THE EUROPEAN LOTTERIES

FOR THE BENEFIT OF SOCIETY

REPORT ON THE LOTTERY SECTOR IN EUROPE 2020

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REPORT SUMMARY

Dear reader,

This is the 15th report on the European Lotteries sector with the objective of helping you understand how current Members of the European Lotteries Association (hereinafter the EL) worked and what their contributions to society were in 2020.

1. Introduction

This is the most detailed report regarding both EL Members operating in the European Union (EU 27) and EL Members all combined.[1,2] The report covers key descriptive statistics about current EL Members operating in Europe in 2020 and includes, where appropriate, comparative statistics for the years 2016 – 2020.

The EL Members share the following common characteristics as they:

1) are **located in Europe**;

2) **hold state licenses** from the country in which they operate, or are directly controlled by the state;

3) **return a large part of their earnings** in the form of taxes or a different type of contribution to the state and/or **to good causes** in the area of sports, education and culture;

4) **provide lottery games in a responsible way** according to the requirements defined by the licensor and only within the area of their respective jurisdiction, and they provide complete coverage of the said area.

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

The report for 2020 consolidates the activities of all reporting EL Members and thus covers 42 European countries and represents data from 69 regular and affiliate EL Members.

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[1] *Until 2014, the report had been called "ELISE" report (ELISE = "European Lotteries Information Sharing Extended"), published historically by the EL's ELISE Working Group. Since 2016, this Working Group has been renamed to the Knowledge Sharing Working Group and the report has been renamed to "EL Report on the Lottery Sector in Europe" and since 2019, the Working Group has been renamed again to Data & Research Working Group.*

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

Table A. Number of EL Members Participating in the 2020 Data Collection Who Provided Data for Individual Years

	2016	2017	2018	2019	2020
EL Members in the EU28	49	49	49	49	49
EL Members outside the EU28	19	20	20	20	20
TOTAL	**68**	**69**	**69**	**69**	**69**

Source: Reporting EL Members.

The data for this report was collected during May and June 2020 and subsequently aggregated by an independent third party, Kantar CZ, responsible for the data collection, consistency, data aggregation and non-disclosure of detailed data to any party.

All monetary figures are calculated in euros using the average exchange rate for 2020.[3]

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

- Draw Based Games;

- Instant Games;

- Sports Games [5]

- Electronic Gaming Machines (EGMs) outside casinos;

- All other games.

And consolidated Sales broken down into the first three "Lottery" categories (Draw Based Games, Instant Games, Sports Games).

It is important to mention that the Covid-19 pandemic has negatively impacted the year 2020 results, in many cases limiting EL Member's operations by enforcing retail network limitations or full closures.

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[3] *The report presents data from 2016, 2017, 2018, 2019 and 2020. To make figures comparable over time, historical figures provided only by EL Members who participated in this years' data collection process and reported the specific figure for 2019 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 2020, 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 2016 to 2019, differences appear as a consequence of the change in exchange rates and also changes in the number of reporting EL Members..*

[4] *Sales minus prizes and hereinafter GGR. This key figure reflects the lottery business better than Sales figures.*

[5] *This category contains all Sports Games, including e.g. horse racing or dogs racing betting. The Pari-Mutuel and Fixed Odds wagering, reported until 2018 as two separate categories, were merged into one category from 2019. A detailed definition of the games is given in the Annex.*

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

Table B. Overview of Key Data 2020

	Reporting EL EU Members	All Reporting EL Members
EL Members All member lotteries reporting within the EU/in Europe	49	69
Money for Society	€14.2bn	€16.0bn
Direct Full-time Employment [7, 8] Yearly average number of full-time employees	42.206	47.727
Sales Includes Sales from the three "Lottery" categories (see introduction)	€69.4bn	€85.6bn
Gross Gaming Revenue Sales minus prizes of the five gaming categories	€27.6bn	€30.5bn
Online Gross Gaming Revenue	€2.8bn	€3.6bn

Source: EL Members who took part in the 2020 survey; data being collected and aggregated by Kantar CZ, 2021.

Enjoy your reading,

Hansjörg HÖLTKEMEIER

President of the European Lotteries and Toto Association

&

Robert CHVÁTAL

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

 & Chair of Data & Research Working Group

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[6] *See the complete information on methodology in the Annex.*

[7] *The figure includes sales people employed by Spain/ Organización Nacional de Ciegos Españoles (ONCE) who were reported to be persons with disabilities selling the tickets and considered as full-time employees.*

[9] *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. Covid-19 impact on the EL Member activities in 2020

The year 2020 has been impacted by a significant non-standard event, which has negatively influenced the EL Members' performance and long-term trends monitored by this annual report.

Starting from March 2020, all European countries have experienced, to different level of intensity, an **outbreak of the Covid-19** pandemic based on which their governments started to regulate the physical movement of the citizens in public places. This has resulted, amongst other things, **retail network access limitations or even full closures** of retail points of sales providing non-essential to life goods or services. Overall, the **Covid-19 impact**, after multiple years of continuous growth, has **resulted in the total GGR decrease of 14.8% compared with 2019** (based on 67 reporting EL Members). Therefore, **please read this report and its trends bearing in mind this non-standard impact.**

Nevertheless, it is important to mention that **despite this unfavorable situation, EL Members have increased their efforts to help the impacted societies** in different ways: by additional voluntary financial contributions to the society, by material support of different foundations, by direct assistance of the EL Members employees and many othe means.

3. Specific Member Activities in the EU and Rest of Europe in 2020

A key characteristic of the EL Members is that they were founded to **supply a legally controlled set of lottery games that protect the players from illegal operations and harmful games**. As a side effect of their operations, and regulated via their respective licenses, they generate money for "good causes" or the states' budgets.

In 2020, the **money contributed to society** by 47 EL Members in the EU (that reported their contributions) amounted to €14.2bn. The funds were channelled towards sports, funds for other good causes and taxes for treasury. As for **all EL Members** reporting the category (65 in total), their contributions to society amounted to **€16.0bn in 2020.** It means that **52% of the GGR generated by EL Members** (not including sponsorships) **went back to society** in the respective countries. The largest EU member states, where the amounts provided by EL Members to society exceeded €2.0bn were the following: France with €3.2bn, Germany with €3.1bn and Spain with €2.5bn. **The average amount that EL Members in the EU paid back to society was €32 per capita in 2020** (across the 27 EU member states that reported)**.**

Another important contribution of the EL Members is the **contribution to employment** in their respective countries. In 2020, the 46 EL Members operating in the EU directly employed 42,206 full-time employees, with **all 65 reporting EL Members employing 47,727 full-time employees**.

Responsible gaming activities are an integral part of the EL Members' business. In 2020, EL Members continued to emphasise and spend on measures to prevent problem gambling.

4. Specific Gaming Activities

Sales for the three main "Lottery" categories (Draw Based Games, Instant Games, Sports Games) by **EL Members in the EU amounted to €69.4bn** in 2020, and showing a significant decrease due to Covid impact of 10.6% in comparison with 2019. This trend was similar when taking into account **all EL Members in total**, where **total Sales amounted to €85.6bn,** resulting in a year on year **decrease of 9.1%.**

In 2020, the **total GGR** (being the sector's key KPI) of the three "Lottery" categories reported by EL Members operating in the EU was €24.4bn, **impacted by the Covid restrictions,** presented a **decrease of 11.6%** compared with 2019, while **all 65 reporting EL Members** reported their **total GGR of €27,2bn, a decrease of 11.0% compared with 2019**. Therefore, the GGR figures dropped after multiple years of continuous growth**.** As for the 46 EL Members operating in the EU, who reported their GGR, the GGR spending per capita ranged from €4 in Romania to more than €100 in Finland, Greece, Italy and Portugal. **Average GGR per capita** across EL EU Members **reached €62.** The corresponding figure for **all EL Members was €43 per capita**. This ranges from Ukraine with €0.2 GGR per capita to Finland with €228 GGR per capita.

The largest lottery category of EL Members was comprised of **Draw Based Games** with brand names like Lotto, EuroMillions, Eurojackpot and Joker. This category of games, offered by EL Members in 27 EU states, had **Sales of €37.7bn.** Their **GGR of €15.9bn** accounted for **almost 57.5% of total GGR** and **decreased by 11.7%** in comparison with 2019, after four years of consecutive growth. **All EL Members** had a total **Sales of €46.7bn.** Their **GGR of €17.6bn accounted for almost 57.7% of total GGR**, **decreasing by 11.7%** in comparison with 2019. The Draw Based Games GGR per capita reported by EL Members in EU countries ranged widely from single digit to €103 in Finland with an average of €37. The non-EU EL Members countries generated smaller figures three quarters of whom generated a GGR per capita of €5 or less; however, Iceland, Switzerland and Norway generated GGR per capita of €50 and more.

The second largest category was **Instant Games**, offered by EL Members in 24 EU countries and 13 non-EU countries, showing a continuous Sales and GGR increase for the last eight years until 2019. The **EL Members in the EU** (43 reported the category) had Instant Games **Sales of €20.9 bn** in 2020. They generated **GGR of €6.4 bn** (42 reported), representing 23.1% of their total GGR and decrease by 10.2% in comparison with 2019**. All EL Members** (59 reported the category) had **a total Sales of €26.3bn. Their GGR** (57 reported the category) **was €7.0bn**, representing **22.8% of their total GGR and decrease due to Covid retail restrictions by 9.7% compared to 2019**. Instant Games in EU countries generated GGR per capita ranging from €0.3 in Romania to €20 and more in France, Ireland, Italy and Portugal. Whereas most of the non-EU countries did not exceed €1, three EL Member countries (Israel, Norway and Switzerland) had GGR per capita above €10.

The **Sports Games category** was reported by the least number of EL members (34 EL Members from 18 EU countries, 43 EL Members altogether). The **EU EL Members generated GGR of €2.2bn,** representing 7.8% of their total GGR and a decrease by 14.3% compared to 2019. **All EL Members generated a total GGR of €3bn, representing 8.5% of GGR and a decrease by 13.4% compared to 2019**. After many years of continuous GGR growth, the Sports Games presented decline in 2020, driven by Covid impact on professional sport events closure and retail limitation. Only few markets being Austria, Bulgaria, Czech Republic, Switzerland and Ukraine reported their category GGR increase.

The fourth category, EGMs outside casinos, included slot machines, Video Lottery Terminals, and Electronic Instant Lotteries located outsides of casinos. Only 10 EL Members reported operating in this category, generating a GGR of €1.9bn, representing on average 6.7% of their total GGR and a drop by 50.9% compared to 2019, driven mainly by Austrian, Finish, Italian and Greek markets. From all EL Members, 13 Members generated GGR of €1.9bn, representing on average 6.3% of their total GGR and a drop by 50.7%, driven by Covid retail network closures, compared to 2019.

Growth of online, in comparison with the previous growth years, was **strengthened by the Covid impact** and migration of the part of customers' transaction into the online channel. The **EL Members in EU states** (38 reported the category) generated **GGR from online activities of €2.8bn, a growth of 28.8% compared to 2019. All EL Members** (51 reported the category) generated **online GGR of €3.6bn, representing 11.7% of total GGR.** The main component of GGR was Draw Based Games with 54% share of the total, complemented by All other games with 23%, Sports Games with 17% and Instant Games with 6%, and a **growth of 25.7% compared to 2019**, strongly surpassing the average annual growth of online GGR over the past five years of 19.0%.
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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, traditionally and almost exclusively, relies on primary data sources from EL Members.[1]

The data gathered covers the results of current regular EL Members in the 2020 calendar year.[2] The report presents only the data that individual members felt comfortable delivering or that they were able to report in terms of their activities. Thus, the breadth of data reported may differ in specific areas and relevant footnotes on this issue are available under the figures and tables when necessary.

An independent third party (Kantar CZ) collected all data from EL Members for 2020.[3] They were responsible for the data collection, consistency, data aggregation and non-disclosure of any detailed data to any party. The data was collected via a secured online questionnaire during spring 2021.

The questionnaire was divided into the three main sections processed in this report: "Covid-19 Impact on Lottery Sector in 2020", "Key data" on five gaming categories (i.e. Draw Based Games, Instant Games, Sports Games, Electronic Gaming Machines (EGMs) outside casinos and All other games), and "Complimentary Data". The section "Covid-19 Impact on Lottery Sector in 2020" describes the one-off impact on EL Members' operations, significantly impacting nearly all data and long-term trends. In the "Key data" section, two types of figures for each gaming category were collected in an aggregated form: Sales and GGR, with a distinction between online and offline results. If an EL Member choose to provide only an overall figure for Sales or GGR without a split by game category, the unspecified amount is attributed to the "Unspecified" game category. GGR, defined as Sales minus prizes, is the best key figure to reflect the results of gaming activities. Nevertheless, this figure solely represents the *gross* income of EL Members. To get to the net profit, further items need to be deducted, such as: taxes and other obligatory charges, retailer commissions, sponsorship payments, money for society, spending on responsible gaming, and typical operational costs. The "Complimentary Data" section contains figures on money for society, contribution to the employment, figures on women share within the EL Members organizations, information related to the Point of Sales (POS) network, figures on retail and online loyalty programs, online customers bases and an overview of EL Members with non-gaming activities.

Data was requested from EL Members in their national currency and figures from the non-euro countries were converted into Euros using the average exchange rates for 2020, either from Eurostat or, if not available, then from the European Central Bank or the national bank of each country.[4] In addition to the data for 2020, data from previous years is also included, namely from the period of 2016–2019.[5,6]

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[1] *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.*

[2] *This report does not include observer members, which are Morocco/ La Marocaine des Jeux et des Sports and Morocco/ Loterie nationale. It also does not include Bulgaria/ Eurofootball, Bulgaria/ National Lottery, Kosovo/ Lotaria e Kosoves, Poland/ Totolotek, which are no longer members, and Turkey/ Turkish National Lottery Administration, which did not take part in this year's data collection.*

[3] *Kantar CZ, Klimentská 10, 11000 Praha, Czech Republic.*

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

[5] *This report includes historical data reported by current EL Members in spring 2020 (figures for 2016, 2017, 2018 and 2019).*

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

To make the figures comparable over time, historical figures provided only by EL Members who participated in this years' data collection process (hereinafter: Currently Reporting EL Members) are shown in this report and, at the same time, all historical monetary figures from those years in currencies other than the euro have also been converted into euros using the same average exchange rate for 2020 (in other words, all amounts in this report are reported in the average 2020 euro value).[7] Thus, looking at the previous years' reports, which have used exchange rates from 2016, 2017, 2018 and 2019 respectively, differences appear because of the change in exchange rates and also because of the change in the number of Currently Reporting EL Members. This approach of using a sole exchange rate across historical periods enables better depiction (and observation), and therefore, better understanding of the trends, independent of local macro-economic influence.

In terms of data processing, the methodology has been quite stable since the very first public report in 2010, with the exception of the above mentioned exchange rate methodology used.[8] The aim is to provide the regular reader of this report with ease of orientation and with the possibility of comparison. The report consists of two reporting parts: an introduction and appendices, including methodology and supportive tables and figures.[9] The introduction brings a short overview of the results achieved in the respective year (and in comparison to previous year(s)) and conclusions, while the supportive tables and figures show the relevant data behind the conclusions.

In the report, the results of the Currently Reporting EL Members are displayed for two groups of members: all EL Members in total and EL Members operating in the EU.[10] To provide the best overview of the results, the data is displayed in aggregated form or broken down into categories or countries, but always with the number of reporting EL Members.[11,12] In the break downs, each game category has its own distinctive colour. In line with previous years, Sales data is presented only based on the "Lottery" category (i.e. not including the EGMs and All other games categories).

A comparison with previous results is always available 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

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[7] *All comparisons in this report, as well as all recalculations of historical monetary figures using the average exchange rates for 2020, have been calculated by Kantar CZ.*

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

[9] *The supportive tables and figures were provided by an independent party, Kantar CZ, which analysed the primary data for the years 2016–2020 that were independently collected via an online questionnaire.*

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

[11] *Monetary values provided by EL Members are always written without decimals, unless a value without decimal places is zero. In that case, the value is written with the minimum number of decimals necessary for displaying the value other than zero, with the maximum number of decimals being two. Furthermore, if the resultant values shown for a respective country for the individual years 2019 and 2020 had different numbers of decimals in large tables with monetary figures by single countries, the displayed decimals of the resultant yearly figures for the respective country were united at the higher number of decimals. This process does not concern per capita figures and GGR Ratio tables.*

[12] *The method of display may differ according to the space available, however, there is always an explanation present under the figure/table or in the footnote, namely, for the last two years of reporting (2019 and 2020). Additionally, an explanation for possibly unusual trends is available too.*

monitored period.[13,14] All percentage changes between years have been calculated based on the figures in the national currency converted to their euro value.

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[13] *In the case of larger tables that show the results of single countries, annual changes are displayed only by countries where the structure of reporting EL Members remained the same in both years/for both categories (i.e. there has not been any change in the number or structure of reporting EL Members from this country); in the opposite case, "n/a" is displayed. Change in 2020–2019 for EL Members in the EU27 and EL Members in total may be influenced by differences in the structure of reporting EL Members.*

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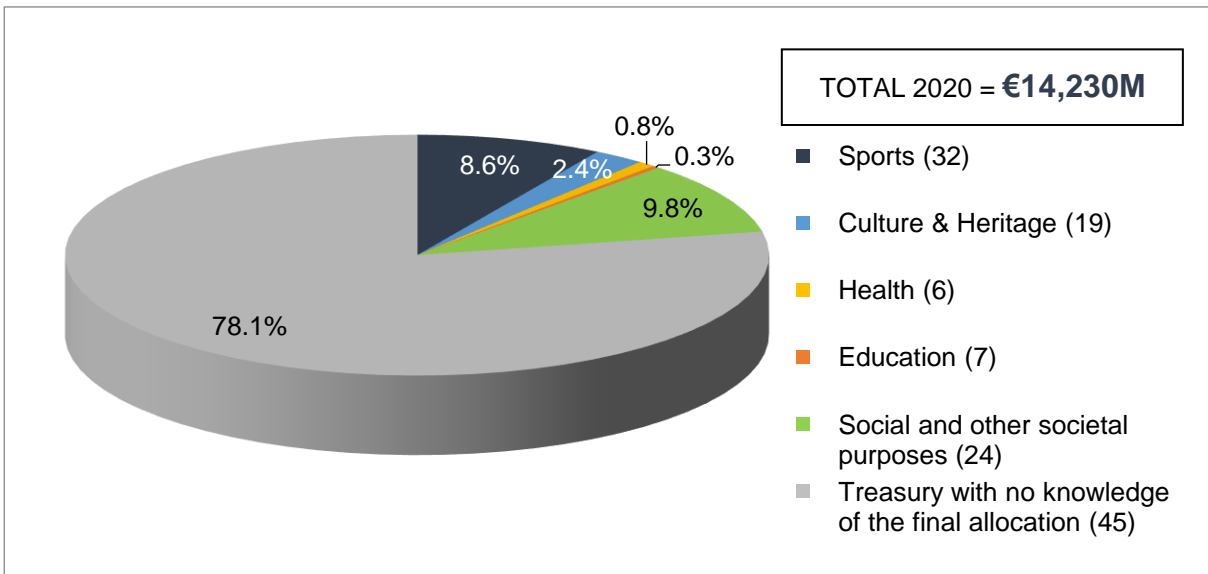
Annex B: Figures and Tables

List of Figures

Figure 1. EL Members in the EU: Money for Society by Target – 2020 (€M)

TOTAL 2020 = **€14,230M**

- Sports (32)
- Culture & Heritage (19)
- Health (6)
- Education (7)
- Social and other societal purposes (24)
- Treasury with no knowledge of the final allocation (45)

Sources: EL Members in the EU reporting figures for their Money for Society for 2020

47 reported (96% of 49 EL Members in the EU, i.e. all except for Germany/ Lotto-Toto GmbH Sachsen-Anhalt, Italy/ Lottomatica).

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

Figure 2. EL Members: Money for Society by Target – 2020 (€M)

TOTAL 2020 = **€15,963M**

- Sports (39)
- Culture & Heritage (23)
- Health (8)
- Education (11)
- Social and other societal purposes (30)
- Treasury with no knowledge of the final allocation (58)

Sources: EL Members reporting figures for their Money for Society for 2020

65 reported (94% of 69 EL Members, i.e. all except for Germany/ Lotto-Toto GmbH Sachsen-Anhalt, Italy/ Lottomatica, Republic of North Macedonia/ National Lottery of Macedonia, United Kingdom/ Camelot UK Lotteries Ltd.)

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

Figure 3. Contribution to Direct Employment – Development 2016–2020
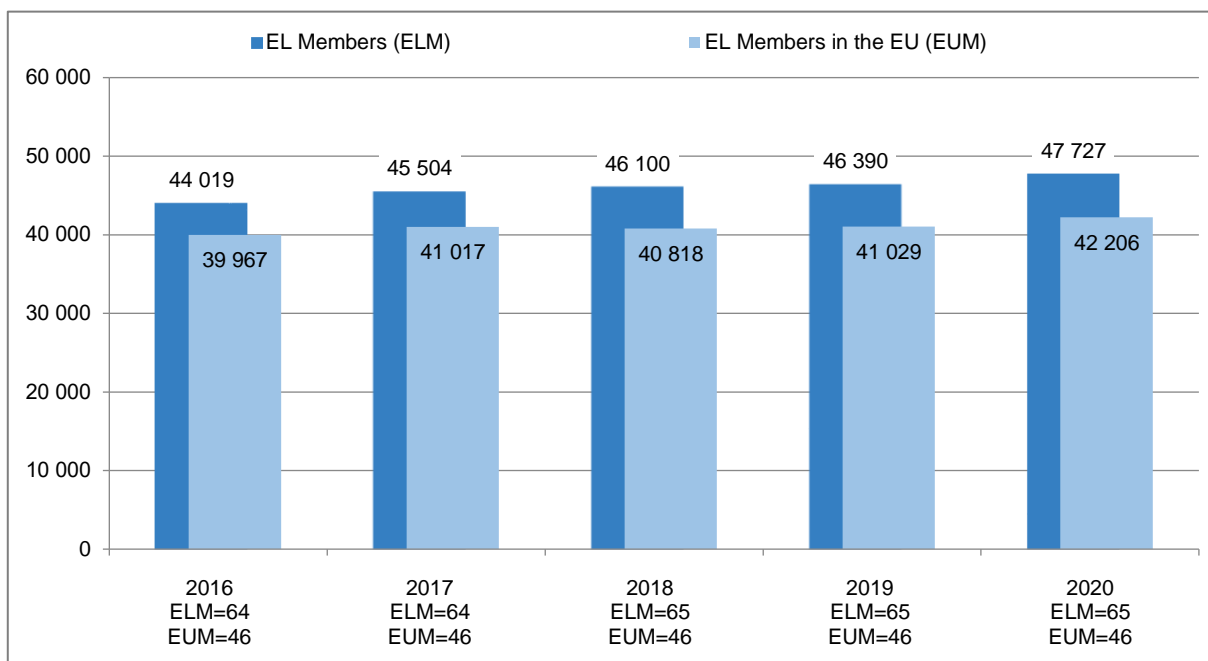
Sources: EL Members reporting the category for 2020

For 2020 and 2019: 65 reported (94% of 69 EL Members, i.e. all except for Denmark/ Danske Spil a/s, Republic of North Macedonia/ National Lottery of Macedonia, Germany/ Verwaltungsgesellschaft Lotto & Toto in Mecklenburg-Vorpommern mbH, Italy/ Lottomatica).

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

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

Figure 4. Average percentage of women in company's employees – 2020 (%)

49.7%   50.3%

■ Women (44)

■ Men (44)
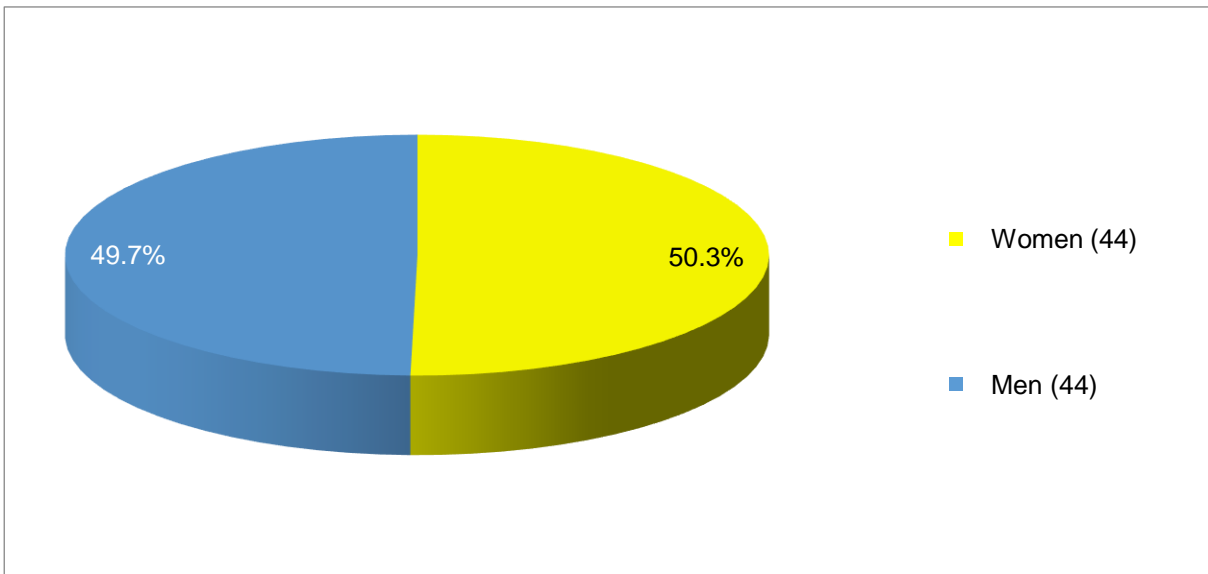
Sources: EL Members reporting percentage of women for 2020

44 reported (64% of 69 EL Members, i.e. all except for Azerbaijan/ Caspian Tech CJSC, Azerbaijan/ Azerlotereya SJSC, Bosnia and Herzegovina/ Lottery of Bosnia & Herzegovina, Denmark/ Danske Spil a/s, Republic of North Macedonia/ National Lottery of Macedonia, Germany/ GKL Gemeinsame Klassenlotterie der Länder, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany/ Bremer Toto und Lotto GmbH, Germany/ LOTTO Hessen GmbH, Germany/ Toto-Lotto Niedersachsen GmbH, Germany/ Verwaltungsgesellschaft Lotto & Toto in Mecklenburg-Vorpommern mbH, Germany/ Westdeutsche Lotterie GmbH & Co. OHG, Germany/ Lotto Rheinland-Pfalz GmbH, Germany/ Sächsische Lotto-GmbH, Germany/ Lotto-Toto GmbH Sachsen-Anhalt, Germany/ NordwestLotto Schleswig-Holstein GmbH & Co. KG, Germany/ Thüringer Staatslotterie, Italy/ Lottomatica, Italy/ Sisal SpA, Malta/ Maltco Lotteries Ltd., Netherlands/ Nederlandse Loterij, Switzerland/ Swisslos Interkantonale Landeslotterie, Ukraine/ MSL, Ukraine/ Ukrainian National Lottery, United Kingdom/ Camelot UK Lotteries Ltd.)

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

Figure 5.a. EL Members in the EU: Lottery Sales by Game Category – 2020 (€M)

TOTAL 2020 = **€69,447M**

- Draw Based Games (46)
- Instant Games (43)
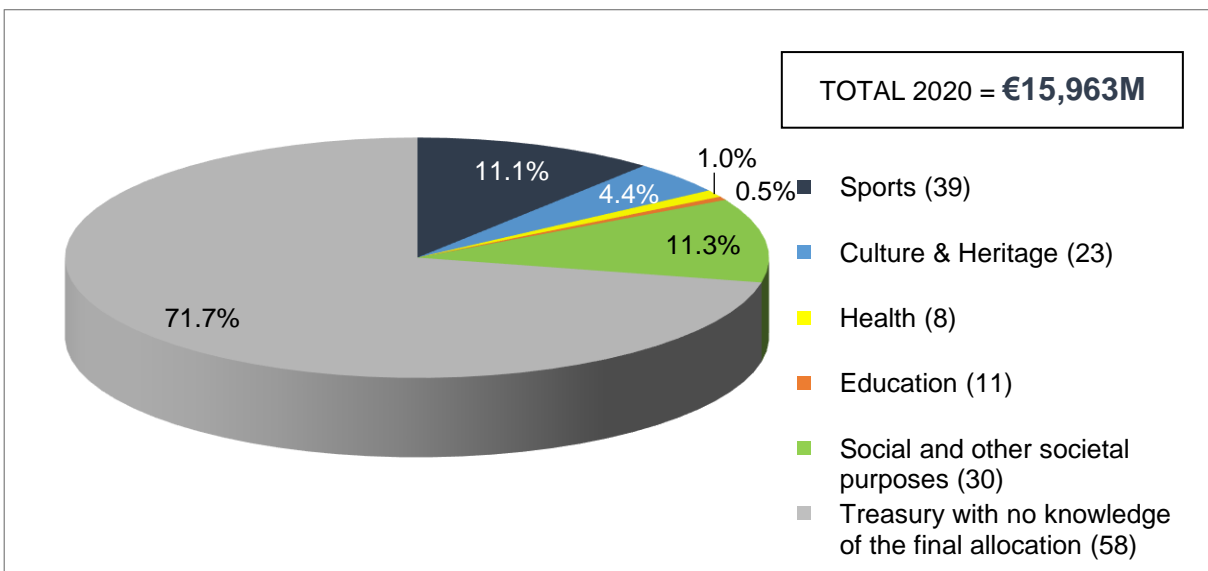- Sports Games (34)
- Unspecified* (1)

54.2%
30.1%
13.7%
2.0%
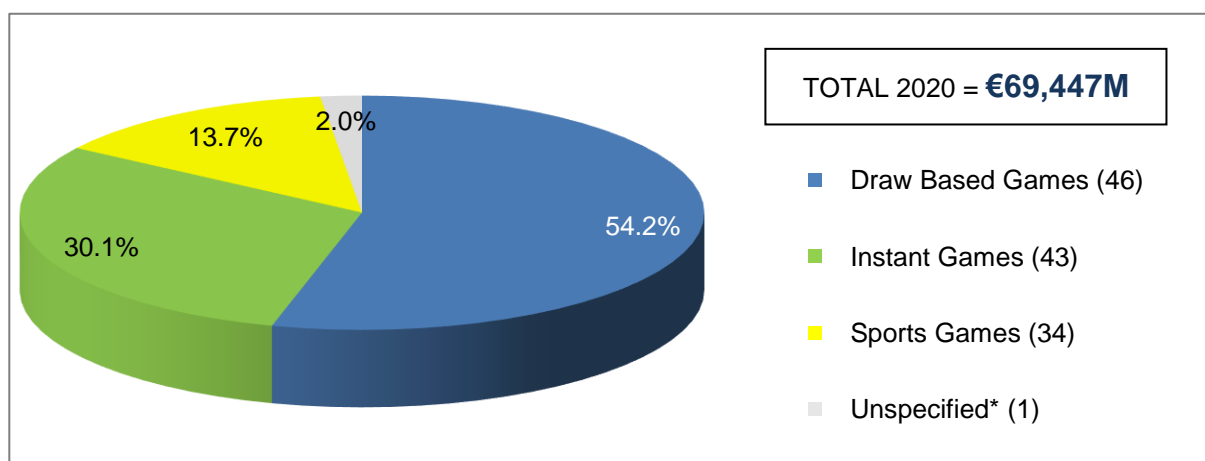
Sources: EL Members in the EU reporting their Lottery Sales for 2020

47 reported (96% of 49 EL Members in the EU, i.e. all except for Austria/ Austrian Lotteries and Sweden/ AB Svenska Spel).

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

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

Figure 5.b. EL Members in the EU: Lottery Sales by Game Category – 2020 (€M)

Game category	Number of EUM reporting Lottery Sales for 2020	EUM: Lottery Sales for 2020 (€M)	Share out of total
Draw Based Games	46	37 660	54.2%
Instant Games	43	20 882	30.1%
Sports Games	34	9 548	13.7%
Unspecified*	1	1 357	2.0%
Total	**47**	**69 447**	**100%**

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

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

Figure 6.a. EL Members: Lottery Sales by Game Category – 2020 (€M)

TOTAL 2020 = **€85,557M**

- Draw Based Games (64)
- Instant Games (59)
- Sports Games (43)
- Unspecified* (1)

54.6%
30.8%
13.0%
1.6%

Sources: EL Members reporting their Lottery Sales for 2020

67 reported (97% of 69 EL Members, i.e. all except for Austria/ Austrian Lotteries and Sweden/ AB Svenska Spel).

* Netherlands/ Nederlandse Loterij provided only the overall figure for Lottery Sales without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.
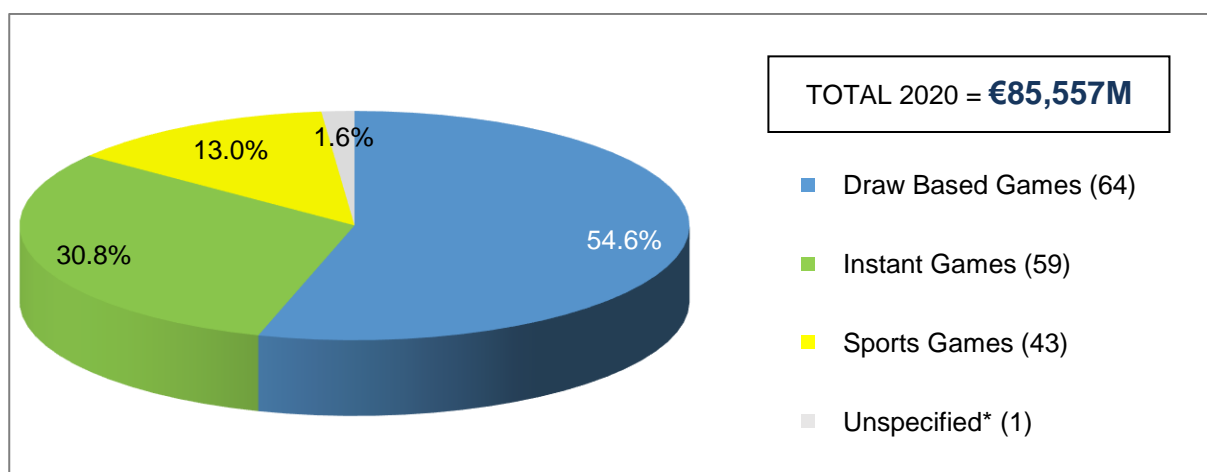
"Game category" ("Number of reporting EL Members").

Figure 6.b. EL Members: Lottery Sales by Game Category – 2020 (€M)

Game category	Number of ELM reporting Lottery Sales for 2020	ELM: Lottery Sales for 2020 (€M)	Share out of total
Draw Based Games	64	46 739	54.6%
Instant Games	59	26 339	30.8%
Sports Games	43	11 121	13.0%
Unspecified*	1	1 357	1.6%
Total	**67**	**85 557**	**100%**

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

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

Figure 7.a. EL Members in the EU: Lottery Sales by Game Category – Development 2016–2020 (€M)

Sources: EL Members in the EU reporting their Lottery Sales for 2020

For 2020 and 2019: 47 reported (96% of 49 EL Members in the EU, i.e. all except for Austria/ Austrian Lotteries and Sweden/ AB Svenska Spel).

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

EUM = "Number of EL Members in the EU reporting figures in the respective column"
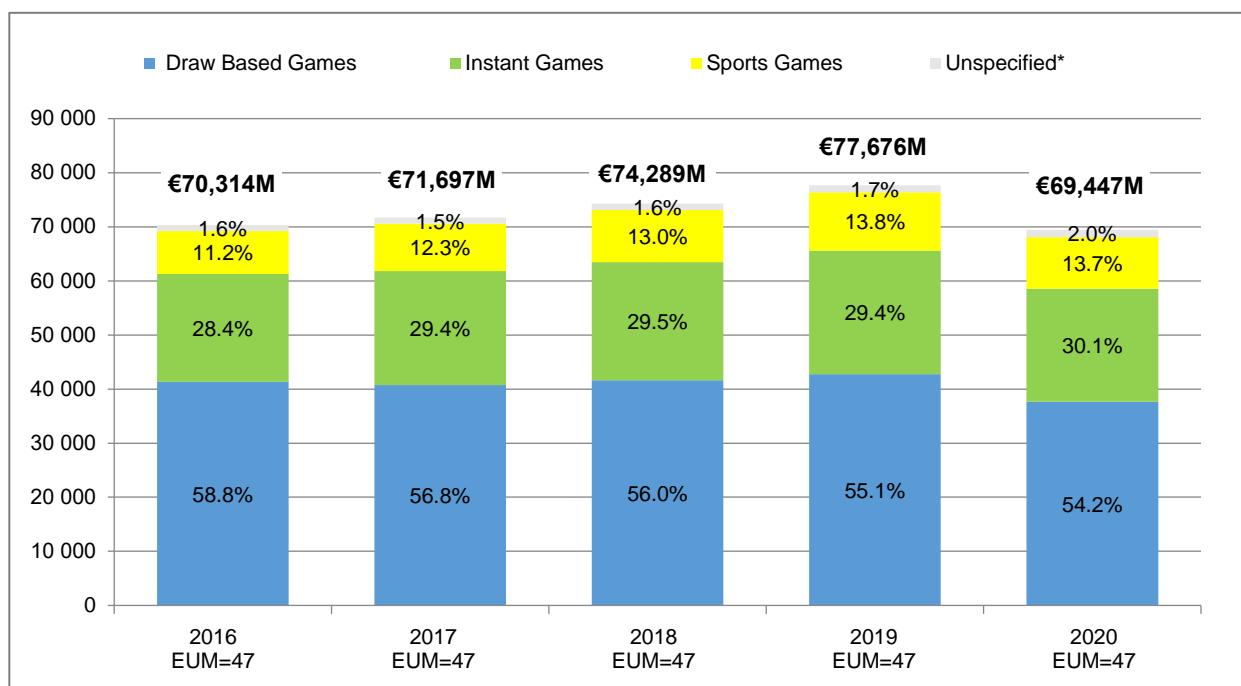
Figure 7.b. EL Members in the EU: Lottery Sales by Game Category – Development 2016–2020 (€M)

Game category	EUM rep. Lottery Sales for 2020	EUM: Lottery Sales for the respective year in €M					2020-2019 Evolution *	CAGR * 2020-2016
		2016 (47)	2017 (47)	2018 (47)	2019 (47)	2020 (47)		
Draw Based Games	46	41 346	40 742	41 605	42 762	37 660	-11.9%	-2.3%
Instant Games	43	19 960	21 061	21 883	22 867	20 882	-8.7%	1.1%
Sports Games	34	7 905	8 788	9 631	10 733	9 548	-11.0%	4.8%
Unspecified**	1	1 103	1 105	1 169	1 315	1 357	3.3%	5.3%
Total	**47**	**70 314**	**71 697**	**74 289**	**77 676**	**69 447**	**-10.6%**	**-0.3%**

Sources: EL Members in the EU reporting their Lottery Sales for 2020, see the comment above for information on those EL Members in the EU who participated in this data collection but did not report the category for the individual years of 2019 and 2020.

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

* YoY and CAGR evolution may be influenced by differences in the structure of EL Members in the EU reporting in the respective category for individual years.
** See the comment above for information on the reported "Unspecified" category.

Figure 8.a. EL Members: Lottery Sales by Game Category – Development 2016–2020 (€M)

Sources: EL Members reporting their Lottery Sales for 2020

For 2020 and 2019: 67 reported (97% of 69 EL Members, i.e. all except for Austria/ Austrian Lotteries and Sweden/ AB Svenska Spel).

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

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

Figure 8.b. EL Members: Lottery Sales by Game Category – Development 2016–2020 (€M)

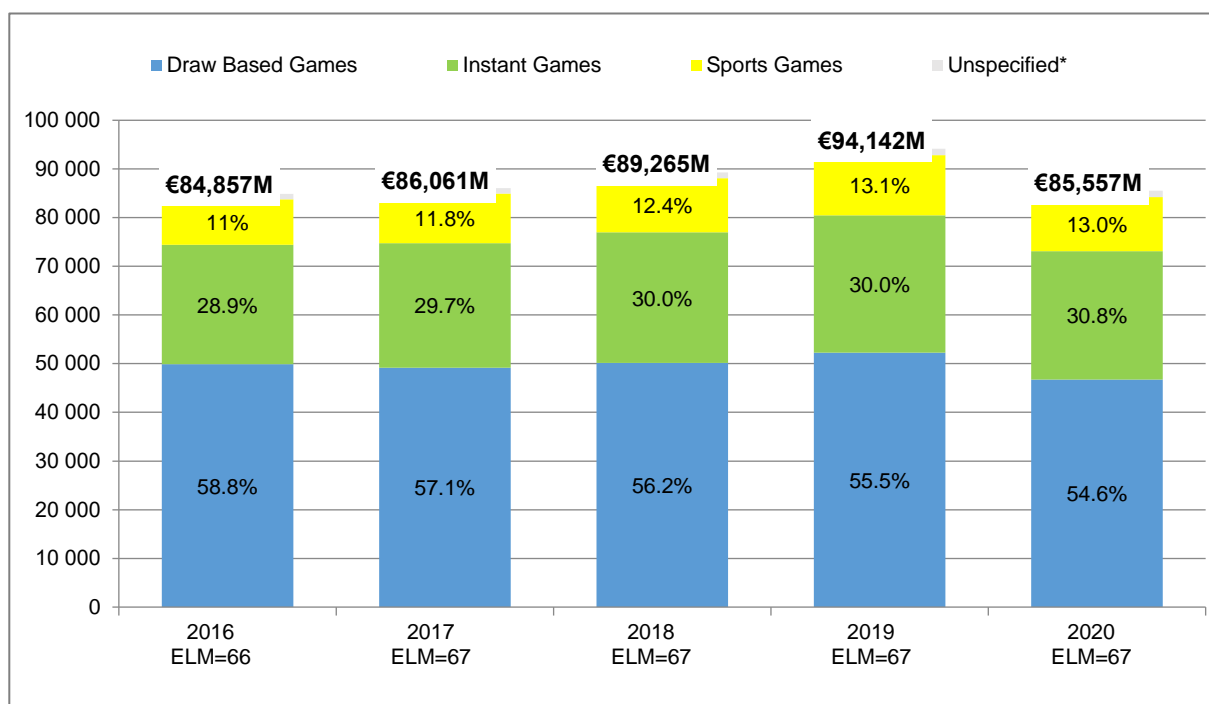| Game category	ELM rep. Lottery Sales for 2020	ELM: Lottery Sales for the respective year in €M					2020-2019 Evolution*	CAGR * 2020-2016
		2016 (66)	2017 (67)	2018 (67)	2019 (67)	2020 (67)		
Draw Based Games	64	49 875	49 164	50 174	52 231	46 739	-10.5%	-1.6%
Instant Games	59	24 560	25 599	26 810	28 229	26 339	-6.7%	1.8%
Sports Games	43	9 318	10 191	11 109	12 363	11 121	-10.0%	4.5%
Unspecified**	1	1 105	1 107	1 172	1 318	1 357	3.0%	5.3%
Total	67	84 857	86 061	89 265	94 142	85 557	-9.1%	0.2%

Sources: EL Members reporting their Lottery Sales for 2020, see the comment above for information on those EL Members who participated in this data collection but did not report the category for the individual years of 2019 and 2020.

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

* YoY and CAGR evolution may be influenced by differences in the structure of EL Members reporting in the respective category for individual years.
** See the comment above for information on the reported "Unspecified" category.

Figure 9.a. EL Members in the EU: GGR by Game Category – 2020 (€M)

TOTAL 2020 = **€27,587M**

- Draw Based Games (46)
- Instant Games (42)
- Sports Games (34)
- EGMs outside casinos (10)
- All other games (12)
- Unspecified* (1)

Sources: EL Members in the EU reporting their GGR for 2020

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

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

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

Figure 9.b. EL Members in the EU: GGR by Game Category – 2020 (€M)

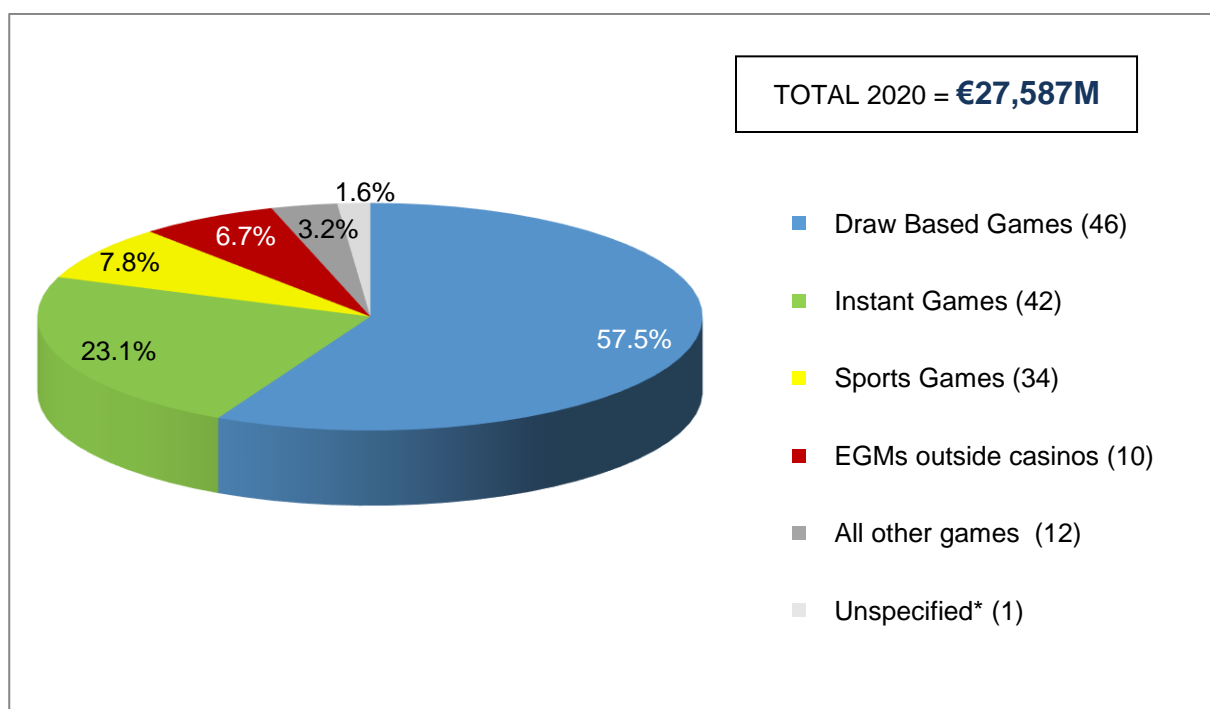| Game category	Number of EUM reporting GGR for 2020	EUM: GGR for 2020 (€M)	Share out of total
Draw Based Games	46	15 875	57.5%
Instant Games	42	6 373	23.1%
Sports Games	34	2 157	7.8%
EGMs outside casinos	10	1 856	6.7%
All other games	12	888	3.2%
Unspecified*	1	439	1.6%
Total	**48**	**27 587**	**100%**

Sources: EL Members in the EU reporting their GGR for 2020, see the comment above for information on those EL Members who participated in this data collection but did not report.

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

Figure 10.a. EL Members: GGR by Game Category – 2020 (€M)

TOTAL 2020 = **€30,546M**

- Draw Based Games (63)
- Instant Games (57)
- Sports Games (43)
- EGMs outside casinos (13)
- All other games (15)
- Unspecified* (1)

Sources: EL Members reporting their GGR for 2020

67 reported (97% of 69 EL Members, i.e. all except for Germany/ Lotto-Toto GmbH Sachsen-Anhalt and United Kingdom/ Camelot UK Lotteries Ltd.)

* Netherlands/ Nederlandse Loterij provided only the overall figure for GGR without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.
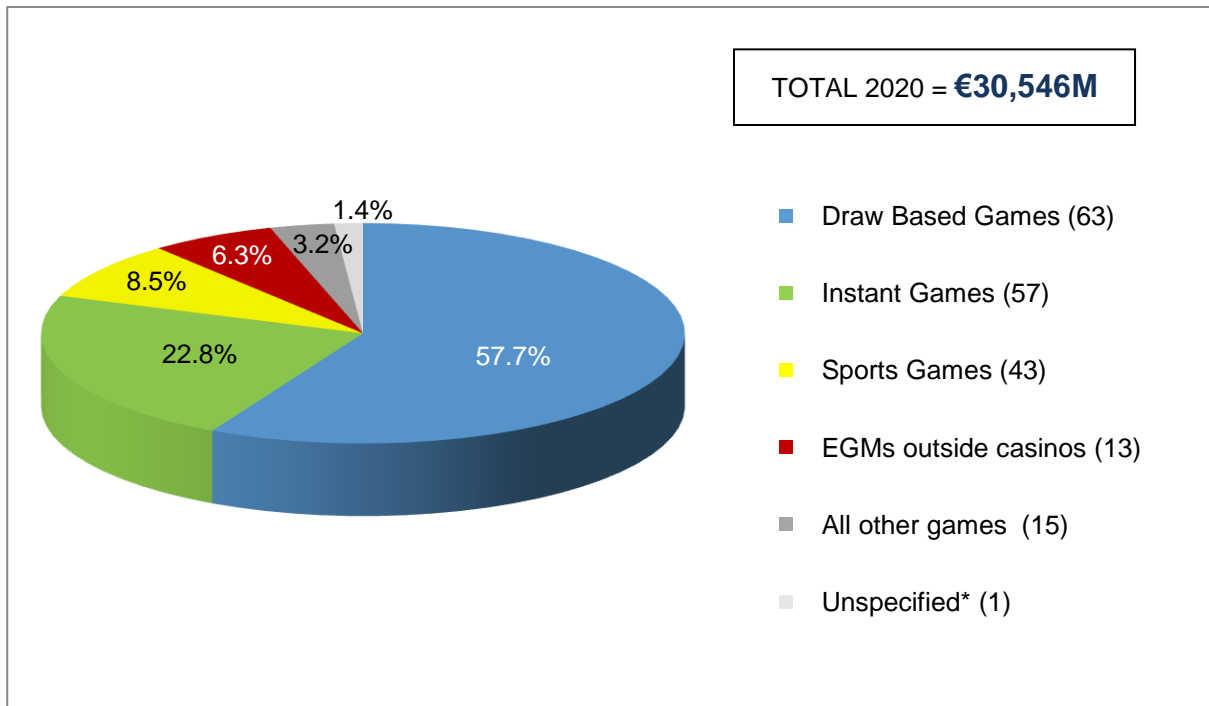
"Game category" ("Number of reporting EL Members").

Figure 10.b. EL Members: GGR by Game Category – 2020 (€M)

Game category	Number of ELM reporting GGR for 2020	ELM: GGR for 2020 (€M)	Share out of total
Draw Based Games	63	17 640	57.7%
Instant Games	57	6 956	22.8%
Sports Games	43	2 601	8.5%
EGMs outside casinos	13	1 926	6.3%
All other games	15	985	3.2%
Unspecified*	1	439	1.4%
Total	**67**	**30 546**	**100%**

Sources: EL Members reporting their GGR for 2020, see the comment above for information on those EL Members who participated in this data collection but did not report.

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

Figure 11.a. EL Members in the EU: GGR by Game Category – Development 2016–2020 (€M)

Sources: EL Members in the EU reporting their GGR for 2020

For 2020 and 2019: 48 reported (98% of 49 EL Members in the EU, i.e. all except for Germany/ Lotto-Toto GmbH Sachsen-Anhalt).

* Netherlands/ Nederlandse Loterij provided only the overall figure for GGR without a split by game category. For the purpose of this chart, the amounts are assigned to Unspecified.
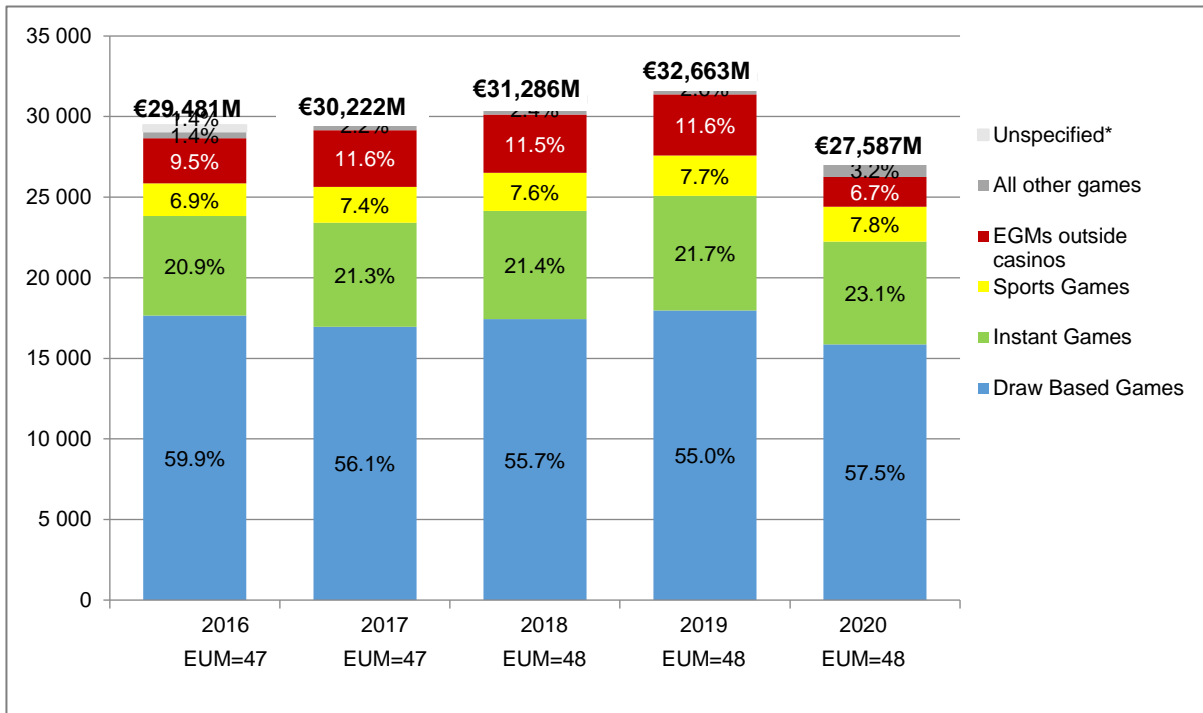
EUM = "Number of EL Members in the EU reporting figures in the respective column"

Figure 11.b. EL Members in the EU: GGR by Game Category – Development 2016–2020 (€M)

Game category	EUM rep. GGR for 2020	EUM: GGR for the respective year in €M					2020-2019 Evolution*	CAGR * 2020-2016
		2016 (47)	2017 (47)	2018 (48)	2019 (48)	2020 (48)		
Draw Based Games	46	17 661	16 967	17 437	17 975	15 875	-11.7%	-2.6%
Instant Games	42	6 162	6 447	6 704	7 100	6 373	-10.2%	0.8%
Sports Games	34	2 044	2 233	2 382	2 516	2 157	-14.3%	1.3%
EGMs outside casinos	10	2 799	3 504	3 602	3 781	1 856	-50.9%	-9.8%
All other games	12	409	665	749	861	888	3.2%	21.4%
Unspecified**	1	406	406	412	430	439	2.0%	2.0%
Total	**48**	**29 481**	**30 222**	**31 286**	**32 663**	**27 587**	**-15.5%**	**-1.6%**

Sources: EL Members in the EU reporting their GGR for 2020, see the comment above for information on those EL Members who participated in this data collection but did not report the category for the individual years of 2019 and 2020.

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

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

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

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

Figure 12.a. EL Members: GGR by Game Category – Development 2016–2020 (€M)
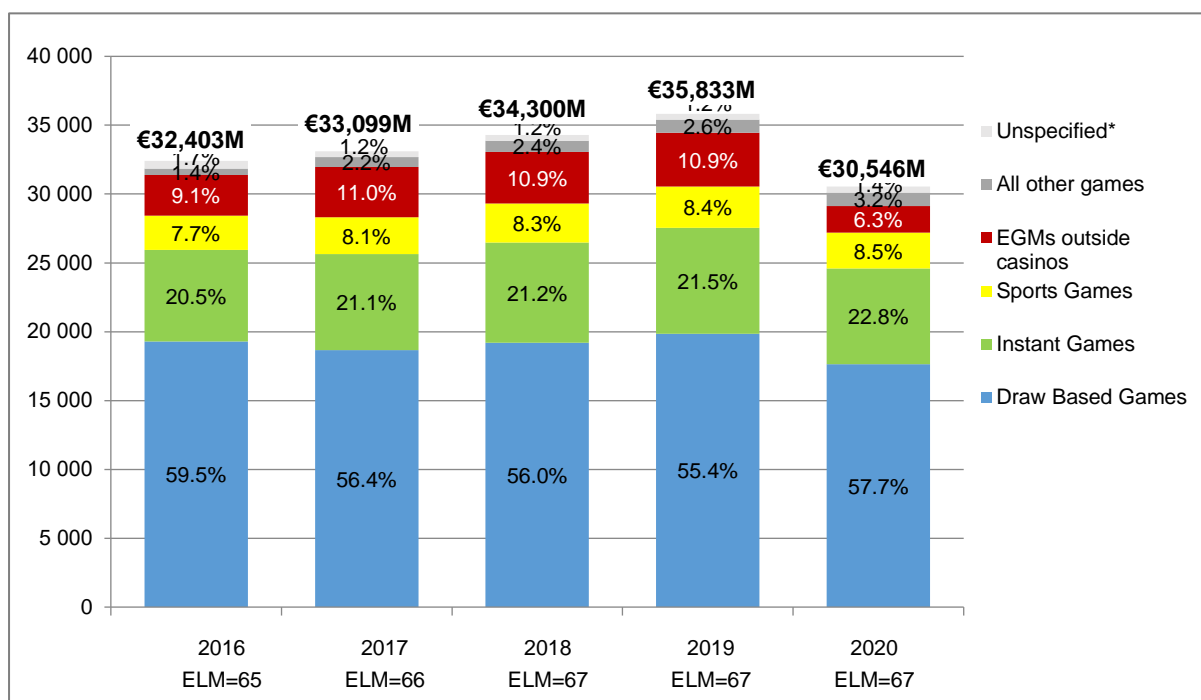
Sources: EL Members reporting their GGR for 2020

For 2020 and 2019: 67 reported (97% of 69 EL Members, i.e. all except for Germany/ Lotto-Toto GmbH Sachsen-Anhalt and United Kingdom/ Camelot UK Lotteries Ltd.)

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

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

Figure 12.b. EL Members: GGR by Game Category – Development 2016–2020 (€M)

Game category	ELM rep. GGR for 2020	ELM: GGR for the respective year in €M					2020-2019 Evolution*	CAGR * 2020-2016
		2016 (65)	2017 (66)	2018 (67)	2019 (67)	2020 (67)		
Draw Based Games	63	19 288	18 669	19 199	19 848	17 640	-11.1%	-2.2%
Instant Games	57	6 655	6 972	7 286	7 704	6 956	-9.7%	1.1%
Sports Games	43	2 483	2 666	2 831	3 003	2 601	-13.4%	1.2%
EGMs outside casinos	13	2 958	3 657	3 748	3 903	1 926	-50.7%	-10.2%
All other games	15	454	722	817	939	985	4.9%	21.3%
Unspecified**	1	564	413	419	436	439	0.8%	-6.1%
Total	67	32 403	33 099	34 300	35 833	30 546	-14.8%	-1.5%

Sources: EL Members reporting their GGR for 2020, see the comment above for information on those EL Members who participated in this data collection but did not report the category for the individual years of 2019 and 2020.

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

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

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

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

Figure 13.a. EL Members in the EU: Online GGR by Game Category – Development 2016–2020 (€M)
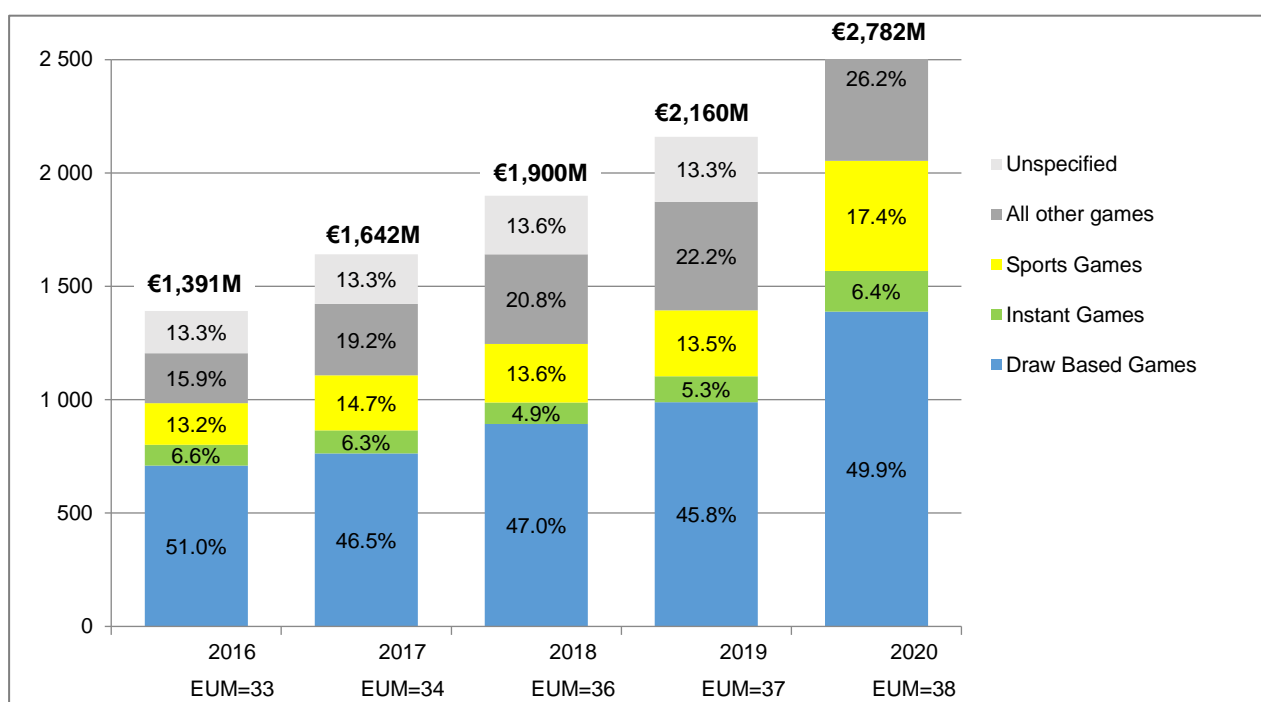
For 2020: 45 EL Members in the EU (92% of 49) offer online games and 38 (84% of 45) provided the figures (i.e. all except for France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Staatliche Lotterieverwaltung (LOTTO Bayern), Toto-Lotto Niedersachsen GmbH, Sächsische Lotto-GmbH, Lotto-Toto GmbH Sachsen-Anhalt, Netherlands/ Nederlandse Loterij, Romania/ C.N. Loteria Romana SA, United Kingdom/ Camelot UK Lotteries Ltd.)

For 2019: 44 EL Members in the EU (90% of 49) offer online games and 37 (84% of 44) provided the figures (i.e. all except for France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Staatliche Lotterieverwaltung (LOTTO Bayern), Toto-Lotto Niedersachsen GmbH, Sächsische Lotto-GmbH, Lotto-Toto GmbH Sachsen-Anhalt, Netherlands/ Nederlandse Loterij, United Kingdom/ Camelot UK Lotteries Ltd.)

In previous years, Sweden/ AB Svenska Spel provided only the overall figure for Online GGR without a split by game category. For the purpose of this table, the whole amount is assigned to Online GGR: Unspecified.

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

Figure 13.b. EL Members in the EU: Online GGR by Game Category – Development 2016–2020 (€M)

Game category	EUM rep. online GGR for 2020	EUM: Online GGR for the respective year in €M					2020-2019 Evolution*	CAGR * 2020-2016
		2016 (33)	2017 (34)	2018 (36)	2019 (37)	2020 (38)		
Draw Based Games	38	710	763	893	990	1 389	40.4%	18.3%
Instant Games	24	91	103	94	114	179	57.1%	18.4%
Sports Games	21	184	242	259	291	485	67.0%	27.5%
All other games	11	221	316	395	479	728	52.1%	34.8%
Unspecified	0	186	218	259	287	0	-100.0%	-100.0%
Total	**38**	**1 391**	**1 642**	**1 900**	**2 160**	**2 782**	**28.8%**	**18.9%**

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

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

Figure 14.a. EL Members: Online GGR by Game Category – Development 2016–2020 (€M)

For 2020: 60 EL Members (87% of 69) offer online games and 51 (85% of 60) provided the figures (i.e. all except for France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Staatliche Lotterieverwaltung (LOTTO Bayern), Toto-Lotto Niedersachsen GmbH, Sächsische Lotto-GmbH, Lotto-Toto GmbH Sachsen-Anhalt, Netherlands/ Nederlandse Loterij, Switzerland/ Swisslos Interkantonale Landeslotterie, United Kingdom/ Camelot UK Lotteries Ltd.)

For 2019: 59 EL Members (86% of 69) offer online games and 50 (85% of 59) provided the figures (i.e. all except for France/ La Française des Jeux, Germany/ Staatliche Toto-Lotto GmbH Baden-Württemberg, Staatliche Lotterieverwaltung (LOTTO Bayern), Toto-Lotto Niedersachsen GmbH, Sächsische Lotto-GmbH, Lotto-Toto GmbH Sachsen-Anhalt, Netherlands/ Nederlandse Loterij, Switzerland/ Swisslos Interkantonale Landeslotterie), United Kingdom/ Camelot UK Lotteries Ltd.).

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

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

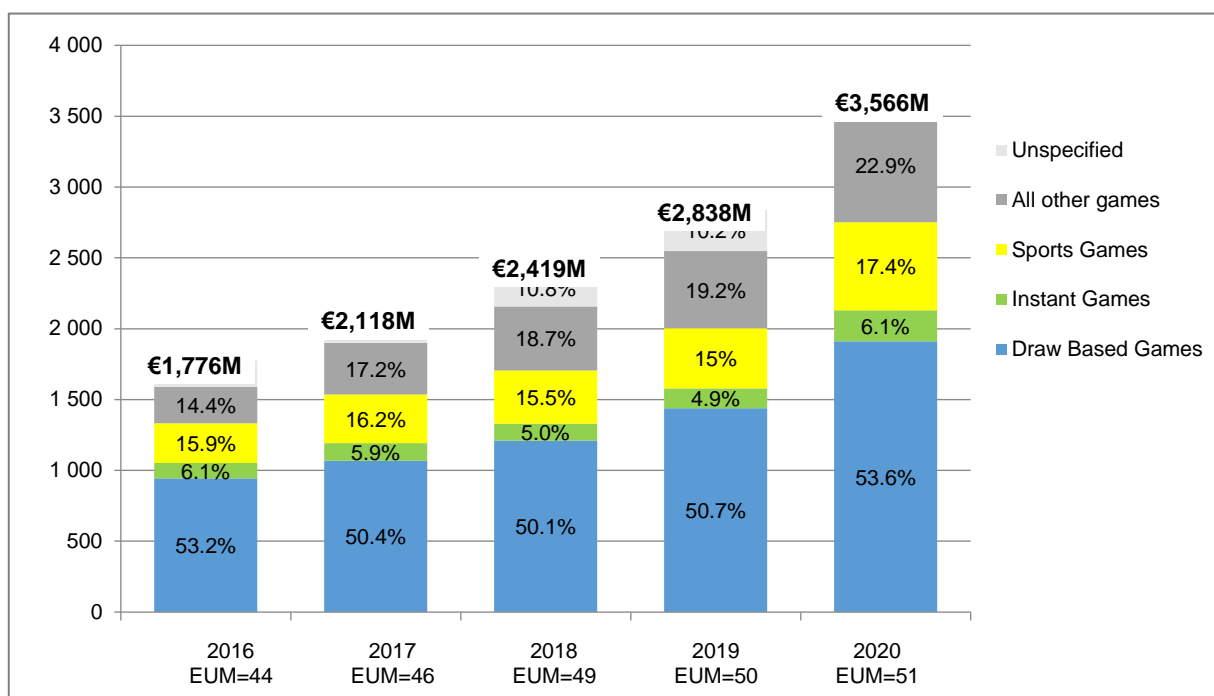**Figure 14.b. EL Members: Online GGR by Game Category – Development 2016–2020 (€M)**

Game category	ELM rep. online GGR for 2020	ELM: Online GGR for the respective year in €M					2020-2019 Evolution*	CAGR * 2020-2016
		2016 (44)	2017 (46)	2018 (49)	2019 (50)	2020 (51)		
Draw Based Games	49	944	1 067	1 211	1 439	1 911	32.8%	19.3%
Instant Games	30	108	125	120	140	219	56.2%	19.4%
Sports Games	28	282	343	375	425	621	46.1%	21.9%
All other games	12	256	363	452	545	815	49.5%	33.6%
Unspecified	0	187	220	261	289	0	-100.0%	-100.0%
Total	**51**	**1 776**	**2 118**	**2 419**	**2 838**	**3 566**	**25.7%**	**19.0%**

Sources: EL Members reporting their Online GGR for 2020, see the comment above for information on those who participated in this data collection but did not report the category for the individual years of 2019 and 2020 and on those who provided only the overall figure without a split by game category (being assigned to Unspecified).

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

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

Figure 15. Overview of Reporting Activity of Members by Country – 2016–2020

Country	Number of Currently Reporting ELM who provided data for individual years				
	2016	2017	2018	2019	20¨20
Austria	1	1	1	1	1
Belgium	1	1	1	1	1
Bulgaria	3	3	3	1	1
Croatia	1	1	1	1	1
Cyprus	1	1	1	1	1
Czech Republic	1	1	1	1	1
Denmark	2	2	2	2	2
Estonia	1	1	1	1	1
Finland	1	1	1	1	1
France	1	1	1	1	1
Germany	17	17	17	17	17
Greece	1	1	1	1	1
Hungary	1	1	1	1	1
Ireland	1	1	1	1	1
Italy	2	2	2	2	2
Latvia	1	1	1	1	1
Lithuania	2	2	2	2	2
Luxembourg	1	1	1	1	1
Malta	1	1	1	1	1
Netherlands	1	1	1	1	1
Poland	2	2	2	2	1
Portugal	1	1	1	1	1
Romania	1	1	1	1	1
Slovakia	1	1	1	1	1
Slovenia	2	2	2	2	2
Spain	3	3	3	3	3
Sweden	1	1	1	1	1
EL Members in the EU27	**52**	**52**	**52**	**50**	**49**
Albania	1	1	1	1	1
Azerbaijan	2	2	2	2	2
Belarus	1	1	1	1	1
Bosnia and Herzegovina	2	2	2	2	2
Iceland	2	2	2	2	2
Israel	2	2	2	2	2
Kazakhstan	0	1	1	1	1
Kosovo	1	1	1	0	0
Norway	1	1	1	1	1
Republic of North Macedonia	1	1	1	1	1
Russia	1	1	1	1	1
Serbia	1	1	1	1	1
Switzerland	2	2	2	2	2
Ukraine	2	2	2	2	2
United Kingdom	1	1	1	1	1
EL Members in total	**72**	**73**	**73**	**70**	**69**

Sources: EL Members who took part in the 2020 survey collecting data for 2016–2020.

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

Country	The lotteries' country of origin.
Lottery	The lottery name needed to be confirmed.
Contact person	The following details of a contact person were requested: name, email address and phone number.
National currency	EL Members were asked to fill in all data in their national currency. The AGENCY team used the yearly average exchange rates from 2020 provided by Eurostat, or, if these were not available, the yearly average exchange rates from the European Central Bank and the national banks of each country.
Sales	Sales (or turnover) should be in your national currency. Do not deduct anything from Sales – not prizes, not commissions for retailers, nor anything else. The amount should reflect the gross amount players pay buying lottery products. If you do not operate games in a category, just leave the field blank. If players also pay a tax on top of the price of the lottery product, please include this tax on top of the Sales figure. Include Sales of the lottery and its subsidiaries from all channels, such as retail, own shops, the Internet, mobiles, tablets and interactive TVs. The Sales figures should correspond to the figures provided in the audited reports, if available.
Gross Gaming Revenue (GGR)	Gross Gaming Revenue (GGR) is equal to Sales minus prizes. For each game, GGR should be equal to Sales multiplied by 100% – the payout rate as a percentage. If, for example, you sell €50 of instant tickets with a payout of 58% in prizes for players, the GGR is equal to 50*(100%-58%) = 21. There may be a slight difference between the theoretical prize payout percentage and the actual payout, as some players never collect their prizes. However, for the purpose of this study, the difference does not matter. Thus, you can use the theoretical payout rates to calculate GGR from Sales figures as shown above. GGR also equals the amount kept by the operator after prizes to cover all costs, retail commissions, taxes, money for good causes and profit. You should include GGR for all channels, including retail, own shops, the Internet, mobiles, tablets and interactive TVs. The GGR figures should correspond to the figures provided in the audited reports, if available.
Sales via the Internet/ mobiles	Sales via the Internet/mobiles should include and reflect the same content as total Sales data, however, only from channels such as the Internet, mobiles, tablets and interactive TVs.
Sales generated via mobile devices	Mobile sales generated through all mobile devices, this typically includes tablets and smartphones. If you don't have an exactFigure for historical numbers, please provide the best estimate for the mobile sales share.
Gross Gaming Revenue via the Internet/ mobiles	GGR via Internet/mobiles should include and reflect the same content as the total GGR data, however, only from channels such as the Internet, mobiles, tablets and interactive TVs.

Draw Based Games	All nationwide games based on numbers or letters, and thus, typical lottery games with both pari-mutuel and fixed prizes. For example, Lotto, Pick 3, Euro Millions, Joker, Spiel, Draw, Class lotteries, Keno (both daily and fast draw), and Bingo. Do not include EGMs or Instant Games based on numbers in this category.
Instant Games	All instant or scratch games and pull tab games - the so-called pre-drawn lotteries.
Sports Games *(incl. Horse Racing Games)*	All pari-mutuel betting games AND all fixed odds betting games, including betting on sports events, horse racing, e-sports and all novelty bets (e.g. weather, song contests, political events, etc.)
EGMs outside casinos	Electronic Gaming Machines located outside licensed brick-and-mortar casinos. For example, slot machines outside casinos, VLTs and EILs.
All other games	Typically, the category includes casino games or poker or virtual games. The category DOES NOT INCLUDE activities other than gaming (for example, financial services) and SALES figures are not required.
Average number of full-time employees	The average number of lottery employees over the year calculated on a full-time basis. Do not include employees of service providers or retailers.
Mandatory Money for Society (Tax/ Duties/ Good Causes)	Include everything your lottery contributes to society in the form of mandatory taxes/levies (local and national, company tax, license fee) and mandatory payments allocated to good causes such as sports, culture, the environment, education, etc. The entry in this field should reflect the total money your lottery contributes to society as mandatory payments.
	For the purpose of this study, the total amount your lottery contributes to society as mandatory payments is broken down into four categories:
of which goes to sport	• Sports: this covers mandatory payments allocated to sports. Include all amounts in national currency your lottery provides for sports purposes that you pay it directly to sports associations/institution. Do NOT Include money you pay for sponsorships of sports.
of which goes to culture and heritage	• Heritage: this covers the mandatory payment allocated to culture and heritage where you are certain of the end allocation and includes all amounts your lottery provides for culture and heritage purposes that you pay directly to arts, cultural and heritage organisations/ associations/foundations, etc.
of which goes to health and well-being	• Health and well-being: this covers the mandatory payment allocated to health and well-being where you are certain of the end allocation and includes all amounts your lottery provides for health and wellness purposes that you pay directly to health- and well-being-related organisations/associations/foundations, etc.
of which goes to education	• Education: this covers the mandatory payment allocated to education where you are certain of the end allocation and includes all amounts your lottery provides for educational purposes that you pay directly to organisations/associations/foundations, etc.
of which goes to social and other societal purposes	• Social and other societal purposes: this covers the mandatory payment allocated to social and other societal purposes where you are certain of the end allocation and includes all amounts your lottery provides for social and other societal purposes that you pay directly to charities/organisations/associations/foundations, etc.
of which goes to the treasury	• Treasury: this group covers mandatory payments with no knowledge of the final allocation. Include all amounts in national currency for all taxes and

(with no knowledge of the final allocation, i.e. taxes, duties)	duties (local and national, company tax, license fee) and any tax paid on prizes. If your profit or part of it goes to Treasury, it must also be included. Do NOT include sponsorships or other NON-mandatory payments.
Sponsorships or patronage of sports	Some lotteries use sponsorships and/ or patronage as marketing and public relations tools. Please include the cost for any such sponsorship and/ or patronage.
Total spending on measures to prevent problem gambling	EL has established a programme of Responsible Gaming Certification. This entry is meant to support evidence that lotteries are fully aware of the obligations to promote responsible gaming. You should report the amount in national currency that was used for measures to prevent problem gaming - covering all 11 elements of the EL Responsible Gaming Standards. It should include costs for prevention, research and treatment of problem gaming supported by your lottery. Also include costs for information material; stakeholder engagement and costs associated with helpline support; education of staff and retailers and costs for employees directly involved in such activities.
Number of Points of Sale (POS)	The number of physical points of sale where your lottery products (DBGs, Instants and/ or sports betting) are sold. Do NOT include POS where EGMs are the only lottery product sold. The following categories of POS are identified: I. Exclusive POS (Lottery/Sports Betting/EGM) • Owned POS - the number of POS owned by your lottery; • Third-party POS (franchise partners) - the number of POS that are not owned by your lottery, but with lottery products the dominant activity (no competitive products may be sold; e.g. "franchise" concept). II. Third-party POS with another predominant product portfolio - the number of Third-party POS where products offered by your lottery are sold based on a contract with the owner of the POS; however, where the dominat products/ services are different from lotteries; products offered by competitive lotteries can also be sold there. • Tobacco/News agents - Third-party POS where lottery products are sold, but Tobacco/Newspapers are the main activity; • Petrol Station - Third-party POS where lottery products are sold, but petrol sale is the main activity; • Food Retail - Third-party POS where lottery products are sold, but food retail is the main activity; • Public Services (post offices, railway, etc.) - Third-party POS where lottery products are sold, but Public Services is the main activity; • HoReCa (Pubs, Bars, Restaurants, etc.) - Third-party POS where lottery products are sold, but HoReCa is the main activity; • Other or Unspecified - Third-party POS where lottery products are sold, but that do not fall into those specified above.

Source: EL, 2020

Annex D: Other Data Sources

Central Bank of the Republic of Azerbaijan (2020). *Official average exchange rates of AZN*, from
https://www.cbar.az/page-42/monetary-indicators

Eurostat (2020). *Population*, from
https://ec.europa.eu/eurostat/databrowser/view/tps00001/default/table?lang=en

Eurostat (2020). *Euro/ ECU exchange rates – annual data*, from
http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ert_bil_eur_a&lang=en

International Monetary Fund (2020). *Population* in *World Economic Outlook Database April 2021,* from
https://www.imf.org/en/Publications/WEO/weo-database/2021/April

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