THE EUROPEAN LOTTERIES

FOR THE BENEFIT OF SOCIETY

REPORT ON THE LOTTERY SECTOR IN EUROPE 2014

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REPORT SUMMARY

1. Introduction

This is the ninth report bringing aggregated data provided by current members of the European Lotteries Association (hereinafter EL), subsequent to the series of so-called "ELISE" reports.[1]

The objective of this report is to make the readers understand how EL Members' lotteries work and what their contributions to society in general are, via data on the economic activities of EL Members operating in the European Union (EU 28) and in Europe in general.[2] The report covers key descriptive statistics about current EL Members operating in Europe in 2014 and includes comparative statistics for the years 2010 – 2014, where appropriate. This is the most detailed report regarding both EL Members operating in the EU and all EL Members in total.

The **EL Members share the following common values and characteristics:**

1. They are **located in Europe**; and
2. They **hold state licenses** from the country in which they operate, or are directly controlled by the state; and
3. They **return a large 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; and
4. They **provide lottery games in a responsible way** according to the requirements defined by the licensor and only within the area of their respective jurisdiction, and they provide complete coverage of the said area.

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

The survey for 2014 presents **data from all 74 regular and affiliate EL Members and covers 44 European countries**. The data for this report was collected during spring 2016 and subsequently aggregated by an independent third party (Ipsos) responsible for the data collection, aggregation and consistency, and the non-disclosure of detailed data to any party. All monetary figures are calculated in euros using the average exchange rate for 2014.[3]

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[1] ELISE, "European Lotteries Information Sharing Extended". The ELISE Working Group, a body working under the European Lotteries Association, historically used to be responsible for publishing the series of so-called "ELISE" reports. Since 2016, the former ELISE Working Group has been renamed to the Knowledge Sharing Working Group and consequently the term "ELISE" has disappeared from the name of the report.

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

[3] The report presents data from 2010, 2011, 2012, 2013 and 2014. To make figures comparable over time, historical figures provided only by EL Members who participated in this years' data collection process are shown in this report and, at the same time, all lottery monetary figures from those years in currencies other than the euro have been converted into euros using the average exchange rates for 2014, 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 change in exchange rates and also changes in the number of reporting EL Members.

Table A. Number of EL Members Participating in the 2016 Data Collection Who Provided Data for Individual Years

	2010	2011	2012	2013	2014
EL Members in the EU28*	51	51	52	51	52
EL Members outside the EU28	19	21	21	22	22
TOTAL	**70**	**72**	**73**	**73**	**74**

*Source: EL, 2016. * Croatia has been a member of the EU since 2013. For comparability, their data are also included in the EU data for the years prior to 2013.*

The report consolidates the activities of all reporting EL Members. It shows consolidated Gross Gaming Revenue (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 games.[5]

The Sales figures are also broken down, namely into the 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 covering data from the last two years and comments on significant changes, but they are otherwise left uncommented to serve as a basis for EL Members' and other stakeholders' own analysis.[6]

Table B. Overview of Key Data 2014

KPI's	**Reporting EU Members**	**All Reporting EL Members**
EL Members All lotteries reporting within the EU/in Europe	52	74
Money for Society	€21.0bn	€22.9bn
Direct Full-time Employment[7] Yearly average number of full-time employees	23,497	27,474
Indirect Employment[8] Created full-time jobs	352,455	412,110
Sales Includes Sales from the four "Lottery" categories, i.e. Draw Based Games, Instant Games, Sports Games Pari-Mutuel, and Sports Games Fixed Odds.	€75.9bn	€82.4bn
Gross Gaming Revenue Sales minus prizes of four "Lottery" categories + EGMs + All other games	€34.1bn	€37.2bn
Gross Gaming Revenue via the Internet	€1.8bn	€2.1bn

Source: Data from single EL Members was collected and aggregated by Ipsos, 2016.

[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.*

[7] *The figure does not include 19,872 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).*

[8] *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 were created in sectors where lotteries are sold.*

2. Specific Member Activities in the EU and in the Rest of Europe in 2014[9]

A key characteristic of the EL state licensed lotteries is that they were founded with the aim, or received their licenses, on the condition that they would generate significant amounts of money for "good causes".

In 2014, **the money contributed to society** that was provided **by 51 EL Members in the EU (that reported their contributions), amounted to €21.0bn.** The funds have been channelled towards sports, funds for other good causes and taxes for treasury. **As for all reporting EL Members, (73 in total), their contributions to society amounted to €22.9bn in 2014**. Thus, in 2014, lotteries within Europe were able to maintain the historically high contribution to society at the same level as compared with the previous year. This means that almost 60% of the GGR generated by EL Members (not including sponsorships) went back to society in the respective countries.

In the **largest EU member states**, the amounts provided by EL Members to society that exceeded €2.0bn were: **Italy €4.4bn, France €3.2bn, the U.K. €3.1bn, Germany €2.8bn, and Spain €2.6bn**. **The average** amount that EL Members in the EU paid back to society (across the 28 EU member states, population of 506.9 million) was **€41 per capita in 2014**, which is similar to 2013.

Another important contribution of the EL Members is the **contribution to employment** in their respective countries. In 2014, the 52 EL Members operating in the EU **directly employed** 23,497 people (full-time employees; all 73 reporting EL Members employed **27,474 full-time employees**), whilst they **indirectly created 352,455 full-time jobs in the EU** (**412,110 jobs across Europe**), typically in the sectors selling lottery products.

Responsible gaming activities are an integrated part of the EL Members' business. In 2014, **EL Members continued to spend a significant amount of money on measures to prevent problem gambling**, which is similar to previous years.

3. Specific Gaming Activities

Sales for the four "Lottery" categories (Draw Based Games, Instant Games, Sports Games Pari-Mutuel, and Sports Games Fixed Odds) **by EL Members in the EU amounted to €75.9bn** in 2014, representing a new stabilization of the market after a period of decrease since 2011, and showing an increase of 3.0% from 2013. This progress is even a little more when taking into account **all EL Members in total**, where the result **accounted for a year on year increase of 3.3%, represented by total Sales of €82.4bn**.

As individual EL Members operate a variety of game activities, their Sales and GGR figures understandably differ accordingly. As for the 48 EL Members operating in the EU, who reported their GGR, per capita GGR spending ranges from €6 in Bulgaria and Latvia, to more than €100 in Cyprus, Greece, Italy and the Nordic countries. **Average per capita GGR spending across the EU was €67**.

[9] *EL Members who reported their figures in individual categories are specified in the Annex B.*

The corresponding figure for **all 69 reporting EL Members was €44**. This includes the Russian JSC TD Stoloto lottery, covering a population of nearly 143.7 million with GGR spending of €1 per capita.

In 2014, the total economic activity, measured as the **GGR of reporting EL Members operating in the EU (28), was €34.1bn**. Compared with 2013, this represented **an increase of 3.1%**. Viewing **all 69 reporting EL Members**, their **total GGR was €37.2bn** (which means an increase of 3.3%). The GGR figures thereby confirm that the lottery market has stabilized and recovered from the impact of crisis.

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 €47.0bn and GGR of €20.0bn, which accounted for 59% of total GGR**. **Sales and GGR figures for all EL Members** were **€50.9bn and €21.9bn** respectively, which **accounted for 59% of total GGR** and represented a decrease of 1.1% from 2013. Per capita GGR spending on Draw Based Games reported by EL Members in EU countries ranges widely from €6 (and lower in Latvia, Bulgaria and Lithuania) to more than €100 in Finland. Non-EU countries show smaller figures where almost three quarters of them show per capita GGR spending of €6 or less, and one half of non-EU countries did not even reach €2. However, Iceland, Israel, Switzerland and especially Norway show significantly higher figures, namely €40 and more per capita.

The second largest category is Instant Games showing a continuous increase in the whole 5-year period monitored. A year on year increase was also recorded in 2014, both by 46 **EL Members in the EU, who reported category Sales of €21.3bn, up 4.2% on 2013** and by **all 63 EL Members, who reported category Sales of €22.4bn, up 4.4% on 2013**. A GGR of €6.9bn from Instant Games was reached by 43 EL Members in the EU, representing some 20% of their total GGR, whilst **GGR from Instant Games in all 59 EL Members reporting the category, was €7.4bn and also accounted for 20% of their total GGR**. **GGR for the category grew by 4.2% in 2014 for EL Members in the EU, and by 4.3% for all EL Members**, thus significantly increasing year on year growth. Instant Games have been offered in all EU 28 states since Greece introduced this category in 2014, and have shown per capita GGR spending ranging from less than €1 in Bulgaria and Croatia to €20 and more in Italy, France, Portugal and Sweden. Per capita GGR, reported by EL Members in most of the non-EU countries, usually did not exceed €1. Nevertheless, there are still three EL Member countries where customers' per capita GGR spending was €15 and more: Switzerland, Israel and Norway. Overall, Italy remains the largest Instant Games market with €2.9bn in GGR and with the highest per capita GGR figure (€47).

The **two Sports Games categories, Pari-Mutuel and Fixed Odds wagering, are rather minor product categories** and **totalled a GGR of €2.2bn by EL Members from the EU (6.4% of the total GGR) and €2.6bn by all EL Members (i.e. 7.0% of the total GGR)**. Figures from the sports wagering Pari-Mutuel, provided by 34 EL Members in 19 EU states, showed a total GGR of €462 million, whilst the total sum reported by all 42 EL Members in this category was €537 million. **Fixed Odds betting**, reported by 31 EL Members in 17 EU states, showed a **total GGR of €1.7bn** in 2014. After the decrease that was recorded in the previous year, this category saw a new **significant year on year increase of 17.0%**, driven mainly by the successful figures of France and Italy. All 41 EL Members reporting this category enjoyed a total GGR of €2.1bn, which also meant a year on year increase of 17.0% from 2013.

The third largest category, EGMs outside casinos, includes slot machines separate from casinos, Video Lottery Terminals, and Electronic Instant Lotteries. These were **operated by EL Members in 7 EU member states with a GGR of €4.7bn, and in 13 states in total generating €5.0bn in 2014**. The GGR figure accounted for **13.7% of the total GGR** of EL Members in the EU, and showed a growth of 21.1% from 2013, whilst by EL Members in total, the GGR share of the category on the total GGR accounted for 13.3% and recorded a year on year increase of 20.0%. This significant growth in GGR for EGMs outside casinos is mainly driven by the growth of the Italian market. The final phase of the rollout in retail of the EGMs on the Italian market was concluded in 2014 allowing Sales to reach a steady rate of growth.

A major industry trend is the growing number of online sales. Some 41 state licensed lotteries operated by EL Members in 23 EU states reported Sales for games on the Internet in 2014. Those who reported total GGR from the Internet showed figures of €1.8bn – slightly higher than the €1.6bn recorded in 2013. A total of €2.1bn was reached by the 50 EL Members that reported GGR for online activities (out of all 53 EL Members that provided their Sales figures for online gaming), showing a **15.6% growth** when compared to 2013. The annual compound growth of GGR via the Internet has averaged 9.5% over the past five years. The GGR for online activities, representing **5.6% of the total GGR**, is composed mainly of Draw Based Games, representing 68.0% of the total, complemented by Sports Games Fixed Odds with 12.6%, Instant Games with 8.5%, All other games with 8.1% and Sports Games Pari-Mutuel with the remaining 2.8%.

APPENDIXES TO THE REPORT

Annex A: Methodology Applied

Annex B: Charts & Tables

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

Annex D: Other Data Sources

Annex A: Methodology Applied

This report, which builds on the series of so-called ELISE reports, traditionally and almost exclusively relies on primary data sources. [10,11]

The data gathered covers the results of all current, regular, and affiliate EL Members in calendar year 2014.[12,13] It is only in the scope that individual 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.

An independent third party (Ipsos) collected all data from EL Members for 2014.[14] They were responsible for the data collection, aggregation and consistency, and the non-disclosure of detailed data to any party. The data was collected via a secured online questionnaire during spring 2016.[15] The questionnaire was divided into two main sections, 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 games)[16] and "Other Data" involving figures of employment, money for society, money for responsible gaming and information related to the Points of Sales (POS) network. In the "Key data" section, two types of figures for each gaming category were collected in aggregated form – Sales and GGR, with a distinction between online and offline results. 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 gaming providers. 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 in EL Members' national currency and figures from the non-euro countries were converted into euros using the average exchange rates for 2014, either from Eurostat or, if not available,

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[10] *ELISE, "European Lotteries Information Sharing Extended". The ELISE Working Group, a body working under the European Lotteries Association, historically used to be responsible for publishing the series of so-called "ELISE" reports. Since 2016, the former ELISE Working Group has been renamed to the Knowledge Sharing Working Group and consequently the term "ELISE" has disappeared from the name of the report. Regardless the name, this report is the ninth in the row of reports having been published by above mentioned Working Group.*

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

[12] *The affiliate members of the 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.*

[13] *Since the previous report, the following change in membership base has occured: CJSC Interlot is no longer a member of the EL.*

[14] *Ipsos s.r.o., Na Příkopě 22, 110 00 Prague, Czech Republic.*

[15] *This is the second year of collecting data online.*

[16] *This year the sixth category has been redefined for higher relevancy: the category "All other games" originated out of the previous "All other games and non-gaming activities" category. The area of non-gaming activities is no longer monitored. A detailed definition of the games is given in Annex C: Explanations of the Collected Data Included in This Report.*

then from the European Central Bank or the national bank of each country.[17] In addition to the data for 2014, data from previous years is also included, namely from the period of 2010 – 2013.[18,19]

To make 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 2014 (in other words, all amounts in this report are reported in the average 2014 euro value).[20,21] The approach of using a sole exchange rate across historical periods enables better depiction (and observation) and therefore understanding of the trends freed from local macro-economic influence.

In terms of data processing, the methodology has been quite stable since the very first public report in 2010.[22] The aim is to provide the regular reader of these reports with ease of orientation and with the possibility of comparison. The report consists of two reporting parts – an introduction, and supportive tables and figures.[23] The introduction brings a short overview of the results achieved in the respective year (and in comparison to previous years), while supportive tables and figures show the relevant data behind the conclusions. Since the 2013 report, the second part has been broadened slightly to make the reader even better informed than in previous years.

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.[24] To provide the best overview of the results, the data is displayed in aggregated form or broken down into categories or countries, and always with the number of reporting EL Members.[25] In the break downs, each game category has its

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

[18] This report includes historical data reported by current EL Members in spring 2016 (figures for 2013), 2013 (figures for 2012), 2012 (figures for 2011) and 2011 (figures for 2010). Data for 2013 was provided together with data for 2014 by Ipsos in an aggregated form.

[19] It was decided to use two types of comparison starting from this report: mostly with the previous year and where possible within a five-year period.

[20] Thus, looking at the previous years' reports, which have used exchange rates from 2008, 2009, 2010, 2011, 2012 and 2013 respectively, differences appear because of the change in exchange rates and also because of the change in the number of Currently Reporting EL Members.

[21] All comparisons in this report as well as all recalculations of historical monetary figures using the average exchange rates for 2014 have been calculated by Ipsos.

[22] 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.

[23] The supportive tables and figures were provided by an independent party, Ipsos, which analysed the primary data (excel files with filled in questionnaires) from the previous years 2010 - 2012, together with the data for the years 2013 - 2014, that were independently collected by this agency via an online questionnaire.

[24] 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 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 home country in the EU. Croatia, which entered the EU in 2013, is always included in the results with EU Members (even for years prior to 2013) to get a better comparison of the numbers in given countries.

[25] The method of display may differ according to the space available, however the explanation under the figure/table or in the footnote is always present, namely for the last two years of reporting (2013 and 2014). Aditionally, an explanation for possibly surprising trends is available too.

own distinctive colour.[26] In line with previous years, Sales data is presented only based on the “Lottery” category (i.e. not including the EGMs and All other games categories that are rarely calculated but rather estimated in Sales).

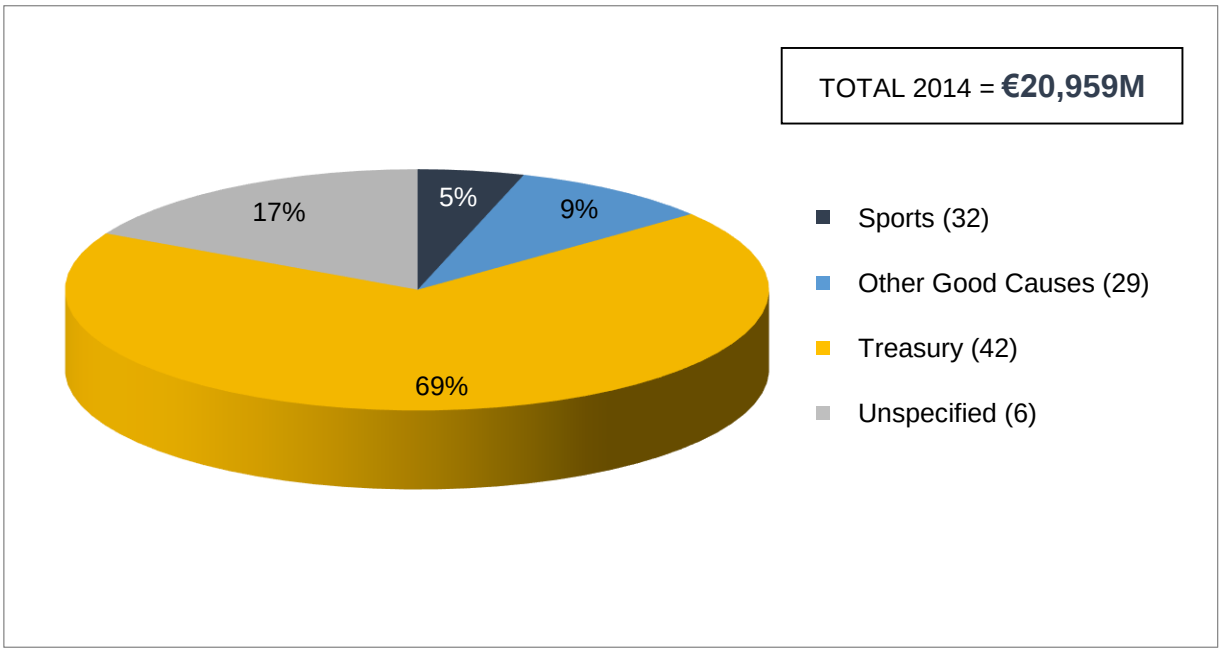
A comparison with previous results is always available and is within a two or five year period, or both. The changes displayed include each Currently Reporting EL Member that reported at least once in the monitored period.[27] All percentage changes between years have been calculated based on the figures in the national currency converted to their euro value.

[26] *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 games in yellow.*

[27] *The results of comparisons are always written with one decimal and negative values are always highlighted in red.*

Annex B: Charts and Tables

Figure C1. EL Members in the EU: Money for Society by Target – 2014 (€M)

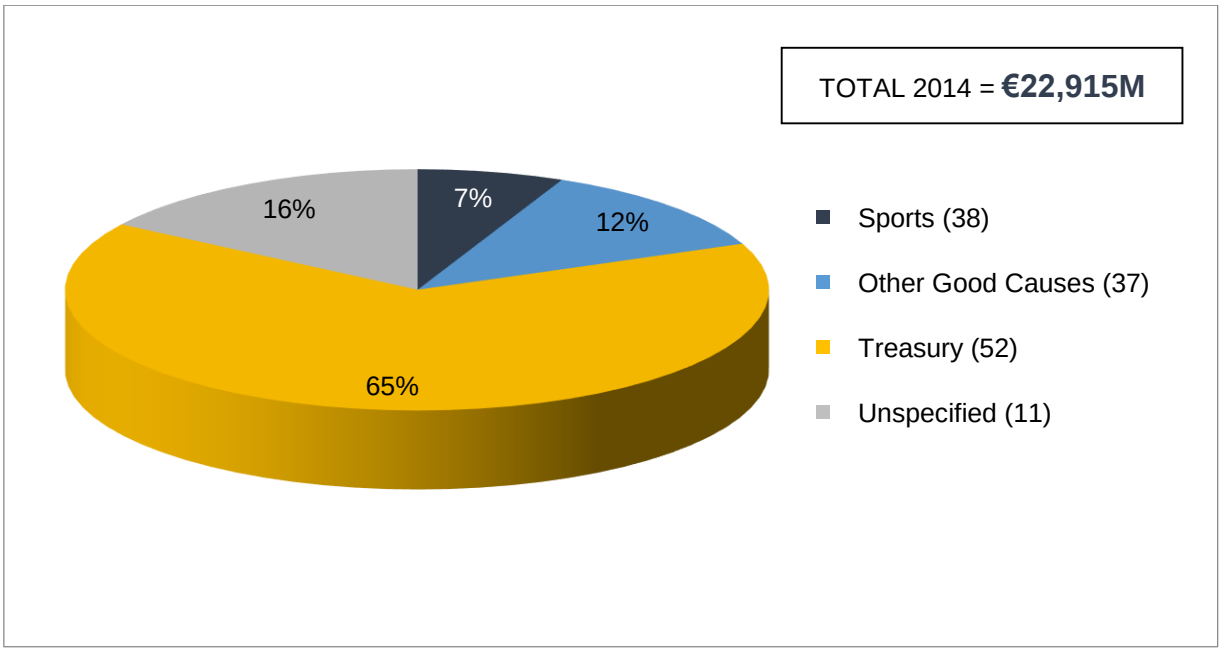


Sources: EL Members in the EU, namely:

51 (98%) reported their Money for Society for 2014 (i.e. all EL Members in the EU except for Netherlands/ Nederlandse Staatsloterij).

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

Figure C2. EL Members: Money for Society by Target – 2014 (€M)

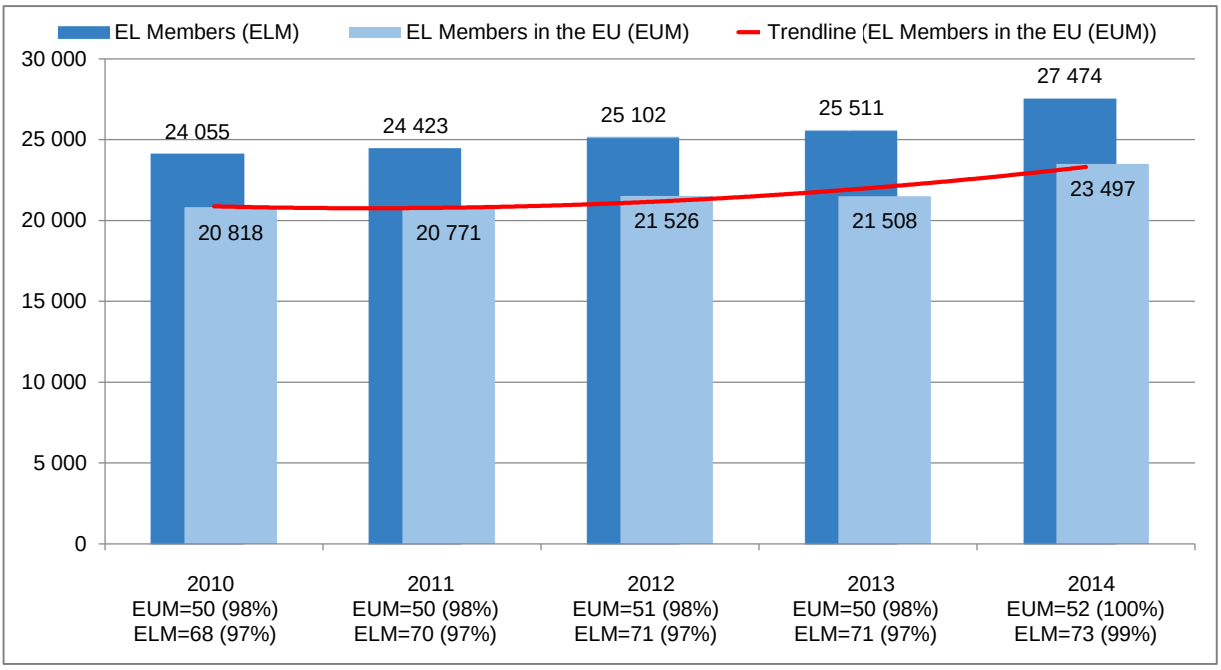


Sources: EL Members, namely:

73 (99%) reported their Money for Society for 2014 (i.e. all EL Members except for Netherlands/ Nederlandse Staatsloterij).

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

Figure C3. Contribution to Direct Employment – Development 2010 - 2014 (€M)



The figure for Spain does not include sales people from Spain/ Organización Nacional de Ciegos Españoles – ONCE, who are also full-time employees. They are not included in order to provide better comparisons with the full-time employment figures reported by other EL Members, where EL Members do not employ retail staff. The following are the numbers of employees: 19 804 (2013), 19 872 (2014).

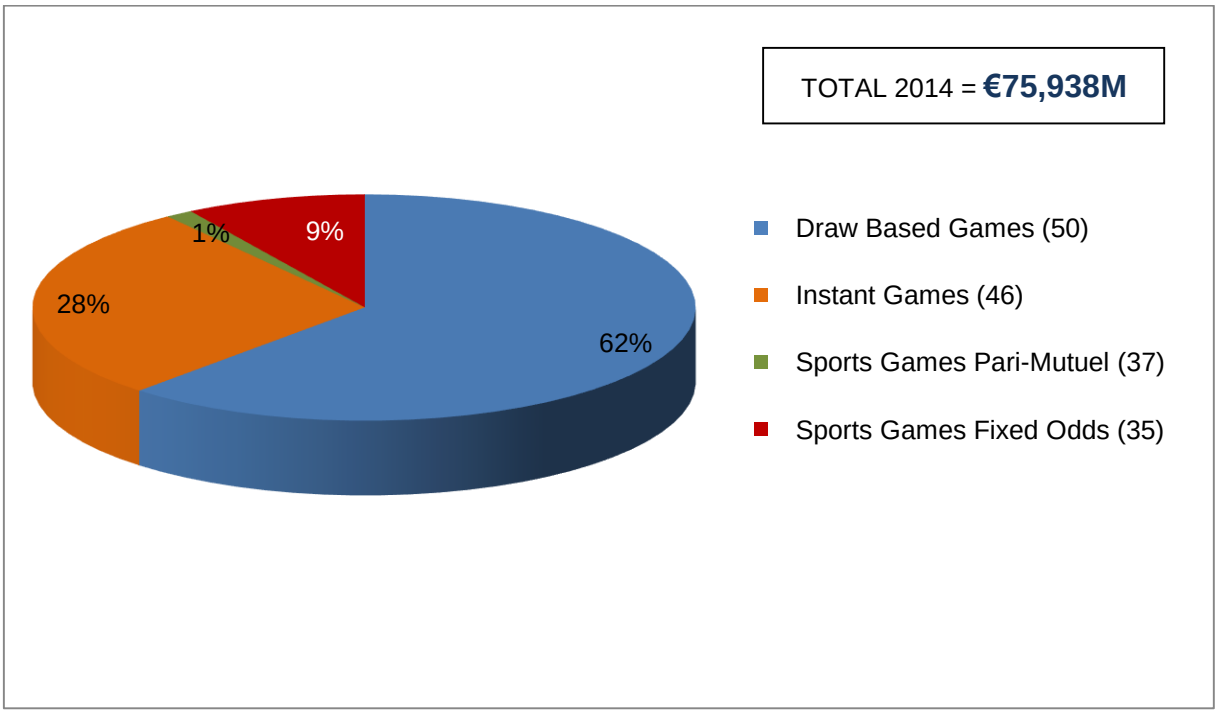
Sources: Currently Reporting EL Members, namely:

For 2014: 73 EL Members (99% out of the Currently Reporting EL Members) provided their number of full-time employees (i.e. all EL Members except for Azerbaijan/ Azerinteltek CJSC).

For 2013: 71 EL Members (97% out of those Currently Reporting EL Members who provided their data for 2013) reported their number of full-time employees (i.e. the same EL Members who reported their number of full-time employees for 2014 except for Germany/ Sächische Lotto-GmbH and Italy/ Sisal S.p.A.).

EUM/ ELM = "Number of Currently Reporting EL Members included in the respective column" ("related to a given year: share of Currently Reporting EL Members who reported their number of full-time employees, out of those who participated in the data collection").

Figure 1. EL Members in the EU: Lottery Sales by Game Category – 2014 (€M)



Sources: EL Members in the EU, namely 52 (100%) reported their Lottery Sales for 2014.

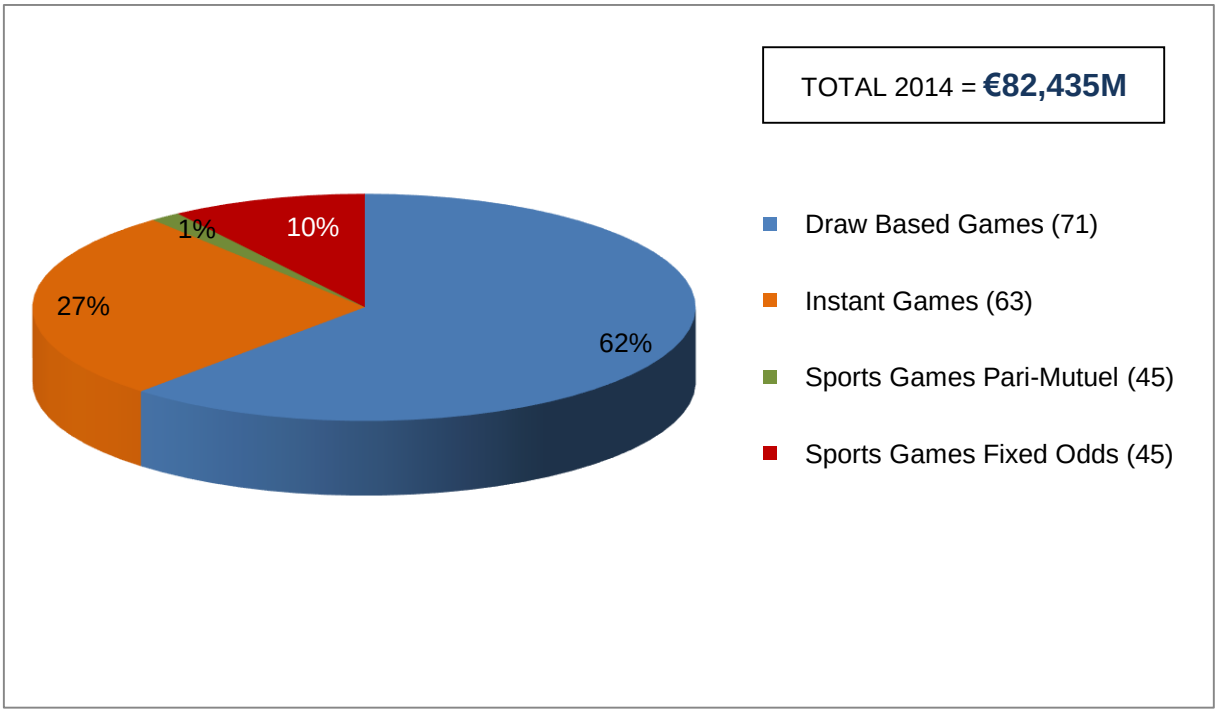
"Game category" ("Number of reporting EL Members in the EU").

Table 1. EL Members in the EU: Lottery Sales by Game Category – 2014 (€M)

Game category	Number of EUM reporting Lottery Sales for 2014	EUM: Lottery Sales for 2014 (€M)	Share out of total
Draw Based Games	50	46 971	62%
Instant Games	46	21 277	28%
Sports Games Pari-Mutuel	37	1 013	1%
Sports Games Fixed Odds	35	6 678	9%
Total	**52**	**75 938**	**100%**

Sources: EL Members in the EU, namely 52 (100%) reported their Lottery Sales for 2014.

Figure 2. EL Members: Lottery Sales by Game Category – 2014 (€M)



Sources: EL Members, namely 74 (100%) reported their Lottery Sales for 2014.

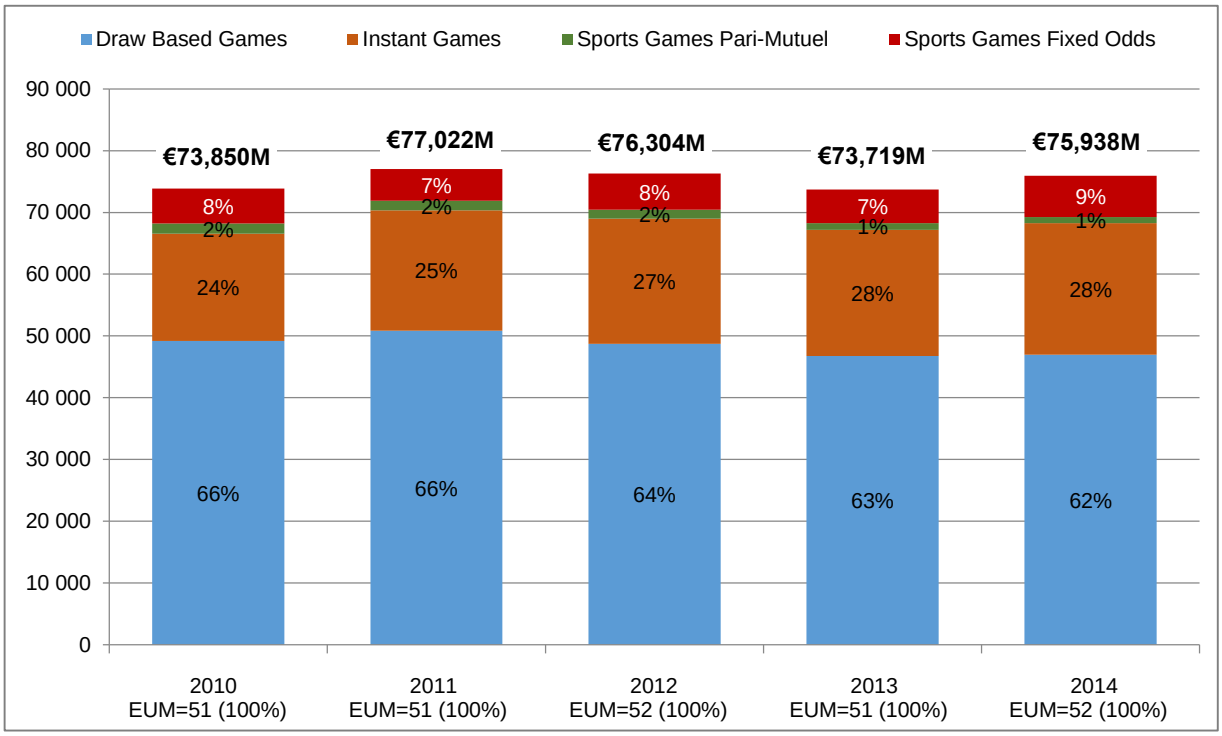
"Game category" ("Number of reporting EL Members").

Table 2. EL Members: Lottery Sales by Game Category – 2014 (€M)

Game category	Number of ELM reporting Lottery Sales for 2014	ELM: Lottery Sales for 2014 (€M)	Share out of total
Draw Based Games	71	50 903	62%
Instant Games	63	22 447	27%
Sports Games Pari-Mutuel	45	1 225	1%
Sports Games Fixed Odds	45	7 860	10%
Total	**74**	**82 435**	**100%**

Sources: EL Members, namely 74 (100%) reported their Lottery Sales for 2014.

Figure 3. EL Members in the EU: Lottery Sales by Game Category – Development 2010 - 2014 (€M)



Sources: Currently Reporting EL Members in the EU, namely:

For 2014: 52 EL Members in the EU (100% out of the Currently Reporting EL Members in the EU) provided their Lottery Sales.

For 2013: 51 EL Members in the EU (100% out of those Currently Reporting EL Members in the EU who provided their data for 2013) reported their Lottery Sales (i.e. the same EL Members in the EU who reported their Lottery Sales for 2014, except for Germany/ Sächische Lotto-GmbH).

EUM = "Number of Currently Reporting EL Members in the EU included in the respective column" ("related to a given year: share of Currently Reporting EL Members in the EU who reported Lottery Sales by game category, out of those who participated in the data collection").

Table 3. EL Members in the EU: Lottery Sales by Game Category – Development 2010 - 2014 (€M)

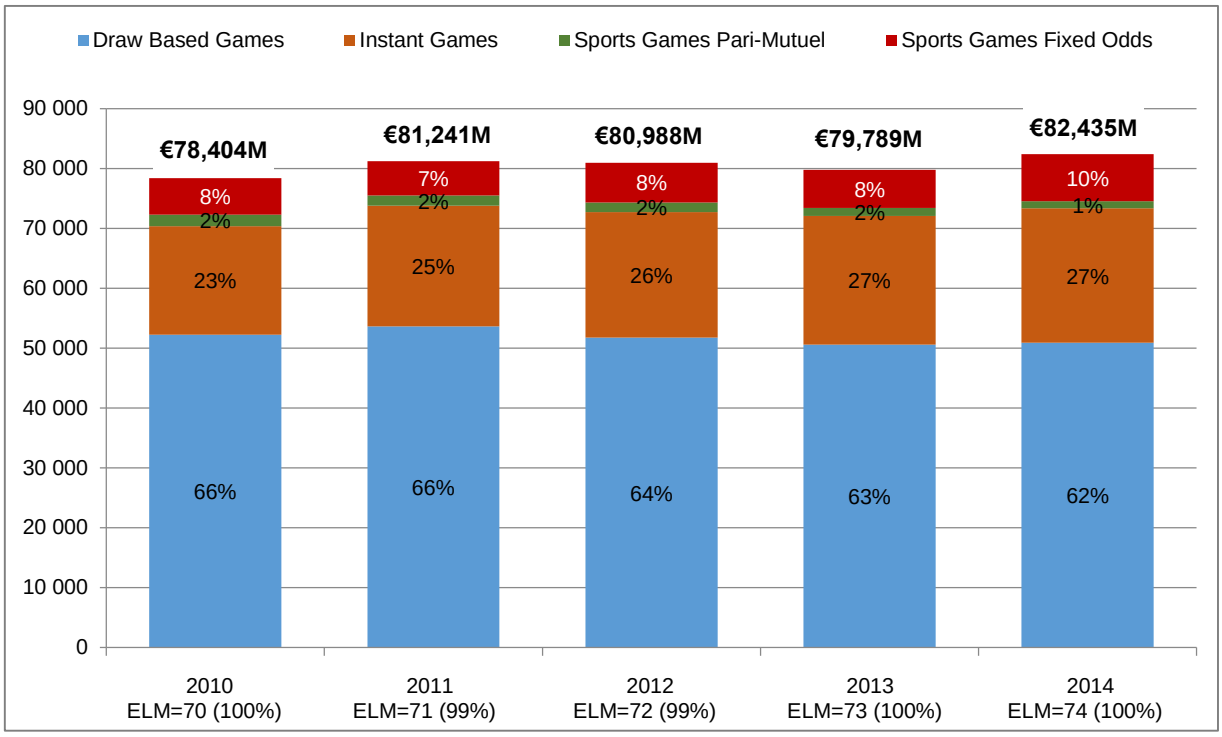
Game category	EUM rep. Lottery Sales for 2014	EUM: Lottery Sales for the respective year in €M					Change* 2014-2013	Avg. YoY change* 2014-2010
		2010 (51)	2011 (51)	2012 (52)	2013 (51)	2014 (52)		
Draw Based Games	50	49 191	50 868	48 745	46 783	46 971	0.4%	-1.1%
Instant Games	46	17 357	19 471	20 250	20 416	21 277	4.2%	5.2%
Sports Games Pari-Mutuel	37	1 688	1 527	1 440	1 075	1 013	-5.8%	-12.0%
Sports Games Fixed Odds	35	5 614	5 156	5 870	5 445	6 678	22.6%	4.4%
Total	**52**	**73 850**	**77 022**	**76 304**	**73 719**	**75 938**	**3.0%**	**0.7%**

Sources: Currently Reporting EL Members in the EU, for information on those who did not report Lottery Sales for individual years see the comment above.

"Year" ("Number of Currently Reporting EL Members in the EU included in the respective column").

** "Change 2014-2013"/"Avg. YoY change 2014-2010" can be influenced by differences in the structure of EL Members in the EU reporting in the respective category for individual years.*

Figure 4. EL Members: Lottery Sales by Game Category – Development 2010 - 2014 (€M)



Sources: Currently Reporting EL Members, namely:

For 2014: 74 EL Members (100% out of the Currently Reporting EL Members) provided their Lottery Sales.

For 2013: 73 EL Members (100% out of those Currently Reporting EL Members who provided their data for 2013) reported their Lottery Sales (i.e. the same EL Members who reported their Lottery Sales for 2014, except for Germany/ Sächische Lotto-GmbH).

ELM = "Number of Currently Reporting EL Members included in the respective column" ("related to a given year: share of Currently Reporting EL Members who reported Lottery Sales by game category, out of those who participated in the data collection").

Table 4. EL Members: Lottery Sales by Game Category – Development 2010 - 2014 (€M)

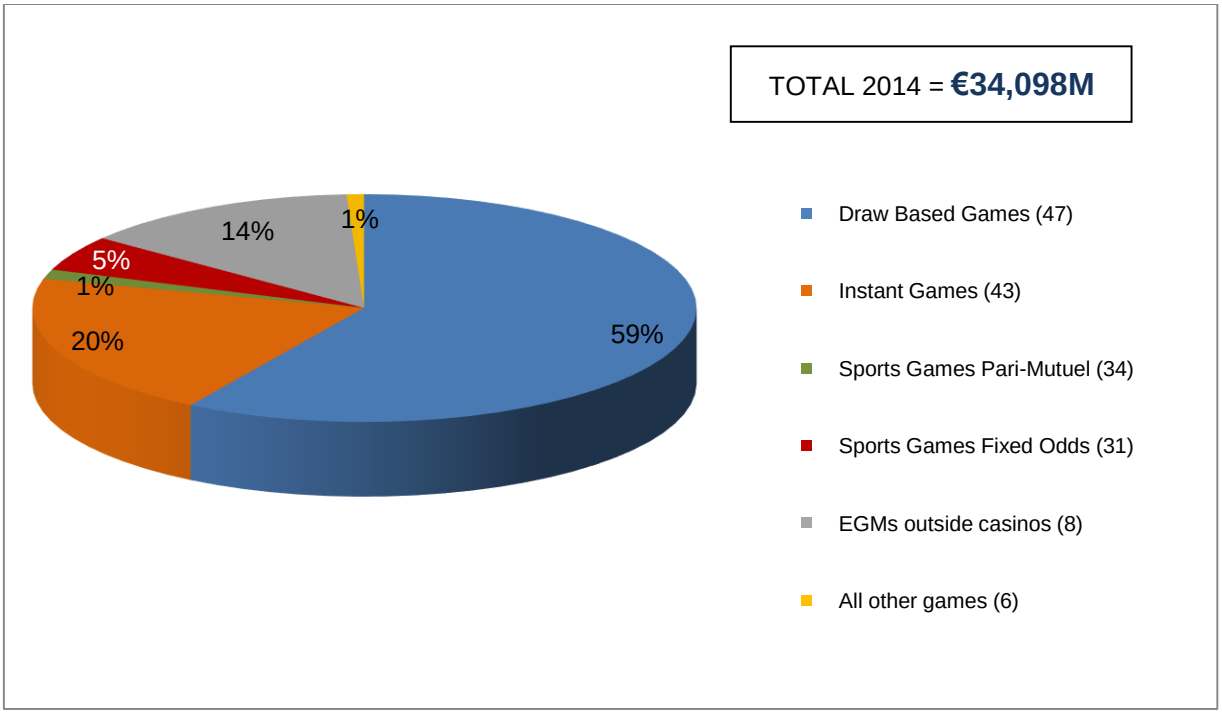
Game category	ELM rep. Lottery Sales for 2014	ELM: Lottery Sales for the respective year in €M					Change* 2014-2013	Avg. YoY change* 2014-2010
		2010 (70)	2011 (71)	2012 (72)	2013 (73)	2014 (74)		
Draw Based Games	71	52 220	53 626	51 754	50 610	50 903	0.6%	-0.6%
Instant Games	63	18 176	20 151	20 964	21 505	22 447	4.4%	5.4%
Sports Games Pari-Mutuel	45	1 888	1 738	1 643	1 290	1 225	-5.0%	-10.2%
Sports Games Fixed Odds	45	6 120	5 726	6 627	6 385	7 860	23.1%	6.5%
Total	**74**	**78 404**	**81 241**	**80 988**	**79 789**	**82 435**	**3.3%**	**1.3%**

Sources: Currently Reporting EL Members, for information on those who did not report Lottery Sales for individual years see the comment above.

"Year" ("Number of Currently Reporting EL Members included in the respective column").

** "Change 2014-2013"/"Avg. YoY change 2014-2010" can be influenced by differences in the structure of EL Members reporting in the respective category for individual years.*

Figure 5. EL Members in the EU: GGR by Game Category – 2014 (€M)



Sources: EL Members in the EU, namely:

48 (92%) reported their GGR for 2014 (i.e. all EL Members in the EU except for Bulgaria/ Eurofootball Ltd., Germany/ Staatliche Lotterieverwaltung, Germany/ Staatliche Toto-Lotto GmbH, Romania/ C.N. Loteria Romana S.A.).

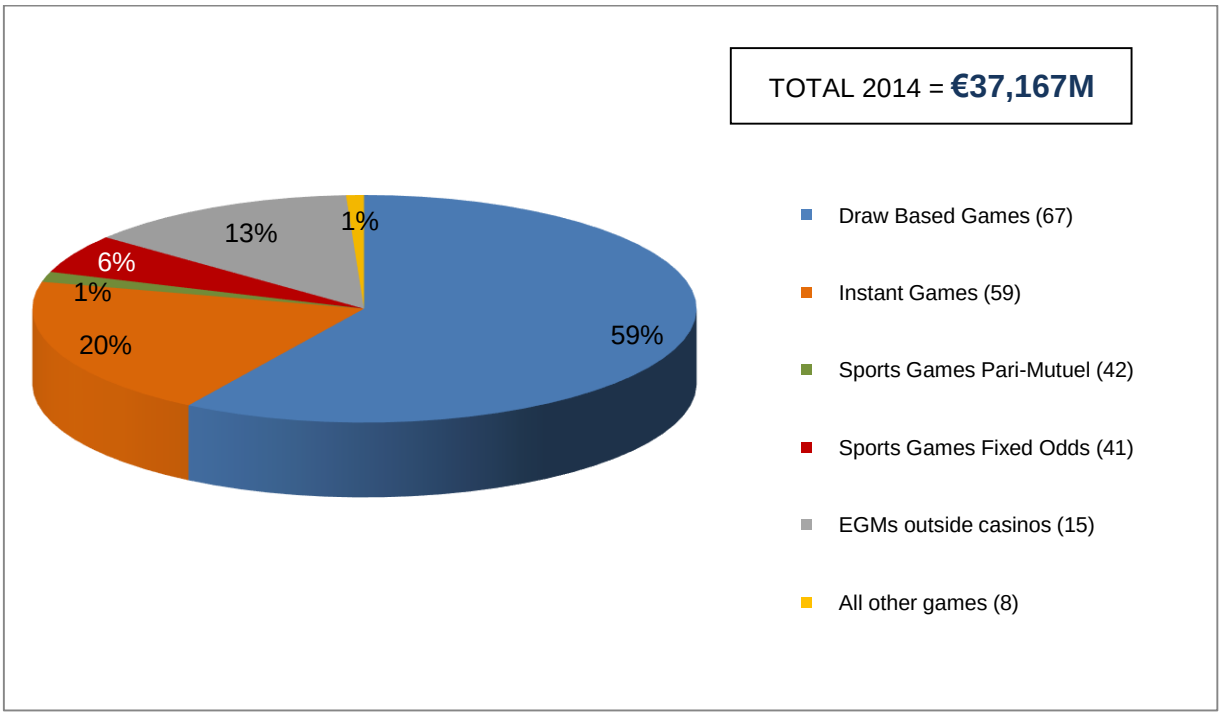
"Game category" ("Number of reporting EL Members in the EU").

Table 5. EL Members in the EU: GGR by Game Category – 2014 (€M)

Game category	Number of EUM reporting GGR for 2014	EUM: GGR for 2014 (€M)	Share out of total
Draw Based Games	47	20 031	59%
Instant Games	43	6 949	20%
Sports Games Pari-Mutuel	34	462	1%
Sports Games Fixed Odds	31	1 710	5%
EGMs outside casinos	8	4 658	14%
All other games	6	288	1%
Total	**48**	**34 098**	**100%**

Sources: EL Members in the EU, for information on those who did not report GGR for 2014 see comment above.

Figure 6. EL Members: GGR by Game Category – 2014 (€M)



Sources: EL Members, namely:

69 (93%) reported their GGR for 2014 (i.e. all EL Members except for Bulgaria/ Eurofootball Ltd., Germany/ Staatliche Lotterieverwaltung, Germany/ Staatliche Toto-Lotto GmbH and Romanian and Kosovan EL Members).

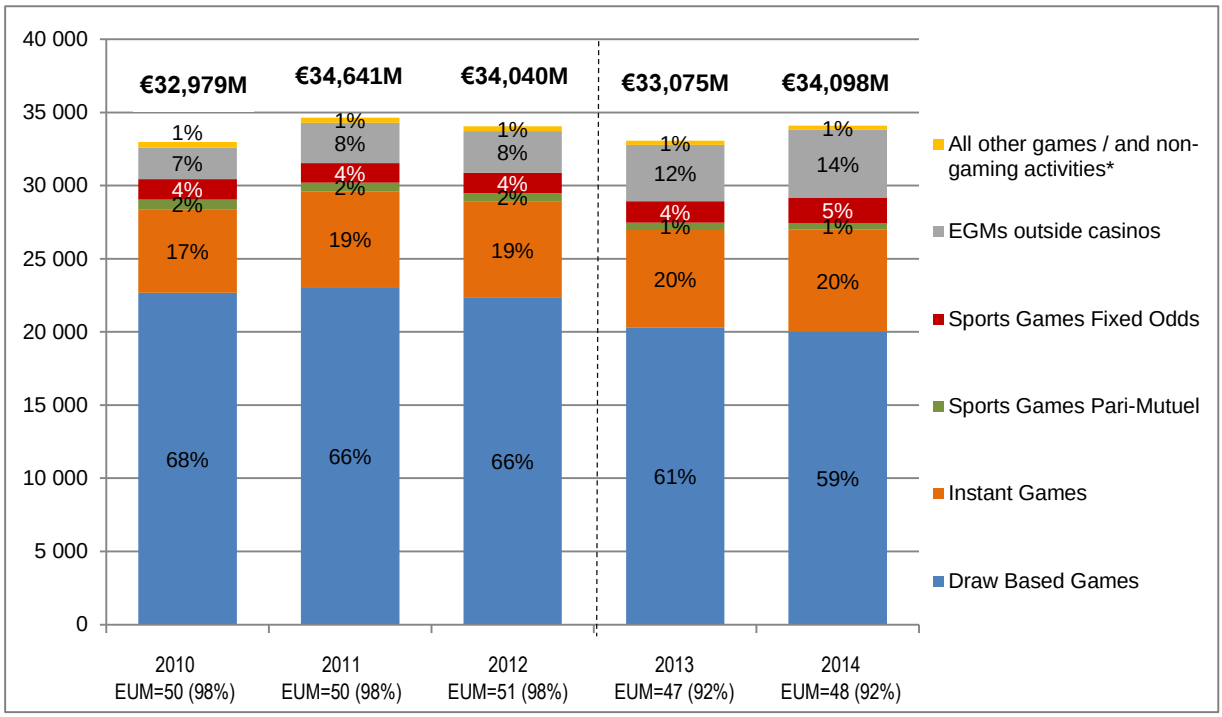
"Game category" ("Number of reporting EL Members").

Table 6. EL Members: GGR by Game Category – 2014 (€M)

Game category	Number of ELM reporting GGR for 2014	ELM: GGR for 2014 (€M)	Share out of total
Draw Based Games	67	21 879	59%
Instant Games	59	7 411	20%
Sports Games Pari-Mutuel	42	537	1%
Sports Games Fixed Odds	41	2 061	6%
EGMs outside casinos	15	4 957	13%
All other games	8	322	1%
Total	**69**	**37 167**	**100%**

Sources: EL Members, for information on those who did not report GGR for 2014 see comment above.

Figure 7. EL Members in the EU: GGR by Game Category – Development 2010 - 2014 (€M)



Sources: Currently Reporting EL Members in the EU, namely:

For 2014: 48 EL Members in the EU (92% out of the Currently Reporting EL Members in the EU) provided their GGR (i.e. all EL Members in the EU except for Bulgaria/ Eurofootball Ltd., Germany/ Staatliche Lotterieverwaltung, Germany/ Staatliche Toto-Lotto GmbH, Romania/ C.N. Loteria Romana S.A.).

For 2013: 47 EL Members in the EU (92% out of those Currently Reporting EL Members in the EU who provided their data for 2013) reported GGR (i.e. the same EL Members in the EU who reported their GGR for 2014, except for Germany/ Sächsische Lotto-GmbH).

EUM = "Number of Currently Reporting EL Members in the EU included in the respective column" ("related to a given year: share of Currently Reporting EL Members in the EU who reported their GGR by game category, out of those who participated in the data collection").

** Until 2013, the "All other games and non-gaming activities" category was reported. Since 2013, this category includes only All other games and does not include non-gaming activities.*

Table 7. EL Members in the EU: GGR by Game Category – Development 2010 - 2014 (€M)

Game category	EUM rep. GGR for 2014	EUM: GGR for the respective year in €M					Change* 2014-2013	Avg. YoY change* 2014-2010
		2010 (50)	2011 (50)	2012 (51)	2013 (47)	2014 (48)		
Draw Based Games	47	22 665	23 002	22 329	20 304	20 031	-1.3%	-3.0%
Instant Games	43	5 711	6 618	6 604	6 668	6 949	4.2%	5.0%
Sports Games Pari-Mutuel	34	656	572	545	494	462	-6.5%	-8.4%
Sports Games Fixed Odds	31	1 401	1 348	1 402	1 461	1 710	17.0%	5.1%
EGMs outside casinos	8	2 163	2 744	2 838	3 847	4 658	21.1%	21.1%
All other games / and non-gaming activities**	6	383	358	322	300	288	-3.9%	-6.9%
Total	**48**	**32 979**	**34 641**	**34 040**	**33 075**	**34 098**	**3.1%**	**0.8%**

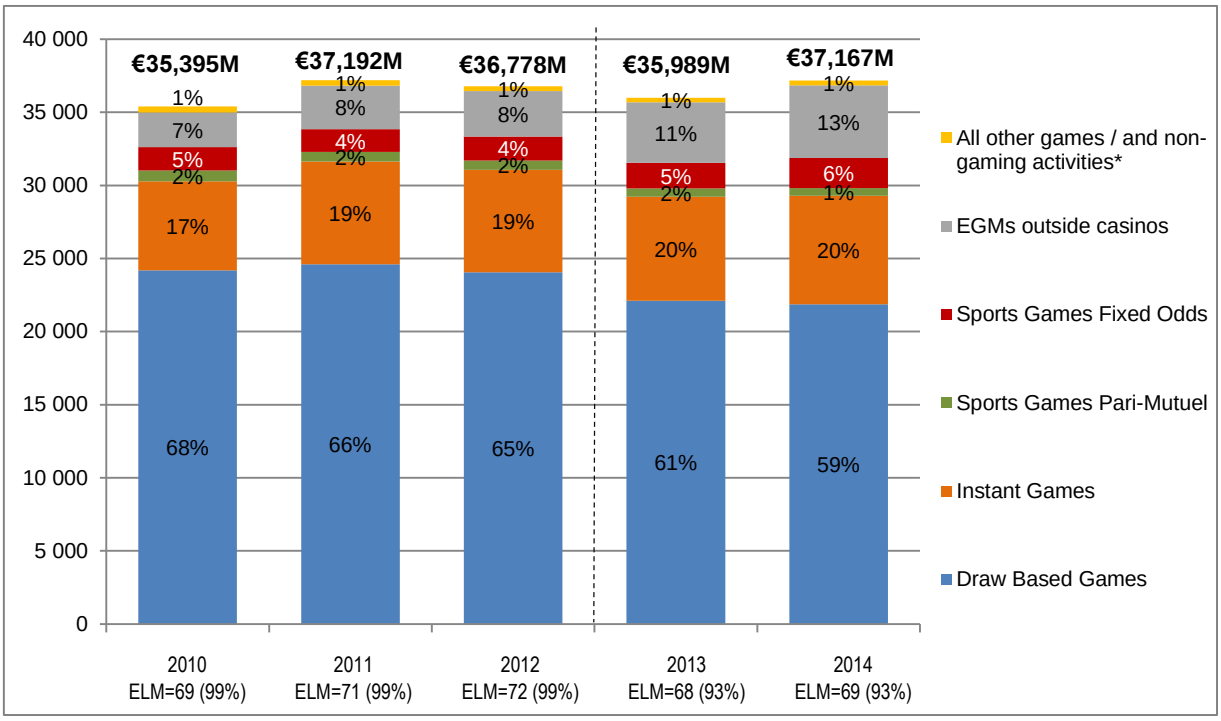
Sources: Currently Reporting EL Members in the EU, for information on those who did not report GGR for individual years see the comment above.

"Year" ("Number of Currently Reporting EL Members in the EU included in the respective column").

** "Change 2014-2013"/"Avg. YoY change 2014-2010" can be influenced by differences in the structure of EL Members in the EU reporting in the respective category for individual years.*

*** Until 2013, the "All other games and non-gaming activities" category was reported. Since 2013, this category includes only All other games and does not include non-gaming activities.*

Figure 8. EL Members: GGR by Game Category – Development 2010 - 2014 (€M)



Sources: Currently Reporting EL Members, namely:

For 2014: 69 EL Members (93% out of the Currently Reporting EL Members) provided their GGR (i.e. all EL Members except for Bulgaria/ Eurofootball Ltd., Germany/ Staatliche Lotterieverwaltung, Germany/ Staatliche Toto-Lotto GmbH and Romanian and Kosovan Currently Reporting EL Members).

For 2013: 68 EL Members (93% out of those Currently Reporting EL Members who provided their data for 2013) reported GGR (i.e. the same EL Members who reported their GGR for 2014, except for Germany/ Sächsische Lotto-GmbH).

ELM = "Number of Currently Reporting EL Members included in the respective column" ("related to a given year: share of Currently Reporting EL Members who reported their GGR by game category, out of those who participated in the data collection").

** Until 2013, the "All other games and non-gaming activities" category was reported. Since 2013, this category includes only All other games and does not include non-gaming activities.*

Table 8. EL Members: GGR by Game Category – Development 2010 - 2014 (€M)

Game category	ELM rep. GGR for 2014	ELM: GGR for the respective year in €M					Change* 2014-2013	Avg. YoY change* 2014-2010
		2010 (69)	2011 (71)	2012 (72)	2013 (68)	2014 (69)		
Draw Based Games	67	24 189	24 615	24 064	22 116	21 879	-1.1%	-2.5%
Instant Games	59	6 094	7 014	7 010	7 103	7 411	4.3%	5.0%
Sports Games Pari-Mutuel	42	737	660	635	571	537	-6.0%	-7.6%
Sports Games Fixed Odds	41	1 592	1 556	1 644	1 761	2 061	17.0%	6.7%
EGMs outside casinos	15	2 380	2 980	3 097	4 131	4 957	20.0%	20.1%
All other games / and non-gaming activities**	8	403	367	328	307	322	4.9%	-5.4%
Total	**69**	**35 395**	**37 192**	**36 778**	**35 989**	**37 167**	**3.3%**	**1.2%**

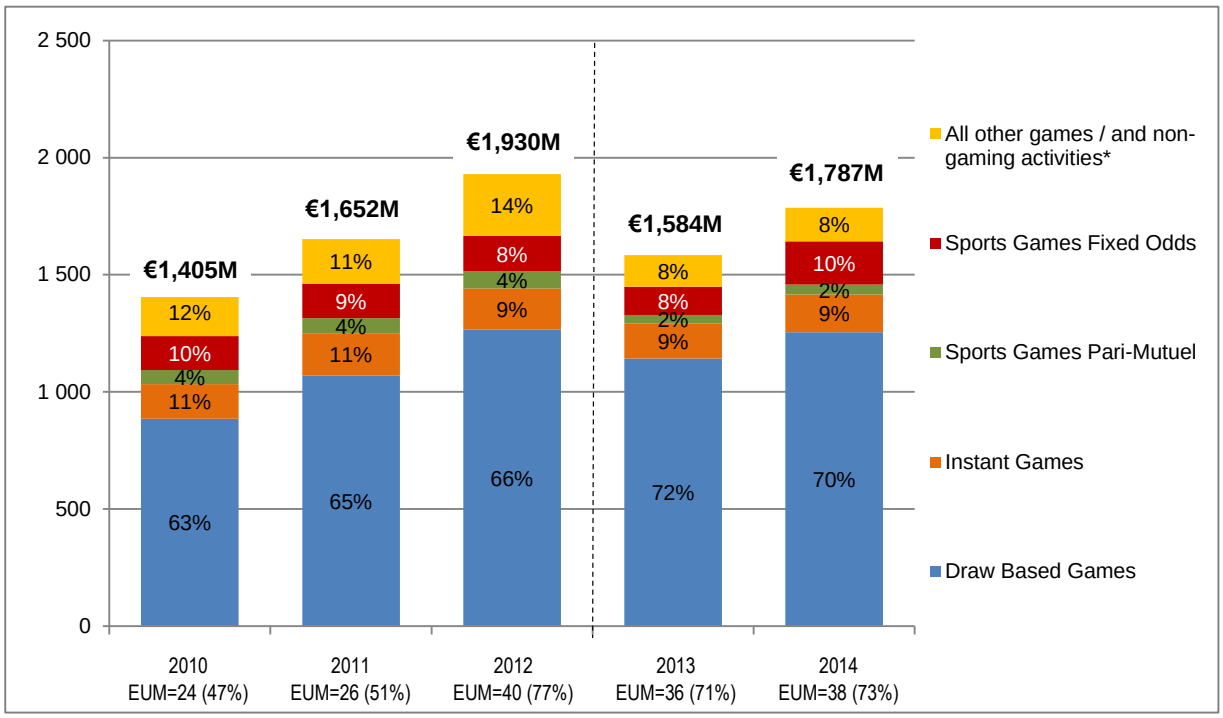
Sources: Currently Reporting EL Members, for information on those who did not report GGR for individual years see the comment above.

"Year" ("Number of Currently Reporting EL Members included in the respective column").

** "Change 2014-2013"/"Avg. YoY change 2014-2010" can be influenced by differences in the structure of EL Members reporting in the respective category for individual years.*

*** Until 2013, the "All other games and non-gaming activities" category was reported. Since 2013, this category includes only All other games and does not include non-gaming activities.*

Figure 9. EL Members in the EU: GGR via the Internet by Game Category – Development 2010 - 2014 (€M)



The decline between 2012 and 2013 resulted mainly from changes in reporting. France/ FDJ and Sweden/ AB Svenska Spel provided their figures for GGR via the Internet for the individual years 2010 - 2012, but not for 2013 and 2014. These two lotteries make up about 15% of the GGR via the Internet that was provided by the Currently Reporting EL Members in the EU for 2012, which helps to explain the 2012 - 2013 year on year decrease.

Sources: Currently Reporting EL Members in the EU, namely:

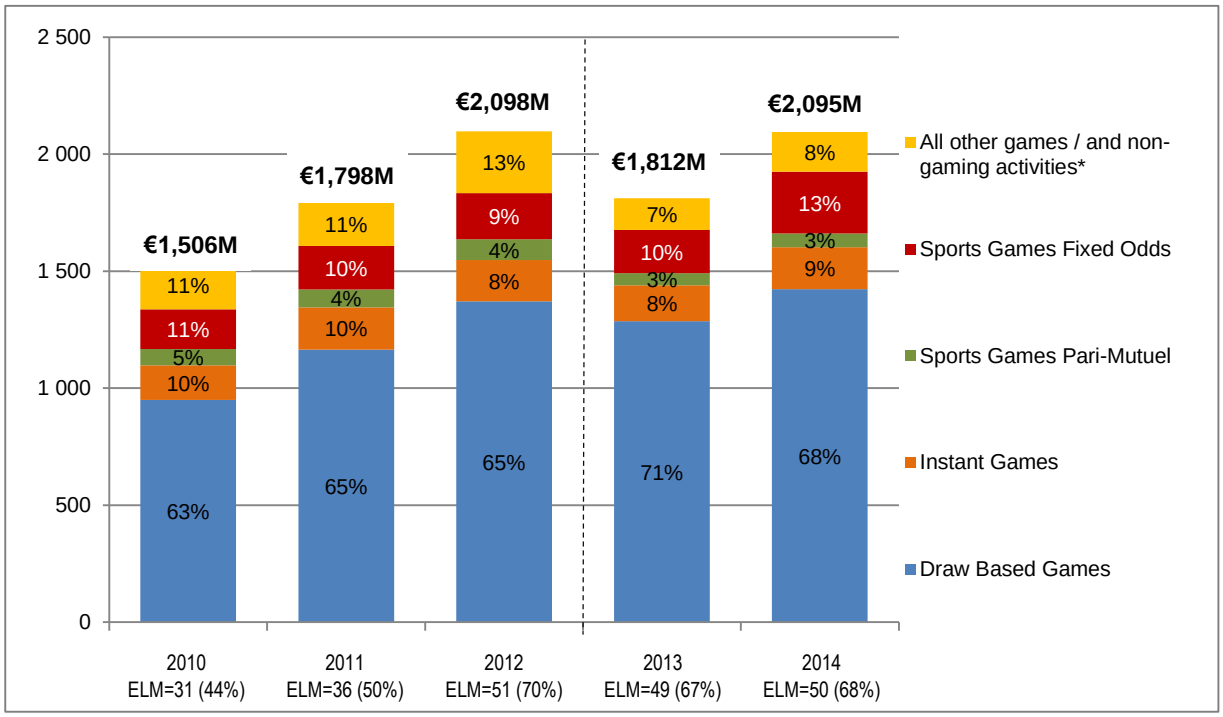
For 2014: 38 EL Members in the EU (73% out of the Currently Reporting EL Members in the EU) provided their GGR via the Internet (i.e. all EL Members in the EU except for Bulgaria/ Eurofootball Ltd., Germany/ Deutsche Klassenlotterie Berlin, Germany/ GKL Gemeinsame Klassenlotterie der Länder, Germany/ Lotterie-Treuhand-Gesellschaft mbH Hessen, Germany/ Sächsische Lotto-GmbH, Germany/ Staatliche Lotterieverwaltung, Germany/ Staatliche Toto-Lotto GmbH, Poland/ Totalizator Sportowy Sp. z o.o. and all Currently Reporting EL Members in the EU from following countries: Cyprus, France, Lithuania, Malta, Romania, Sweden).

For 2013: 36 EL Members in the EU (71% out of those Currently Reporting EL Members who provided their data for 2013) reported their GGR via the Internet (i.e. the same EL Members in the EU who reported their GGR via the Internet for 2014 except for Greece/ OPAP S.A. and Spain/ Loteria de Catalunya Loteria de Catalunya – Entitat autònoma de Jocs i Apostes).

EUM = "Number of Currently Reporting EL Members in the EU included in the respective column" ("related to a given year: share of Currently Reporting EL Members in the EU who reported GGR via the Internet, out of those who participated in the data collection").

** Until 2013, the "All other games and non-gaming activities" category was reported. Since 2013, this category includes only All other games and does not include non-gaming activities.*

Figure 10. EL Members: GGR via the Internet by Game Category – Development 2010 - 2014 (€M)



The decline between 2012 and 2013 resulted mainly from changes in reporting. France/ FDJ and Sweden/ AB Svenska Spel provided their figures for GGR via the Internet for the individual years 2010 - 2012, but not for 2013 and 2014. These two lotteries make up about 14% of the GGR via the Internet that was provided by the Currently Reporting EL Members for 2012, which helps to explain the 2012 - 2013 year on year decrease.

Sources: Currently Reporting EL Members, namely:

For 2014: 50 EL Members (68% out of the Currently Reporting EL Members) provided their GGR via the Internet (i.e. all EL Members except for Bulgaria/ Eurofootball Ltd., Germany/ Deutsche Klassenlotterie Berlin, Germany/ GKL Gemeinsame Klassenlotterie der Länder, Germany/ Lotterie-Treuhand-Gesellschaft mbH Hessen, Germany/ Sächsische Lotto-GmbH, Germany/ Staatliche Lotterieverwaltung, Germany/ Staatliche Toto-Lotto GmbH, Poland/ Totalizator Sportowy Sp. z o.o., Iceland/ Happdrætti Háskóla Íslands, Israel/ Mifal Hapais Israel National Lottery, Switzerland/ Swisslos Interkantonale Landeslotterie, Ukraine/ Ukrainian National Lottery and all Currently Reporting EL Members from following countries: Cyprus, France, Lithuania, Malta, Romania, Sweden, Albania, Bosnia and Herzegovina, FYROM, Kosovo and Serbia).

For 2013: 49 EL Members (67% out of those Currently Reporting EL Members who provided their data for 2013) reported their GGR via the Internet (i.e. the same EL Members who reported their GGR via the Internet for 2014 except for Greece/ OPAP S.A. and Spain/ Loteria de Catalunya Loteria de Catalunya – Entitat autònoma de Jocs i Apostes that did not report for 2013 and Serbia/ State Lottery of Serbia d.o.o., which, conversely, reported for 2013 but not for 2014).

ELM = "Number of Currently Reporting EL Members included in the respective column" ("related to a given year: share of Currently Reporting EL Members who reported GGR via the Internet, out of those who participated in the data collection").

** Until 2013, the "All other games and non-gaming activities" category was reported. Since 2013, this category includes only All other games and does not include non-gaming activities.*

Table M1. Countries: Overview of Reporting Activity by Country – 2010 - 2014

Country	Number of Currently Reporting ELM who provided data for individual years				
	2010	2011	2012	2013	2014
Austria	1	1	1	1	1
Belgium	1	1	1	1	1
Bulgaria	2	2	2	2	2
Croatia*	1	1	1	1	1
Cyprus	1	1	1	1	1
Czech Republic	1	1	1	1	1
Denmark	2	2	2	2	2
Estonia	1	1	1	1	1
Finland	1	1	1	1	1
France	1	1	1	1	1
Germany	17	17	17	16	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	1	1	1	1	1
Luxembourg	1	1	1	1	1
Malta	1	1	1	1	1
Netherlands	2	2	2	2	2
Poland	1	1	2	2	2
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
United Kingdom	1	1	1	1	1
EL Members in the EU28	**51**	**51**	**52**	**51**	**52**
Albania				1	1
Azerbaijan	1	2	2	2	2
Belarus	1	1	1	1	1
Bosnia and Herzegovina	2	2	2	2	2
FYROM		1	1	1	1
Georgia	1	1	1	1	1
Iceland	2	2	2	2	2
Israel	2	2	2	2	2
Kosovo	1	1	1	1	1
Moldova	1	1	1	1	1
Norway	1	1	1	1	1
Russia	1	1	1	1	1
Serbia	1	1	1	1	1
Switzerland	2	2	2	2	2
Turkey	1	1	1	1	1
Ukraine	2	2	2	2	2
EL Members in total	**70**	**72**	**72**	**73**	**74**

Sources: Currently Reporting EL Members.

** Croatia has been a member of the EU since 2013. For comparability, their data are also included in the EU data for the years prior to 2013.*

Table M2. Currently Reporting EL Members: Overview of Reporting Activity – 2010 - 2014

Country		ELM reported for each year (Y or N)				
EL Member	Founded	2010	2011	2012	2013	2014
Austria						
Österrechische Lotterien	1986	Y	Y	Y	Y	Y
Belgium						
Loterie Nationale Belgium	1934	Y	Y	Y	Y	Y
Bulgaria						
Bulgarian Sports Totalizator	1957	Y	Y	Y	Y	Y
Eurofootball Ltd.	1993	Y	Y	Y	Y	Y
Croatia**						
Hrvatska Lutrija d.o.o.	1973	Y	Y	Y	Y	Y
Cyprus						
Cyprus Government Lottery	1958	Y	Y	Y	Y	Y
Czech Republic						
Sazka a.s.	1956	Y	Y	Y	Y	Y
Denmark						
Det Danske Klasselotteri A/S	1753	Y	Y	Y	Y	Y
Danske Spil A/S	1948	Y	Y	Y	Y	Y
Estonia						
AS Eesti Loto	1971	Y	Y	Y	Y	Y
Finland						
Veikkaus Oy	1940	Y	Y	Y	Y	Y
France						
FDJ	1933	Y	Y	Y	Y	Y
Germany						
Staatliche Lotterieverwaltung	1946	Y	Y	Y	Y	Y
Deutsche Klassenlotterie Berlin	1947	Y	Y	Y	Y	Y
Bremer Toto und Lotto GmbH	1948	Y	Y	Y	Y	Y
LOTTO Hamburg GmbH	1948	Y	Y	Y	Y	Y
Lotto Rheinland-Pfalz GmbH	1948	Y	Y	Y	Y	Y
Staatliche Toto-Lotto GmbH	1948	Y	Y	Y	Y	Y
Lotterie-Treuhand-Gesellschaft mbH Hessen	1949	Y	Y	Y	Y	Y
Toto-Lotto Niedersachsen GmbH	1949	Y	Y	Y	Y	Y
Saarland-Sporttoto GmbH	1951	Y	Y	Y	Y	Y
Westdeutsche Lotterie GmbH & Co. OHG	1957	Y	Y	Y	Y	Y
Sächsische Lotto- GmbH	1990	Y	Y	Y	N	Y
Land Brandenburg LOTTO GmbH	1991	Y	Y	Y	Y	Y
Lotterie-Treuhand-Gesellschaft mbH Thüringen	1991	Y	Y	Y	Y	Y
Lotto-Toto GmbH Sachsen-Anhalt	1991	Y	Y	Y	Y	Y
Nordwestlotto Schleswig-Holstein GmbH & Co. KG	1991	Y	Y	Y	Y	Y
Verwaltungs-Gesellschaft Lotto und Toto in Mecklenburg-Vorpommern mbH	1991	Y	Y	Y	Y	Y
GKL Gemeinsame Klassenlotterie der Länder**	2012	Y	Y	Y	Y	Y
Greece						
OPAP S.A.	1959	Y	Y	Y	Y	Y
Hungary						
Szerencsejáték Zrt.	1991	Y	Y	Y	Y	Y
Ireland						
Premier Lotteries Ireland	1987	Y	Y	Y	Y	Y
Italy						
Sisal S.p.A.	1946	Y	Y	Y	Y	Y
Lottomatica	1990	Y	Y	Y	Y	Y
Latvia						
Latvijas Loto	1993	Y	Y	Y	Y	Y
Lithuania						
Olifėja Inc.	1993	Y	Y	Y	Y	Y
Luxembourg						
Loterie Nationale Luxembourg	1945	Y	Y	Y	Y	Y

Country EL Member	Founded	ELM reported for each year (Y or N) 2010	2011	2012	2013	2014
Malta						
Maltco Lotteries Limited	2004	Y	Y	Y	Y	Y
Netherlands						
Nederlandse Staatsloterij	1726	Y	Y	Y	Y	Y
De Lotto	1959	Y	Y	Y	Y	Y
Poland						
Totalizator Sportowy Sp. z o.o.	1956	Y	Y	Y	Y	Y
Totolotek SA	2007	N	N	Y	Y	Y
Portugal						
SCML - Santa Casa da Misericórdia de Lisboa	1783	Y	Y	Y	Y	Y
Romania						
C.N. Loteria Romana S.A.	1906	Y	Y	Y	Y	Y
Slovakia						
TIPOS, National Lottery Company, a.s.	1993	Y	Y	Y	Y	Y
Slovenia						
Loterija Slovenije d.d.	1952	Y	Y	Y	Y	Y
Športna Loterija d.d.	1996	Y	Y	Y	Y	Y
Spain						
Sociedad Estatal Loterías y Apuestas del Estado	1812	Y	Y	Y	Y	Y
Organización Nacional de Ciegos Españoles - ONCE	1938	Y	Y	Y	Y	Y
Loteria de Catalunya – Entitat autònoma de Jocs i Apostes	1987	Y	Y	Y	Y	Y
Sweden						
AB Svenska Spel	1996	Y	Y	Y	Y	Y
United Kingdom						
Camelot UK Lotteries Ltd.	1994	Y	Y	Y	Y	Y
Number of Currently Reporting EUM who provided data		**51**	**51**	**52**	**51**	**52**
Albania						
Lotaria Kombëtare	2013	N	N	N	Y	Y
Azerbaijan						
Azerlotereya SJSC	2001	Y	Y	Y	Y	Y
Azerinteltek CJSC	2010	N	Y	Y	Y	Y
Belarus						
CJSC Sport-Pari	2007	Y	Y	Y	Y	Y
Bosnia and Herzegovina						
Lottery of Bosnia and Herzegovina	1973	Y	Y	Y	Y	Y
Lottery of the Republic of Srpska	1992	Y	Y	Y	Y	Y
Croatia* **						
Hrvatska Lutrija d.o.o.	1973	Y	Y	Y	Y	Y
FYROM						
National Lottery of Macedonia	2008	N	Y	Y	Y	Y
Georgia						
Georgian Lottery Company	2009	Y	Y	Y	Y	Y
Iceland						
Happdrætti Háskóla Íslands	1934	Y	Y	Y	Y	Y
Íslensk Getspá	1986	Y	Y	Y	Y	Y
Israel						
Mifal Hapais Israel National Lottery	1951	Y	Y	Y	Y	Y
TOTO (The Israel Sports Betting Board)	1968	Y	Y	Y	Y	Y
Kosovo						
Lotaria e Kosovës	1974	Y	Y	Y	Y	Y
Moldova						
I.M. Loteria Moldovei S.A.	1994	Y	Y	Y	Y	Y
Norway						
Norsk Tipping AS	1948	Y	Y	Y	Y	Y
Russia						
JSC TD STOLOTO (until 2012 named Orglot OOO)	2006	Y	Y	Y	Y	Y

Country EL Member	Founded	ELM reported for each year (Y or N) 2010	2011	2012	2013	2014
Serbia						
State Lottery of Serbia d.o.o.	2004	Y	Y	Y	Y	Y
Switzerland						
Société de la Loterie de la Suisse Romande	1937	Y	Y	Y	Y	Y
Swisslos Interkantonale Landeslotterie	2003	Y	Y	Y	Y	Y
Turkey						
Turkish National Lottery Administration	1939	Y	Y	Y	Y	Y
Ukraine						
MSL	1971	Y	Y	Y	Y	Y
Ukrainian National Lottery	1997	Y	Y	Y	Y	Y
Number of Currently Reporting ELM who provided data		**70**	**72**	**73**	**73**	**74**

Sources: Currently Reporting EL Members.

Countries in the EU and outside the EU in alphabetical order. EL Members within countries are in the order of their foundation and then listed in alphabetical order.

** This report covers data from all regular EL Members and from affiliate members. The data from two Moroccan observer members are not included.*

*** GKL Gemeinsame Klassenlotterie der Länder is the result of a merger between SKL and NKL as per July 1st, 2012. In this report, they were treated as one entity.*

**** Croatia has been a member of the EU since 2013. For comparability, their data are also included in the EU data for the years prior to 2013.*

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

Country	*The lotteries' country of origin needed to be confirmed.*
Lottery	*The lottery name needed to be confirmed.*
Contact person	*The following details of a contact person were asked for: name, e-mail address and phone number.*
National currency	*EL Members were asked to confirm their national currency and to fill in all data in their national currency. The Ipsos team used the yearly average exchange rates from 2014 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 or handles for slot machines) should be in your national currency. Do not deduct anything from Sales – not prizes, not commission 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 like retail, own shops, the Internet, mobiles, tablets and interactive TVs. The Sales figures should correspond to the figures provided in the audited reports if available.
Gross Gaming Revenue (GGR)	Gross Gaming Revenue (GGR) is equal to sales minus prizes. For each game, GGR should be equal to Sales multiplied by 100% – the payout rate as a percentage. If, for example, you sell €50 of instant tickets with a payout of 58% in prizes for players, the GGR is equal to 50*(100%-58%) = 21. There may be a slight difference between the theoretical prize payout percentage and the actual payout, as some players never collect their prizes. However, for the purpose of this study the difference does not matter. You may thus 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 like the Internet, mobiles, tablets and interactive TVs.
Gross Gaming Revenue via the Internet/mobiles	GGR via the Internet/mobiles should include and reflect the same content as total GGR data, however only from channels like 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 Pari-Mutuel *(total and partly going to Horse Racing)*	All games on sports events with running odds i.e. games where players play against each other for 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 *(total and partly going to Horse Racing)*	All games where players bet on the outcome of a sports event and all novelty bets on, for example, the weather, song contests, 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 (EGMs) 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.

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.
Mandatory Money for Society (Tax/Duties/Good Causes) *of which goes to sports* *of which goes to other good causes (e.g. culture, education, health, social...)* *of which goes to treasury (with no knowledge of the final allocation, i.e. taxes, duties)*	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 like 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 the purpose of this study, the total amount your lottery contributes to society as mandatory payments is broken down into three categories: • Sports: This covers mandatory payments allocated to sports. Include all amounts in your national currency that 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 your national currency that your lottery provides for good causes like culture, education, the 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 as sponsorships to good causes. • Treasury: This covers mandatory payments to treasury (state budget) with no specific allocation. Include all amounts in your 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 this must also be included. Do not include sponsorships or other non-mandatory payments.
Total spending on measures to prevent problem gambling	The 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 your national currency that was used for measures to prevent problem gambling – covering all 11 elements of the EL Responsible Gaming Standards. It should include costs for the prevention, research and treatment of problem gambling supported by your lottery. Include also costs for informational material; stakeholder engagement and costs associated with helpline support; education of staff and retailers and costs for employees directly involved in such activities.
Number of Points of Sales (POS)	The number of physical Points of Sales (POS) at the end of the period where your lottery sells its products – either all or part of them. Do NOT include POS where EGMs are the only lottery product sold. In coutries with more than one active EL Member, please indicate separately the number of POS shared with other EL Members.

Source: EL, 2016

Annex D: Other Data Sources

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