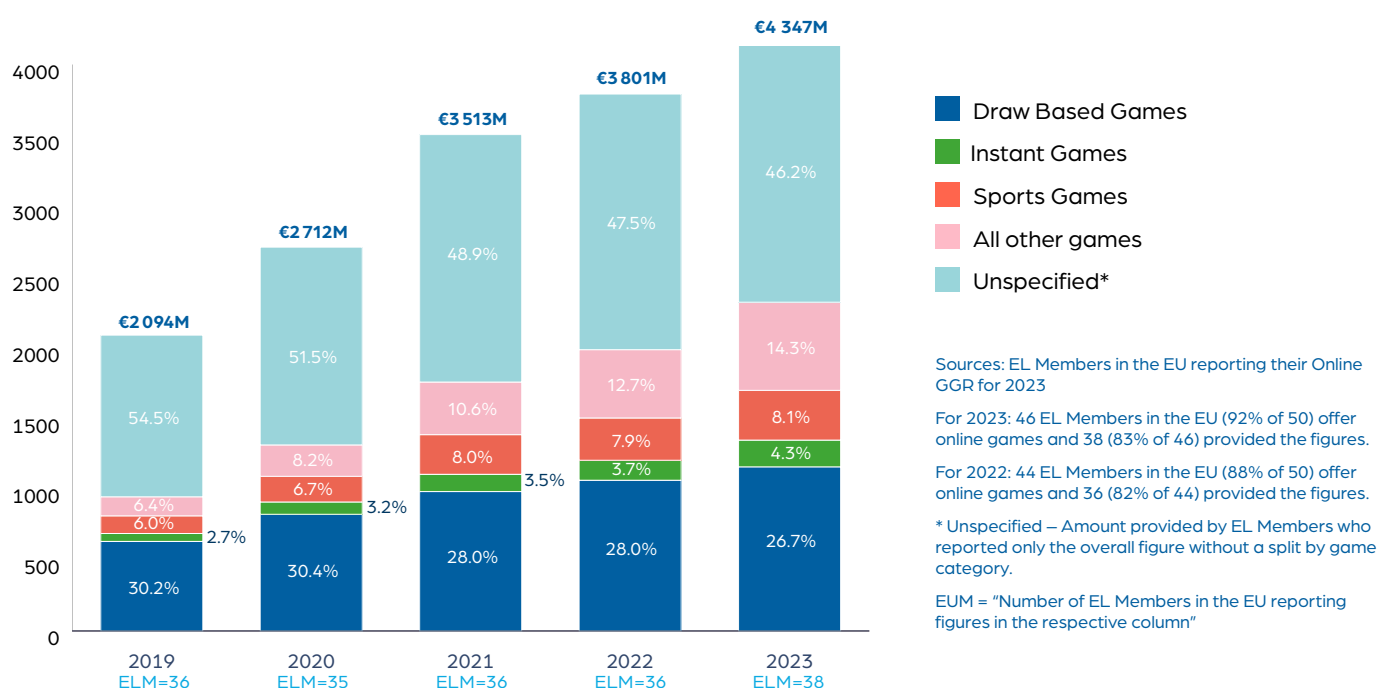


Figure 17b. EL Members in the EU: Online GGR by Game Category – Development 2019–2023 (€M)

Game category	EUM rep. GGR	EUM: Online GGR for the respective year in €M					Evolution* 2023–2022	CAGR* 2023–2019
		for 2023	2019 (35)	2020 (35)	2021 (35)	2022 (35)		
Draw Based Games	30	633	824	985	1 065	1 160	8.9%	16.4%
Instant Games	17	56	87	122	141	189	33.9%	35.6%
Sports Games	15	125	181	280	299	351	17.6%	29.5%
All other games	5	135	222	372	483	623	29.1%	46.7%
Unspecified**	4	1 142	1 397	1 748	1 806	2 008	11.2%	15.2%
Sub-total	35	2 090	2 712	3 507	3 793	4 331	14.2%	20.0%
EU Members who did not report for all five-years***	3	4 (1)	0 (0)	7 (1)	7 (1)	16 (3)		
Total	38	2 094	2 712	3 513	3 801	4 347		

Sources: EL Members in the EU reporting their Online GGR for 2023.

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

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

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

*** 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 2019–2023 (€M)

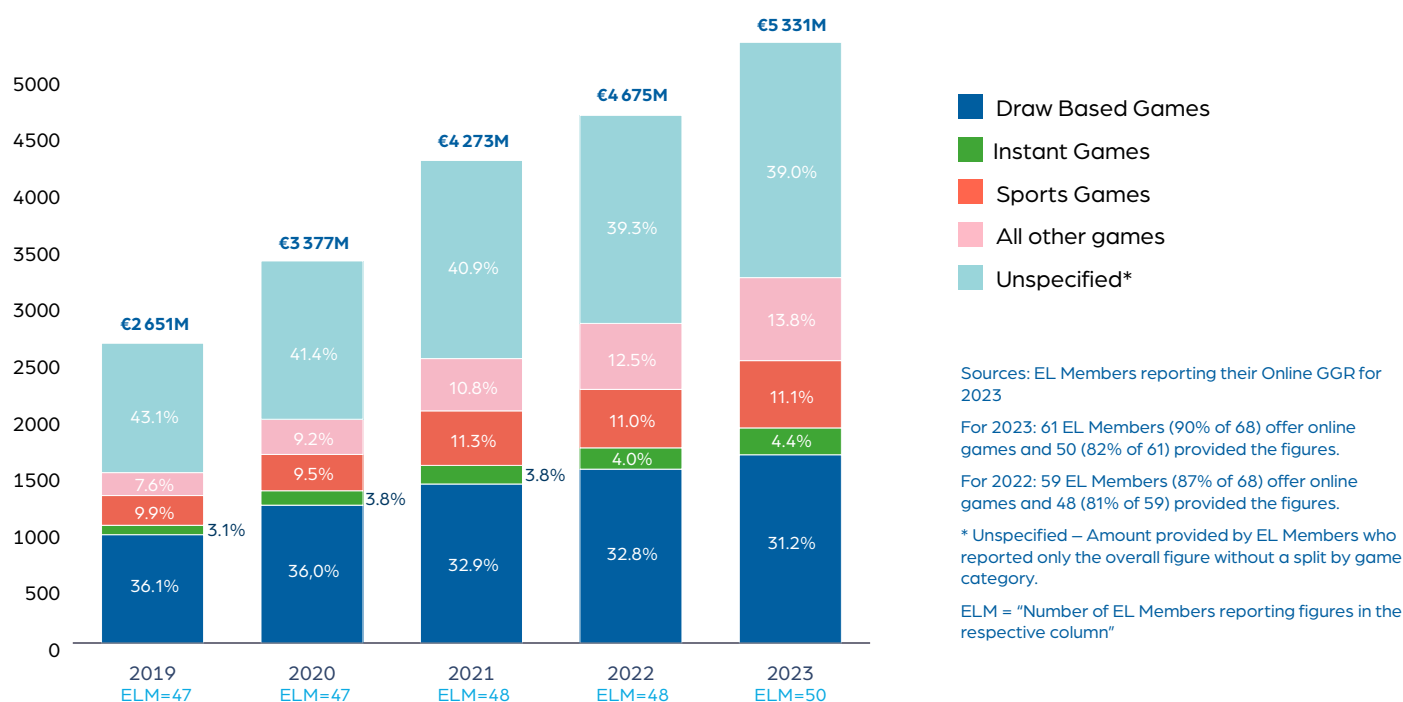


Figure 18b. EL Members: Online GGR by Game Category – Development 2019–2023 (€M)

Game category	ELM rep. GGR	ELM: Online GGR for the respective year in €M					Evolution* 2023–2022	CAGR* 2023–2019
		for 2023	2019 (46)	2020 (46)	2021 (46)	2022 (46)		
Draw Based Games	39	957	1 217	1 404	1 535	1 662	8.3%	14.8%
Instant Games	22	83	127	164	188	237	25.9%	30.0%
Sports Games	22	263	321	482	516	594	15.1%	22.6%
All other games	6	203	311	462	582	733	25.9%	37.9%
Unspecified**	4	1 142	1 398	1 750	1 837	2 077	13.1%	16.1%
Sub-total	46	2 647	3 374	4 261	4 659	5 304	13.8%	19.0%
EU Members who did not report for all five-years***	4	4 (1)	3 (1)	12 (2)	15 (2)	26 (4)		
Total	50	2 651	3 377	4 273	4 675	5 331		

Sources: EL Members reporting their Online GGR for 2023, 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 2022 and 2023 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.

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

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

Figure 19. Overview of Reporting Activity of Members by Country – 2019–2023

Country	Number of Currently Reporting ELM who provided data for individual years				
	2019	2020	2021	2022	2023
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	2	1	1
Estonia	1	1	1	1	1
Finland	1	1	1	1	1
France	1	1	1	1	1
Germany	17	17	17	17	17
Greece	1	1	1	1	1
Hungary	1	1	1	1	1
Ireland	1	1	1	1	1
Italy	2	2	2	2	2
Latvia	1	1	1	1	1
Lithuania	2	2	2	2	2
Luxembourg	1	1	1	1	1
Malta	0	0	0	1	1
Netherlands	2	2	2	2	2
Poland	2	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	51	50	50	50	50
Albania	1	1	1	0	0
Azerbaijan	2	2	2	2	2
Bosnia and Herzegovina	2	2	2	2	2
Iceland	2	2	2	2	2
Israel	2	2	2	2	2
Kazakhstan	1	1	1	1	1
Norway	1	1	1	1	1
Republic of North Macedonia	1	2	2	2	2
Serbia	1	1	1	1	1
Switzerland	2	2	2	2	2
Turkey	1	1	1	0	0
Ukraine	2	2	2	2	2
United Kingdom	1	1	1	1	1
EL Members in total	70	70	70	68	68

Annex C:

Explanations of the Collected Data Included in This Report

Country	The lotteries' country of origin.
Lottery	The lottery name needed to be confirmed.
Contact person	The following details of a contact person were requested: name, email address and phone number.
National currency	EL Members were asked to fill in all data in their national currency. The AGENCY team used the yearly average exchange rates from 2021 provided by Eurostat, or, if these were not available, the yearly average exchange rates from the European Central Bank and the national banks of each country.
Sales	Sales (or turnover) should be in your national currency. Do not deduct anything from Sales – not prizes, not commissions for retailers, nor anything else. The amount should reflect the gross amount players pay buying lottery products. If you do not operate games in a category, just leave the field blank. If players also pay a tax on top of the price of the lottery product, please include this tax on top of the Sales figure. Include Sales of the lottery and its subsidiaries from all channels, such as retail, own shops, the Internet, mobiles, tablets, and interactive TVs. The Sales figures should correspond to the figures provided in the audited reports, if available.
Gross Gaming Revenue (GGR)	Gross Gaming Revenue (GGR) is equal to Sales minus prizes. For each game, GGR should be equal to Sales multiplied by 100% – the payout rate as a percentage. If, for example, you sell €50 of instant tickets with a payout of 58% in prizes for players, the GGR is equal to $50 \times (100\% - 58\%) = 21$. 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 this study, the difference does not matter. Thus, you can use the theoretical payout rates to calculate GGR from Sales figures as shown above. GGR also equals the amount kept by the operator after prizes to cover all costs, retail commissions, taxes, money for good causes and profit. You should include GGR for all channels, including retail, own shops, the Internet, mobiles, tablets, and interactive TVs. The GGR figures should correspond to the figures provided in the audited reports, if available.
Sales via the Internet/ mobiles	Sales via the Internet/mobiles should include and reflect the same content as total Sales data, however, only from channels such as the Internet, mobiles, tablets, and interactive TVs.
Sales generated via mobile devices	Mobile sales generated through all mobile devices, this typically includes tablets and smartphones. If you don't have an exact figure for historical numbers, please provide the best estimate for the mobile sales share.
Gross Gaming Revenue via the Internet/ mobiles	GGR via Internet/mobiles should include and reflect the same content as the total GGR data, however, only from channels such as the Internet, mobiles, tablets, and interactive TVs.
Draw Based Games	All nationwide games based on numbers or letters, and thus, typical lottery games with both pari-mutuel and fixed prizes. For example, Lotto, Pick 3, Euro Millions, Joker, Spiel, Draw, Class lotteries, Keno (both daily and fast draw), and Bingo. Do not include EGMs or Instant Games based on numbers in this category.
Instant Games	All instant or scratch games and pull-tab games – the so-called pre-drawn lotteries.

Sports Games (incl. Horse Racing Games)	All pari-mutuel betting games AND all fixed odds betting games, including betting on sports events, horse racing, e-sports and all novelty bets (e.g. weather, song contests, political events, etc.)
EGMs outside casinos	Electronic Gaming Machines located outside licensed brick-and-mortar casinos. For example, slot machines outside casinos, VLTs and EILs.
All other games	Typically, the category includes casino games or poker or virtual games. The category DOES NOT INCLUDE activities other than gaming (for example, financial services) and SALES figures are not required.
Average number of full-time employees	The average number of lottery employees over the year calculated on a full-time basis. Do not include employees of service providers or retailers.
Diversity & Inclusion	
percentage of women in company's employees (not including the board)	The percentage of representation of women in company's employees (not including the board). Employee (GRI 405): individual in an employment relationship with the organization, according to national law or its application.
percentage of women in company's top-level management	The percentage of representation of women in company's top-level management (not including the board). Considered top-level management are: CEOs, Presidents, Vice-Presidents and all C-level positions below executive board OR executive management (i.e. B-1).
percentage of women on Board of Directors	The percentage of representation of women on company's board. Board (GRI 405): committee or board responsible for the strategic guidance of the organization, the effective monitoring of management, and the accountability of management to the broader organization and its stakeholders.
Mandatory Money for Society (Tax/Duties/Good Causes)	Include everything your lottery contributes to society in the form of mandatory taxes/levies (local and national, company tax, license fee) and mandatory payments allocated to good causes such as sports, culture, the environment, education, etc. The entry in this field should reflect the total money your lottery contributes to society as mandatory payments. For this study, the total amount your lottery contributes to society as mandatory payments is broken down into four categories:
of which goes to sport	<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/institution. 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.</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"> • 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 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>
Base of online customers as of 31.12. of the respective year	<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>
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>

Source: EL, 2023

Annex D:

Other Data Sources

Eurostat (2023). Euro/ ECU exchange rates – annual data from:

https://ec.europa.eu/eurostat/databrowser/view/ERT_BIL_EUR_A/default/table?lang=en


Eurostat (2023). Population on 1 January, from:

<https://ec.europa.eu/eurostat/databrowser/view/tps00001/default/table?lang=en>

About The European Lotteries (EL)


The European Lotteries (EL) is the largest representative European umbrella organisation in the field of gambling, representing 70 members across 39 European countries (50 members in the EU and 20 in non-EU member states), who prioritize operating games of chance for the public benefit. EL stands for the sound and sustainable model for the benefit of society, based on the values of forward-thinking, sustainability and integrity.

Further questions? Feel free to contact us!

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**THE EUROPEAN
LOTTERIES**

FOR THE BENEFIT OF SOCIETY