



# World Lottery Association



*The year 2017 in review*



# Constancy, competence and continuity

*It seems as though things have moved very fast in the five years I have served as President of the WLA. Digital technology has started to transform our lives. Signs of a global economic recovery are emerging after a long period of stagnation. New leaders have been elected and new promises have been made.*

*But what I see when I take a closer look is not a revolution but a long process of incremental change. I see a series of small, deliberate steps moving us slowly closer to our shared objectives. We cannot always take the shortest possible path, but we remain confident that, with perseverance, we will ultimately achieve our vision.*

*By and large, we face the same issues today as we faced five years ago. Sports integrity, responsible gaming, the fight against illegal gaming, money laundering and cybercrime are nothing new. But by patiently explaining these challenges to our stakeholders, by raising public awareness, and by speaking and acting consistently, we are chipping away at the obstacles and, slowly but surely, helping our members to accomplish their mission and fulfil their role in society.*

*This continuity is part of the unique value proposition of the WLA.*

*In 2017, at the global level, we once again provided a robust framework for professional development and continuous improvement. We maintained a set of*

*world-class tools and standards that help our members, on a daily basis, to demonstrate the materiality of their responsible gaming and security control measures. We continued to liaise between the five regional lottery associations to develop synergies and enable lottery professionals to leverage the insights and experience of their peers around the world.*

*All this is possible because of the engagement of the members themselves. The WLA is a membership organization – in other words, it relies on dedicated and highly competent professionals who volunteer their time to move its initiatives forward. These are the people who find the time to sit on WLA committees and working groups, to present at WLA conventions and seminars, and to open up our industry to the best minds of each generation. Ultimately it is the members themselves – ably supported by a permanent staff in Basel and Montreal – who are deliberately and persistently making our industry stronger every day.*

*It is an honor to have been part of this effort for the last five years and to have made my own modest contribution once again in 2017.*

A handwritten signature in blue ink, appearing to read 'JL Moner-Banet', written over a set of horizontal lines.

**Jean-Luc Moner-Banet**  
WLA President



# Organized to create value for members

*2017 represents a significant jump forward for me and the WLA staff. Working closely with the Executive Committee to analyze where we stood in terms of service to our members and the industry, we took steps to address our organizational approach. We agreed a simple but integrated structure that prepares the WLA for the future. Coalescing around key priorities such as teamwork, service to the mission, strategic thinking and flexibility, I am very proud of the dedication all staff members showed this year, and confident that we are equipped to deliver added value to our members while defending the core values our industry represents. Senior Operations Manager Nadia Bachorski heads up Member Relations; Senior Operations Manager Paul Peinado heads up Program Management; and Senior CSR Manager Mélissa Azam oversees our approach to corporate responsibility. Together with these senior staff leaders, the Research Manager, Executive Assistant and two Young Professionals (a program that allows us to benefit from and train inspiring and aspiring lottery professionals for fixed periods) are leading a drive to engage with members to transform genuine needs into services and support.*

*In this annual report, you will get a sense of the many activities we are charged with managing or administering, from committee and certifications coordination, event logistics and member management, to scholarships, communications, and finance. In 2017 we added a task force on illegal*

*gaming, published a position paper on the subject, and elevated the importance of collaboration with our regional association partners. I take this opportunity to congratulate our President, Jean-Luc Moner-Banet for these initiatives, and pledge that I will personally see to their continued implementation.*

*Having conducted over 300 interviews with leaders of our community, I am more convinced than ever that we must not be complacent about the challenges we face. Digital technologies alone represent multiple threats in which we must find opportunities. I trust you will continue to confide in me at every turn, and to express your urgent needs and long-term views, so that the WLA may present a strong and unified voice into the future.*

*I am very much looking forward to seeing everyone at the World Lottery Summit in Buenos Aires in November 2018.*

A handwritten signature in blue ink that reads "Philip A. Springuel". The signature is fluid and cursive.

**Philip A. Springuel**  
WLA Executive Director

# The WLA at a glance

## Profile

The WLA was formed in August 1999 through the union of AILE (International State Lotteries Association) and Intertoto (International Association of Toto and Lotto Organizations).

WLA Lottery Members are organizations licensed or otherwise authorized to conduct lotteries or sports betting operations in a jurisdiction domiciled in a state recognized by the United Nations. The majority of their net revenues must be dedicated to funding education, sports, culture, social programs, community projects, and other good causes in their respective jurisdictions.

WLA Associate Members are suppliers of goods and services to lottery or sports betting organizations whose business practices conform to the aims and objectives of the WLA. Associate Members include suppliers of online and off-line systems, terminals, printers, video lottery terminals, special papers, vending machines, dispensers and drawing machines, telecommunication organizations, ticket printers, game designers, marketing and advertising specialists,

consultants, auditors, trade magazines, and interactive gaming specialists.

The annual budget of the World Lottery Association is approximately CHF 2.5 million (USD 2.54 million), financed by membership subscriptions, the Contributor program, and any surpluses from seminars and the biennial convention.

## Key figures

The number of WLA Lottery Members and Associate Members has varied very little over the years. As of December 31, 2017, the membership included 148 Lottery Members and 74 Associate Members, compared with 146 Lottery Members and 60 Associate Members when the WLA was founded in 1999.

Of today's 74 WLA Associate Members, eight participate in the WLA Contributor program. Currently there are four Platinum Contributors and four Gold Contributors. The WLA Platinum Contributors are *IGT*, *INTRALOT*, *Novomatic Lottery Solutions*, and *Scientific Games*. The WLA Gold Contributors are *500.com*, *Playtech*, *Pollard Banknote*, and *Jumbo Interactive*.

148

Lottery Members

74

Associate Members

\$273bn

WLA Lottery Members generated revenues of USD 273.3 billion in 2016\*.

\$80bn

WLA Lottery Members returned USD 79.7 billion to good causes in 2016\*.

\*

Based on figures provided by 97% of the WLA membership as published in the 2017 edition of the WLA Global Lottery Data Compendium. The sales figures for 2016 are 6.8% higher than for 2015; money to good causes rose by 5.4% over the same period.

## The Platinum Contributors



## The Gold Contributors



# New members

The following new *Lottery Members* were provisionally admitted to the WLA in 2017, subject to approval by the WLA General Meeting in Buenos Aires in November 2018:

## New Lottery Members



Joint-Stock Company  
"Torgoviy Dom  
"Stoloto" (JSC  
TD STOLOTO)  
Russia



La Société  
du Pari Mutuel  
Urbain Mali  
(PMU MALI)  
Mali



National Lottery  
JSC  
Bulgaria



New Hampshire  
Lottery  
Commission  
United States



Ukrainian  
National Lottery  
Ukraine



Vietnam Lottery  
Company  
(Vietlott)  
Vietnam

The Executive Committee also approved applications for *associate membership* from the following lottery suppliers:

## New Associate Members



Beijing  
ZCSS Culture  
Diffusion  
Co., Ltd.  
China



Boldt  
Gaming S. A.  
Argentina



China  
LotSynergy  
Holdings  
Limited  
China



China Sports  
Lottery  
Printing Co.  
China



Philippine  
Gaming  
Management  
Corporation  
Philippines

# The WLA Executive Committee

The WLA Executive Committee met three times in 2017, in Geneva, Switzerland (March 10), Napa Valley, California (June 29), and Hong Kong (November 16).

*Andy Duncan*, the former CEO of Camelot UK Lotteries, the UK National Lottery operator, left the Committee after serving since 2014. Mr. Duncan's seat has been taken by *Nigel Railton*, who was formerly CEO of Camelot Global and was officially appointed CEO of both Camelot Global and Camelot UK Lotteries in June 2017. In accordance with the WLA's by-laws, Mr. Railton was appointed by the Executive Committee and will serve for the remainder of Mr. Duncan's term. WLA Vice President *Marion Caspers-Merk* announced her intention to stand down from the Executive Committee at the end of 2017, upon her retirement from the position of CEO of Staatliche Toto-Lotto GmbH Baden-Württemberg, Germany, having served on the Committee since 2015.

The WLA thanks *Andy Duncan* and *Marion Caspers-Merk* for their commitment to the Association and the worldwide lottery community.

## WLA President



**Jean-Luc Moner-Banet**  
CEO  
Société de la Loterie  
de la Suisse Romande  
Switzerland

## WLA Senior Vice President



**Rebecca Paul Hargrove**  
President and CEO  
Tennessee Education Lottery  
Corporation  
United States

## WLA Vice President



**Marion Caspers-Merk**  
CEO  
Staatliche Toto-Lotto GmbH  
Baden-Württemberg  
Germany

## Elected members of the WLA Executive Committee



**Fabio Cairoli**  
Chairman and CEO  
Lottomatica  
Italy



**Richard Cheung**  
Executive Director,  
Customer and  
Marketing  
HKJC Lotteries Limited  
Hong Kong



**Inmaculada García**  
Chairman & CEO  
Sociedad Estatal  
Loterías y Apuestas del  
Estado (SELAE)  
Spain



**Alfredo Monaco**  
President  
Asociación de Loterías,  
Quinielas y Casinos  
Estatales de Argentina  
(A.L.E.A.)  
Argentina



**Nigel Railton**  
CEO  
Camelot UK Lotteries  
Limited  
The National Lottery  
United Kingdom

## Members of the WLA Executive Committee appointed by the regional associations



**Luis Gama**  
Director  
Dirección Nacional  
de Loterías y Quinielas  
(D.N.L.Q.)  
Uruguay  
*(representing the  
Corporación  
Iberoamericana de  
Loterías y Apuestas  
del Estado)*



**David Loeb**  
President  
Western Canada  
Lottery Corporation  
Canada  
*(representing the  
North American  
Association of State  
and Provincial  
Lotteries)*



**Dato Lawrence Lim  
Swee Lin**  
CEO  
Magnum Corporation  
Sdn Bhd (MCSB)  
Malaysia  
*(representing the  
Asia Pacific Lottery  
Association)*



**Younes El Mechrafi**  
General Director  
La Marocaine des Jeux  
et des Sports (MDJS)  
Morocco  
*(representing  
the African Lottery  
Association)*



**Stéphane Pallez**  
President and CEO  
La Française des Jeux  
(FDJ)  
France  
*(representing the  
European Lotteries)*

# Continuing education

Throughout 2017, the WLA supported the professional development efforts of member lotteries and supplier organization, working with the regional lottery associations to offer a varied program of seminars aimed at lottery professionals at middle management level.

## Seminar program 2017

The seminars run by the WLA Academy continued to attract lottery professionals from all over the world. A total of 764 people took part in the 2017 seminar program (*see table opposite*), with attendance ranging from 50 for the WLA Security Control Standard and Certification Workshop in Zurich, Switzerland to 174 for the EL/WLA Marketing Seminar in London, UK.

Most WLA seminars are organized in cooperation with the regional lottery associations. In 2017, these joint seminars ranged from the traditional marketing seminar with EL in London to a joint analysis of the impact of the digital transformation with APLA in China. Seminars on security and integrity were organized in Latin America and Europe.

The EL/WLA marketing seminar in London touched on three key topics: big jackpots (the pros and cons, and the dangers of jackpot fatigue); communities and engagement (particularly through social media and gamification); and big data (omni-channel marketing and the importance of occupying the online space). The joint APLA/WLA seminar in Chengdu, China, included keynotes from outside the lottery industry and helped participants understand the management challenges and opportunities of digital transformation and disruptive business models. Panel sessions covered omni-channel sales, social media, and the role of regulation and legislation, with panel members from Europe as well as the Asia Pacific region. Another popular event was the two-day security and

integrity seminar in Buenos Aires in March, which attracted about 100 people. As well as briefing attendees on the practicalities of certification to the WLA Security Control Standard, the key takeaway from the sessions was the crucial importance of embedding security and integrity within an organization's everyday practices, processes, and culture.

Further details of past WLA Academy events, together with selected speaker presentations, are available to members on the WLA website.

## Seminar program 2018

The detailed program of seminars and training opportunities for staff from WLA member organizations in 2018 was nearing completion as this publication went to press.

The first seminar of the year will be the joint EL/WLA Marketing Seminar in London from February 7–9, 2018. The 2018 seminar will focus on the implications for lottery marketers of the emergence of new business models based on small clusters of niches, competitors and individuals rather than mass audiences.

The 2018 seminar program will cover all the key challenges facing the sector, from marketing and cybersecurity to sports integrity and responsible gaming. The full program of educational events can be consulted on the WLA website at [www.world-lotteries.org](http://www.world-lotteries.org).

*WLA seminars attracted lottery professionals from all over the world, with a total of 764 people taking part in 2017.*





## The full 2017 line-up of seminars and workshops

Date	Topic	Location	Organizers
February	<b>Marketing</b>	London, UK	EL/WLA
March	<b>Security and integrity</b>	Buenos Aires, Argentina	CIBELAE/WLA
April	<b>Security certification workshop</b> <b>Digital transformation</b>	Zurich, Switzerland Chengdu, China	WLA APLA/WLA
May	<b>Sports betting</b>	Sweden, Stockholm	EL/WLA
June	<b>Language and presentation skills</b>	York, UK	WLA
September	<b>Responsible gaming</b>	Madrid, Spain	EL/WLA
October	<b>Security and integrity</b>	Oslo, Norway	EL/WLA



### The WLA scholarship program

The scholarship program was launched in 2013 to encourage lottery professionals around the world to participate as speakers and delegates at WLA seminars, offering the chance to take part in educational events that they would probably not be able to attend otherwise.

Since the program began in 2013, a total of 108 people have taken part, with 18 benefitting in 2017 alone. The overall breakdown of scholars by regional association for 2017 is as follows:

NASPL	7
CIBELAE	4
APLA	3
EL	2
ALA	1
Independent	1
<b>Total</b>	<b>18</b>

The WLA will continue to support the scholarship program in 2018 as an additional opportunity to fulfill the Association's mandate as an inclusive, global organization and to bring the membership the broadest possible range of insights and lottery experiences.

Lotteries should contact the WLA business office in Basel (e-mail: [info@world-lotteries.org](mailto:info@world-lotteries.org) Telephone: +41 61 544 1100) if they wish to propose candidates for the WLA Scholarship program in 2018.



# WLA business activities and

One of the aims of the WLA is to help the global lottery industry speak with a united voice and act in a coordinated fashion on lottery-related issues that have a global dimension.

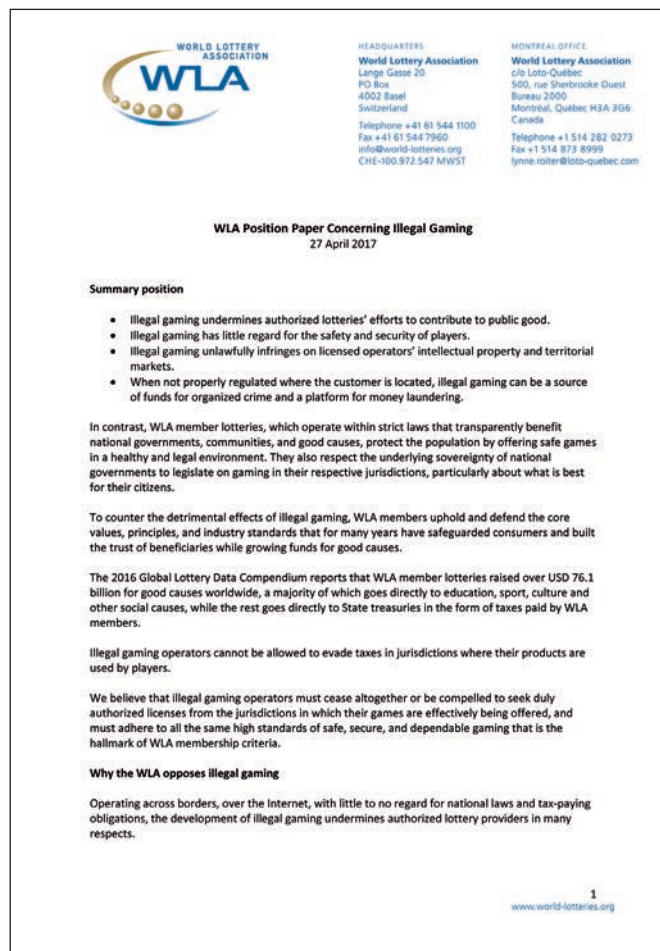
## The threat of illegal gaming

All state-licensed lotteries around the world face a threat from operators that are not authorized by local regulators to offer gaming products or services in their respective jurisdictions. Territorial integrity is therefore a core principle of the global lottery industry. As a result, the WLA periodically reviews the tools and resources available to help members uphold that principle with stakeholders in every region.

At the beginning of 2017, the WLA published a position paper on illegal gaming. This document is intended to be relevant to all regions and is freely accessible on the WLA website.

The WLA position paper characterizes the threat in terms of the potential damage to fiscal revenues and community fundraising, player safety and security, the intellectual property of state-authorized operators, and organized crime and money laundering.

The scope and timing of the 2017 publication are particularly appropriate in view of the increasing availability of “lottery betting”, in which illegal operators offer players a chance to bet on the outcomes of state lotteries without actually taking part in those games. To help fight this threat in particular, but also to spearhead efforts to tackle illegal gaming operations in general, the WLA in the middle of 2017 set up a dedicated task force chaired by *Rebecca Paul Hargrove* and with *Marion Caspers-Merk* and *Stéphane Pallez* as members. The illegal gaming task force is supported by WLA Executive Director *Philip Springuel* and WLA General Secretary *Lynne Roiter*. Throughout the year, the task force liaised with members and associate members and has



The WLA published a position paper on illegal gaming at the beginning of 2017.

defined an action plan for effective and rapid global stakeholder advocacy on the subject of illegal gaming.

The task force's action plan includes measures to raise public awareness and elicit the support of the playing public, retailers, and beneficiaries of lottery funding. It also provides a framework for coordinating efforts to influence policymakers and pursue legal actions when appropriate. The work of the task force on illegal gaming continues in 2018.

## Sports integrity

The lottery industry is a key stakeholder in the fight to keep sports fair and honest. Sports integrity is a core value of the lottery community, not least because more than half of the world's state-licensed lotteries offer sports betting

products to their customers. Efforts to support the fight against match fixing therefore cannot be dissociated from the WLA's dedication to gaming responsibility, and they continued to mobilize industry leaders in 2017.

## Global Lottery Monitoring System



The Global Lottery Monitoring System (GLMS) went live in 2015 and has gone from strength to strength, signing agreements with sports federations and partners and consolidating the system's global reach. It is now capable of moni-

# achievements 2017

toring 1 million odds every 5 minutes on football alone.

The GLMS is an independent association. At the end of 2017, 29 lottery and sports betting operators from around the world were members. It has its own Executive Committee comprising professionals from member lotteries which offer sports betting, and a General Secretary responsible for public relations, marketing, stakeholder relations, and administrative matters. *Seah Chin Siong* of Singapore Pools stepped down as President of GLMS in 2017 and *Ludovico Calvi* of Lottomatica, Italy, has taken his place. *Thierry Pujol* also stood down as Vice Chair of GLMS in 2017 upon his retirement from La Française des Jeux. The current line-up of the GLMS Executive Committee is as follows:

- Ludovico Calvi, Italy (President)
- Younes El Mechrafi, Morocco (Secretary)
- Sami Kauhanen, Finland (Treasurer)
- Edmundo Dupre Echevarria, Chile
- How Sheng Lee, Singapore
- Jannie Haek, Belgium
- Niels Erik Folmann, Denmark
- Rupert Bolingbroke, Hong Kong

The operational headquarters of the GLMS are located at Danske Spil's facility in Copenhagen, where the Danish lottery was already hosting the original system created by EL in 2005.

The first in a series of regional GLMS hubs went live in Hong Kong on January 1, 2018. The new Asian hub – hosted by the Hong Kong Jockey Club – further establishes GLMS as a credible and effective solution for stakeholders, including the Council of Europe, sports federations, the Olympic movement, and law enforcement authorities worldwide.

In December 2017, GLMS organized a workshop in Paris which attracted a total of 70 participants, including more than

## Organization and governance

The WLA is an international, non-governmental, non-profit organization, incorporated under Swiss law and headquartered in Basel, Switzerland. The WLA Executive Committee, which oversees the association, has 13 members. Eight of the members, including the President, are elected by the delegates of the WLA's biennial General Meeting. The other five members are appointed by the five regional lottery associations:

- ALA (Africa)
- APLA (Asia Pacific)
- CIBELAE (Latin America)
- EL (Europe), and
- NASPL (North America)

The Senior Vice President and Vice President of the Association are appointed by the WLA Executive Committee.

The Executive Director of the Association reports to the WLA Executive

Committee and is based in Basel with seven staff members. The WLA also has an office in Montreal, Canada consisting of a General Secretary with one staff member.

### Mission and objectives

The mission of the World Lottery Association is to advance the interests of its members as the recognized global authority on the state-authorized lottery sector, uphold the highest ethical principles, and support members in achieving their vision for their own communities.

The WLA's core objectives are to create opportunities for learning and information sharing among members, establish global standards of best practice and ethical conduct, and provide a united voice, together with the regional associations, so that members can convey consistent messages to their stakeholders.

50 traders and odds managers from some 25 countries around the world. During the workshop, the organizers announced the new partnership with TXODDS, which has replaced Sportradar as the GLMS technology partner, effective January 1, 2018. The press conference held at the end of the Paris workshop led to positive media coverage in France and Switzerland.

In 2017, GLMS concluded a formal partnership with FIFA and also reached an agreement with the International Olympic Committee (IOC) for the monitoring of the PyeongChang 2018 Winter Olympics.

Further information is available on the GLMS website <http://glms-sport.org/>

To contact the organization, email [info@glms-sport.org](mailto:info@glms-sport.org)

## Information and communication

### Online presence

The WLA website at [www.world-lotteries.org](http://www.world-lotteries.org) continues to be one of the most valuable sources of information on global lottery industry issues for members and non-members alike. The website is constantly updated with lottery news, details about WLA events and member services, links to other relevant content, and discussion papers. It is also a central repository for application forms and informational documents about the WLA Security Control Standard and the WLA Responsible Gaming Framework.

Content is in English, with key documents also available in the WLA's other official languages (French, German, and Spanish).



Two issues of the WLA Magazine were published in 2017, with a range of feature articles on strategic and marketing-related issues, as well as Association news updates, a full report on the 2016 World Lottery Summit in Singapore, a selection of WLA Academy seminar reports and industry insights from WLA Contributors.

WLA information services include the WLA Quarterly Lottery Sales Indicator and the WLA Global Lottery Data Compendium. The Quarterly Lottery Sales Indicator can be accessed freely on the website. Registered members can also access the Global Lottery Data Compendium and download a range of guides and other documents not available to the public.

Traffic to the site is relatively stable and is expected to increase over the long term. As more reliable web monitoring and

analytics tools become available, meaningful indicators of visitor numbers, page hits, etc. will help the website team to monitor usage, adapt site content and structure, and optimize the user experience for members and other stakeholders.

A dedicated website has been launched for the biennial World Lottery Summit at [www.worldlotterysummit.org](http://www.worldlotterysummit.org). The same URL will also be used for future World Lottery Summits.

**Print magazine**

The WLA Magazine is published in English twice a year with a print run of 2,500. Copies are mailed to all Lottery Members and Associate Members and are distributed at all major WLA events. Advertising by WLA Associate Members continues to attract strong interest and helps to cover production and distribution costs.

The first issue of 2017 offered extensive coverage of the World Lottery Summit in Singapore as well as a report on the Sports Integrity Conference in Geneva at the end of 2016. The summer issue car-

ried a feature on illegal lottery betting schemes as well as a cover story on the expansion of “play at the pump” lottery sales at gas stations across America.

The magazine also provides updates on the WLA Academy program, with recent seminar reports and news of upcoming professional development events, while the regular Corporate News section offers associate members an opportunity to share industry insights and in-depth analysis of strategic issues.

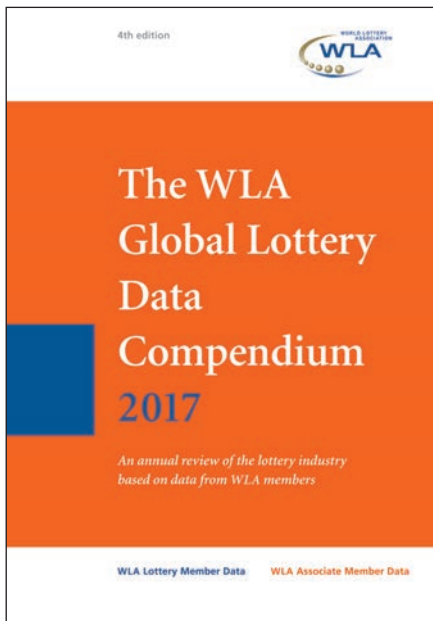
**Global Lottery Data Compendium**

WLA Lottery Members and external stakeholders continue to demand accurate, reliable data on the worldwide lottery industry. First published in 2014, the WLA Global Lottery Data Compendium provides statistics on sales and support for good causes by the vast majority of state lottery operators.

The 2017 edition, published in early 2018, includes key performance indicators provided by 97% of WLA Lottery Members as well as statistics from 99% of Associate Members. This virtually ex-



The WLA website is a popular source of information on global lottery industry issues and statistics for members and non-members alike.



### North America/The Caribbean: Regional Profile

**Table 1. Key summary statistics for the North America/The Caribbean region.**

**Summary**  
North American lotteries sold, in aggregate, approximately US\$2 793 billion in traditional lottery products in 2016 and transferred approximately US\$2 148 billion to beneficiaries.<sup>1</sup> WLA Lottery Members in North America/The Caribbean contributed US\$2 394 billion and US\$2 21 billion towards these totals respectively.<sup>2</sup> In both the US and Canada, lotteries are organized at either the state (US) or provincial (Canadian) level. In Canada, the provinces operate all legal gambling, including casinos. In the US, all but six state-operated lotteries<sup>3</sup> and individual states may also allow other forms of gambling not operated by the state. Instant games and draw-based games sold through an extensive retailer network account for the majority of lottery sales. The bulk of monies raised for good causes are returned to the state or provincial government, and may be dedicated to specific good causes such as education. Responsible gaming and player protection measures are developed to varying degrees across the many jurisdictions.

**History**  
Although lotteries of various sorts were conducted in North America in the eighteenth and nineteenth centuries, by the middle of the twentieth century there were no legal lotteries in the US or Canada. The islands of the Caribbean were among the first to introduce modern state-sanctioned lotteries. The lottery of the US territory of Puerto Rico has been continuously active since 1854.

**Most gambling, other than betting on horse races, was illegal in the US states during the same period that saw the prohibition of alcoholic beverages (1920-1933). Repeat of alcohol prohibition was not generally accompanied by repeal of the prohibitions on gambling. Illegal gambling, conducted by organized criminal networks, was a significant business. In this context, a rationale for state-sanctioned lotteries was to recognize that since prohibition had resulted in strengthening criminal enterprises, ending legal gambling available might weaken those same enterprises. US states began to introduce legal lotteries in the US or Canada. Since 1969, several East-coast states followed. Games that still survive from this early period include the three-digits' numbers' game, which had been a mainstay of the illegal gambling business.**

**Between 1969 and 1983, both the Federal Government of Canada and the individual**

**North America/The Caribbean at a glance<sup>11</sup>**

Demographics	Population <sup>1</sup>	363.63 million
Median age (years) <sup>2</sup>	38.5	
GDP PPP (USD) <sup>3</sup>	25.93 trillion	
FC GDP PPP (USD) <sup>4</sup>	55,960	
Real GDP growth (%) <sup>5</sup>	1.5	
FC Market share <sup>6</sup>	1.2	
Government assets (%) <sup>7</sup>	27.5	
2016 Total sales (USD) <sup>8</sup>	29.54 billion	
2016 (adjusted) global share of sales (%) <sup>9</sup>	27.1	
2016 Total monies to good causes (USD) <sup>10</sup>	24.77 billion	

**Footnotes:**  
<sup>1</sup> North America/The Caribbean region of all major countries within western and central North America/The Caribbean where WLA Member lotteries are operating and all countries in North America/The Caribbean.  
<sup>2</sup> Not all representative information related to the North America/The Caribbean region of a given country statistics, see those if any are listed.  
<sup>3</sup> Excludes US territories.  
<sup>4</sup> Excludes US territories.  
<sup>5</sup> Excludes US territories.  
<sup>6</sup> Excludes US territories.  
<sup>7</sup> Excludes US territories.  
<sup>8</sup> Excludes US territories.  
<sup>9</sup> Excludes US territories.  
<sup>10</sup> Excludes US territories.

The WLA Global Lottery Data Compendium continues to be the most authoritative and accurate dataset on the global lottery industry. The latest edition includes key performance indicators provided by 97% of WLA Lottery Members, statistics from 99% of Associate Members, and a profile of the lottery industry in each of the five major regions.

haustive coverage is one of the major strengths of the publication, making it the most authoritative and accurate dataset compiled on the global lottery industry to date.

One innovation in the 2017 edition is the inclusion of regional profiles. For each of the five regions of the world, the latest Data Compendium includes a brief history of the lottery industry, its current status and regulatory environment, and an introduction to the corresponding regional lottery association. Other regional-level data includes the most prominent and popular products in the region and the main priorities of the region's state lottery operators in terms of distribution of funds to good causes. The overall status of corporate social responsibility and responsible gaming initiatives in the region is described and the most recent trends in each region are briefly highlighted.

All of the information reported in the Data Compendium is sourced directly from WLA members and checked for accuracy and completeness. The indicators

are carefully selected to assure compliance with competition laws.

As well as providing valuable business intelligence for WLA Associate Members, the Data Compendium further consolidates the WLA's unifying role within the global lottery industry and helps to promote the core societal objectives of Member Lotteries.

### WLA Quarterly Lottery Sales Indicator

Every quarter, the WLA collects and compiles lottery sales data from WLA members around the world. Currently 37 lotteries, representing approximately 60% of global lottery sales by volume, provide these figures to the WLA on a quarterly basis. The data is aggregated and published as the WLA Quarterly Lottery Sales Indicator to provide lotteries, suppliers, and the general public with a snapshot of shorter-term global and regional sales trends.

Now in its seventh year, the WLA Quarterly Lottery Sales Indicator is regularly quoted as a source in the trade press and is consulted frequently on the WLA website.

## Global standards

### WLA Security Control Standard

The WLA Security Control Standard was first developed in 2003 and is now in its fourth iteration (WLA-SCS:2016).

Currently, a total of 70 WLA Member Lotteries from around the world are certified to the WLA-SCS, compared with 67 at the end of 2016. Of these, 48 are based in Europe, 12 in Asia-Pacific, 4 in Africa, 3 in Latin America and 3 in North America.

Certification has also been open to WLA Associate Members since 2008. At end-2017, a total of 17 Associate Members were certified to WLA-SCS, compared with 13 in 2016.

As its interest in WLA-SCS certification has increased, the number of WLA-approved assessment service entities and auditors has grown to ensure that certification is readily accessible to lotteries and suppliers in every region. There are currently 23 assessment service entities and more than 60 approved auditors around the world.



A total of 70 WLA Member Lotteries from around the world are certified to the WLA Security Control Standard, which is now in its fourth iteration (WLA-SCS:2016).



Thierry Pujol, former Director of Sport Integrity at La Française des Jeux, France



Carlos Bachmaier, Head of Risk, Continuity and Personal Data Protection Management at SELAE, Spain.

Thierry Pujol stood down as Chair of the WLA's Security and Risk Management Committee after 10 years in the role, and has been replaced by the former Vice Chair, Carlos Bachmaier.

The standard is developed and maintained by the WLA Security and Risk Management Committee (SRMC), an international group of 20 top security professionals from WLA member lotteries around the globe. *Thierry Pujol* stood down as Chair of the SRMC in 2017 after 10 years in the role, and has been replaced by the former Vice Chair, *Carlos Bachmaier*, Head of Risk, Continuity and Personal Data Protection Management at SELAE, Spain. *Driss Hamdoune*, General Secretary of La Marocaine des Jeux et des Sports, Morocco, was elected to replace Mr. Bachmaier as Vice Chair.

The SRMC is also taking steps to gain official ISO recognition for the WLA-SCS, building on the ISO International Workshop Agreement (ISO IWA) that was formally initiated in 2014. When

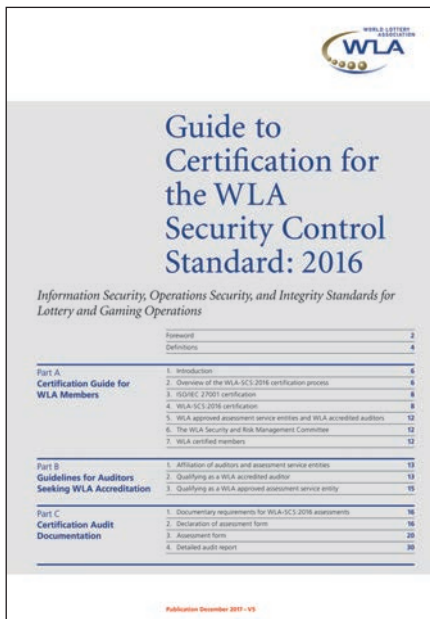
completed, the agreement will consolidate the WLA-SCS's position as the lottery sector's only internationally recognized security standard.

A certification stakeholders workshop was held in Zurich in April 2017. This one-day event was an opportunity for stakeholders to share experiences and learn more about the history and objectives of WLA-SCS certification. It was well-attended, attracting participants from lotteries, supplier organizations, and standards institutes from Europe, North America, and Africa.

The formation of a cybersecurity working group within the WLA Security and Risk Management Committee (SRMC) was also initiated in 2017. With the continuing expansion of businesses into the online sphere in recent years, the impor-

tance of cybersecurity has increased accordingly. The working group, which is led by *David Boda*, head of information security at Camelot and a member of the SRMC, comprises security professionals from eight different lotteries around the globe. The aim of the working group is to share information on cyber threats and the measures being taken to defend against them, and to establish an information platform to help better defend state lotteries across the globe against cyber attacks.

Based on a cybersecurity survey that was launched at the WLA/EL security seminar in Oslo, Norway, in October 2017, the group will work to produce a whitepaper on cybersecurity in 2018. The whitepaper will take the anonymous, aggregated data of the survey and produce a document that will allow mem-



Practical guides, templates and informational documents about the WLA's Security Control Standard and Responsible Gaming Framework are available on the WLA website.



Well over 60% of lotteries, representing more than 86% of global lottery revenues, are certified to level 2 through 4 of the WLA's Responsible Gaming Framework.

ber lotteries to benchmark themselves against the industry as a whole in order to know where they stand on cybersecurity. A special parallel session on cyberattacks, led by the WLA cybersecurity working group, has been planned for the 2018 World Lottery Summit in Buenos Aires. With these efforts, the group is working to raise the bar on cybersecurity across the lottery sector.

### WLA Responsible Gaming Framework

More than ten years after the WLA Responsible Gaming Framework (WLA-RGF) was ratified by the delegates of the 2006 General Meeting in Singapore, the number of certified lotteries continues to rise. At the end of 2017, a total of 85 member lotteries were certified to the WLA-RGF at levels 2 through 4 (compared with 81 at end-2016), including 58

at the highest level (compared with 50 at end-2016).

The objective of the benchmarking exercise undertaken in 2015, namely for 60% of lotteries representing 86% of global lottery revenues be certified to level 2 through 4 by May 2017, had already been achieved in 2016 and has now been exceeded. WLA-RGF certification is valid for three years. To retain certified status after three years, organizations need to provide material evidence of continued compliance with the criteria for the same level or a higher level of certification.

The WLA Responsible Gaming Framework is administered by 11 international professionals dedicated to the development and maintenance of global standards of responsible gaming practice. These 11 individuals are divided into

three groups, namely: the WLA Corporate Social Responsibility Committee, the WLA Responsible Gaming Independent Assessment Panel (IAP), and the WLA Responsible Gaming Working Group. Each of these groups individually performs a distinct function; together they form the backbone of the WLA's responsible gaming program.

The WLA Corporate Social Responsibility Committee manages the continuous development of the WLA-RGF, overseeing member accreditation in accordance with the recommendations of the IAP and lending guidance to the WLA Responsible Gaming Working Group. *Rebecca Paul Hargrove* from the Tennessee Education Lottery Corporation took over as Chair of the Committee when *Andy Duncan* left Camelot UK Lotteries in 2017.

The Independent Assessment Panel (IAP) evaluates individual certification submissions by Lottery Members. The sustainability expert *Anne Pattberg* continued to serve as Chair of the panel in 2017, alongside *Robert Ladouceur* of Canada, an acclaimed researcher into problem gaming prevention and treatment, and lottery veteran *Henry Chan*, formerly of the Hong Kong Jockey Club, who continued to bring an important Asian perspective on responsible gaming issues.

Coordinated by *Mélissa Azam*, WLA Senior CSR Manager working out of the WLA Montreal Office, the WLA Responsible Gaming Working Group includes members from every region of the world and has helped to produce various responsible gaming guides, case studies, and other relevant documents, many of which are available on the WLA website. The Working Group is currently chaired *ad interim* by *Emilia Mazur* from Lotto New Zealand (during the maternity leave of *Alison Gardner* from Camelot, who has chaired the Group since January 2015), with *Tay Boon Khai* from Singapore Pools representing Asia-Pacific; *Sanaa Kabbaj* from La Marocaine des Jeux et des Sports representing Africa; *Raymond Bovero* from La Française des Jeux and *Stefania Colombo* from Lottomatica representing Europe; *Sandra Conde Gomez de Freitas* from Banca de Cubierta Colectiva de Quinielas de Montevideo representing Central and Latin America; and *Chip Polston* from Kentucky Lottery Corporation representing North America.

Certification of Associate Members is a natural extension of the WLA-RGF program. To achieve this certification, WLA Associate Members must score at least 75% on eight key criteria, and are required to undergo a full assessment every three years to maintain the status of WLA-certified supplier. As at end-2017, three WLA Associate Members have achieved WLA-RGF certification, the same number as at end-2016.

## World Lottery Summit 2018



*"Gaining the edge in the new world" is the theme for the World Lottery Summit in Buenos Aires, Argentina in November 2018.*



The World Lottery Summit (WLS) is held every two years in a different region. After WLS 2016 in Singapore, the 2018 convention will be hosted from November 18–22, 2018 in Buenos Aires, Argentina, by ALEA (Asociación de Loterías, Quinielas y Casinos Estatales de Argentina), the Argentinian association of state lotteries.

Members of the Executive Committee and staff from the Basel office visited Buenos Aires on several occasions in 2017 and worked closely with the or-

ganizers throughout the year to finalize the choice of venues and accommodations, develop the business program and make practical arrangements for the trade show.

The World Lottery Summit is widely recognized as the most important event on the world lottery industry calendar, and the WLA is confident that the event will once again meet the high expectations of the membership.

As this publication went to press, several keynote speakers had already confirmed their participation, the program of parallel sessions was almost complete, and registration was about to open. Practical information for delegates and full details of the business program will be published on the official WLS 2018 website at [www.worldlotterysummit.org](http://www.worldlotterysummit.org) as they become available.

