

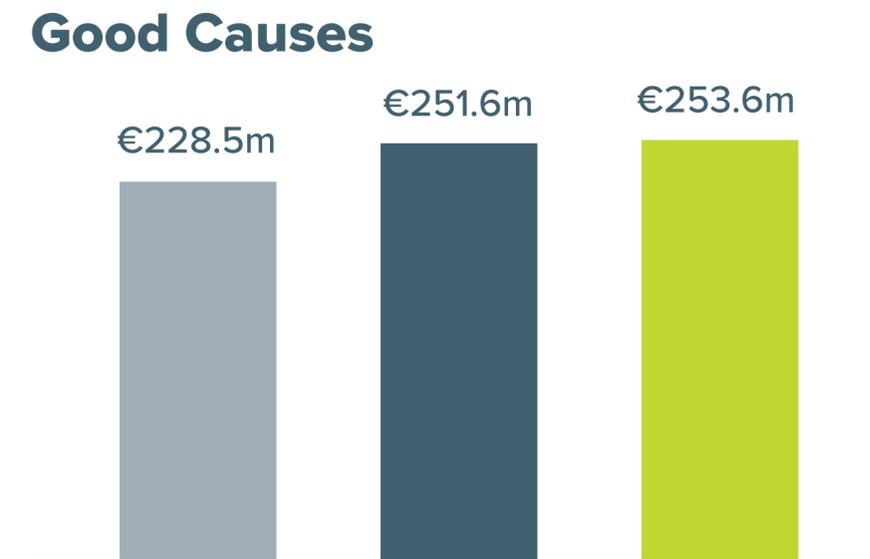
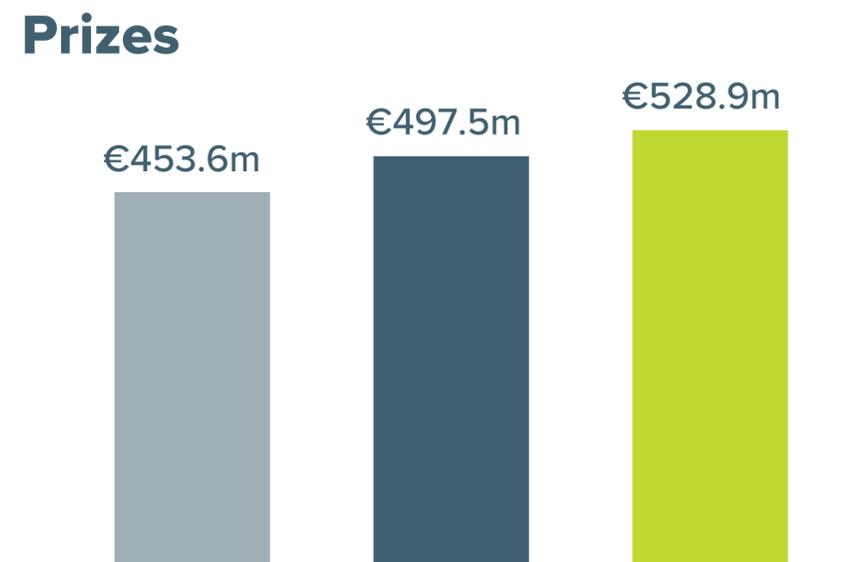
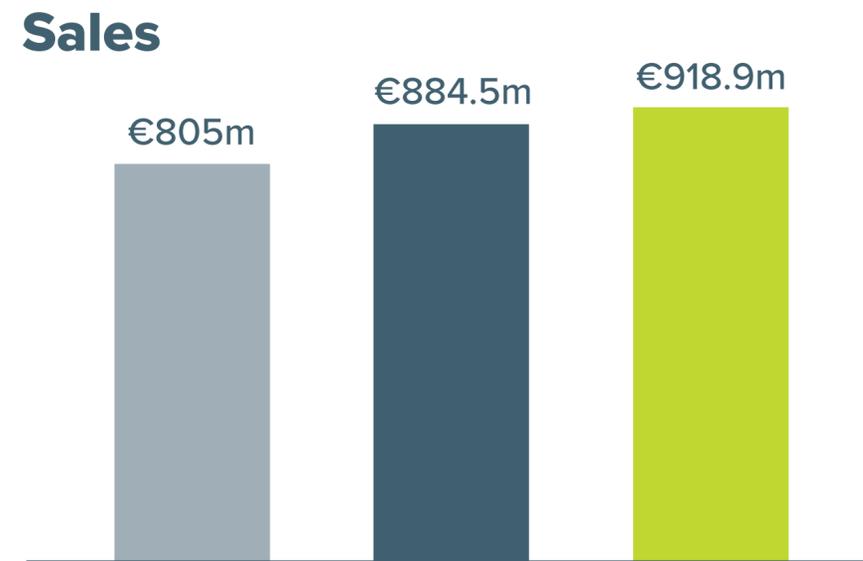
National Lottery in 2020: A Year in Review



**National
Lottery**



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● 2018 ● 2019 ● 2020



Message from CEO

The National Lottery was at the heart of Irish communities in 2020, a time when it mattered. Good Causes themselves and the communities which they support, faced extraordinary challenges in the year and so we were particularly delighted that the funds raised by the National Lottery for Good Causes grew to €254m. That is a remarkable achievement by the staff and all stakeholders of the National Lottery in the face of real adversity, including particularly the retailers who supported our communities in so many vital ways.

The continued popularity of the National Lottery was evident in record sales and record prizes in 2020. By playing National Lottery games, our customers ensured that €254 million was raised for Good Causes during the year. 2020 is the fifth consecutive year that National Lottery funding for Good Causes has grown, and that funding was 35% higher in 2020 than in 2015, which demonstrates substantial progress that everyone in Ireland can be proud of.

We continued and indeed accelerated our strategy of investing in the National Lottery brand, customer experience and products and internally in our technology, processes and people.

We aim to grow the National Lottery responsibly, and the numerous further improvements in player protection measures which we introduced in 2020 will help to ensure safe and responsible play.

The people who work at the National Lottery, like our customers and our retailers, endured enormous unexpected disruption in 2020, and I would like to thank them for their resilience as well as their achievements in 2020.

Celebrating our players

On an average day in 2020, the players of National Lottery games provided over €694,000 of funding to Good Causes, just by playing. The primary purpose of the National Lottery is to raise money for Good Causes all over Ireland and our players are the reason for our continued success in achieving this. At a time when charitable groups and projects needed funding the most, our players raised €254 million last year and have now raised more than €6 billion for Good Causes since the inception of the National Lottery in 1987. Approximately 1.3 million adults play National Lottery games and draws regularly and by doing so raise an average of €4.8 million for the Good Causes fund each week. This money is transferred to the Exchequer and is used to part fund (on average) over 4,000 projects, groups and voluntary organisations each year.

Helping frontline workers

Following discussions between PLI, the Department of Public Expenditure and Reform and the Regulator of the National Lottery, it was agreed that the €16 million historic, expired unclaimed prize money would be transferred to the Exchequer for use by the Government for Good Causes funding. The Government announced that the money would be allocated to the health service to support the response to COVID-19. We, at PLI, were delighted to see the money used in this way.

Winners

While we may have been unable to host celebrations in our Winners room during the pandemic, it still proved to be another life-changing year for our winners. Throughout 2020, there were 33 prizes worth €1 million or more won by National Lottery players all over the country with many more life-changing prizes being paid out almost each and every day. The National Lottery is built on the premise of many people spending small amounts to win life-changing prizes, all while raising funds for Good Causes.

Protecting our players

Responsible play and player protection is at the core of everything we do at the National Lottery. In the last 12 months, the National Lottery has introduced additional measures which have been designed to protect our players both in retail and on our online channels. Some of these measures include the phasing out of credit cards as payment methods and advanced player monitoring and intervention tools.

Thank you!

None of this would have been possible without the vital work and support of our 5,415 retailers, who in a 34-year partnership with the National Lottery have built a loyal customer base and ensured the vital flow of Good Causes funding. Particularly in 2020, when our local shopkeepers and retail staff kept their doors open to support their local communities and became frontline workers in a once in a lifetime health emergency. Despite these challenges, retail sales of National Lottery products were a key contributor to the amount raised for Good Causes funding in 2020.

Our Team

Our staff kept the show on the road, revitalised our marketing as well as our digital platforms and introduced new products, all while simultaneously transforming the processes and technology of the National Lottery and adapting to new ways of working. It was a large and unexpected challenge and I saw first hand the dedication and ingenuity that the National Lottery team brings to their work. To have grown returns to Good Causes at the same time as adapting and indeed improving through that disruption, is a real credit to the employees of PLI and our partners.

Andrew Algeo
CEO
National Lottery



Who We Are

The National Lottery was established by the Irish Government in 1987 with the purpose of raising funds for Good Causes in line with the National Lottery Act.

Since 2014, the National Lottery is operated by Premier Lotteries Ireland (PLI), having been awarded a 20-year licence by the Irish Government. We are an Irish company, based at Lottery HQ in Abbey Street in Dublin 1. We are committed to running a responsible, world-class lottery for the people in Ireland raising much needed funding for Good Causes.

Our shareholders are **Ontario Teachers' Pension Plan, An Post and An Post Pension Funds.**

Our Board



David McRedmond
Chair



Fabrice Chesnais
Non-executive Director



Ashvin Malkani
Non-executive Director



Andrew Algeo
CEO, Premier Lotteries Ireland



Vivienne Jupp
Non-executive Director



Wayne Pickup
Non-executive Director



Debbie Byrne
Non-executive Director



David Kelly
Non-executive Director



Peter Quinn
Non-executive Director

Board Changes

Padraig O’Riordain (former Chair) and Ilya Kachko (Director) left the Board in 2020. We are grateful to both Padraig and Ilya for their significant contributions during their respective terms.

We are pleased to have welcomed new Board members David Kelly, Debbie Byrne, Fabrice Chesnais, and Ashvin Malkani.

Senior Leadership Team



Andrew Algeo
Chief Executive



Paul Dervan
Chief Marketing Officer



Jeremy O'Sullivan
Chief Technology Officer



Niall Andrews
Chief Retail Officer



Nikki Gallagher
Head of Corporate Affairs



Diana Sirila
Chief Legal & Regulatory Officer



Colette Cotter
Head of Human Resources



Mari Hurley
Chief Financial Officer



Ian Wallace
Head of Core Operations



Cian Murphy
Chief Product & Digital Officer

Our Values



Ambitious

Because what we do is essential to our communities, brings enjoyment to our customers, is valued by our stakeholders and represents our professional worth.



Open

Because we know that what we do is built on our customers' trust.



Generous

Because the purpose of the National Lottery is to support communities.



Reliable

Because trust requires us to deliver on our promises, and because ambition achieves nothing without follow through.



Gender Pay Gap

It is very important to us that our culture is one where everyone is valued and respected. Gender equality is an important part of this culture. Ahead of the introduction of the Gender Pay Gap legislation, we assessed our own gap in December 2020. We found that our gap is 1.3%.



1.3% mean*

* Mean gender pay gap: Men are paid 1.3% on average more than women in PLI

Gender Profile - PLI

40%
Women (78)



60%
Men (118)



We are now implementing a number of measures to help us to reduce the gap.

They include:

- 1 Taking steps to ensure that more women are recruited by:**
 - Reviewing role profiles to **eliminate gender bias** if present.
 - Ensuring **balanced shortlists of candidates** for each role where possible.
 - Ensuring **balanced interview panel** during recruitment process.
- 2 Providing unconscious bias training for managers**
- 3 Encouraging more women to apply for promotion opportunities and career development opportunities**
- 4 Continuing to offer benefits such as term-time, career break /sabbatical, flexi-time and opportunity for remote working**



Good Causes

The National Lottery was set up 34 years ago to raise money for good causes organisations – organisations working to develop our culture and heritage, support our youth, grow participation in sports, and contribute to an inclusive and just society. These funds raised by the National Lottery are transferred to the Exchequer and are used to part-finance expenditure by various Government Departments.

Nearly **30c** of every euro spent
on National Lottery games goes to the Good Causes Fund.

Last year, the fund amounted to

€254 million

raised by National Lottery Players

Over

4,000

groups (on average) receive Good Causes funding **each year**



Liquid Therapy

Liquid Therapy was established in 2011, in Bundoran, Donegal, to provide one to one support for young people who wanted to experience surfing but are unable to participate in mainstream opportunities due to various physical, emotional, behavioural or intellectual needs. The team of dedicated ocean lovers believe that everybody should be able to benefit from the therapeutic experience of the ocean and Liquid Therapy's mission is to provide the perfect platform to empower each individual to be able to reach their aquatic potential! A grant from the National Lottery Good Causes fund went towards the purchase of specialised larger surf boards with handles which enable more than one person to be on the board at a time.





BeLonG To Youth Services

Based in Dublin, BeLonG To Youth Services is the national organisation supporting Lesbian, Gay, Bisexual, Transgender and Intersex (LGBTI+) young people in Ireland. The organisation was founded in 2003, working with young people aged between 14 and 23 years old. Their aim is to create a world where young people are equal, safe and valued in the diversity of their identities and experiences. BeLonG TYS advocates and campaigns on behalf of young LGBTI+ people and offer a specialised LGBTI+ youth service focusing on mental and sexual health, alongside alcohol and drug support.



Raidió Rí-Rá

Is é Raidió Rí-Rá an t-aon stáisiún raidió náisiúnta cheol-cairte lán-aimseartha do dhaoine óga a chraolann go hiomlán i nGaeilge.

Tá sceideal iomlán ceoil, comhrá is spraoi ag an stáisiún raidió ar líne seo agus an t-iomlán á chur i láthair trí Ghaeilge amháin.

Daoine deonacha agus mic léinn tríú leibhéal iad formhór de láithreoirí Raidió Rí-Rá. Is cuid thábhachtach d'obair an stáisiúin í saotharlanna a chur ar fáil i mbunscoileanna is i meánscoileanna ar fud na tíre – rud a thugann deis do dhaoine óga blas a fháil ar bheith ag obair i gcúrsaí raidió mar láithreoir nó fiú amháin sa chúlra!

Chuir maoiniú ó chiste Dhea-Chúiseanna an Chrannchuir Náisiúnta ar chumas Raidió Rí-Rá treallamh breise a cheannach le go bhféadfadh sé craoladh ar an gcaighdeán is airde agus chun a chlár scoile a mhaoiniú gach bliain.



Immigrant Council of Ireland

The Immigrant Council of Ireland is a national, non-governmental organisation that promotes the rights of migrants. Their vision is a society that is fair, respects human rights and diversity and is committed to everyone, including people from a migrant background having the opportunity to fulfil their potential. Their mission is to support and advocate for the rights of immigrants and their families and act as a catalyst for public, debate, legal and policy changes.



Winners - It Could Be You!

And it was for individuals and syndicates all over Ireland who won 33 jackpot and top prize amounts worth between €1 million and €49.5 million throughout 2020.





Lotto

There were 19 prizes of €1 million and above in the Lotto game during 2020 which included eleven Lotto jackpots as well as eight Lotto Plus 1 top prizes.

The biggest Lotto jackpot winner in the past 12 months was a lucky ticketholder who won a life-changing prize of €10,780,193 with a ticket they purchased at Cantillon's Spar store in Mount Oval village in Rochestown, Co. Cork.

EuroMillions

In February 2020, a large Mayo family syndicate shared their €17 million jackpot prize with a ticket they purchased at Mulroy's service station in Castlebar, Co. Mayo. In July, an online player from Co. Dublin won their life-changing €49,564,587 jackpot prize with a €2.50 Normal Play ticket they purchased just before the draw.

It was another great year for our 'Ireland Only Raffle' and EuroMillions Plus prize winners. A further eight winners won the EuroMillions 'Ireland Only Raffle' special prize of €1 million each last year while there were a truly impressive 28 top prizes of €500,000 in the EuroMillions Plus game.

Minor Draw Based Games

Our Telly Bingo and Daily Million games remain as popular as ever among a core group of players who shared in incredible prizes in the past year. During 2020, there was over €16.5 million in prizes in the Telly Bingo game. This includes 25 separate winners of the Snowball prize which amounted to €1,130,000.

Daily Million players also had cause for celebration last year with more than €12.8 million in prizes which includes ten top prizes in the Daily Million and Daily Million Plus draws. Three individual players in Cork, Dublin and Kerry won the Daily Million top prize of €1 million while a further seven players won the Daily Million Plus top prize of €500,000.

Meanwhile, the Christmas Millionaire Raffle was a complete sell-out with 500,000 tickets sold in advance of the New Year's Eve draw. Due to the sell-out, €5.1 million was raised for Good Causes for the raffle draw alone.

Instants (Scratchcards and IWGs)

There was almost €184 million in prizes on our scratch card games throughout 2020 while our online players enjoyed 43 different instant win games throughout the year with circa €25.9 million prizes.



Corporate Social Responsibility

Giving and doing good is at the heart of the National Lottery. Through our CSR policies and programme of activities, every day we aim to do good by our beneficiaries, our employees, our communities, our players and our environment.

Jigsaw Partnership

In June 2019, National Lottery staff chose to support Jigsaw, the national charity for youth mental health as our Staff Charity Partner. Over the 18-month partnership, we raised over €71,000.

Storytelling for Success Webinar Series

In May 2020, we hosted our first ever 'Storytelling for Success' Webinar Series for the Charity Sector, in collaboration with The Wheel. The Wheel is the largest umbrella group for the Irish community and voluntary sector, and by partnering with them we were able engage with hundreds of charities.



The Covid-19 pandemic brought widespread challenges to the voluntary and charity sector. One of these challenges is being properly equipped with the necessary skillsets to be able to promote themselves and get noticed for what they do, particularly in the art of storytelling.

Using our skills and resources, we co-developed and co-hosted a series of Storytelling Workshops.

The key objectives were to:

- Help build the capacity of the Irish charity sector to communicate their impact and tell their story.
- Drive support and awareness for National Lottery Good Causes around Ireland

Sustainability project

We commenced a carbon review of our business operations. We will develop a climate reduction strategy that will help us reduce our emissions.

Expert Guidance

In 2020, we engaged with academic experts Professor Paul Delfabbro, Psychology PhD University of Adelaide, and Dr. Jonathan Parke PhD, Director of Sophro, an organisation that specialises in independent research and education on gambling behaviour, game design and harm minimisation. We are currently working with Harvard Medical School to review our Player Protection approach.

On foot of this expert guidance, we introduced additional measures to support responsible play in both our online and retail channels including:

- Introduction of scratch card purchase limits throughout our retail network which limits the sale of ten scratch cards per customer.
- Removal of credit cards as means of payment online.
- Mandatory confirmation of spend limits upon online registration.
- Revamp of responsible play pages onsite, easier access to player protection self-service tools.

- Introduction of player self-assessment tools.
- Introduction of new reports that give a holistic view of the player activity overtime.
- Expansion of the player protection team, including a dedicated player protection analyst.
- Responsible Play week continues to promote player protection measures to our retail partners and further educates players on how to play responsibly.



Our Retailers

2020 was a year like no other, and like every other business, we had to adapt our operations to ensure there was no interruptions in our support to almost 5,500 retail partners in our network who essentially became frontline workers for their communities in the face of the Covid-19 pandemic.

The resilience of retailers in this period was a key contributor to the amount raised for Good Causes in 2020. Retail sales were €783.1m and retail commission was almost €50 million.

“

Our shop has become known in the area for the winning tickets that we have sold in the past which has had a positive impact on our business since that's become one of the things that customers associate with us. Being an agent for the National Lottery has a noticeable knock-on effect for the rest of our business and even over the past year we have been fortunate in that we saw our trade increase substantially. The support from the National Lottery is fantastic and I am a big believer in National Lottery products – I think that the Retailer Portal is particularly useful. I log in every few weeks and print different sections off to leave in the staff canteen as a refresher. We're all well-versed in the player protection and responsible play areas! It's a great resource to have and to be able to log in when needed.

John Eivers – Eivers Spar, Irishtown Service Station, Kilkenny City

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“

We've had the shop for four years and during that time we have seen snowstorms and now a pandemic. Thank goodness we were able to stay open during lockdown as we noticed customers enjoying visiting the store as a break from the house and working from home. We did notice an increase in sales and one of the things that we really do love to see is when customers tell us that they have won a prize. You need those good news stories, especially over the past twelve months. It's great that all we have to do is pick up the phone to our Field Sales Representative any time we have a query or an issue might crop up. Our Rep comes into us regularly and it's always helpful to know that we can count on him whenever needed

”

Rosemary Corcoran – Centra Rushbrook, Cobh, Co. Cork



Given the continued popularity of National Lottery products in retail, further Responsible Play tools were introduced to further support our retailers in the sale of these regulated products.

- In 2020, 100% of retailers within the National Lottery retail network participated in a mandatory training programme on the responsible promotion of our games.
- The Think 21 ID campaign continued to be promoted across all retailers, management and staff to ensure there was no sale of products to underage customers.
- Two mystery shopper campaigns on age control were conducted.
- Additionally in 2020, the National Lottery introduced a scratch card transaction limit, restricting the number of scratch cards which could be sold to an individual customer.



Our Digital Channels

Our digital channels really increased in importance in 2020. Throughout the pandemic they offered Irish players an opportunity to continue to play the National Lottery from the safety of their own homes. Although we saw growth in player numbers across all demographics, the highest growth was seen in players over the age of 50. We invested into improving these platforms for all our players, launching a new National Lottery App in July 2020.

186,296 new players set up a new online account in 2020, up from 138,916 in 2019. Over the course of 2020, 441,735 players transacted with us online, up from 311,684 in 2019 (+42%).

Online channel sales grew to €135.8 million in 2020, representing 14.8% of total sales.

There were 1.3 million app downloads with the mobile app accounting for approximately 59% of Digital Sales.

We launched a new Mobile App with a host of new features including a 'Shake, Pick and Play' ticket purchase design, a single check-out for multiple draw games and an in-app registration process and the introduction of ID verification software. The newly designed app also featured a key consolidated area for Responsible Play features for players.

Two additional player protection tools: a Self-Assessment Quiz and a Budget Calculator Tool were added in March 2020. These

important additions to our online channels ensure that all our players have the necessary resources to make sound and informed decisions when playing our games.

Our online players enjoyed a record-breaking year with over €76.5 million in prizes across draw-based games. Among these winners was a Dublin player who became Ireland's 16th winner of the EuroMillions jackpot in Ireland as they won the €49,564,587 jackpot prize in July 2020. Other winners included two online winners of the Lotto Plus 1 top prize of €1 million from Dublin, a EuroMillions 'Ireland Only Raffle' winner of €1,005,000 from Cork while the top prize winner of the Christmas Millionaire Raffle prize of €1 million was an online player from Limerick.

