



## Lottery Benchmarking Report

2019/2020 edition

London/Munich, November 2019

Go to [www.lottery-benchmarking.mecn.net](http://www.lottery-benchmarking.mecn.net) to obtain the full report

## Summary

To compete successfully in the global marketplace, lotteries want to know as much as possible about benchmarking and success factors, as WLA benchmarking seminars and several regional initiatives have repeatedly shown. MECN is therefore proud to present the 2019/2020 edition of our “Lottery Benchmarking Report”.

The 2019/2020 edition again includes a large number of analyses of the Internet/digital segments. Since social media and networks, such as Facebook, and social gam(bl)ing are becoming more and more important, we again include analyses of activities and successes of lotteries in social media.

### Content of report

The updated study includes:

- **Sales-related benchmarks** – Total sales and product-related sales (e.g., lotto, betting, instant, ...) benchmarks, such as per-capita sales analyses.
- **Sales channel benchmarks**, such as number of residents and sales per outlet, ...
- **Internet/digital segments and channels** – The report offers many analyses of the Internet/digital/mobile segments and channels, users, .... We have also included comparisons to private Internet gambling companies.
- **Marketing benchmarks**, such as marketing/advertising expenses in % of total sales.
- **Operating expense benchmarks**, such as operating expenses in % of sales broken down into human resources (e.g., average personnel expenses, sales per employee), IT and communications, and other benchmarks.
- **Large number of lotteries analysed and most up-to-date information** – Analyses of data from ca. 130 state/public lotteries and operators for the years 2018 and 2017 as well as long-term trend analyses.

In total, the report has **46 pages and 42 graphs/exhibits**.

## List of benchmarks

### Sales-related benchmarks (excerpt)

- **Total sales** per capita
- Per-capita **total sales** as % of per-capita income
- **Lotto sales** per capita and lotto sales as % of total sales
- **Betting sales** per capita and betting sales in % of total sales
- **Instant lottery sales** per capita and instant lottery sales in % of total sales
- **Keno sales** per capita and keno sales in % of total sales
- **VLT net income** per capita and VLT net income per machine
- ...

### Benchmarks related to sales channels (excerpt)

- Number of **retail outlets per 1,000 residents** and average number of residents per outlet
- **Sales per outlet**
- **Catchment area** of outlets – sq km per outlet
- **Interactive/Internet sales** per capita and interactive/Internet sales in % of total sales
- **Mobile sales** in % of total interactive/Internet sales
- Development of average **interactive sales** per capita

- **Registered users** of state/public operators and lotteries in % of population and in % of total Internet users
- **Interactive sales** per registered user and per active player
- ...

#### Expense-related benchmarks (excerpt)

- **Operating expenses** in % of total sales
- **Marketing/advertising expenses** in % of total sales
- **Personnel expenses** in % of total sales and average personnel expense per employee
- Average **sales per employee**
- Average **prizes** in % of total sales
- **IT and data communication** expenses in % of total sales
- **Retailer commission** in % of total sales
- ...

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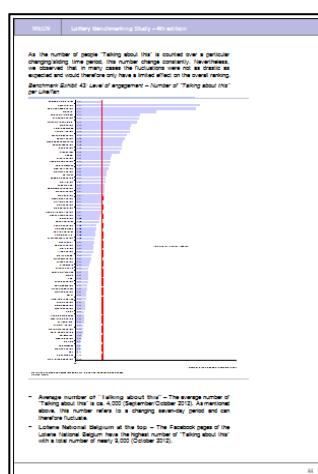
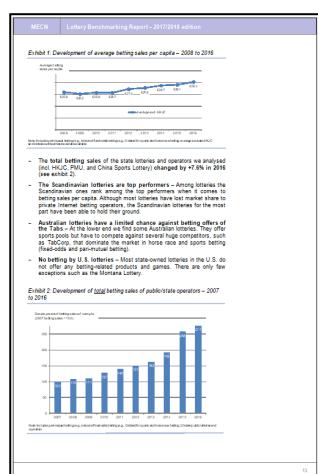
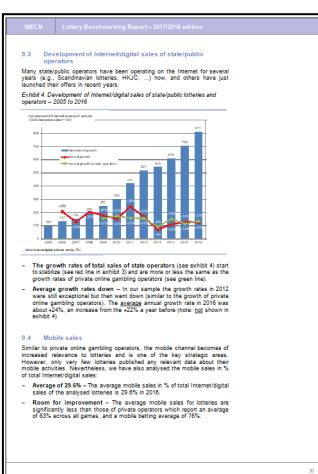
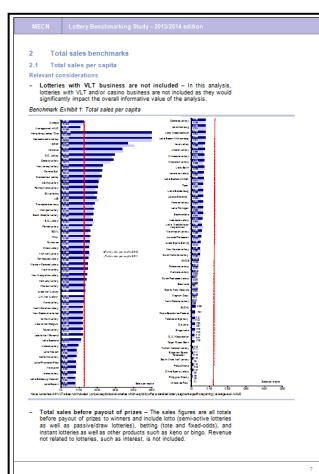
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## About authors and contact information

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