



THE
EUROPEAN
LOTTERIES

FOR THE BENEFIT OF SOCIETY

ELISE

EUROPEAN LOTTERIES' REPORT ON
LOTTERIES IN THE EU AND IN EUROPE

2013

SUMMARY

Introduction

This is the eighth report of European Lotteries (hereinafter EL) based on data gathered under the heading “ELISE”¹. This report is made to contribute to the understanding of how lotteries operated by EL Members work and what their contributions to society in general are. This report is the most detailed report, both on EL Members operating in the EU and on all EL Members in total.

The objective of the report is to provide data on the economic activities of EL Members operating in the European Union (EU 28) and in Europe in general. The report covers key descriptive statistics about current EL Members operating in Europe in 2013 and includes comparative statistics for the years 2008 – 2013 where appropriate.

It is important to mention that the EL Members share the following common values and characteristics:

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

EL Members operate a various range of game activities, depending on historical background, local legal conditions or their position on the market, therefore the emphasis placed to particular gaming activities may differ one member from the other – an EL Member can be either a monopolistic company with exclusive license for lotteries or a company focused solely on sports-betting and online gaming or a company with completely different gaming orientation.

The survey for 2013 presents data from all 75 regular and affiliate EL Members and covers 44 European countries. The data for this report was collected during spring 2015 and subsequently aggregated by an independent third party - Economica Institute of Economic Research – responsible for the data collection, aggregation and consistency and non-disclosure of detailed data to any party. All monetary figures are calculated in EUR using the average exchange rate for 2013².

¹ ELISE = “European Lotteries Information Sharing Extended”; the members of the ELISE working group are in charge of publishing this report.

² The survey has data from 2008, 2009, 2010, 2011, 2012 and 2013. To make figures comparable over time, all lottery monetary figures from those years in currencies other than EUR have been converted into EUR using the average exchange rates for 2013 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 2007, 2008, 2009, 2010, 2011, 2012 and 2013 respectively, differences appear as a consequence of the evolution in exchange rates.

Table A. Number of Reporting EL Members – 2008 - 2013*

	2008	2009	2010	2011	2012	2013
EL Members in the EU	53	53	54	53	53	52
EL Members outside EU	16	17	21	25	24	23
TOTAL	69	70	75	78	77	75

Source: EL, 2015; *EL Members whose data was included in the aggregated lottery data shown in ELISE reports.

The report consolidates the activities of all reporting EL Members³. The report shows the consolidated Gross Gaming Revenues (GGR)⁴ broken down into six gaming categories:

- Draw based games,
- Instant games,
- Sports games pari-mutuel,
- Sports games fixed odds,
- Electronic Gaming Machines (EGMs) outside casinos and
- All other gaming and non-gaming activities⁵

and the sales figures broken down into first four “lottery categories” (draw based games, instant games, sports games pari-mutuel and sports games fixed odds). The tables and charts are accompanied with explanatory footnotes, where appropriate,⁶ but otherwise left uncommented to serve as a basis for EL Members’ and other stakeholders’ own analysis.

Table B. Overview of Key Data 2013

KPI's	Reporting EU Members	All Reporting EL Members
EL Members All Lotteries reporting within EU (EUM)/ in Europe (ELM)	52	75
Money from lotteries to society	€21bn	€23bn
Direct full time employment Yearly average number of full time employees	43.000	47.000
Indirect employment Created full time jobs	345.000	407.000
Money for Responsible gaming	€31M	€42M
Sales Includes sales from the four "lottery categories", i.e. draw based games, instant tickets, sports games with pari-mutuel and fixed- odds)	€75bn	€82bn
Gross Gaming Revenue Sales minus prizes, includes the four "lottery categories" plus EGM's and other gaming activities	€32bn	€35bn
Gross Gaming Revenue via Internet	€2.0bn	€2.2bn

Source: Data of single EL Members have been collected and aggregated by Economica, 2015

³ A detailed list of the EL Members is given in the Annex.

⁴ Sales minus prizes and hereinafter GGR; this key figure reflects the lottery business better than sales figures.

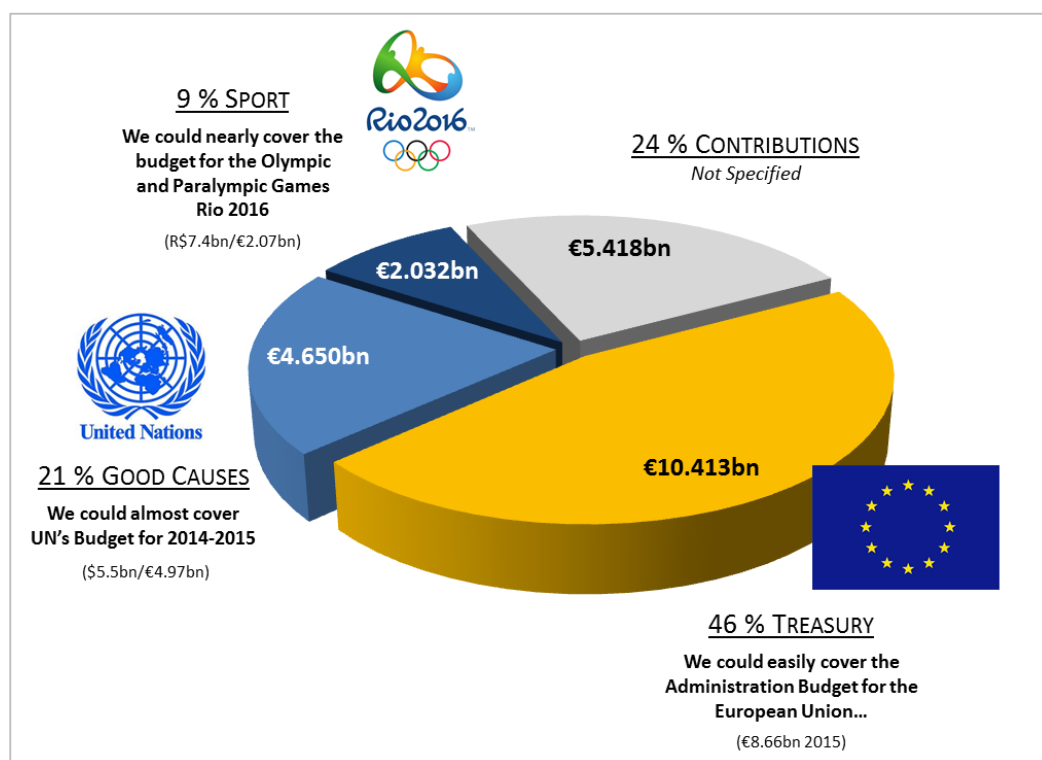
⁵ A detailed definition of the games is given in the Annex.

⁶ See the complete information on methodology in the Annex.

Specific Member Activities in the EU and in the Rest of Europe in 2013

A key characteristic of the state licensed lotteries in the EU is that they were founded with the aim or received their licenses with the condition to generate significant amounts of money to “good causes”. In 2013, the money contributed to society provided by 51 EL Members in the EU⁷ reporting their contributions to the society amounted to €20.6bn. The funds have been channelled in the form of taxes for treasury, duties and funds for sports or funds for other good causes. This figure was down by 0.5% compared with 2012⁸. The decrease is primarily driven by the decreases in three markets, Italy, Poland and UK; when excluding these three countries then it would present a 3.6% growth compared with 2012. As for all reporting EL Members (73⁹ in total), their contributions to the society amounted to €22.5bn in 2013, down by 0.4% in comparison with 2012, driven by significant decrease in Russian and Ukrainian contributions¹⁰. On average, a state licensed lottery in the EU, a member of EL, gives back to society – not including sponsorships – 64.5% of each Euro GGR it earns, whilst EL Members in total are giving back to society on average 64.3% of their earnings.

Figure A. Money for Society in 2013 – Split of its Distribution



Source: EL, 2015; Brazilian reals and US dollars have been converted into euros using the average exchange rates for 2015 in period 02 January 2015 – 12 November 2015.

In the largest EU member states, the amount provided by EL Members for society raised from lotteries exceeded €2.0bn (Italy €4.7bn, the U.K. €3.1bn, France €2.9bn, Germany €2.8bn, Spain

⁷ All EL members from the EU reported money provided to the society, except of one Bulgarian member.

⁸ All comparisons in this report as well as all recalculations of historical monetary figures using the average exchange rates for 2013 have been calculated by Economica.

⁹ All EL members reported money provided to the society, except of one Bulgarian and one Icelandic member.

¹⁰ However, it is necessary to state that one from two reporting Russian EL Members has changed (base difference).

€2.4bn). On average, the amount that EL Members in the EU paid back to society across the 28 EU member states (population of 506.6 million) was **€41 per capita in 2013** (similar to 2012).

Another important contribution of the EL Members is the **contribution to the employment** in their respective countries. In 2013, the 52 EL Members operating in the EU have **directly employed** 42,771 people (full time employees¹¹; all current EL Members have employed **46,938 full time employees**), whilst they have **indirectly created 344,505 full time jobs in the EU (407,010 jobs across Europe)**, typically in the sectors selling lottery products¹².

Responsible gaming activities are an integrated part of the EL Members' business. In 2013, the 30 EL Members in the EU reported spending of €30.7 million on measures to prevent problem gambling, whilst **36 EL Members in total spent €42.2 million on measures to prevent problem gambling. This is in both cases nearly twice as much when compared to the previous year!**

Specific Gaming Activities

Sales for the four "lottery categories" (draw based games, instant tickets, sports games with pari-mutuel and fixed-odds) **by EL Members in the EU amounted to €75.2bn** in 2013, representing a decrease of 1.4% over 2012. However, when taking into account **all EL Members in total**, the result **accounted for a YoY increase of 0.2% represented by total sales of €81.6bn**

As individual EL Members operate a various range of game activities, their sales and GGRs figures understandably differ accordingly. As for 50 EL Members operating in the EU¹³, per capita GGR spending ranges from €5 in Latvia and Romania and €8 in Lithuania, to more than €100 in Cyprus, Greece, Italy and the Nordic countries. **Average per capita spending across the EU was €63. The corresponding figure for all the 73 reporting EL Members was €42** including the Russian JSC TD Stoloto and CJSC Interlot lotteries covering a population of nearly 143.5 million and spending at €1.0 per capita.

In 2013, the total economic activity measured as GGR of reporting EL Members operating in the EU (28), was €31.9bn. Compared with 2012, this represented a decrease of 5.9%. Viewing **all the 73 reporting European Lotteries' Members**, their **total GGR was €35.0bn**, of this, lotteries from Israel, Norway, Switzerland and Turkey account for almost 90% of the difference, representing a decrease of 5.1%, driven mainly by decrease in the largest game category – draw based games.

The largest lottery activity of EL members is comprised of **draw based games** with brand names like Lotto, EuroMillions, Eurojackpot and Joker. This category of game, **offered by EL Members in 28 EU states, had sales of €47.1bn and a GGR of €19.9bn, which accounted for 62% of total GGR.** **By all EL Members**, respective figures were **€51.2bn for sales and €21.9bn for GGR, accounting for 62% of total GGR**, representing a decrease of 9.4% over 2012. Per capita spending on draw

¹¹ Including 19,804 people employed by Spain/ Organización Nacional de Ciegos Españoles - ONCE who were reported to be persons with disabilities (this EL Member considers disabled people selling the tickets as full-time employees).

¹² The calculation is based on the London Economics study "The case for State lotteries", Sept. 2006, which found a multiplier effect of 15. In other words, for each full time employee of the lotteries an average of 15 full time jobs was created in sectors where lotteries are sold.

¹³ GGR data for 2013 has not been provided by Italy/ Sisal S.p.A. and Germany/ Staatliche Lotterieverwaltung.

based games reported by EL Members in EU countries ranges widely from €10 or less in Bulgaria, Latvia and Romania to more than €200 in Cyprus, Finland and Spain. Non-EU countries show smaller figures where their per capita spending is usually less than €12 and one half of Non-EU countries does not even reach €3. However Iceland, Israel, Switzerland and especially Norway show significantly higher figures, namely exceeding €100 per capita.

The second largest category is instant games with EL Members' sales in the EU of €20.6bn (up 2.4% on 2012) and **all EL Members' total sales of €21.7bn (up 4.0% on 2012)**. A GGR of €6.7bn reached by EL Members in the EU through instant games represented some 21% of their total GGR whilst a **GGR in instants achieved by all EL Members was €7.1bn and accounted for 20% of their GGR in total**. The category **GGR grew by 1.6% in 2013 YoY by EL Members in the EU and 1.8% by all EL Members**, having remained quite steady for the last three years. Instant lotteries, having been introduced in Greece only in 2014, were offered in 2013 by EL Members in 27 of the 28 EU member states and per capita spending ranged from €2 or less in Croatia, the Czech Republic, Latvia and Romania to more than €40 in Italy, France, Portugal and Sweden. Per capita spending reported by EL Members in most of non-EU countries usually did not exceed €1, nevertheless there are still three countries where customers of EL Members spent on instants €28 and more: Switzerland, Israel and Norway with their per capita spending. On the whole, Italy remains the largest instant market with the highest per capita sale figure (€161) and with €2.9bn in GGR.

The **two sports games categories, pari-mutuel and fixed-odds wagering, are rather minor category** and **totalled a GGR of €1.8bn by EL Members from the EU being 5.7% of the total GGR and €2.2bn by all EL Members, i.e. 6.3% of the total GGR, respectively**. The sports wagering pari-mutuel, operated by EL Members in 21 EU states, showed a total GGR of €469 million of EL Members in the EU and €551 million of all EL Members in total. Fixed-odds betting, operated by EL Members in 19 EU states showed a total GGR of €1.3bn in 2013. The category saw a decrease, namely of 4.3% compared with 2012, driven mainly by local and non-licensed international competition. All EL Members in total enjoyed a total GGR of €1.6bn, which meant a slight YoY decrease of 0.9% over 2012.

The third largest category, EGMs (Electronic Gaming Machines) outside casinos includes slot machines, apart from casinos, Video Lottery Terminals and Electronic Instant Lottery. They were **operated by EL Members in 7 EU member states with a GGR of €3.1bn and in 13 states in total generating €3.4bn in 2013**. Both figures accounted for **10% of the total GGR** and showed a growth of over 2012, this 9.5% by EL Members in the EU and 9.6% by EL Members in total.

The major industry trend is the growing on-line sales. Some 42 state licensed lotteries operated by EL Members in 23 EU states offered games on the Internet in 2013. Those who reported a total GGR through the Internet showed figures of €2.0bn – slightly more from the €1.9bn recorded in 2012. €2.2bn reached by 51 EL Members reporting GGRs for online activities (out of all 56 EL Members operating online gaming) showed a **4.9% growth when compared to 2012**. **The annual compound growth of GGR through the Internet has averaged 31.8% over the past six years**.

Appendixes to the Report

Annex A: Methodology Applied

Annex B: Charts & Tables

Annex C: Explanations to Collected Data from EL Members

Annex D: Other Data Sources

Annex A: Methodology Applied

This report, which is the eighth one in row of so-called ELISE¹⁴ reports, traditionally almost exclusively relies on primary data sources¹⁵.

The data gathered covers the results of all current regular and affiliate¹⁶ EL Members in calendar year 2013¹⁷ in the scope that single members felt comfortable to deliver or that they were able to report in terms of their activities. Thus breadth of data reported may differ in some cases and relevant footnotes on this issue are available under figures and tables when necessary.

All data from European Lotteries Members (hereinafter EL Members) for 2013 was collected by an independent third party – Economica Institute of Economic Research¹⁸ – responsible for the data collection, aggregation and consistency and non-disclosure of detailed data to any party. Data was collected by this third party via a secured online questionnaire¹⁹ during spring 2015. The questionnaire was divided in three main sections, two of which are processed in this report – “Key data” on six gaming categories (i.e. draw based games, instant games, sports games pari-mutuel, sports games fixed odds, Electronic Gaming Machines (EGMs) outside casinos and all other gaming and non-gaming activities²⁰) and “Other data” involving figures of employment, money for society, money for sport, money for retailers and information related to POS network. In the “Key data” section, two types of figures for each gaming category were required in aggregated form – Sales and GGR with division between online and offline results. GGR, being 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 gaming providers. To get to the net profit, further items need to be deducted as: taxes and other obligatory charges, retailer commissions, sponsorship payments, money on good causes, spending on prevent gambling and typical operational costs.

Data was requested in EL Members national currency and figures from the non-Euro countries were converted into Euros using the average²¹ exchange rates for 2013 either from Eurostat or, if not available, from the European Central Bank or the national banks of each country. Besides data for 2013, also data from previous years is included, namely from period of 2008 - 2012²². To make figures

¹⁴ ELISE, “European Lotteries Information Sharing Extended, is the body by European Lotteries Association; the Members of the ELISE working group are in charge of publishing this report.

¹⁵ The only external sources used have been EUROSTAT and the World Economic Outlook Database for population figures and European Central Bank’s sites, Worldbank sites and some local banks’ sites as information sources for conversion of exchange rate, for further information see Annex D: Other Data Sources.

¹⁶ Affiliate Members of EL are Albania/ Lotaria Kombëtare and Poland/ Totolotek SA. This report does not include Observer Members, which are Morocco/ La Marocaine des jeux et des sports and Morocco/ Loterie nationale.

¹⁷ Since the previous ELISE report the following changes in membership base have occurred: Cyprus/ OPAP (Cyprus) Ltd., Greece/ Greek State Lotteries, Kazakhstan/ National Lottery of Kazakhstan and Russia/ OOO Ural Loto are no longer members of EL, therefore their last data is not available, Albania/ Lotaria Kombëtare has become an Affiliate Member and as such reported its data for 2013, Russia/ Orglot OOO renamed to Russia/ JSC TD STOLOTO and Croatia has become EU Member since 2013, which means a shift of Croatia/ Hrvatska Lutrija d.o.o. from group of EL Members outside the EU to group of EL Members in the EU

¹⁸ Economica Institute of Economic Research, Liniengasse 50-52, 1060 Wien, Österreich; <http://www.economica.at/>

¹⁹ This is the first year of collecting data online.

²⁰ A detailed definition of the games is given in Annex C: Explanation of Data Fields Asked for in the Questionnaire.

²¹ So far, the exchange rate closest to the end of reported period has been used (e.g. 2.1. 2013 for ELISE 2012). Current customization has been done so as to make the analysis more meaningful.

²² So far, the period of comparison has not been fixed across the report. It has been decided to use two types of comparison starting from this report: mostly with the previous year and where possible within the six year period.

comparable over time, all historical monetary figures from those years in currencies other than Euro have been also converted into Euro using the same average exchange rate for 2013. In other words, all amounts in this report are reported in average 2013 Euro value^{23,24}. The approach of sole exchange rate across historical periods enables better depiction (observation) and hereby understanding of trends freed from local macro-economic influence.

In terms of data processing, the methodology has been stable since the very first public report in 2010²⁵. The aim is to provide the regular reader of ELISE reports with ease of orientation and also with the possibility of comparison. The report has consisted of two reporting parts – Summary and supportive tables and figures. Summary brings a short overview of results achieved in the respective year (also with comparison to previous years), while supportive tables and figures show the relevant data behind this conclusion. In this report the second part has been slightly broaden so as to make reader even better informed than in previous years.

In the report, there are two bases on which the results are reported – all EL Members in total and EL Members operating in the EU²⁶. To provide the best overview of results, data is displayed either in aggregated form or in break up to categories or to countries, always with number of reporting EL Members²⁷. In the break ups, each game category has its own distinctive colour²⁸. In line with previous years, sales data is presented only on basis of “lottery category” (i.e. not including EGMs and all other gaming and non-gaming activities, categories that are rarely calculated but rather estimated in sales).

Comparison with previous results is always available, this within the period of two or six years or both. The changes displayed include each EL Member which reported at least once in monitored period, it is not necessary that it reports in both, resp. in all six years. The results of comparison are always displayed by number with one decimal unless the displayed number is zero. In that case the displayed number has as many decimals as necessary for displaying the number other than zero. All percentage changes between years have been calculated on the basis of figures in national currency.

²³ Thus, looking at the previous years reports, which have used exchange rates from 2008, 2009, 2010, 2011 and 2012 respectively; differences appear as a consequence of the change in exchange rates.

²⁴ All comparisons in this report as well as all recalculations of historical monetary figures using the average exchange rates for 2013 have been calculated by Economica.

²⁵ With the slight exception of exchange rate conversion and employment of external research agency service, both starting from this report, see above for further details.

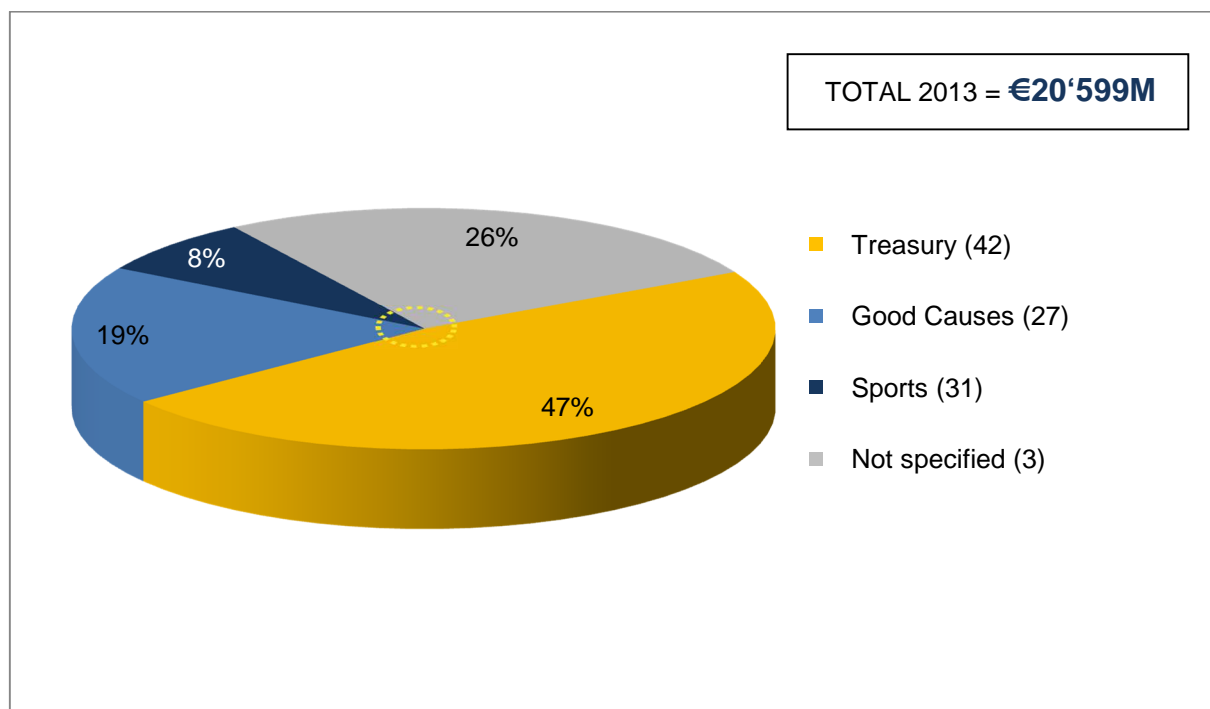
²⁶ All Members of European Lotteries are further abbreviated as “All EL Members” or “EL Members in total” or, where necessary because of the lack of place, “ELM” and Members of European Lotteries operating in the EU are further abbreviated as “EL Members in the EU” or “EUM”. Affiliation to the group of EL Members in the EU is given by membership home country in the EU.

²⁷ The way of display may differ according to the place available, however the explanation under figure / table or in the footnote is always present.

²⁸ Draw based games in blue, instant games in orange, sports games pari-mutuel in green, sports games fixed odds in red, Electronic Gaming Machines (EGMs) outside casinos in grey and all other gaming and non-gaming activities in yellow.

Annex B: Charts & Tables

Figure 1. EL Members in the EU: Money for Society by Target – 2013 (€M)

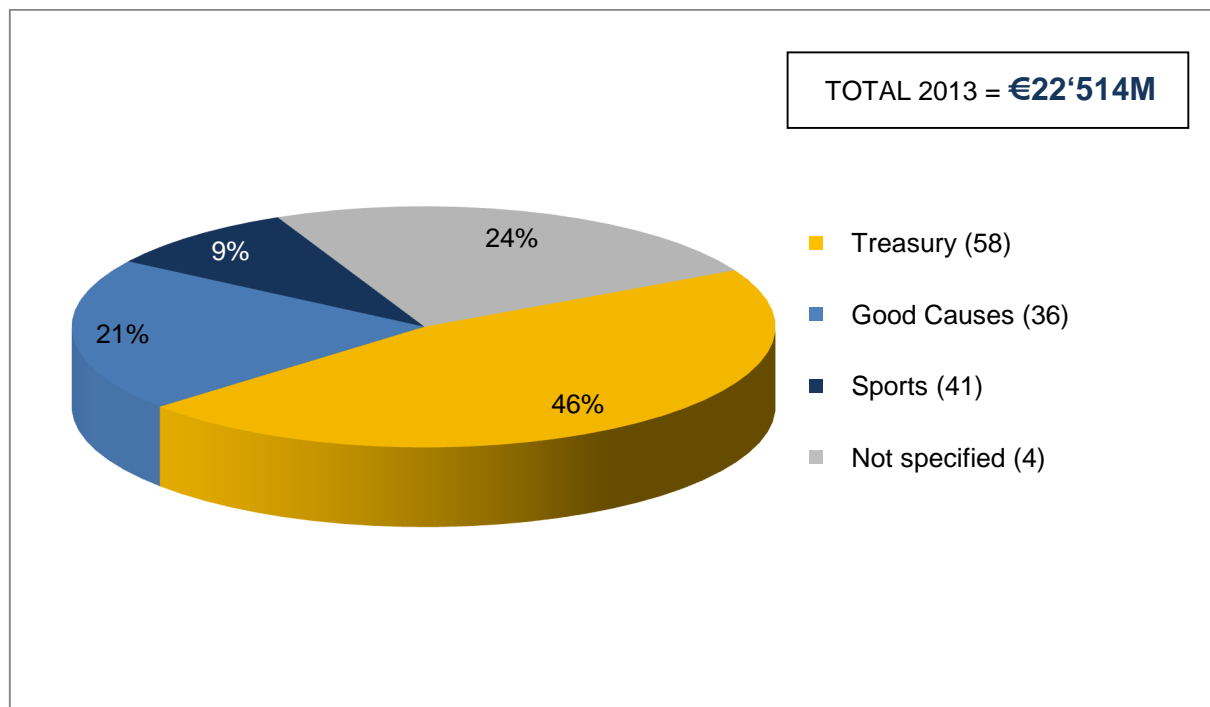


Sources: Data provided by EL Members in the EU in Q1/2015 (2013), 51 (98%) reported (missing data from one EL Member from Bulgaria)

"Category" ("Number of reporting EL Members")

Euro exchange rate: average 2013

Figure 2. EL Members: Money for Society by Target – 2013 (€M)

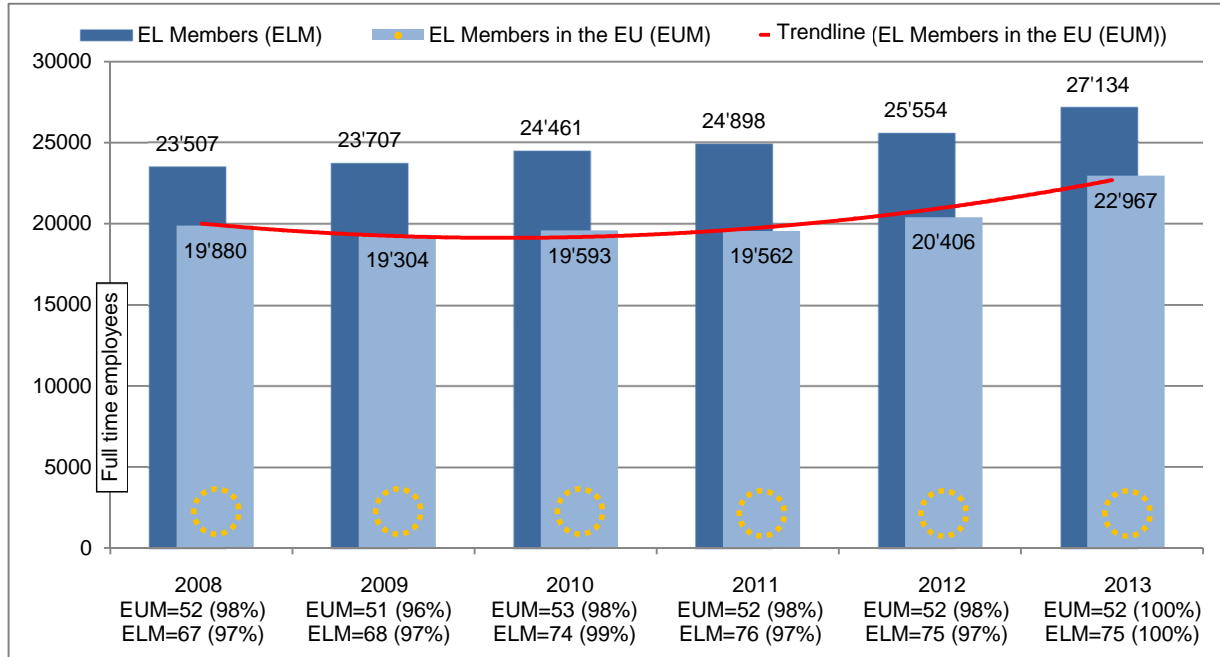


Sources: Data provided by EL Members in Q1/2015 (2013), 73 (97%) reported (missing data from one EL Member from Bulgaria and one from Iceland)

"Category" ("Number of reporting EL Members")

Euro exchange rate: average 2013

Figure 3. Contribution to Direct Employment – Development 2008 - 2013



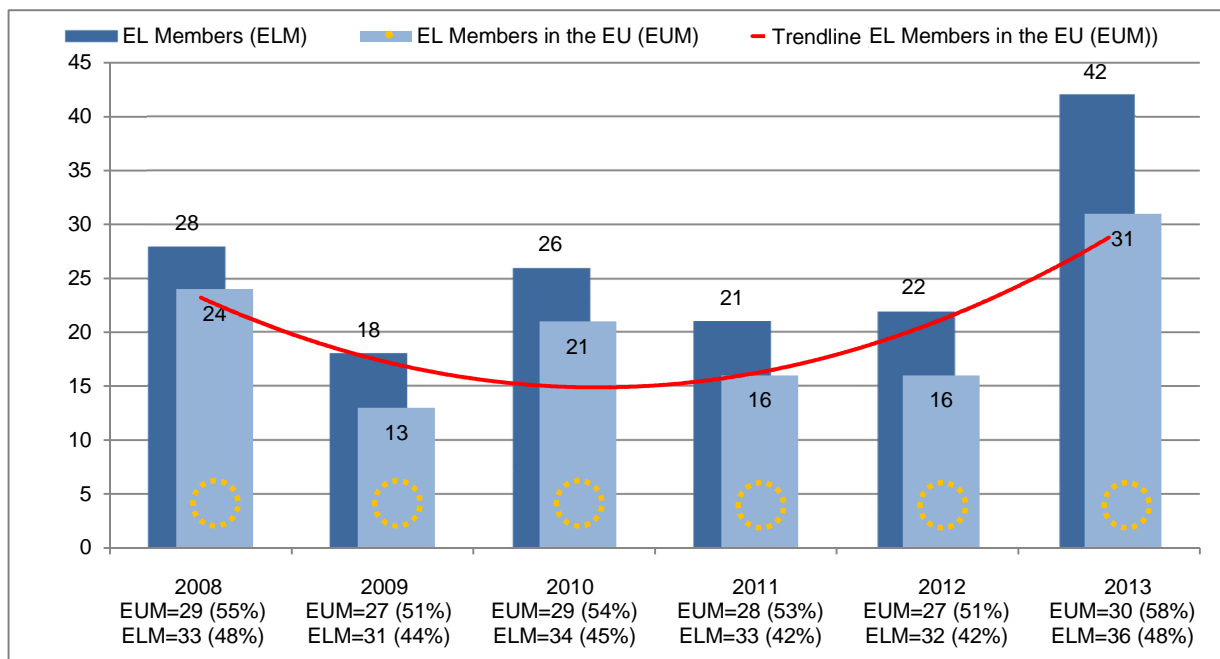
Sources: Data provided by EL Members in Q1/2009 (2008) - Q1/2015 (2013)

The following EL Members, participants of respective ELISE data aggregation, did not report data of their employment in the years displayed: Germany/ Deutsche Klassenlotterie Berlin(2009, 2010, 2011, 2012), Germany/ LOTTO Hamburg GmbH (2009), Germany/ Verwaltungs-Gesellschaft Lotto und Toto in Mecklenburg-Vorpommern mbH (2008), Kosovo/ Lotaria e Kosovës (2008), Switzerland/ Société de la Loterie de la Suisse Romande (2011, 2012).

The figure for Spain does not include the sales people from Spain/ Organización Nacional de Ciegos Españoles – ONCE, who are also full-time employees. They are not included to better allow for comparisons with the full-time employment figures reported by other EL Members, where retail staff is not employed by EL Members. These are namely the following numbers of employees: 20 550 (2010), 20 075 (2011), 19 823 (2012), 19 804 (2013).

“Category”=“Number of reporting EL Members” (“share of EL Members who reported full-time employment out of the total number of EL Members that reported results in respective year”)

Figure 4. Money for Responsible Gaming – Development 2008 - 2013 (€M)

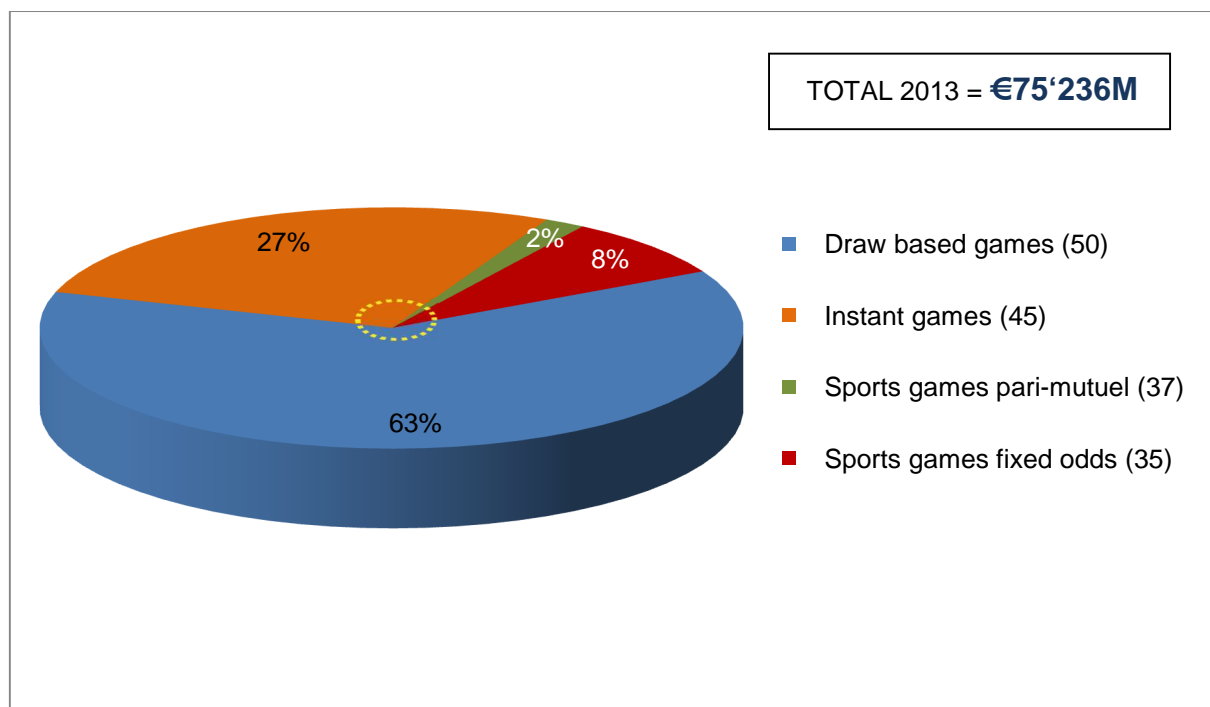


Sources: Data reported by EL Members in Q1/2009 (2008) - Q1/2015 (2013), 2013 data provided by Economica in aggregated form

“Category”=“Number of reporting EL Members” (“share of EL Members who reported money for responsible gaming out of the total number of EL Members that reported results in respective year”)

Euro exchange rate: average 2013

Figure 5. EL Members in the EU: Lottery Sales by Game Category – 2013 (€M)



Sources: Data provided by EL Members in the EU in Q1/2015 (2013), 52 (100%) reported

“Category” (“Number of reporting EL Members”)

Euro exchange rate: average 2013

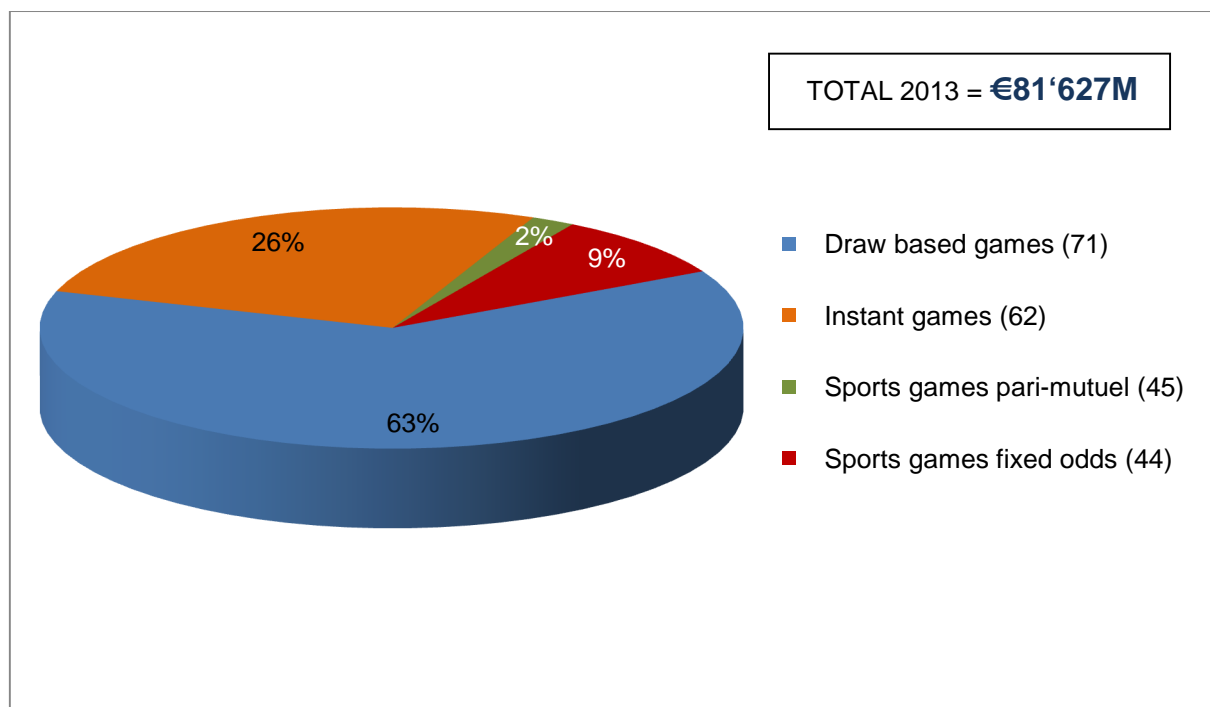
Table 1. EL Members in the EU: Lottery Sales by Game Category – 2013 (€M)

Game category	EL Members in the EU reporting lottery sales in 2013	Lottery sales: EL Members in the EU28 2013 (€M)	Share out of total
Draw based games	50	47 092	63%
Instant games	45	20 618	27%
Sports games pari-mutuel	37	1 394	2%
Sports games fixed odds	35	6 131	8%
Total	52	75 236	100%

Sources: Data provided by EL Members in the EU in Q1/2015 (2013), 52 (100%) reported

Euro exchange rate: average 2013

Figure 6. EL Members: Lottery Sales by Game Category – 2013 (€M)



Sources: Data provided by EL Members in Q1/2015 (2013), 75 (100%) reported

"Category" ("Number of reporting EL Members")

Euro exchange rate: average 2013

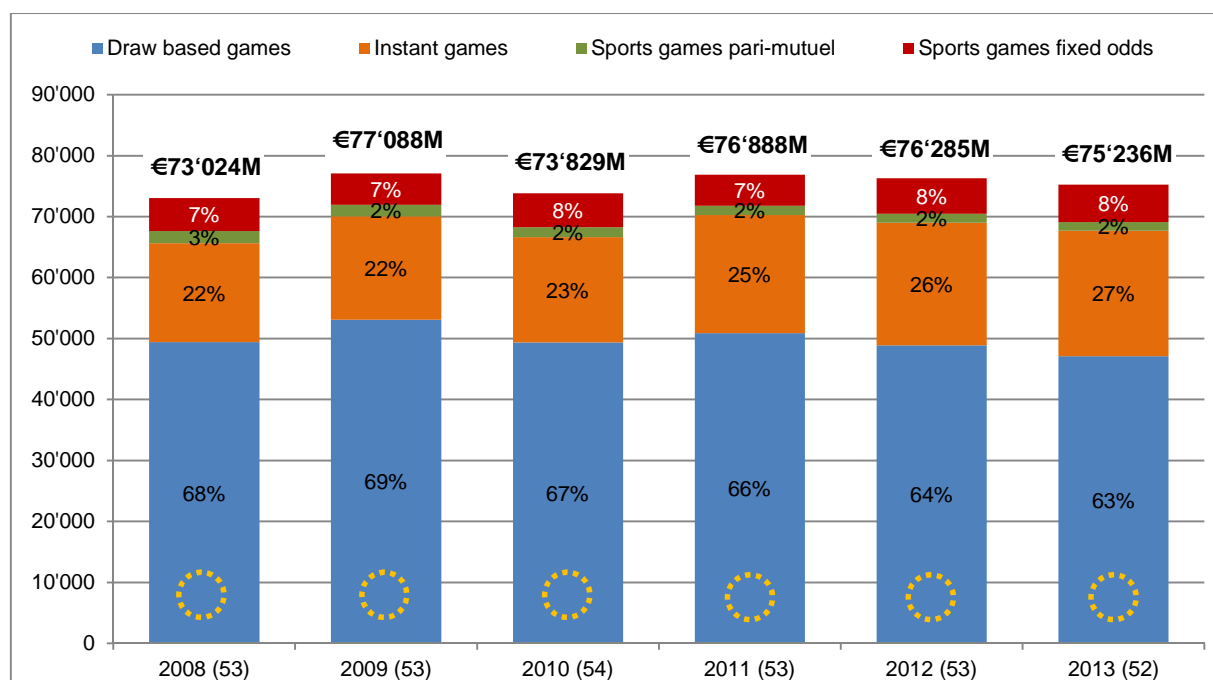
Table 2. EL Members: Lottery Sales by Game Category – 2013 (€M)

Game category	All EL Members reporting lottery sales in 2013	Lottery sales: EL Members in total 2013 (€M)	Share out of total
Draw based games	71	51 184	63%
Instant games	62	21 726	26%
Sports games pari-mutuel	45	1 626	2%
Sports games fixed odds	44	7 090	9%
Total	75	81 627	100%

Sources: Data provided by EL Members in Q1/2015 (2013), 75 (100%) reported

Euro exchange rate: average 2013

Figure 7. EL Members in the EU: Lottery Sales by Game Category – Development 2008 - 2013 (€M)



Sources: Data provided by EL Members in the EU in Q1/2009 (2008) - Q1/2015 (2013), 100% EL Members from the EU participating in respective ELISE data aggregation reported their lottery sales*

*"Year" ("Number of reporting EL Members")

Euro exchange rate: average 2013

Table 3. EL Members in the EU: Lottery Sales by Game Category – Development 2008 - 2013 (€M)

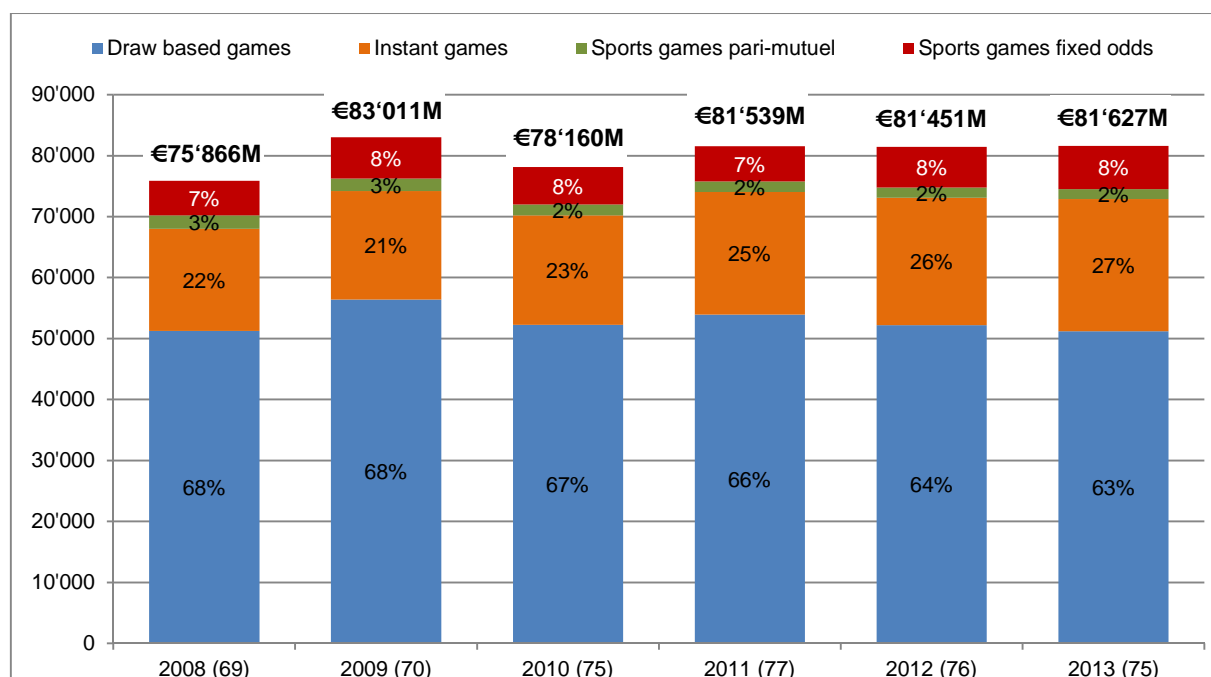
Game category	EUM rep. lottery sales in 2013	EL Members in the EU28/27: Lottery sales in €M						Change* 2013-2012	Avg. YoY change* 2013-2008
		2008 (53)	2009 (53)	2010 (54)	2011 (53)	2012 (53)	2013 (52)		
Draw based games	50	49 444	53 113	49 370	50 864	48 894	47 092	-3,7%	-0,8%
Instant games	45	16 180	16 953	17 280	19 376	20 129	20 618	2,4%	5,0%
Sports games pari-mutuel	37	2 010	1 888	1 617	1 538	1 456	1 394	-4,3%	-7,0%
Sports games fixed odds	35	5 390	5 134	5 561	5 110	5 805	6 131	5,6%	2,9%
Total	52	73 024	77 088	73 829	76 888	76 285	75 236	-1,4%	0,7%

Sources: Data provided by EL Members in the EU in Q1/2009 (2008) - Q1/2015 (2013), 100% of EL Members from the EU participating in respective ELISE data aggregation reported their lottery sales, Euro exchange rate: average 2013

*"Year" ("Number of reporting EL Members")

* Both types of changes also include Cyprus/ OPAP (Cyprus) Ltd., Estonia/ AS Spordiennustus, Greece/ Greek State Lotteries and Poland/ Totolotek SA although they did not report in all the years compared

Figure 8. EL Members: Lottery Sales by Game Category – Development 2008 - 2013 (€M)



Sources: Data provided by EL Members in Q1/2009 (2008) - Q1/2015 (2013); all EL Members participating in respective ELISE data aggregation reported their lottery sales, except of Switzerland/ Swisslos Interkantonale Landeslotterie which was not reporting sales in 2011 and 2012*; Euro exchange rate: average 2013

*"Year" ("Number of reporting EL Members")

Table 4. EL Members: Lottery Sales by Game Category – Development 2008 - 2013 (€M)

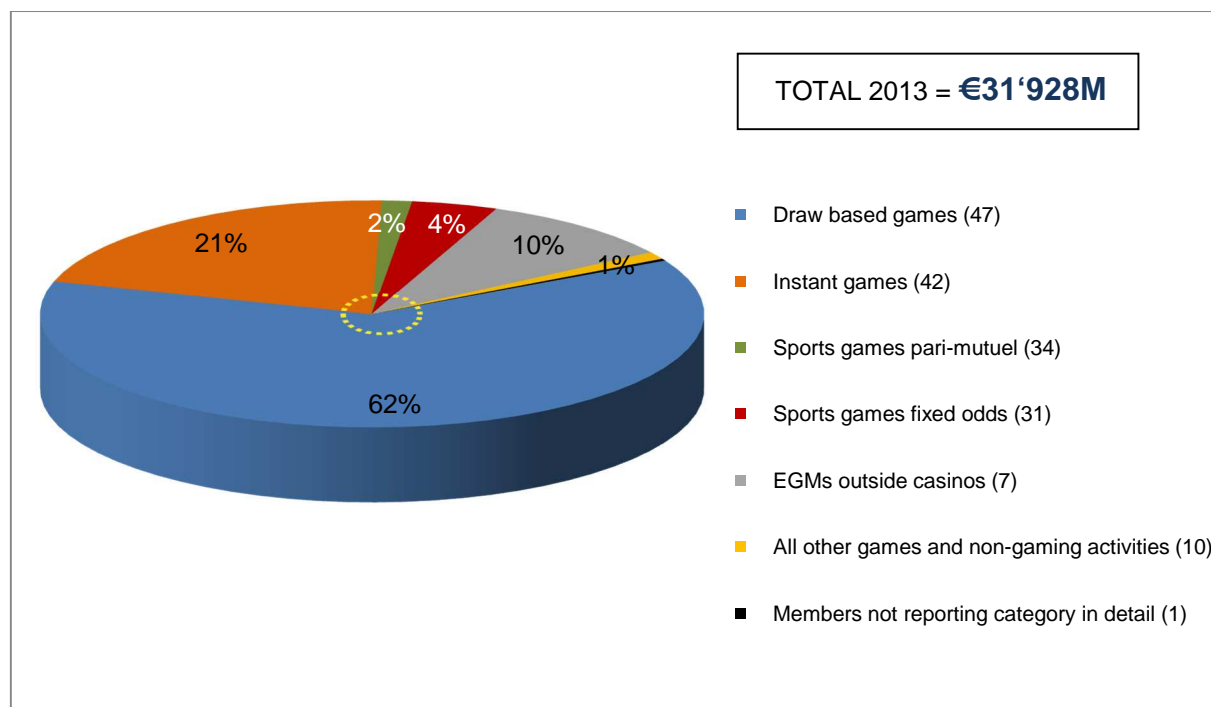
Game category	ELM rep. lottery sales in 2013	EL Members in total: Lottery sales in €M						Change* 2013-2012	Avg. YoY change* 2013-2008
		2008 (69)	2009 (70)	2010 (75)	2011 (77)	2012 (76)	2013 (75)		
Draw based games	71	51 235	56 427	52 277	53 935	52 222	51 184	-2,0%	0,2%
Instant games	62	16 779	17 748	17 935	20 085	20 881	21 726	4,0%	5,4%
Sports games pari-mutuel	45	2 208	2 077	1 801	1 754	1 664	1 626	-2,3%	-5,8%
Sports games fixed odds	44	5 644	6 760	6 146	5 765	6 683	7 090	6,1%	5,3%
Total	75	75 866	83 011	78 160	81 539	81 451	81 627	0,2%	1,6%

Sources: Data provided by EL Members in Q1/2009 (2008) - Q1/2015 (2013), all EL Members participating in respective ELISE data aggregation reported their lottery sales, except of Switzerland/ Swisslos Interkantonale Landeslotterie which was not reporting sales in 2011 and 2012, Euro exchange rate: average 2013

*"Year" ("Number of reporting EL Members")

* Both types of changes also include Cyprus/ OPAP (Cyprus) Ltd., Estonia/ AS Spordiennustus, Greece/ Greek State Lotteries, Poland/ Totolotek SA, Albania/ Lotaria Kombëtare, Azerbaijan/ Azerinteltek CJSC, Belarus/ CJSC Sport-Pari, Bosnia and Herzegovina/ Lottery of the Republic of Srpska, FYROM/ National Lottery of Macedonia, Georgia/ Georgian Lottery Company, Kazakhstan/ National Lottery of Kazakhstan, Russia/ CJSC Interlot, Russia/ OOO Ural Loto, Russia/ JSC TD STOLOTO, Switzerland/ Swisslos Interkantonale Landeslotterie and Turkey/ Turkish National Lottery Administration although they did not report in all years compared.

Figure 9. EL Members in the EU: GGR by Game Category – 2013 (€M)



Sources: Data provided by EL Members in the EU in Q1/2015 (2013), 50 (96%) reported (i.e. all EL Members in the EU except Italy/ Sisal S.p.A. and Germany/ Staatliche Lotterieverwaltung)

"Category" ("Number of reporting EL Members")

Euro exchange rate: average 2013

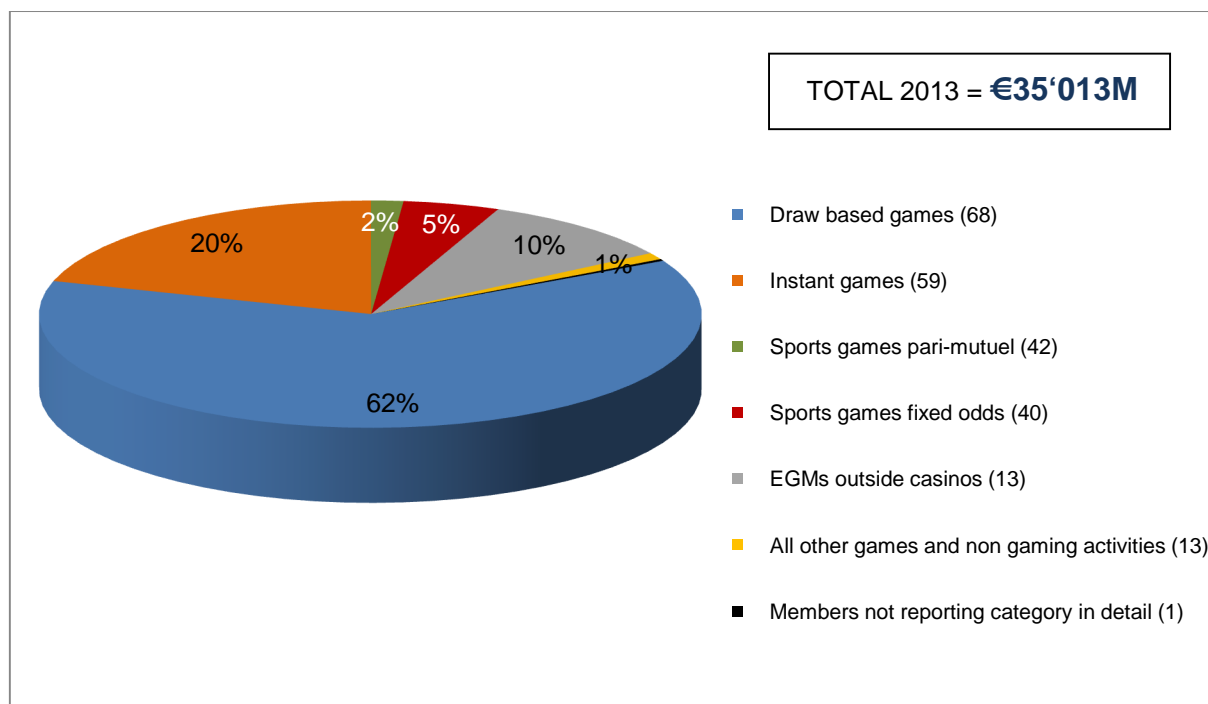
Table 5. EL Members in the EU: GGR by Game Category – 2013 (€M)

Game category	EL Members in the EU reporting GGR in 2013	GGR: EL Members in the EU28 2013 (€M)	Share out of total
Draw based games	47	19 917	62%
Instant games	42	6 661	21%
Sports games pari-mutuel	34	469	2%
Sports games fixed odds	31	1 337	4%
EGMs outside casinos	7	3 114	10%
All other games and non-gaming activities	10	338	1%
Members not reporting category in detail	1	92	0,3%
Total	50	31 928	100%

Sources: Data provided by EL Members in the EU in Q1/2015 (2013), 50 (96%) reported (i.e. all EL Members in the EU except Italy/ Sisal S.p.A. and Germany/ Staatliche Lotterieverwaltung)

Euro exchange rate: average 2013

Figure 10. EL Members: GGR by Game Category – 2013 (€M)



Sources: Data provided by EL Members in Q1/2015 (2013), 73 (97%) reported (i.e. all EL Members except Italy/ Sisal S.p.A. and Germany/ Staatliche Lotterieverwaltung)

"Category" ("Number of reporting EL Members")

Euro exchange rate: average 2013

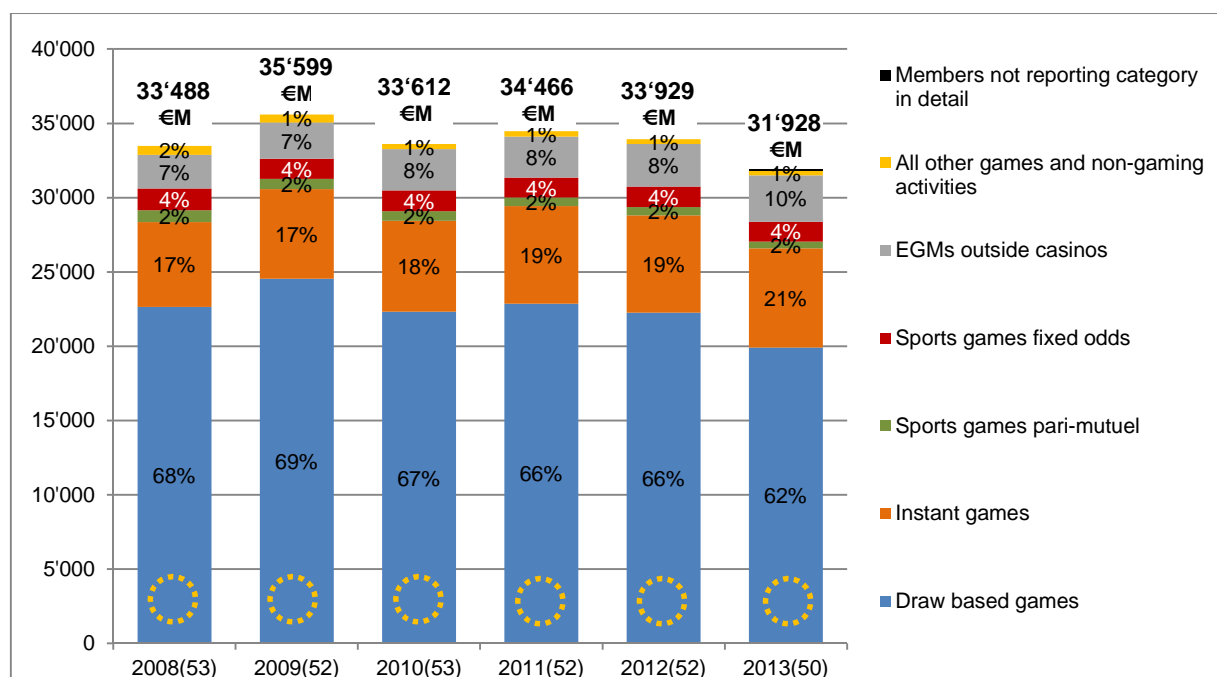
Table 6. EL Members: GGR by Game Category – 2013 (€M)

Game category	All EL Members reporting GGR in 2013	GGR: EL Members in total 2013 (€M)	Share out of total
Draw based games	68	21 874	62%
Instant games	59	7 105	20%
Sports games pari-mutuel	42	551	2%
Sports games fixed odds	40	1 643	5%
EGMs outside casinos	13	3 408	10%
All other games and non-gaming activities	13	339	1%
Members not reporting category in detail	1	92	0,3%
Total	73	35 013	100%

Sources: Data provided by EL Members in Q1/2015 (2013), 73 (97%) reported (i.e. all EL Members except Italy/ Sisal S.p.A. and Germany/ Staatliche Lotterieverwaltung)

Euro exchange rate: average 2013

Figure 11. EL Members in the EU: GGR by Game Category – Development 2008 - 2013 (€M)



Sources: Data provided by EL Members in the EU in Q1/2009 (2008) - Q1/2015 (2013)

All EL Members from the EU participating in respective ELISE data aggregation reported their GGR except of 1. Bulgaria/ Eurofootball Ltd. which was not reporting GGR in 2009 – 2012, 2. In 2013, GGR data was not received from Italy/ Sisal S.p.A. and Germany/ Staatliche Lotterieverwaltung

“Year” (“Number of reporting EL Members”), Euro exchange rate: average 2013

Table 7. EL Members in the EU: GGR by Game Category – Development 2008 - 2013 (€M)

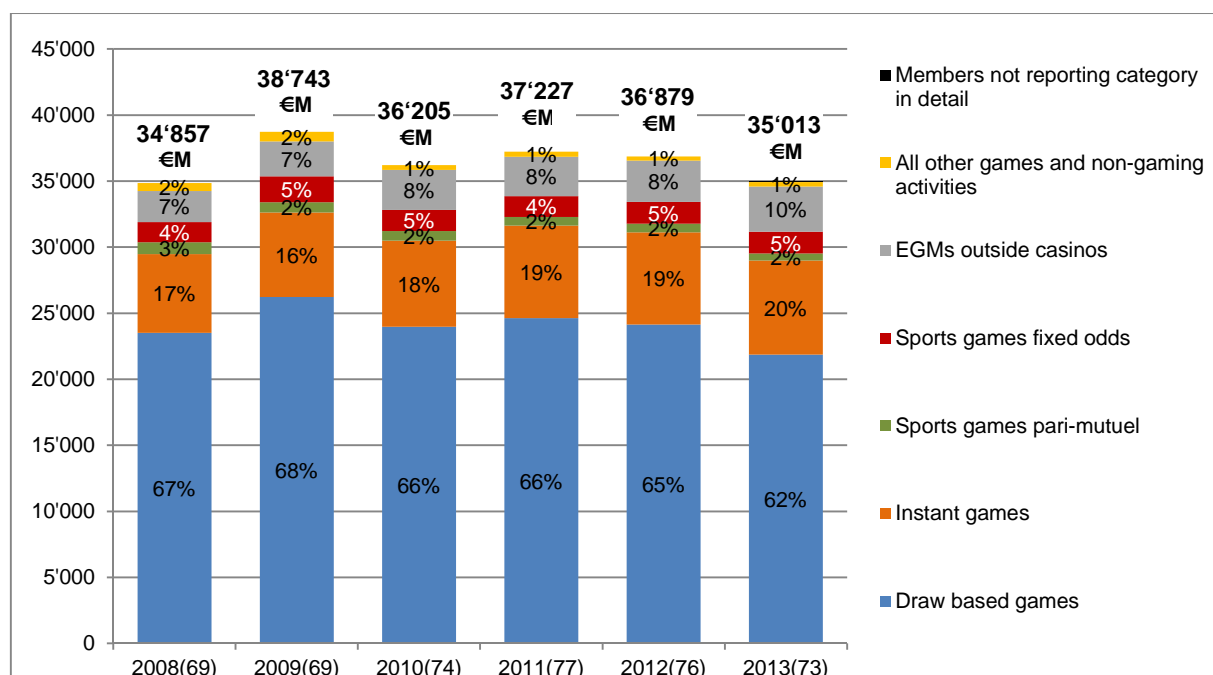
Game category	EUM rep. GGR in 2013	EL Members in the EU28/27: GGR in €M						Change* 2013-2012	Avg. YoY change* 2013-2008
		2008 (53)	2009 (52)	2010 (53)	2011 (52)	2012 (52)	2013 (50)		
Draw based games	47	22 648	24 547	22 316	22 865	22 251	19 917	-10,5%	-2,3%
Instant games	42	5 710	6 018	6 128	6 568	6 558	6 661	1,6%	3,2%
Sports games pari-mutuel	34	804	708	638	576	550	469	-14,8%	-10,2%
Sports games fixed odds	31	1 454	1 339	1 395	1 342	1 397	1 337	-4,3%	-1,5%
EGMs outside casinos	7	2 258	2 433	2 790	2 751	2 845	3 114	9,5%	6,8%
All other games and non-gaming activities	10	614	553	343	364	329	338	2,8%	-9,7%
Members not reporting category in detail	1	0	0	0	0	0	92	n/a	n/a
Total	50	33 488	35 599	33 612	34 466	33 929	31 928	-5,9%	-0,8%

Sources: Data provided by EL Members in the EU in Q1/2009 (2008) - Q1/2015 (2013), for information on EL Members not reporting in particular years see comment above; Euro exchange rate: average 2013

“Year” (“Number of reporting EL Members”)

* Both types of changes also include Bulgaria/ Eurofootball Ltd., Cyprus/ OPAP (Cyprus) Ltd., Estonia/ AS Spordiennustus, Greece/ Greek State Lotteries, Italy/ Sisal S.p.A., Germany/ Staatliche Lotterieverwaltung and Poland/ Totolotek SA although they did not report in all years compared.

Figure 12. EL Members: GGR by Game Category – Development 2008 - 2013 (€M)



Sources: Data provided by EL Members in Q1/2009 (2008) - Q1/2015 (2013)

All EL Members from the EU participating in respective ELISE data aggregation reported their GGR except of 1. Bulgaria/ Eurofootball Ltd. which was not reporting GGR in 2009 – 2012, 2. In 2013, GGR data was not received from Italy/ Sisal S.p.A. and Germany/ Staatliche Lotterieverwaltung.

“Year” (“Number of reporting EL Members”), Euro exchange rate: average 2013

Table 8. EL Members: GGR by Game Category – Development 2008 - 2013 (€M)

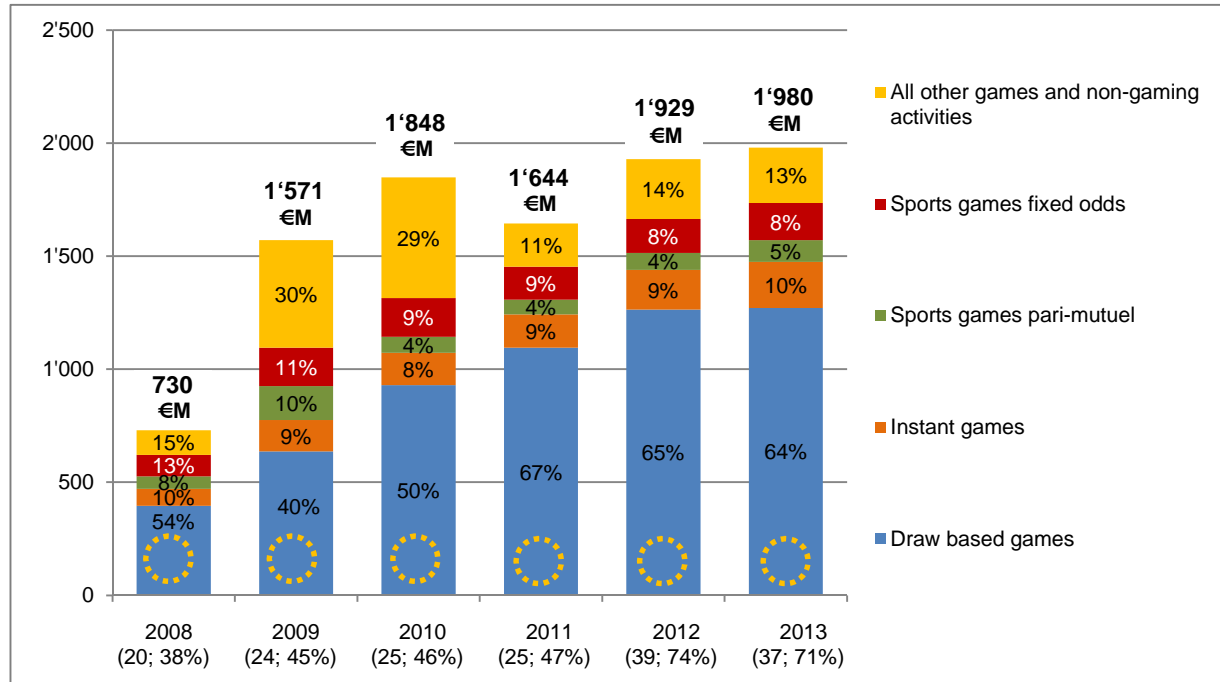
Game category	ELM rep. GGR in 2013	EL Members in total: GGR in €M						Change* 2013-2012	Avg. YoY change* 2013-2008
		2008 (69)	2009 (69)	2010 (74)	2011 (77)	2012 (76)	2013 (73)		
Draw based games	68	23 518	26 229	23 983	24 640	24 150	21 874	-9,4%	-1,1%
Instant games	59	5 965	6 395	6 519	6 984	6 979	7 105	1,8%	3,6%
Sports games pari-mutuel	42	880	779	723	666	644	551	-14,5%	-8,9%
Sports games fixed odds	40	1 535	1 965	1 599	1 567	1 657	1 643	-0,9%	2,5%
EGMs outside casinos	13	2 346	2 627	3 014	2 993	3 111	3 408	9,6%	7,9%
All other games and non-gaming activities	13	614	747	366	376	338	339	0,3%	-7,3%
Members not reporting category in detail	1	0	0	0	0	0	92	n/a	n/a
Total	73	34 857	38 743	36 205	37 227	36 879	35 013	-5,1%	0,3%

Sources: Data provided by EL Members in Q1/2009 (2008) - Q1/2015 (2013), for information on EL Members not reporting in particular years see the comment above; Euro exchange rate: average 2013

“Year” (“Number of reporting EL Members”)

*Both types of changes also include Bulgaria/ Eurofootball Ltd., Cyprus/ OPAP (Cyprus) Ltd., Estonia/ AS Spordiennustus, Greece/ Greek State Lotteries, Italy/ Sisal S.p.A., Germany/ Staatliche Lotterieverwaltung, Poland/ Totolotek AS, Albania/ Lotaria Kombëtare, Azerbaijan/ Azerinteltek CJSC, Belarus/ CJSC Sport-Pari, Bosnia and Herzegovina/ Lottery of the Republic of Srpska, FYROM/ National Lottery of Macedonia, Georgia/ Georgian Lottery Company, Kazakhstan/ National Lottery of Kazakhstan, Russia/ CJSC Interlot, Russia/ OOO Ural Loto, Russia/ JSC TD STOLOTTO and Turkey/ Turkish National Lottery Administration although they did not report in all years compared.

Figure 13. EL Members in the EU: GGR via Internet by Game Category – Development 2008 - 2013 (€M)

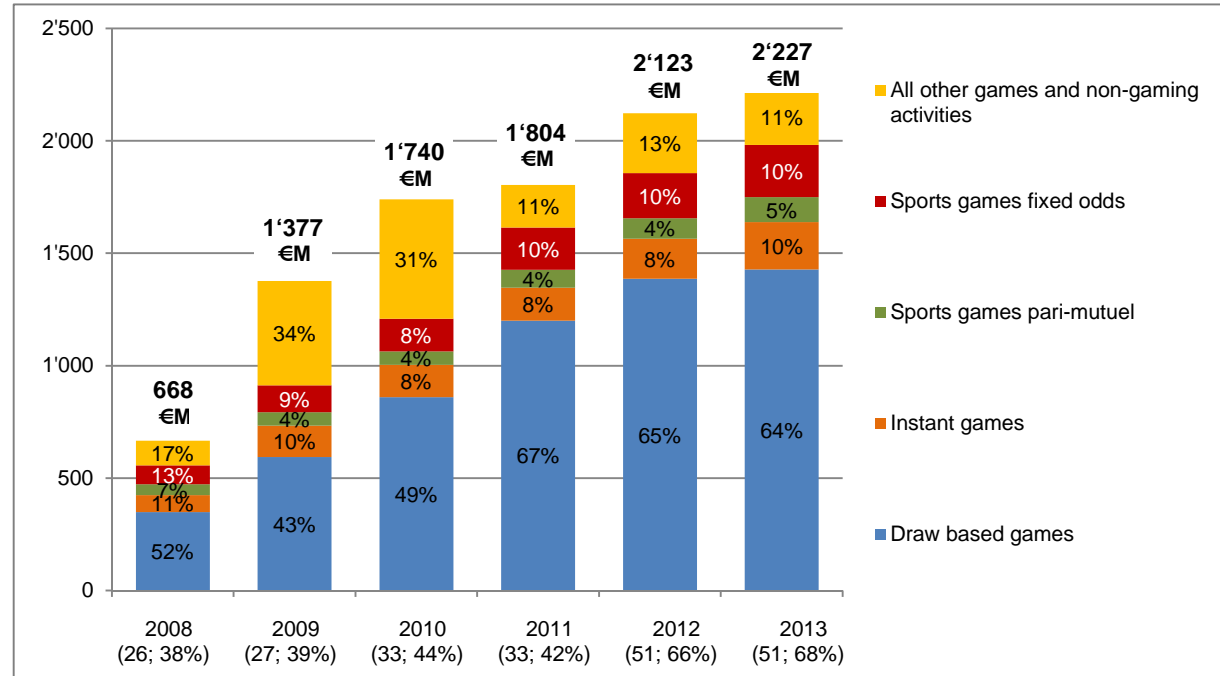


Sources: Data provided by EL Members in the EU in Q1/2009 (2008) - Q1/2015 (2013)

“Category” (“Number of GGR through the Internet reporting EL Members”; “share of EL Members who reported GGR through the Internet out of the total number of EL Members that reported results in respective year”)

Euro exchange rate: average 2013

Figure 14. EL Members: GGR via Internet by Game Category – Development 2008 - 2013 (€M)



Sources: Data provided by EL Members in Q1/2009 (2008) - Q1/2015 (2013)

“Category” (“Number of GGR through the Internet reporting EL Members”; “share of EL Members who reported GGR through the Internet out of the total number of EL Members that reported results in respective year”)

Euro exchange rate: average 2013

Annex C: Explanation to Collected Data from EL Members

Country	<i>The lotteries country of origin needed to be chosen in a drop-down field.</i>
Lottery	<i>The lottery needed to be chosen in a drop-down field.</i>
Contact person	<i>It was asked to insert the following details of a contact person: name, e-mail address and phone number.</i>
National currency	<i>Each EL Member was asked to indicate its national currency and to fill in all data in the national currency. Economica team used the yearly average exchange rates of 2013 provided by Eurostat or, if not available, of the European Central Bank and the national banks of each country.</i>
Sales	<p>Sales (or turnover or handle for slot machines) should be in national currency. Do not deduct anything from sales - not prizes, not commission for retailers nor anything else. It 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 like retail, own shops, Internet, mobile, tablets and interactive TV.</p> <p>Please provide the complete figure, for example, "675 000 000" and not "675 million" as the data entry field is formatted as a number to be used in calculations. Furthermore, please use a "." as a decimal point instead of ",". The sales figures should correspond to the figures provided in audited reports if available.</p>
GGR	<p>Gross Gaming Revenue (GGR) is equal to sales minus prizes. For each game, GGR should be equal to sales multiplied by (100 %-pay-out rate in %). If, for example, you sell for 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. You may thus 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, good causes' money and profit. You should include GGR for all channels including retail, own shops, Internet, mobile, tablets and interactive TV.</p> <p>Please provide the complete figure in national currency and not "651 million" as a text entry. You may round the figure and enter "651 000 000" but please provide all digits. Furthermore, please use a "." as a decimal point instead of ",".</p>
Sales on the internet/mobile only	<p>Sales on the Internet/Mobile should include and reflect the same content than Total Sales Data, HOWEVER ONLY from channels like Internet, mobile, tablets and interactive TV.</p> <p>Please provide the complete figure, for example, "675 000 000" and not "675 million" as the data entry field is formatted as a number to be used in calculations. Furthermore, please use a "." as a decimal point instead of ",".</p>
Gross Gaming Revenue on the internet/mobile	<p>GGR on the Internet/Mobile should include and reflect the same content than Total GGR Data, HOWEVER ONLY from channels like Internet, mobile, tablets and interactive TV. Please provide the complete figure, for example, "675 000 000" and not "675 million" as the data entry field is formatted as a number to be used in calculations. Furthermore, please use a "." as a decimal point instead of ",".</p>

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 pari-mutuel <i>(total and part going to Horse Racing)</i>	All games on sports events with running odds i.e. games where players play against each other about one or more prize pools defined as a percentage of the total stake sum. For example Tips, Toto, Maljagt and horse racing with pari-mutuel odds. Do not include any fixed odds games.
Sports games fixed odds <i>(total and part going to Horse Racing)</i>	All games where players bet on the outcome of a sports event and all novelty bets on, for example, the weather, song contest, political events where the lottery offers fixed odds i.e. games where the player plays against the lottery. For example Oddset, live betting and all fixed odds games on horse racing.
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 and non-gaming activities	Typically, the category includes online casino games (where sales are recorded), poker (where sales are not recorded) and activities other than gaming, for example financial services (where there are no prizes).
Average no. of full time employees	Average number of lottery employees over the year calculated on a full time basis. Do not include employees of service providers or retailers.
Total mandatory money for Society (Tax/Duties and Good Causes) <i>of which to good causes on sports</i> <i>of which to other good causes (for example culture or education)</i> <i>of which to Treasury with no knowledge of the final allocation</i>	<p>Include everything in national currency 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 like sports, culture, environment, education, etc. The entry in this field should reflect the total money your lottery contributes to society as mandatory payments.</p> <p>For the purpose of this study, the total amount your lottery contributes to society as mandatory payments is broken down into three categories:</p> <ul style="list-style-type: none"> • Good causes on sports: covers mandatory payments allocated to sports. Include all amounts in national currency your lottery provides for sports purposes whether you pay it directly to sports associations or indirectly to a ministry or another institution. Do NOT include money you pay for sponsorships to sports. • Other good causes: This covers mandatory payments allocated to good causes where you are certain of the end allocation. Include all amounts in national currency your lottery provides for good causes like culture, education, environment, health, social, etc., whether you pay it directly to the good cause or indirectly through a ministry or another institution. Do NOT include money you pay for sponsorships to good causes. • Part to Treasury: This group covers mandatory payments to Treasury (state budget) with no specific 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. <p>Please provide complete figure, for example, "650 000 234" and not "650 million". You may round it to "650 000 000" but please enter all digits.</p>

Sponsorships for sports or other good causes	Some lotteries use sponsorships and/or patronage as a marketing and public relations tool. Please include the cost for any such sponsorship and/or patronage. Please provide complete figure, for example, "6 000 234" and not "6 million". You may round it to "6 000 000" but please give all digits.
Total spending on measures to prevent problem gambling	EL has established a program 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. Include also cost for information material, cost for stakeholder engagement, costs associated with helpline support, cost for education of staff and retailers and costs for employees directly involved in such activities. Please provide complete figure, for example, "6 500 234" and not "6.5 million". You may round it to "6 500 000" but please give all digits.
Retail selling costs	The amount in national currency paid in commission to retailers for selling your products. The figure will allow the calculation of an estimated manpower support in the retail sector coming from lottery products. Please provide complete figure, for example, "6 000 234" and not "6 million". You may round it to "6 000 000" but please give all digits.
Number of Point of Sales (POS)	The number of physical points of sales at the end of the period where your lottery sells its products - all or part of them. Do NOT include POS where EGMs are the only lottery product sold. In countries with more than 1 EL Member active, please indicate separately the number of POS shared with other EL Members. Please provide complete figure, for example, "6 523 000" and not "6.5 thousand". You may round it to "6 500" but please give all digits.
Product Sheet	There are six product categories. Each group contains games with similar characteristics. The product groups are defined in order to make statements about sales at European level. For each game category, sales and Gross Gaming Revenues (GGR) are requested.

Source: *Economica*. 2015

Annex D: Other Data Sources

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- The European Lotteries (2010). *ELISE – European Lotteries’ Report on Lotteries in the EU and in Europe 2009*. Retrieved October 31, 2015, from https://www.european-lotteries.org/search/apachesolr_search?filters=tid%3A14&solrsort=tds_cck_field_date%20desc [Password protected access]
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