

Review of the Distribution and Utilisation of National Lottery Funding

Submitted to

**Department of Public Expenditure and
Reform**

Prepared by

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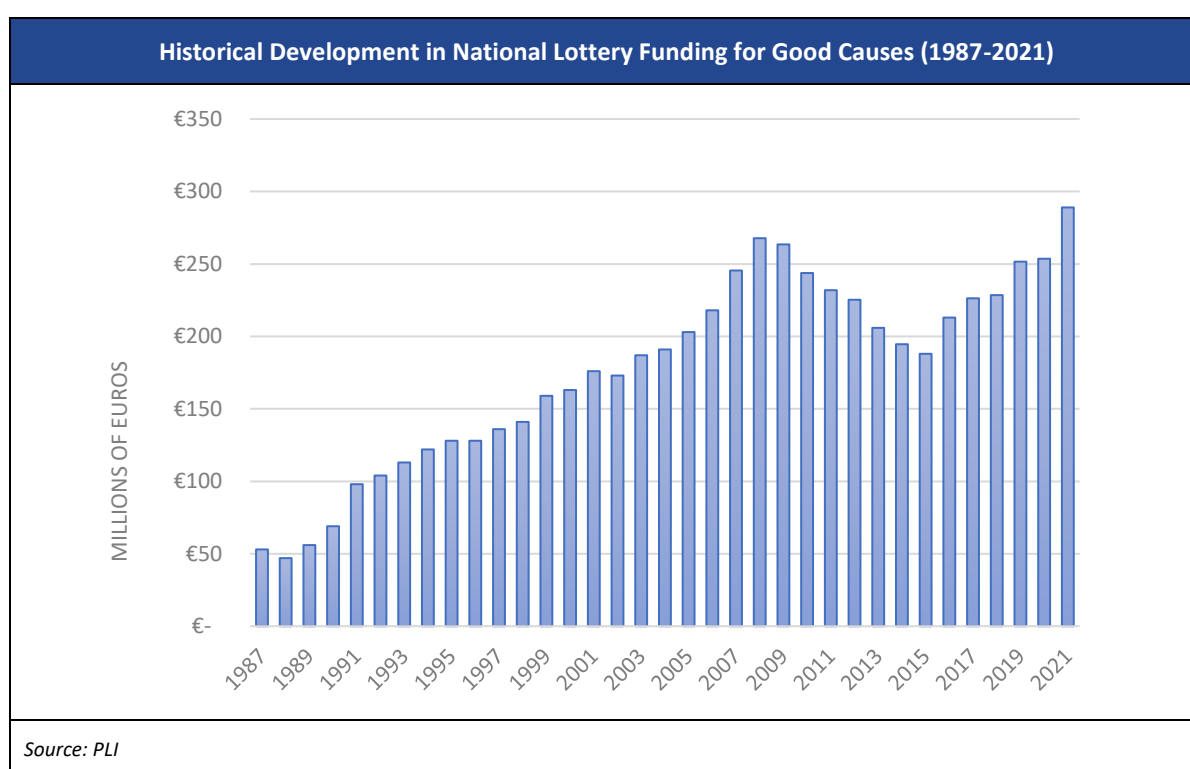
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Executive Summary

Introduction and Overview

According to the terms specified in the National Lottery licence, 65% of Gross Gaming Revenue, which is the total lottery sales minus the total prizes, is passed on to the Exchequer to be disbursed for use by good causes. Projects are in practice only part-funded by the National Lottery, with the remainder paid for by the Exchequer via Government Departments. In 2021, of the €425 million in total expenditure provided to schemes and programmes that received National Lottery funding, €254 million was lottery funds and the remainder from the Exchequer. The National Lottery represents a critical source of revenue for many Irish non-profits, with lottery proceeds representing over one-third of total philanthropic and charitable giving in Ireland in 2021. The annual figure for lottery funding for good causes is shown below.



Current Allocation Procedures

Funding for projects supported by the National Lottery is allocated to five Departments. The next table shows the total expenditure (in millions) provided to each department from the Exchequer and National Lottery from 2017 to 2022, as well as the share of the total that came from National Lottery funding. In 2021, €425m in expenditure was part financed (68%) by National Lottery funds of €289m.

Total allocated budget by Department for projects which are part-funded by National Lottery in €m (2017-2022)

| Vote | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|------------|------------|------------|------------|------------|------------|
| Tourism, Culture, Arts, Gaeltacht, Sport and Media | 166 | 175 | 185 | 182 | 270 | 280 |
| Housing, Local Government and Heritage | 41 | 60 | 64 | 66 | 70 | 78 |
| Health | 15 | 15 | 10 | 8 | 5 | 5 |
| Children, Equality, Disability, Integration and Youth | 60 | 60 | 63 | 66 | 70 | 73 |
| Rural and Community Development | 10 | 5 | 10 | 11 | 11 | 17 |
| Total expenditure | 292 | 315 | 333 | 332 | 425 | 453 |
| <i>Of which National Lottery Funding (%):</i> | <i>77%</i> | <i>73%</i> | <i>76%</i> | <i>77%</i> | <i>68%</i> | <i>-</i> |
| <i>Source: The Revised Estimates Volumes for the Public Service¹</i> | | | | | | |

The current process for the allocation of National Lottery monies is conducted by the Department of Public Expenditure and Reform with the relevant line Departments as part of the estimates process, with schemes identified as being part-funded by the National Lottery, with the remainder being funded by general exchequer resources. We now set out how each department/agency disburses lottery funds.

Department of Tourism, Culture, Arts Gaeltacht, Sport and Media

The Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media operates a number of schemes part-funded by the National Lottery, namely through the Arts Council, Irish language support schemes, grants for sporting bodies and the provision of sports and recreational facilities, and Sport Ireland². The breakdown of expenditure by the Department is shown in the table below.

Department of Tourism, Culture, Arts Gaeltacht, Sport and Media allocated budget by programme €m (2017-2022)

| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2017 -2022 |
|---|------------|------------|------------|------------|------------|------------|--------------|
| The Arts Council | 65 | 68 | 75 | 80 | 130 | 130 | 548 |
| Irish Language Support Schemes | 4 | 5 | 5 | 5 | 8 | 10 | 36 |
| Grants for Sporting Bodies & Provision of Sports & Recreational Facilities | 44 | 42 | 43 | 28 | 28 | 35 | 218 |
| Sport Ireland | 53 | 61 | 62 | 69 | 105 | 106 | 455 |
| Total | 166 | 175 | 185 | 182 | 270 | 280 | 1,258 |
| <i>Source: The Revised Estimates Volumes for the Public Service³</i> | | | | | | | |

¹ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

² <https://www.gov.ie/en/policy/21f19-culture/>

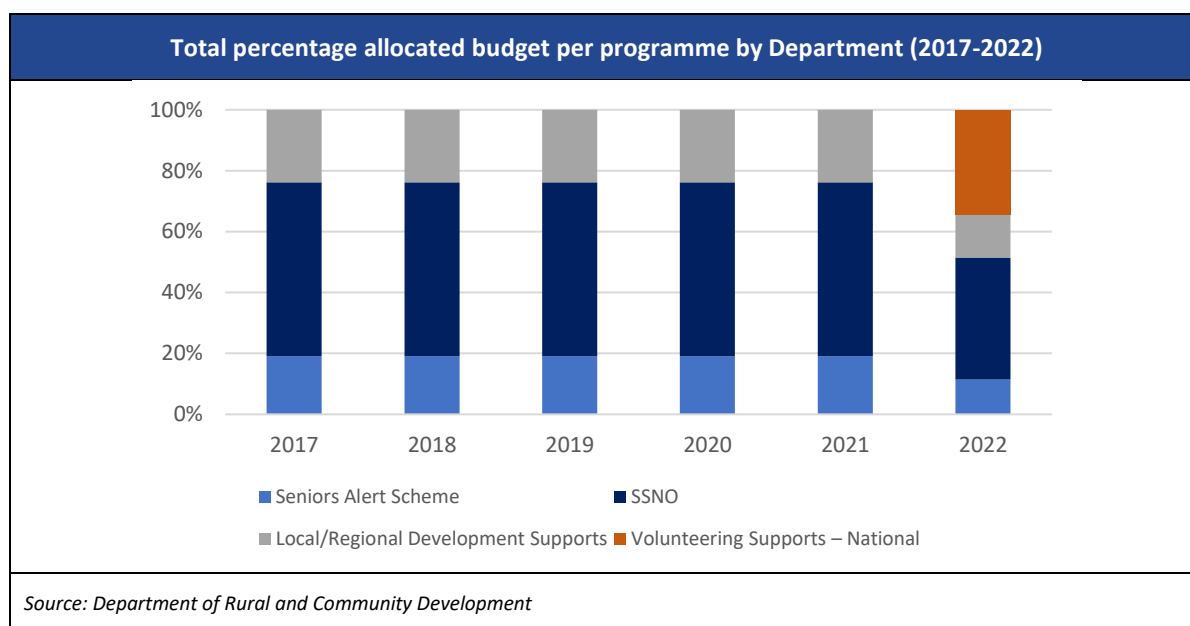
³ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

Department of Rural and Community Development

The Department of Rural and Community Development's goal is to "promote rural and community development" and to encourage "vibrant, inclusive and sustainable communities" throughout Ireland⁴. Some of the department's community development schemes are part funded by the National Lottery, namely, the Senior Alerts Scheme, the Scheme to Support National Organisations, and local/regional community development supports which includes funding to the Society of St Vincent de Paul and Protestant Aid. Each of these is discussed briefly below.

- ❑ Senior Alerts Scheme
- ❑ Scheme to Support National Organisations
- ❑ Local/Regional Community Development Supports

The governance applied to Lottery funded projects by the Department is the same as for other public funding. For example, a Focused Policy Assessment was completed for the Senior Alerts Scheme. A number of these schemes have received the same allocation over the last number of years. The share of spending disbursed to each programme is shown in the next figure. Overall, SSNO funded bodies received the most funding, representing around half of all funding which is partially supported by the National Lottery for that Department.



Department of Housing, Planning and Local Government

The Department of Housing, Local Government and Heritage's has three schemes which are part-funded by the National Lottery, namely Communal Facilities in Housing Projects; Mobility Aids Grant Scheme; and The Heritage Council. The Communal Facilities in Housing Projects has consistently had budget allocations of €0.5 million annually over the last number of years. Private Housing Grants have experienced a steady year on year increase over the six-year period. In the case of Private Housing Grants the total includes allocations for Mobility Aids Grant and 2 other housing grant schemes (Housing Adaptation Grant for People with a Disability and the

⁴ <https://www.gov.ie/en/organisation-information/d0ef42-about-us/>

Housing Aid for Older People Grant. The Heritage Council has increased its level of funding received from the Department in recent years, from 2017 (€6 million) to 2022 (€12 million).

| Department of Housing, Local Government and Heritage allocated budget allocation by programme €m (2017-2022) | | | | | | | |
|--|-------------|-------------|-------------|-------------|-------------|-------------|---------------|
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Total 2017-22 |
| Communal Facilities in Housing Projects | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 3 |
| Private Housing Grants | 34 | 53 | 57 | 59 | 60 | 65 | 328 |
| Heritage Council | 6 | 6 | 7 | 7 | 10 | 12 | 47 |
| Total | 40.5 | 59.5 | 64.5 | 66.5 | 70.5 | 77.5 | 379 |
| <i>Source: The Revised Estimates Volumes for the Public Service⁵</i> | | | | | | | |

Department of Children, Equality, Disability, Integration and Youth

The Department of Children, Equality, Disability, Integration and Youth's main objective is to improve the lives of children, young people, adults, families and communities, appreciating diversity and encouraging equal opportunities⁶. The Department oversees funding from the National Lottery to part-fund grants to community groups and voluntary organisations through the following schemes:

- ☐ UBU Your Place Your Space
- ☐ Youth Services Grant Scheme
- ☐ Youth Information Centres
- ☐ Transition Youth Funding Scheme and Revised Youth Funding Scheme

As these funds are only partially funded by the National Lottery, it is not possible to directly link any specific activity with lottery funding. A small number of individual organisations have indicated to the Department that they do not want to receive lottery funding, and these receive Exchequer only funding. There is no open competition for the funds disbursed to many of the bodies supported by these funds. Youth Organisations and Services received €73 million in funding from the Department of Children and Youth Affairs in 2022.

HSE/Department of Health

Health projects which receive funding from the National Lottery are currently managed by the HSE. The latest published estimates for 2022 shows that National Lottery funding was related to "Health Agencies and other Similar Organisations", with funding of almost €5m. Previous years have also shown funding for the Healthy Ireland fund, though no National Lottery funding has been connected with this scheme since 2018. The HSE run an open application process for the disbursement of lottery funding, with applications invited through a

⁵ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

⁶ <https://www.gov.ie/en/organisation-information/67f5eb-about-the-department-of-children-and-youth-affairs/>

dedicated webpage⁷. The HSE also publish an annual report setting out the names of beneficiary bodies and their location, as well as the amount they received.

International Review

In this section we review the systems in place to allocate lottery money in a number of countries, namely, the UK, New Zealand and Finland. Some of the key features of the practice in these countries of most relevance to Ireland is shown in the table below.

| Summary matrix of selected features of international lotteries | | | |
|--|---|---|--|
| | UK | New Zealand | Finland |
| Structure of beneficiaries | While several organisations are part-funded by the lottery, 40% is allocated through the National Lottery Community Fund (NLCF) | Half of profits go to three statutory bodies; remainder distributed through a range of grants to individual and group applicants. | Divided across three departments, with almost half open to non-profit applicants |
| Reprioritisation | Distribution amounts set out in legislation, though NLCF can identify new priorities | System allows reprioritisation by project and by priority area | Some elements rigid, though re-prioritisation by project and priority area also possible |
| Application process | Open application process for NLCF element of funding | Open application process via online application process | Open application process via Funding Centre for Social Welfare and Health Organisations (STEA) |
| Impact Assessment | Has not been much evaluation of impact, though two recent evaluations published | No specific guidelines or requirements, other than social impact of gambling | Recipients required to provide information on impacts |
| % Distribution to Good Causes | 23% | 23% | 27% |
| Source: Indecon | | | |

The UK National Lottery

The UK's National Lottery supports projects in the arts, sport, heritage, charity, voluntary, health, education and environmental sectors, and distributes approximately £30 million per week for good causes through twelve separate organisations.⁸ For every £1 sales, 23% is spent on good causes, 58% on prizes, 12% on Government lottery duty, with the remainder on operating costs of both operator and retailers.⁹ The allocation to Good

⁷ <https://www2.hse.ie/services/national-lottery-grants/national-lottery-grants.html>

⁸ <https://www.lotterygoodcauses.org.uk/coronavirus-pandemic-response>

⁹ Derived from <https://www.national-lottery.co.uk/life-changing/where-the-money-goes>, accessed on 7th February 2022.

Causes is undertaken by the National Lottery Distribution Fund (NLDF), with other expenditure from the fund split based on a fixed percentage for an identified list of beneficiary organisations/funders.

The National Lottery Community Fund (NLCF) is dedicated to the dispersal of lottery funds and has established structures and principles set out in legislation for this dispersal. Within the wider structure is a National Lottery Community Fund Advisory Group made up of community groups, charities and other funders which meets regularly to identify and discuss key issues facing civil society, with recent discussions centering on the climate emergency, and the organisation's funding approach. The legislation which underpins the fund contains a range of considerations which the NLCF must take into account when distributing money, as set out below. Traditionally, there has not been much evaluation of the impact of the fund, though there have been recent evaluations conducted.

Legislative Principles for UK National Lottery Community Fund

1. **Engagement** – the development of programmes should be based on the active engagement of public, private and voluntary and community sector and social enterprise partners.
2. **Representation** – the development of programmes should take account of those most in need by targeting inequality and improving the capability of people and communities to contribute to, participate in and benefit from outcomes funded through the Fund's programmes.
3. **Sustainability** – a programme's ability to improve the environment today and for future generations and reduce the impact on the environment.
4. **Longer-term benefit** – that projects can achieve longer term financial viability and resilience.
5. **Additionality and complementarity** – the development of programmes and funding of projects should complement, add value and be distinct from the work of other funders and parties working towards the Fund's goals.
6. **Collaborative working** – where this produces better results, the development of programmes and funding of projects should support collaborative action between funded organisations and public, private and civil society partners.

Source: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/141867/BIG_Policy_Directions.pdf

New Zealand: Lotto NZ

Established in 1987, the New Zealand Lotteries Commission operates under the authority of the NZ Gambling Act 2003 and Crown Entities Act 2004.¹⁰ The commission trades as "Lotto NZ" and promotes, organises, and conducts lotteries; makes rules regulating the conduct and operation of those lotteries.⁵⁵ All net profits are transferred to the New Zealand Lottery Grants Board which distributes them to sporting and cultural agencies and other community recipients. Of each dollar received, Lotto NZ spends 55c on prizes, 12c on taxes and 10c on costs and fees. The remaining 23c profit is distributed to public causes and projects in the form of grants by the NZ Lottery Grants Board.¹¹

The Department of Internal Affairs oversees the Lottery Grants Board and has a dedicated staff to support the applications process.⁵⁶ The board itself is not independent from Government, with membership of the board

¹⁰ <https://www.treasury.govt.nz/information-and-services/commercial-portfolio-and-advice/commercial-portfolio/new-zealand-lotteries-commission>

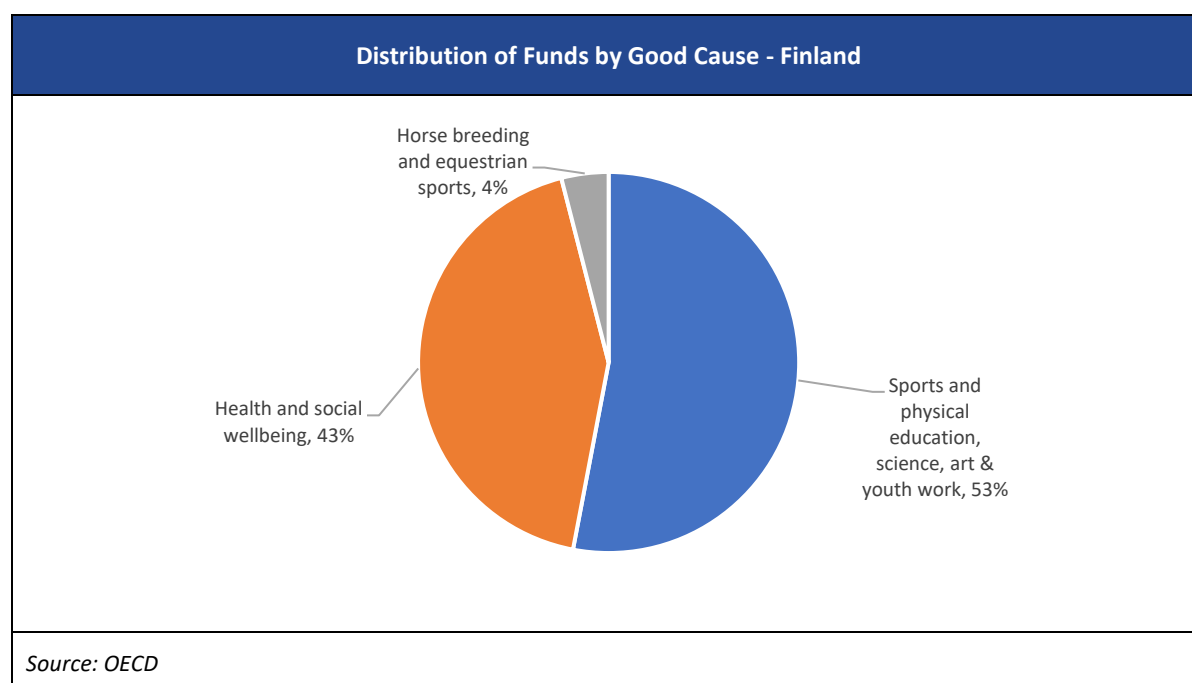
¹¹ <https://mylotto.co.nz/community-funding>

including a Minister, the Prime Minister, the Leader of the Opposition, and three appointees who are selected based on knowledge, skills, and experience relating to the functions and powers of the Board. Approximately half of all profits go to three statutory bodies, namely Creative New Zealand; Sport New Zealand; and the New Zealand Film Commission. The remaining profits are distributed through a range of grants to individual and group applicants.¹² In distributing funds, the board can appoint distribution committees, which consist of 3-5 members who are all appointed by the Minister. There are currently 20 distribution committees distributing grants on behalf of the board.¹³ The system in New Zealand allows for a reprioritisation of resources, both across projects and by priority area.

Applications to the various funds that exist can be made directly to the Lottery Grants Board. The Community Matters website¹⁴ provides a central point where organisations can apply for funding for National Lottery funds, while also distributing funds from other public and philanthropic sources. Projects that have had lottery grant funding must acknowledge the Lottery Grants Board's support in any publicity materials, such as event programmes or annual reports. There is some evidence of beneficiaries being required to report on impacts as a condition of receipt of New Zealand Lottery grants. There is a results report which focuses on: what happened; who benefitted; what outcomes were achieved and evidence for same; how many people benefitted or participated; and details of any feedback received.

Finland: Veikkaus

Veikkaus is the Finnish government-owned betting agency, which holds a monopoly to provide gambling services in Finland. As well as the Finnish Lottery, Veikkaus is also responsible for electronic gambling machines, casinos and betting. It allocates 27% of money generated by ticket sales to Good Causes.¹⁵ The allocation of this funding as determined by legislation is set out in the following graph:



¹² <https://www.communitymatters.govt.nz/lottery-grants-board/>

¹³ <https://www.communitymatters.govt.nz/ask-us/view/564>

¹⁴ <https://www.communitymatters.govt.nz/>. An example of one of the pages of this website is shown in the annex to this report.

¹⁵ <https://www.euro-jackpot.net/en/good-causes>

Three Government ministries are charged with distributing this funding. The Ministry of Education and Culture, allocates funds for the promotion of sports and physical education, science, art and youth work out of the proceeds. As such, while the system has a certain degree of inflexibility in terms of allocation across priority area, the 10% annual allocation allows for the reprioritisation of funds on an annual basis.

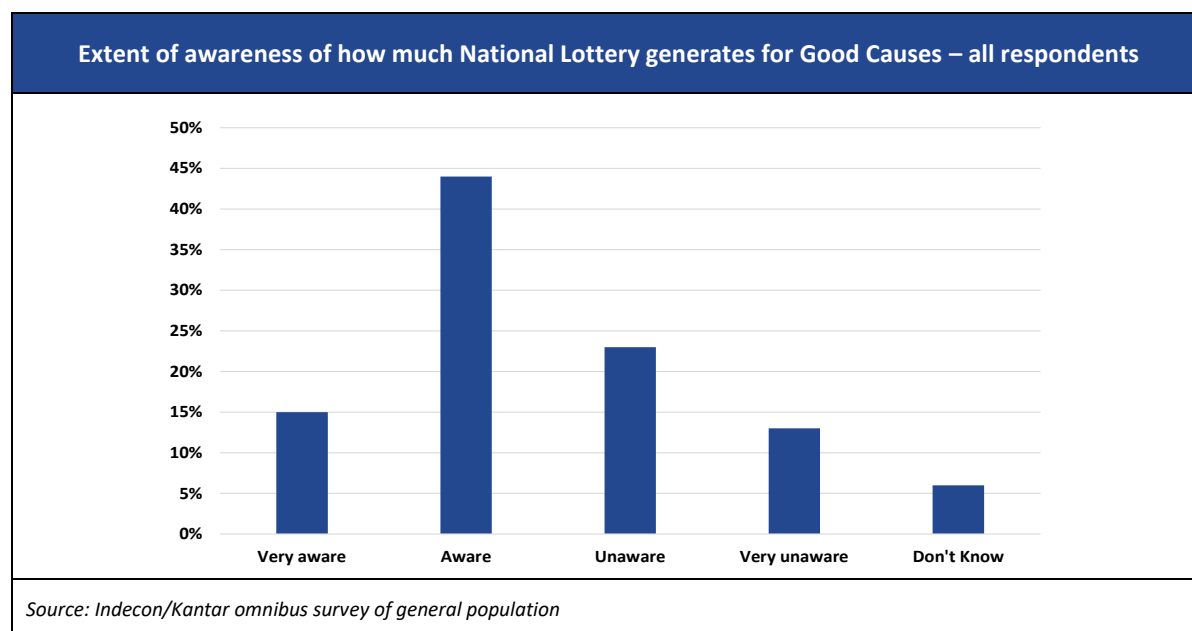
The second tranche of money is distributed by the Funding Centre for Social Welfare and Health Organisations (STEA),¹⁶ which operates under the Ministry of Social Affairs and Health, and is tasked with preparing, paying, monitoring and overseeing grants for the promotion of health and social wellbeing.¹⁷ STEA is the most significant funding operator for Finnish organisational operations within social and health services. Funding is not intended for the use of statutory public services, or anything that approaches a commercial activity. Organisations receive grants for general or targeted activities, investments, development projects, introductory projects and other projects with a defined purpose.

The Ministry of Agriculture and Forestry decides on the distribution of the grants awarded for the promotion of horse breeding and equestrian sports out of the proceeds. The proportioning of this money is based on historical considerations, with at least 95 per cent of the proceeds for the promotion of horse breeding and equestrian sports allocated to the Finnish trotting and breeding association and its member organisations.

In terms of social impact, as with New Zealand a lot of emphasis in Finland is placed on avoiding and reducing the economic, social and health-related harm resulting from participation in lotteries. However, STEA also monitors changes and the general development of health and social welfare and non-profit organisation sectors.

Awareness of Good Causes Funding

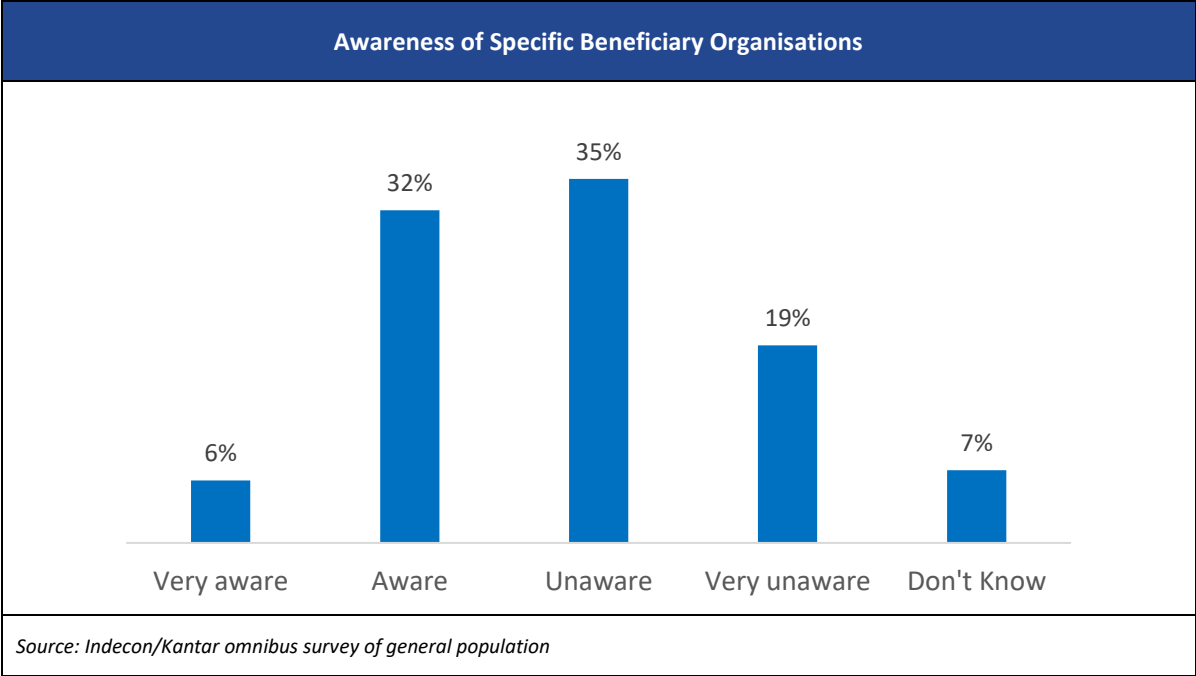
There was a high level of reported understanding that the National Lottery generated significant sums annually for good causes as illustrated below. It shows that three in five members of the population said that they were aware or very aware of the extent of support that the National Lottery provides.



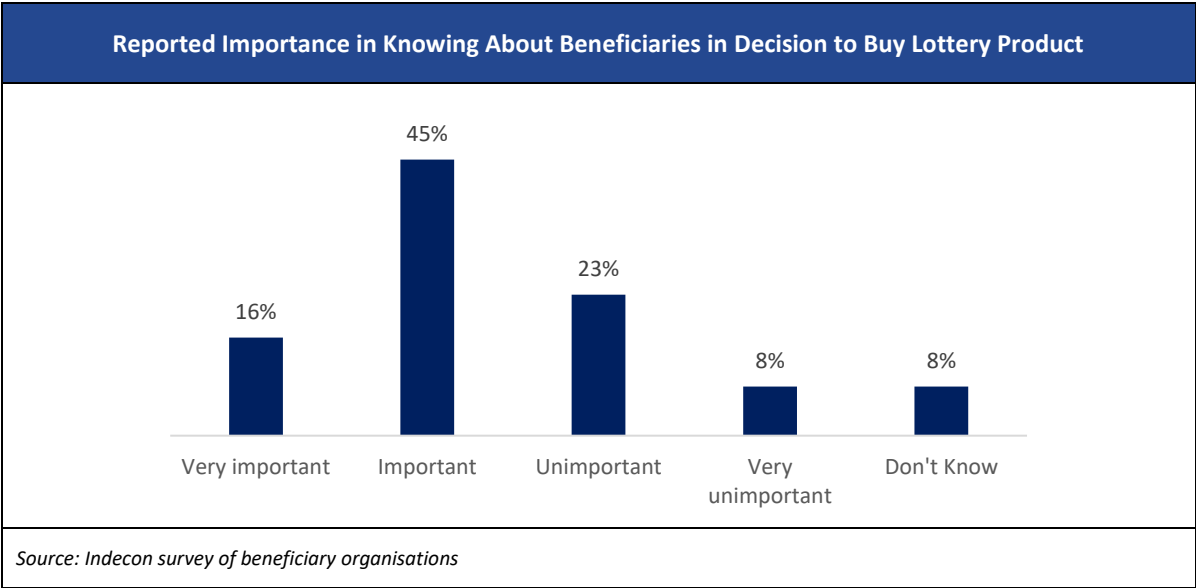
¹⁶ <https://www.stea.fi/en/applying-grants/who-can-apply/>. An example of one of the pages of the website are shown in the annex to this report.

¹⁷ EC (2020) "Social enterprises and their ecosystems in Europe – Comparative synthesis report."

While there was high reported awareness of overall good causes funding, members of the public were far less able to identify any specific beneficiary organisations which benefited, as illustrated below. Indecon's survey of beneficiary organisations also suggested a belief that there was a lack of understanding of the link between the decision to purchase a lottery product and the expenditure which ultimately benefits good causes.



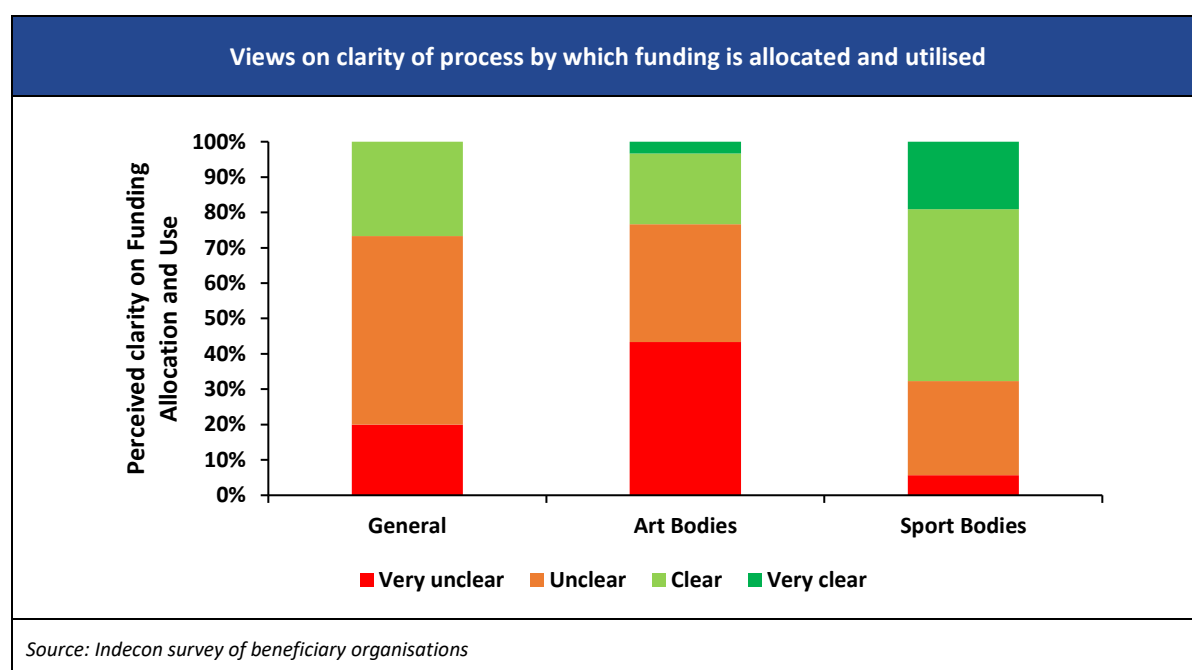
The beneficiary survey indicated that the decision whether to buy a lottery product was influenced by awareness of beneficiaries. Two in three respondents who expressed an opinion said that such an awareness was either important or very important in deciding to purchase a lottery product. This suggests that by generating such an awareness among the public, greater funds for good causes could be raised.



The issue of the link between lottery sales and subsequent beneficiaries was raised by a number of stakeholders during the public consultation. Clarity and transparency of the allocation process was seen by a number of stakeholders as important for consumers as well as beneficiary organisations. Further, greater acknowledgement of funding received by beneficiary organisations was identified as being important, as the part-funding by the National Lottery was often not known by the beneficiary organisations themselves, let alone users of their services. The role of effective marketing to consumers highlighting the important role that National Lottery funding plays was raised as a means of improving the link between purchases and beneficiaries, as was the role that retailers have a role in highlighting local beneficiaries at point of sale.

Process for Accessing Funding

Beneficiary bodies generally reported that the process for accessing funding was unclear, though there were differences between recipient types. Among general organisations and arts bodies, a large majority of beneficiary respondents indicated that the process was 'unclear' or 'very unclear'. There was a much higher level of clarity among sports bodies who receive funding through the Sports Capital and Equipment Fund.

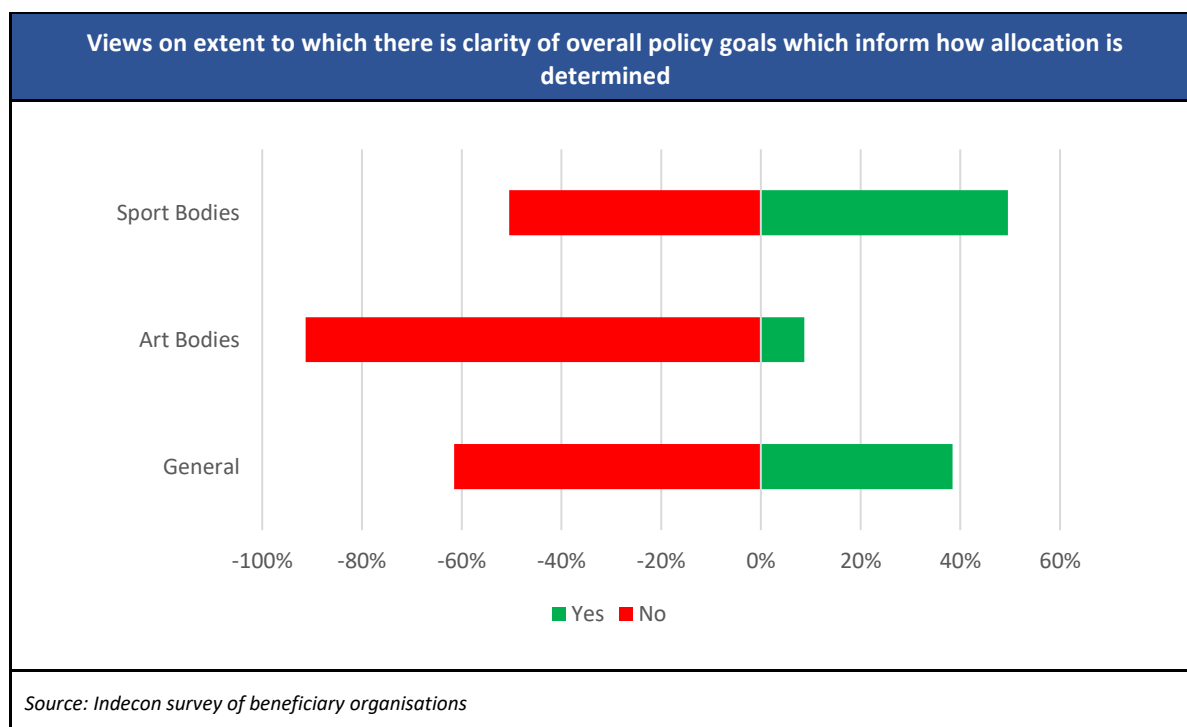


There was broad agreement among stakeholders who participated in the public consultation programme of the need to simplify and clarify the application processes and timelines for National Lottery funding. There was also support for an 'open call' for funding, such as with the UK's National Lottery Community Fund, which could also allow for flexibility in meeting emerging needs. Stakeholders also highlighted the need for multi-annual funding should become a feature of funding processes.¹⁸ Indecon notes that in balancing the opportunity for an open fund and other means to meet the needs of new organisations or different societal challenges, and the need to protect existing beneficiaries if a portion of funding were to be reallocated.

¹⁸ See for example the pre-Budget submission from the Charities Institute of Ireland: <https://www.charitiesinstituteireland.ie/news/news/293/293-Budget-2022-Submission>

Governance and Reporting Process

Beneficiary organisations surveyed by Indecon as part of this project indicated a lack of clarity regarding how the process to allocate funding is run. This was reported across all categories of respondents.



As well as making decision as to where to allocate funding, the communication and reporting of these decisions is also important, though was highlighted as an issue by stakeholders. Almost half of beneficiary respondents who expressed an opinion indicated that the reporting on the impacts of National Lottery expenditures was either poor or very poor.

Stakeholders who engaged as part of the public consultation were in broad agreement that a greater level of governance and reporting was needed regarding the disbursement of National Lottery funds. In particular, the need for a centralised body to oversee distribution was a strong theme among submissions, though a variety of views were expressed as to whether this could take the form of a statutory or a non-statutory body. A secondary option of much greater coordination among Government Departments was also suggested. Numerous stakeholders highlighted the need for the governance process to be made more transparent, including through the active engagement of the voluntary and community sector and social enterprise partners.

Policy Options for Reform

In this section we set out three possible options for reform. These are not mutually exclusive, and other options could also be considered in the future by the Government. It is critical that transitioning arrangements to any new arrangement be put in place given the length of time some organisations have been in receipt of lottery funding.

Option A: Represents a series of measures that could be taken without significant changes to the overall structures that are in place to oversee the allocation of National Lottery funds. These centre on a greater acknowledgement of the National Lottery by beneficiaries, and a reduction and refocussing of schemes that are supported. Option A is shown in the table below.

| Summary of Option A | |
|--|---|
| Governance | <ul style="list-style-type: none"> <input type="checkbox"/> Continue current allocation of funds through estimates process. <input type="checkbox"/> Each Department/agency retain responsibility for overseeing and monitoring their own schemes. |
| Reduce and Refocus Supported Schemes | <ul style="list-style-type: none"> <input type="checkbox"/> Concentrate resources on fewer schemes without impacting overall scheme funding. <input type="checkbox"/> Some schemes could cease to receive lottery funding, without affecting their overall budget/expenditure. |
| Implement Greater Acknowledgement of National Lottery Support | <ul style="list-style-type: none"> <input type="checkbox"/> Beneficiary bodies will need to meet new DPER guidelines regarding funding acknowledgement. <input type="checkbox"/> Funding for capital projects over minimum level will need physical signage as part of scheme terms and conditions. <input type="checkbox"/> Beneficiary bodies website or social media platforms will need to display lottery symbol prominently. <input type="checkbox"/> Disbursement Departments/agencies will need to refer to National Lottery support in press releases; websites and on social media. |
| <i>Source: Indecon</i> | |

Option B: The second option represents a further development on Option A and should be understood to include a process to potentially reduce and refocus the number of supported schemes, and to ensure greater acknowledgement of lottery expenditures. In addition, Option B proposes the creation of a Cross-Departmental liaison group to promote a greater acknowledgement of National Lottery support, data collection and any necessary coordination on any other operational issues, as well as the creation of a database of beneficiaries, and the publication of an annual report setting out information on the beneficiaries of good causes funding. The main elements of Option B are summarised in the following table.

| Summary of Option B |
|--|
| Liaison <ul style="list-style-type: none"> <input type="checkbox"/> Cross-Departmental liaison group, chaired by the Department of Public Expenditure and Reform. |
| Reduce and Refocus Supported Schemes - As in Option A |
| Implement Greater Acknowledgement of National Lottery Support - As in Option A |
| Create Centralised Database of Funding Beneficiaries <ul style="list-style-type: none"> <input type="checkbox"/> Create a single-database to track and highlight the disbursement of funds on good causes. <input type="checkbox"/> Agreement on minimum data fields that disbursement bodies will need to populate. <input type="checkbox"/> Database to be operated and maintained centrally, though departments and agencies will be required to update it regularly. |
| Publish Annual Report on the support provided to good causes by National Lottery <ul style="list-style-type: none"> <input type="checkbox"/> Publish an annual report setting out breakdown of good causes beneficiaries based on geography, activity area, etc. <input type="checkbox"/> Develop regular/annual level of publicity around annual report as a way of highlighting impact on good causes of National Lottery support. |
| <i>Source: Indecon</i> |

Option C: The third option represents a further development on Options A and B. Most notably, it would entail a regular independent evaluation, and the creation of an open fund. The main elements of Option C are summarised in the next figure.

| Summary of Option C |
|--|
| Liaison - As in Option B |
| Reduce and Refocus Supported Schemes - As in Option A |
| Implement Greater Acknowledgement of National Lottery Support - As in Option A |
| Create Centralised Database of Funding Beneficiaries - As in Option B |
| Publish Annual Report on the support provided to good causes by National Lottery - As in Option B |
| Independent Evaluation <ul style="list-style-type: none"> <input type="checkbox"/> Independent evaluation of impact of National Lottery disbursement every three-five years. |
| Create Open Fund <ul style="list-style-type: none"> <input type="checkbox"/> Establishment of an open call for funding, with clear application deadlines, process and reporting. |
| <i>Source: Indecon</i> |

In the table below we set out a potential sequencing of actions.

| Potential Sequencing of Reform Actions | |
|---|--|
| Reform Actions | Comment |
| Governance (Option A or Option B/C) | Establish initial project governance and liaison as per Option A or Option B/C to oversee basic reforms. |
| Reduce and refocus Supported Schemes | Review current schemes with a view to making any changes, which may include removing certain schemes and adding others. Important that this be completed before others to avoid imposing unnecessary work in relation to schemes which don't continue to receive NL funding. |
| Acknowledgement of NL Support | An agreed set of rules for beneficiaries should be agreed, with a view to it being fully implemented by all beneficiary bodies/Departments. |
| Centralised Database | Agreement on data on disbursement allocation to be collected with creation of first version of database relating to 2022 activities. |
| Annual Report | Publication of an annual report will be dependent on the availability of a centralised database which set out allocation as discussed above. |
| Create Open Fund | The timing of the initiation of an open fund would be dependent on sufficient resources being available to do so. If this is to be funded from future growth, it is possible that this would be sufficient to launch an open fund in 2024. |
| First periodic evaluation | An evaluation of the activities and impacts of National Lottery funding could be conducted relating to activities in 2023. Subsequent evaluations could be run every 3-5 years and cover a multi-annual evaluation period. |
| Source: Indecon | |

1 Introduction and Background

1.1 Introduction

The Indecon International Consultancy Group was appointed by the Department of Public Expenditure and Reform to support an independent review of the allocation and utilisation of National Lottery funding. The National Lottery is operated under licence by Premier Lotteries Ireland, on behalf of the Minister for Public Expenditure and Reform. The study seeks to review the system for the allocation and utilisation of National Lottery funding.

1.2 National Lottery Act 2013

The National Lottery Act 2013 provides for the holding of the National Lottery on behalf of the Minister for Public Expenditure and Reform. The National Lottery is operated under licence by Premier Lotteries Ireland, on behalf of the Minister for Public Expenditure and Reform. As set out in the National Lottery licence, 65% of gross gaming revenue is returned to the Exchequer to be used for Good Causes Projects, and as set out in the National Lottery Act 2013 these moneys should be assigned to one or more of the following purposes, and in such amounts, as the Government may determine from time to time –

- a) Sports and recreation;
- b) National culture and heritage (including the Irish language);
- c) The arts (within the meaning of the Arts Act 2003);
- d) Health of the Community;
- e) Youth, welfare and amenities;
- f) Natural environment;
- g) Such objectives as the Government may determine from time to time.

These moneys are ultimately assigned to a number of related voted expenditure subheads via the annual estimates process. A discussion of the allocation process is set out in Section 2. The financial model in the Licence incentivises the operator (currently Premier Lotteries Ireland) to maximise funds for good causes.¹⁹

The National Lottery is regulated by the Office of the National Lottery Regulator. The Regulator carries out her functions in a manner most likely to ensure:

- a) that the National Lottery is run with all due propriety;
- b) that the interests of participants in the National Lottery are protected;
- c) that the long-term sustainability of the National Lottery is safeguarded, and

¹⁹<https://www.rnl.ie/wp-content/uploads/2022/04/RNL-Statement-of-Strategy-2022-24-Final-For-Publication.pdf>

subject to a) to c), to ensure revenues allocated to Good Causes are maximized.²⁰ The regulator is responsible for managing and controlling the National Lottery Fund, which includes the receipt of monies from the lottery operator each week. Each week the amounts for good causes are retained in the fund and every two months the office of the regulator transfers the cumulative amount for good causes to the Central Exchequer for allocation to good causes. Once the funds for good causes are transferred to the Central Exchequer, the regulator has no remit over them. However, the regulator's statement of strategy sets out actions to maximise good causes funding, mainly through providing greater transparency around the collection and transfer of funds.

Table 1.1: Strategies Employed by Regulator to Maximise Good Causes Funding

| | |
|--|--|
| Manage and control the Fund from receipt of funds from Operator to transfers to Exchequer. | The amounts going to Good Causes are accounted for correctly |
| Assess the potential impact on returns for Good Causes when considering requests for approval e.g., of new games. | Impact on returns for Good Causes assessed and considered in each decision by the Regulator |
| Prioritise the interests of participants and the probity and long-term sustainability of the National Lottery over short term returns for Good Causes. | Positive expected returns for Good Causes assessed considered only after the impact on the interests of participants and the probity and longterm sustainability of the National Lottery are satisfactory |
| Provide more accessible information to the public on how National Lottery returns for Good Causes are calculated and transferred to the Exchequer. | New website offers more accessible information to the public on the calculation of returns for Good Causes and their transfer to the Exchequer. Greater transparency and understanding of the National Lottery. |
| <i>Source: Office of the Regulator Statement of Strategy 2022-24</i> | |

1.3 Scope of Study

The objective of this research is to:

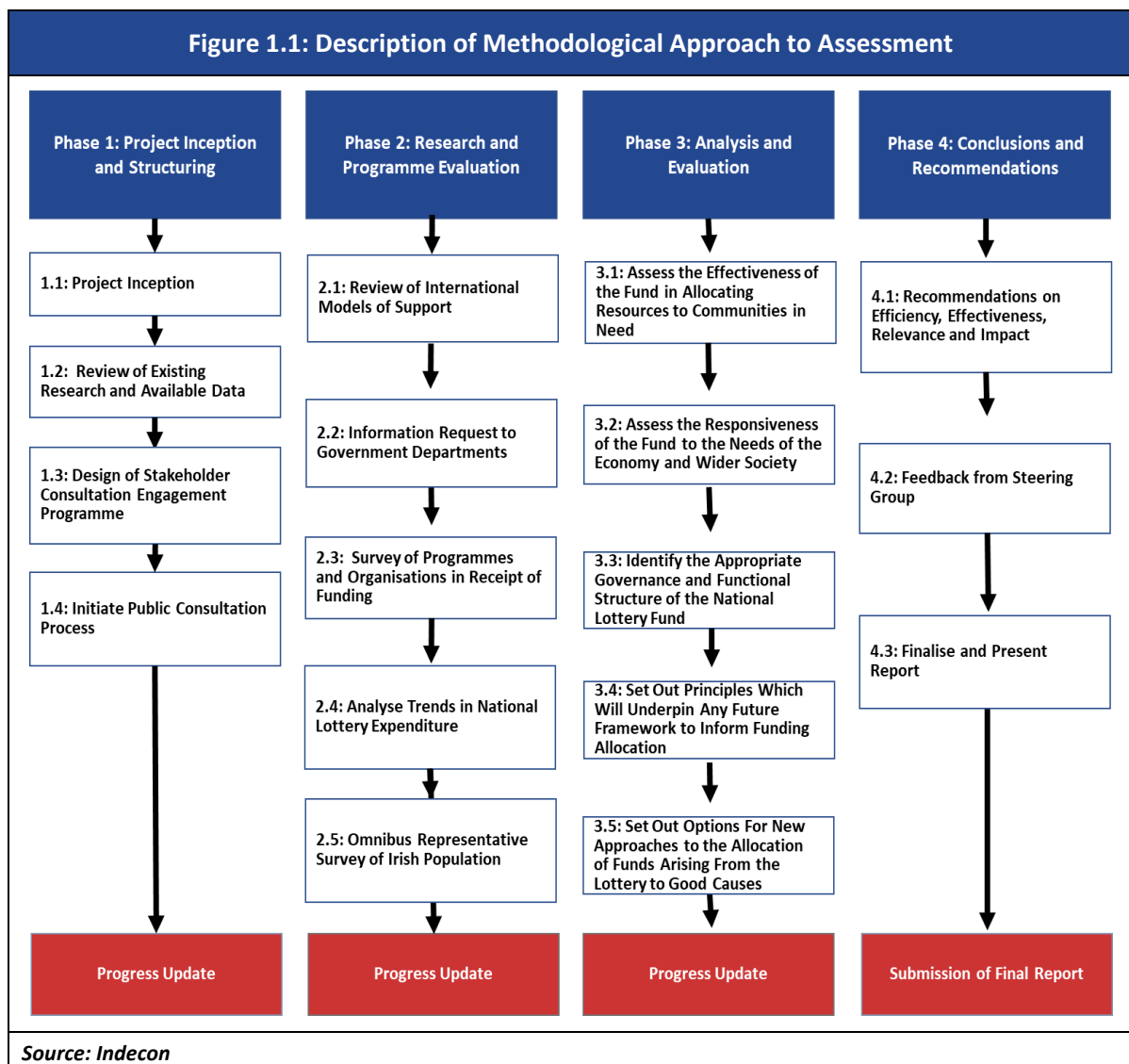
1. Report on the current practice of the allocation of funding to Government Departments, and its utilisation by Government Departments.
2. Review and report on examples of systems used in other jurisdictions for the allocation of Lottery funding and draw out lessons for Ireland. The report is to identify and report on current best practice, and provide policy options which seek to:
 - a. Enhance the connection between lottery sales and the allocation of funds to Good Causes.

²⁰ www.rnl.ie

- b. Monitor and report on the impact of funding allocated, either centrally, and/or at a delegated level.
 - c. Identify potential new areas which could be considered for funding allocations, and a suitable process for identifying and approving same.
 - d. Such other issues as are likely to inform the future policy framework in Ireland.
3. Run a public consultation process, to seek the views of a number of relevant stakeholders regarding the future policy framework for the allocation of Good Causes funding.
4. The final report should:
 - a. Report on the current practice of allocation of funding for Good Causes (point 1 above).
 - b. Report on systems and best practice in other jurisdictions and lessons learnt.
 - c. Set out principles which will underpin any future framework to inform funding allocation.
 - d. Set out options for new approaches to the allocation of funds arising from the Lottery, to Good Causes.
 - e. Have particular regard to any issues that might arise in any transition to a new process and how these issues can be best be managed.

1.4 Approach and Methodology

A rigorous methodology was applied in completing this evaluation. An overview of the methodological approach to completing the evaluation is presented in the next figure.



1.5 Consultation Process

As part of this project, the Department of Public Expenditure and Reform and Indecon conducted an extensive consultation exercise, which included a public consultation process, a survey of the general population and a survey of beneficiary organisations. Each of these three elements is discussed in more detail below.

Public Consultation Exercise

The Department of Public Expenditure and Reform launched a public consultation exercise on the Government's online consultation portal. Stakeholders were invited to give their views on a range of issues which were detailed in a public consultation document. The consultation period ran from 28th March 2022 to 22nd April 2022. A list of organisations who made submissions in response to the public consultation are shown in Figure 1.2 below.

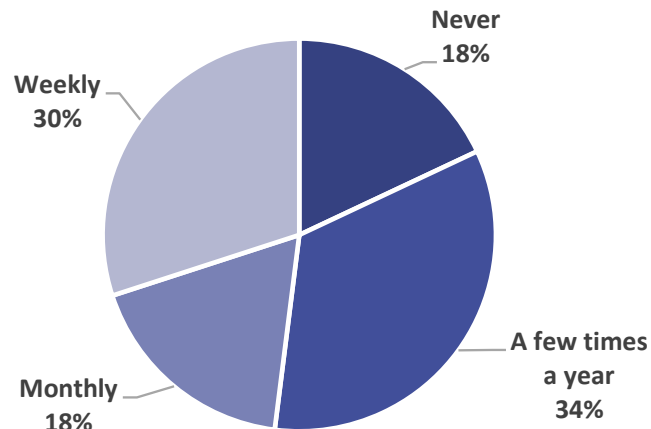
Figure 1.2: List of Organisations who submitted to Public Consultation

- The Wheel
- Charities Institute Ireland
- Philanthropy Ireland
- RGDATA
- Premier Lotteries Ireland
- Prevention and Early Intervention Network
- Lottoland
- Rethink Ireland
- Brian Harvey Social Research

Source: Indecon

Omnibus Survey of General Population

An omnibus survey of the Irish population was run by Kantar in November 2021 on behalf of Indecon, with the aim of better understanding the link between the use of funds raised through purchase of Lottery products and expenditure by consumers on Lottery products. The survey was of 1,041 adults, including both regular Lottery players and non-players. The breakdown of the sample between lottery buyers, with the frequency of purchase, is shown in Figure 1.3 below. The national representative panel employed for the purpose of the survey was based on an adjusted sample based on gender, age and region. Only adults aged 18+ were surveyed for the purposes of this report, given that this is the minimum legal age for buying lottery products. Cross gender/age quotas were applied, meaning our gender and age quotas are representative of the national picture, so that each age group is representative of the correct male female split for that specific age group.

Figure 1.3: How Frequency of lottery purchases within sample

Source: Indecon/Kantar omnibus survey of general population

Beneficiary Survey

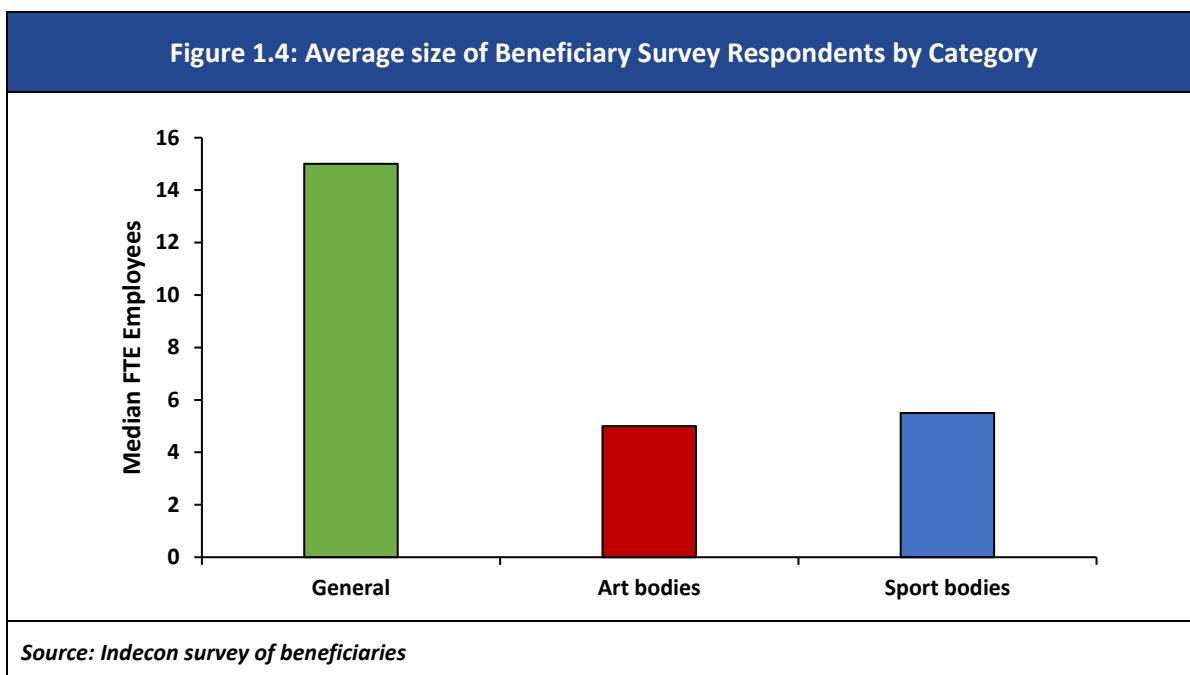
As part of this study, Indecon undertook a survey of beneficiaries of National Lottery funding by way of associated Departmental programmes. This was aimed at gathering feedback on the ease of accessing National Lottery funding, and the perceived link between good causes funding and expenditure on the national lottery. In all, beneficiary organisations funded through eight distinct schemes were engaged in for this survey, as illustrated in Table 1.2 below.

Table 1.2: Schemes surveyed as part of Beneficiary Survey

| Scheme | Department/Agency |
|--|---|
| Arts Council Recipients | Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media |
| Sports Capital & Equipment Fund | |
| Communal Facilities in Housing Projects | Department of Housing, Planning and Local Government |
| Private Housing Grants | |
| Youth Organisations and Services | Department of Children, Equality, Disability, Integration and Youth |
| Local/Regional Development Supports | Department of Rural and Community Development/Pobal |
| Senior Alerts Scheme | |
| Scheme to Support National Organisations | |

Source: Indecon

For the purposes of this review, the responses to the survey are grouped into three categories, namely general respondents, arts bodies as funded through the Arts Council, and sports clubs as funded through the Sports Capital and Equipment scheme. Generally, the arts and sports bodies which responded were smaller in size in terms of full-time equivalent employees (including paid and unpaid), as shown in Figure 1.4 below. The median arts body reported income of around €0.5m, sports bodies €50,000, while other organisations reported a median income in excess of €1m.



1.6 Report Structure

An outline of the structure of the report is as follows:

- ❑ Chapter 1 sets out the background to the study, including the legislative basis for the National Lottery;
- ❑ Chapter 2 sets out the current process for allocation of good causes funding across government departments;
- ❑ Chapter 3 provides a review of practice in three comparable countries, namely the UK, New Zealand and Finland;
- ❑ Chapter 4 sets out the evidence gleaned from the extensive consultation exercise conducted for this study on the connection between National Lottery sales and funding allocation to good causes; while:
- ❑ Chapter 5 sets three possible options for reform.
- ❑ Additional information is provided in the annexes.

1.7 Acknowledgements

We wish to acknowledge the valuable inputs provided during this study. We would particularly like to thank staff in the Department of Public Expenditure and Reform for their invaluable inputs and support during this project. In particular we would like to thank Fergal Costello, Liam Gleeson, Angelena Hollingsworth and Cillian McBride. We would also like to thank members of the Steering Committee, and other staff in their respective Departments for supporting the review. In particular, we would like to thank Joe Healy, Ann Byrne, Aine Keane and Kathleen Hannigan (Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media); Kenneth Jordan (Department of Rural and Community Development); Marguerite Ryan and Sinead Kehoe (Department of Housing, Local Government and Heritage); Kevin Colman (Department of Health); Andrew Patterson, Paul Fay and Damian McKeon (Department of Children, Equality, Disability, Integration and Youth); and Tom Whelan (Department of Education). We would also like to thank all stakeholders who took the time to input into the extensive consultation process conducted by Indecon in completing this review. In particular, we would like to thank Maureen Kennelly and Martin O'Sullivan (Arts Council); Lily Power (The Wheel); Áine Myler (Charities Institute Ireland); Eilis Murray (Philanthropy Ireland); Tara Buckley and Clare Walsh (RGDATA); Andrew Algeo, Niamh Hodnett, Paul Dervan, Shane Dempsey and Sharon O'Connell (Premier Lotteries Ireland); Francis Chance (Prevention and Early Intervention Network); Laura Pearson (Lottoland); Pádraic Vallely and Mario Vottero (Rethink Ireland); and Brian Harvey (Brian Harvey Social Research). **The usual disclaimer applies and the views and analysis in this independent report are the sole responsibility of Indecon International Economic Consultants.**

2 Current Allocation Process for Lottery Funds

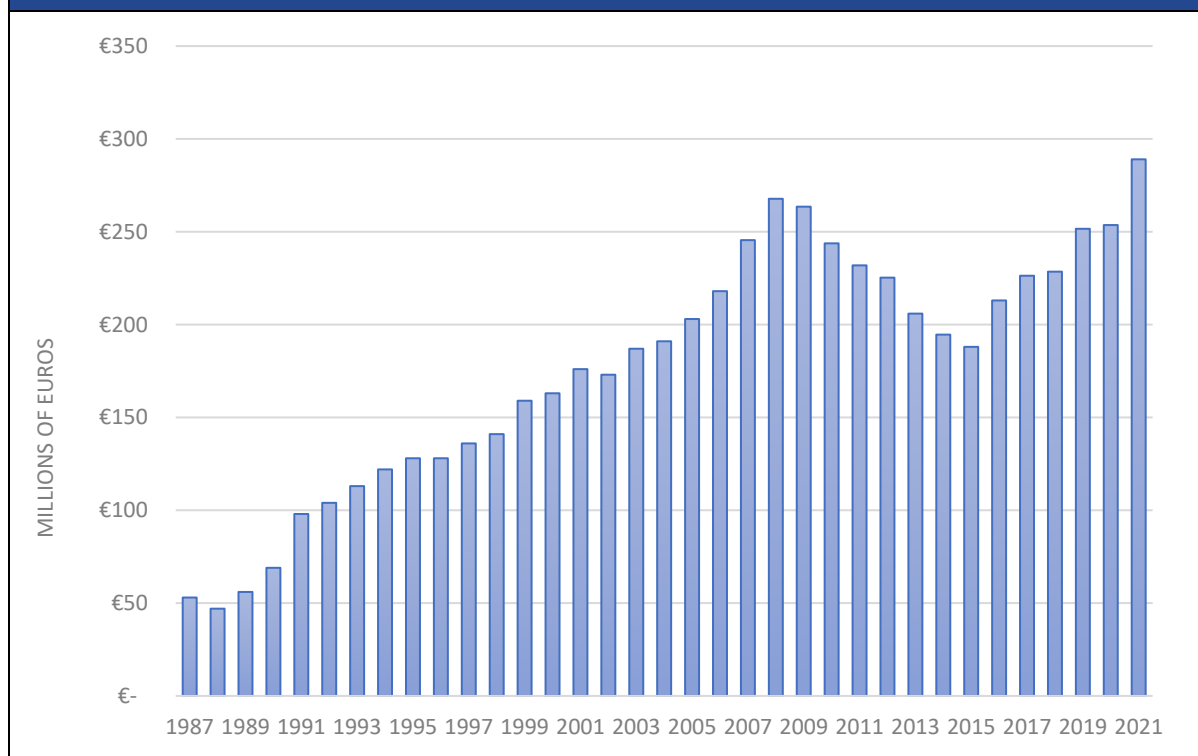
2.1 Introduction and Overview

According to the terms specified in the National Lottery licence, 65% of Gross Gaming Revenue, which is the total lottery sales minus the total prizes, is passed on to the Exchequer to be disbursed for use by good causes. Projects are in practice only part-funded by the National Lottery, with the remainder paid for by the Exchequer via Government Departments. In 2021, of the €425 million in total expenditure provided to schemes and programmes that received National Lottery funding, €254 million was lottery funds and the remainder from the Exchequer. In this section we discuss the current disbursement practice across the relevant Departments and agencies that have a role in distributing lottery funding. The section begins by setting out the evolution of lottery good causes funding since 1987.

2.2 Trends in Good Causes Funding

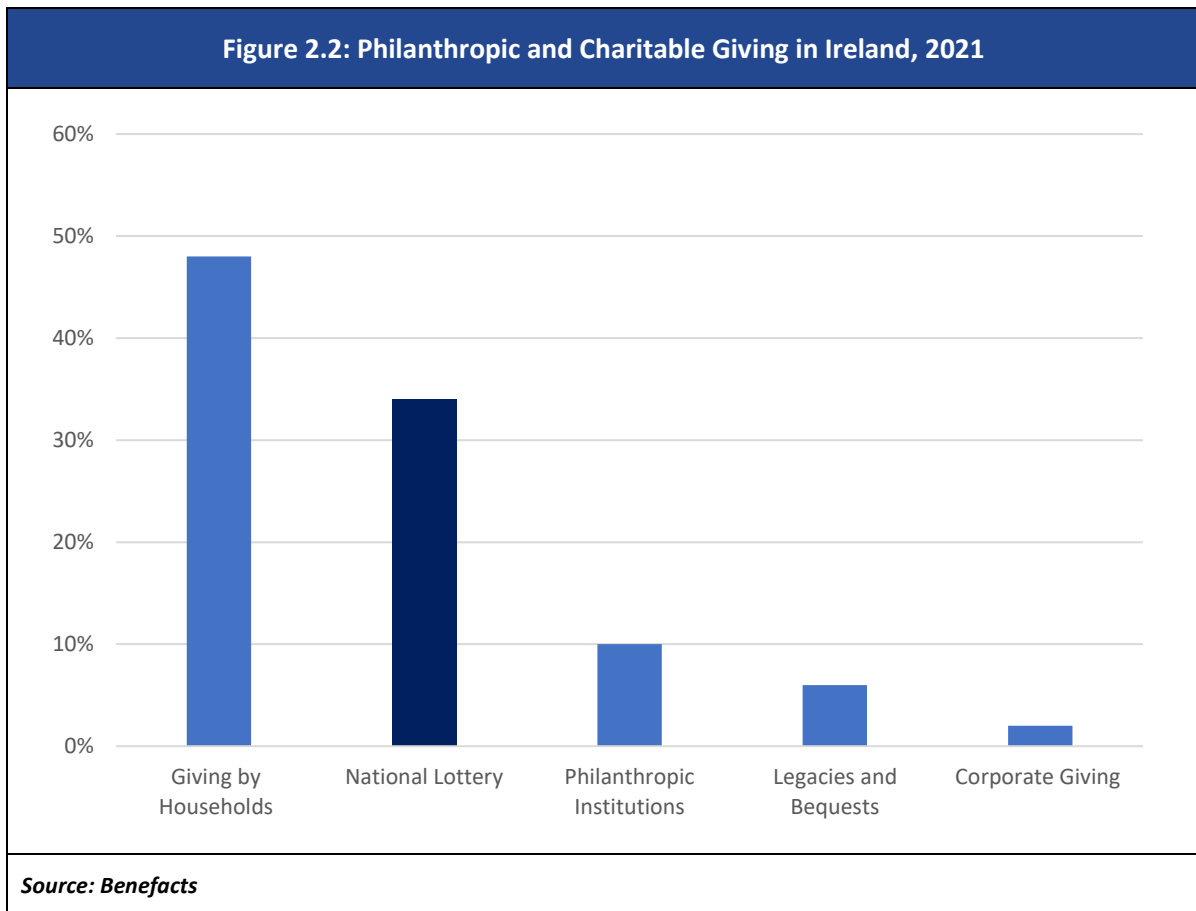
The primary objective of the National Lottery is to raise funds for good causes. A total of over €6 billion has been distributed since the inception of the National Lottery in 1987 on good causes. The annual figure for lottery expenditure is shown in Figure 2.1 below.

Figure 2.1: Historical Development in National Lottery Funding for Good Causes (1987-2021)



Source: PLI

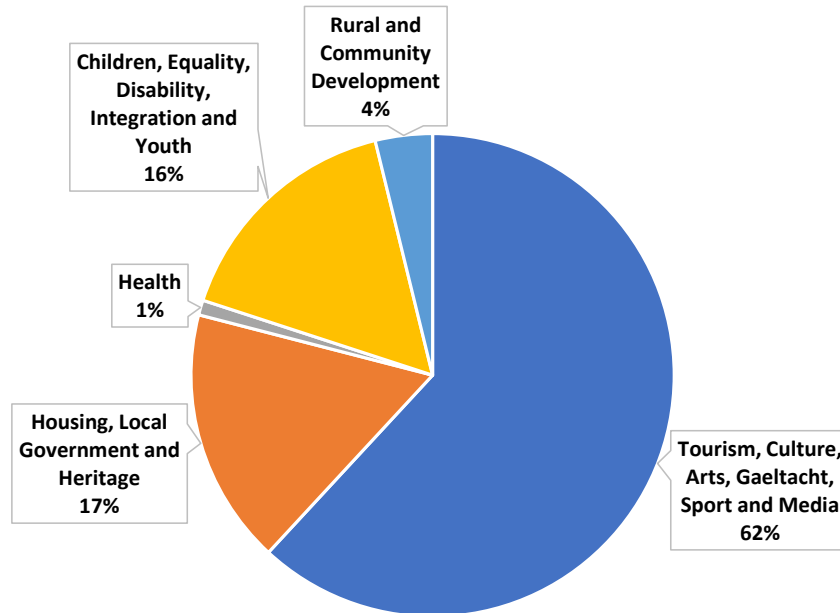
The National Lottery represents a critical source of revenue for many Irish non-profits. Benefacts have estimated that lottery proceeds represented over one-third of total philanthropic and charitable giving in Ireland in 2021, second only in importance to charitable giving by households. This is illustrated in Figure 2.2 below.



2.3 Allocation Overview

Funding for projects supported by the National Lottery is allocated to five Departments, though in practice since 2016 the HSE has managed the disbursement to health bodies. Figure 2.3 below represents the percentage of expenditure on projects part-funded by the National Lottery allocated to each Department. The Department of Tourism, Culture, Arts Gaeltacht, Sport and Media receives almost two-thirds of expenditure, mainly focused on The Arts Council, Sports Capital and Equipment Grants and Sport Ireland.

Figure 2.3: Percentage Allocated Budget by Department on good causes funding as a percentage of total good causes funding (2022)



Source: *The Revised Estimates Volumes for the Public Service*²¹

The table below shows the total expenditure (in millions) provided to each department from the Exchequer and National Lottery from 2017 to 2022, as well as the share of the total that came from National Lottery funding. In 2021, €425m in expenditure was part financed (68%) by National Lottery funds of €289m. This is shown in Table 2.1.

²¹ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

Table 2.1: Total allocated budget by Department for projects which are part-funded by National Lottery in €m (2017-2022)

| Vote | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--|-------------|-------------|-------------|-------------|-------------|-------------|
| Tourism, Culture, Arts, Gaeltacht, Sport and Media | 166 | 175 | 185 | 182 | 270 | 280 |
| Housing, Local Government and Heritage | 41 | 60 | 64 | 66 | 70 | 78 |
| Health | 15 | 15 | 10 | 8 | 5 | 5 |
| Children, Equality, Disability, Integration and Youth | 60 | 60 | 63 | 66 | 70 | 73 |
| Rural and Community Development | 10 | 5 | 10 | 11 | 11 | 17 |
| Total expenditure | 292 | 315 | 333 | 332 | 425 | 453 |
| <i>Of which (euro):</i> | | | | | | |
| <i>National Lottery Funding</i> | 226 | 229 | 252 | 254 | 289 | - |
| <i>.....Exchequer Funding</i> | 66 | 86 | 81 | 78 | 136 | - |
| <i>Of which (%):</i> | | | | | | |
| <i>National Lottery Funding</i> | 77% | 73% | 76% | 77% | 68% | - |
| <i>.....Exchequer Funding</i> | 23% | 27% | 24% | 23% | 32% | - |
| <i>Source: The Revised Estimates Volumes for the Public Service²²</i> | | | | | | |

The current process for the allocation of National Lottery monies is conducted by the Department of Public Expenditure and Reform with the relevant line Departments as part of the estimates process. Certain schemes are identified in the published estimates as being part-funded by the National Lottery, with the remainder being funded by general exchequer resources. In the published estimates no figure is given as to percentage of funding that can be ascribed to the National Lottery for any scheme, and there is no strong link between the resources allocated to a scheme and the aggregate value of National Lottery sales in the proceeding budgetary period. There is currently no separate reporting mechanism setting out how National Lottery proceeds are used, such as exists for the annual accounts published regarding the use of proceeds from the Dormant Accounts Fund²³.

²² <https://www.gov.ie/en/collection/e20037-revised-estimates/>

²³ <https://www.gov.ie/en/policy-information/c376c9-dormant-accounts-fund/#the-dormant-accounts-fund-annual-report>

2.4 Department of Tourism, Culture, Arts Gaeltacht, Sport and Media

The Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media aim to “promote, nurture and develop Ireland's culture and arts” and to promote a healthier and more active society through the promotion of sport participation. The Department operates a number of schemes which are part-funded by the National Lottery, namely through the Arts Council, Irish language support schemes, grants for sporting bodies and the provision of sports and recreational facilities, and Sport Ireland²⁴. A short description of each of these is given below.

The Arts Council of Ireland: An Chomhairle Ealaíon/Arts Council of Ireland is the Irish government agency that oversees the development of the arts in Ireland²⁵. It provides a central hub for the arts in Ireland through collaboration with artists, art organisations, public policy makers and others. The Arts Council's primary functions are to:

- Stimulate public interest in the arts;
- Promote knowledge, appreciation and practice of the arts;
- Assist in improving standards in the arts;
- Advise the Minister and other public bodies on the arts.

The Arts Council runs a range of programmes for arts organisations, artists, and groups working within the arts. The application process is online²⁶, with numerous streams of funding with different objectives, for example the Writers in Schools Scheme; Circus Bursary Award; and Dance Bursary Award.

Irish Language Support Schemes: The Department provides financial assistance to a number of organisations and activities that aid the use of the Irish Language outside of the Gaeltacht. Organisations which receive funding every year include:

- Taibhdhearc na Gaillimhe
- Gaillimh Le Gaeilge
- Gno Mhaigh Eo
- Gael Taca, Cork

Initiatives also funded via the Irish language support schemes include the development by Fiontar, an interdisciplinary school based in DCU which delivers through the medium of Irish, and the creation of a database of EU terminology in the Irish language. Some of the supported bodies also receive funding through the Arts Council (e.g. Taibhdhearc na Gaillimhe).

Sport Ireland: Sport Ireland is the authority responsible for the development of sport in Ireland. It oversees and participates in sport, high performance sport, anti-doping, coaching and the forming of

²⁴ <https://www.gov.ie/en/policy/21f19-culture/>

²⁵ <https://www.artscouncil.ie/home/>

²⁶ <https://www.artscouncil.ie/available-funding/>

the Sport Ireland National Sports Campus. Sport Ireland is the statutory agency responsible for implementing many of the key policy objectives of the National Sports Policy.

The Sports Capital and Equipment Grant: The Sports Capital Programme is the primary vehicle for government support for the development of sports and physical recreation facilities and the purchase of non-personal sports equipment throughout the country. It is part funded from the proceeds of the National Lottery. Applications for Sports Capital and Equipment Grants are made online through the dedicated OSCAR website²⁷. There are very specific requirements on recipients of the Sports Capital and Equipment Grant to acknowledge National Lottery Funding.

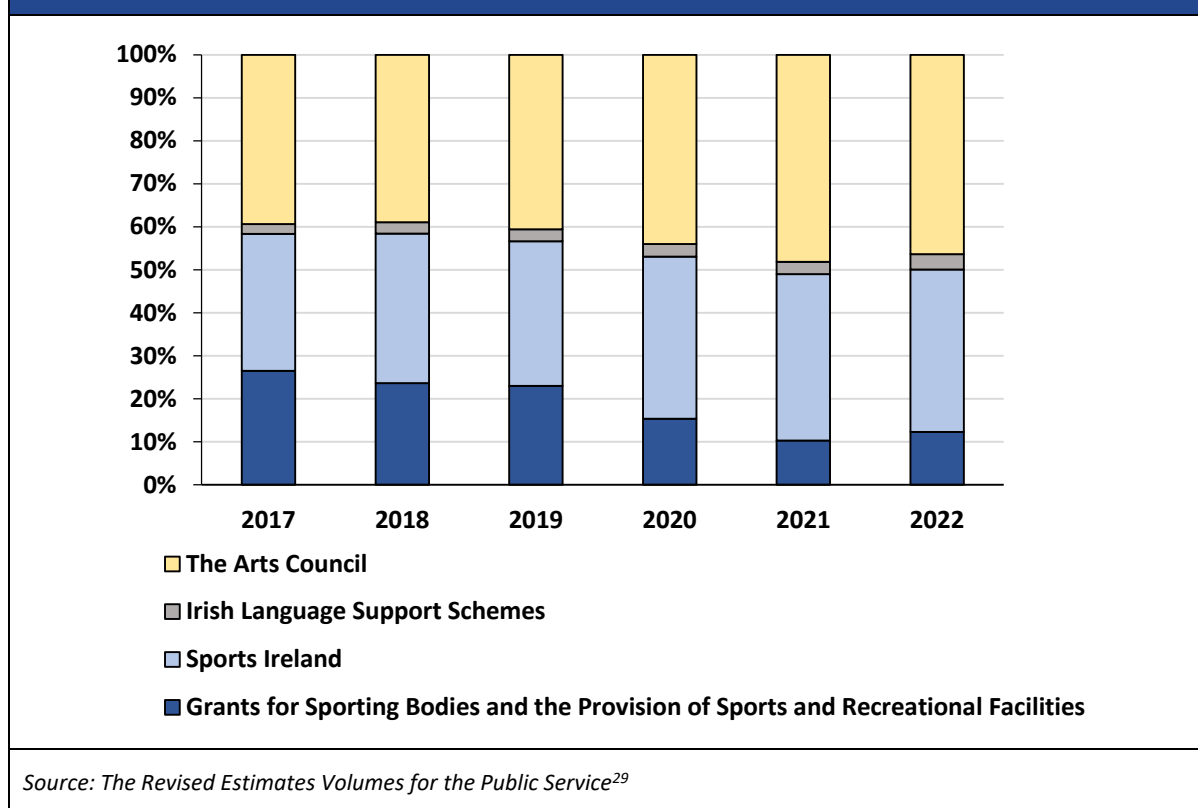
The breakdown of expenditure by the Department on funds and schemes which are part-funded by the National Lottery is shown in the table below. In total these schemes accounted for €280m of expenditure in 2022, with most accounted for by the Arts Council and Sport Ireland. There is no explicit specification of the amount of National Lottery funds which is allocated to any of these areas of expenditure.

| Table 2.2: Department of Tourism, Culture, Arts Gaeltacht, Sport and Media allocated budget by programme €m (2017-2022) | | | | | | | |
|---|------------|------------|------------|------------|------------|------------|--------------|
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2017 - 2022 |
| The Arts Council | 65 | 68 | 75 | 80 | 130 | 130 | 548 |
| Irish Language Support Schemes | 4 | 5 | 5 | 5 | 8 | 10 | 36 |
| Grants for Sporting Bodies & Provision of Sports & Recreational Facilities | 44 | 42 | 43 | 28 | 28 | 35 | 218 |
| Sport Ireland | 53 | 61 | 62 | 69 | 105 | 106 | 455 |
| Total | 166 | 175 | 185 | 182 | 270 | 280 | 1,258 |
| <i>Source: The Revised Estimates Volumes for the Public Service²⁸</i> | | | | | | | |

The Arts Council has received the most funding of all programmes which are part-funded by the National Lottery from 2017 to 2022, as shown in Figure 2.4 below.

²⁷ <https://www.sportscapitalprogramme.ie/>

²⁸ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

Figure 2.4: Total percentage allocated budget per programme by Department (2017-2022)

2.5 Department of Rural and Community Development

The Department of Rural and Community Development's goal is to "promote rural and community development" and to encourage "vibrant, inclusive and sustainable communities" throughout Ireland³⁰. Some of the department's community development schemes are part funded by the National Lottery, namely, the Senior Alerts Scheme, the Scheme to Support National Organisations, and local/regional community development supports which includes funding to the Society of St Vincent de Paul and Protestant Aid. Each of these is discussed briefly below.

Senior Alerts Scheme – This scheme is administered by Pobal, a not-for-profit company that supports the administration of programmes for the Irish government and the EU. The scheme provides funding for a personal monitored alarm, connected to a contact centre, for people aged 65 or older with limited means. The scheme was put in place to allow older people to live safe and independent lives in their homes³¹. Given the scale of demand in recent years the scheme also receives funding from the Dormant Accounts Fund to meet this demand.

²⁹ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

³⁰ <https://www.gov.ie/en/organisation-information/d0ef42-about-us/>

³¹ <https://www.pobal.ie/programmes/seniors-alert-scheme-sas/>

Scheme to Support National Organisations - The Scheme to Support National Organisations (SSNO) provides multi-annual funding that contributes to the core costs of national community and voluntary organisations across Ireland. The scheme is administered by Pobal on behalf of the Department of Rural and Community Development³² and helps meet the costs of core staffing positions within the funded national organisation.

Local/Regional Community Development Supports – National Lottery funding also contributes to funding of specific organisations to support their contribution to local and/or regional community development. The most significant funding is provided to the Society of St Vincent de Paul (SVP), which is the largest voluntary charitable organisation in Ireland, with supports for the homeless, providing social housing and operating holiday homes. Apart from providing direct assistance, the society also encourages personal and community self-sufficiency³³. Protestant Aid also receive support from this funding area. Protestant Aid is a charity which was established over 180 years ago to alleviate deprivation in Ireland. It provides support without reference to religious, ethnic or social backgrounds. Some of its many activities include providing grants to lessen poverty or distress, heating and energy cost allowances, school expenses and annuities for the elderly³⁴.

The governance applied to Lottery funded projects by the Department is the same as for other public funding. For example, a Focused Policy Assessment was completed for the Senior Alerts Scheme. A number of these schemes have received the same allocation over the last number of years. The funding for the years 2017-2022 is shown in the next table.

| Table 2.3: Department of Rural and Community Development allocated budget by programme €m (2017-2022) | | | | | | | |
|--|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2017-22 |
| Seniors Alert Scheme ³⁵ | 2 | 2 | 2 | 2 | 2 | 2 | 14 |
| SSNO | 6 | 6 | 6 | 6 | 6 | 7 | 37 |
| Local/Regional Development Supports (including SVP and Protestant Aid) | 2.5 | 2.5 | 2.5 | 2.5 | 2.5 | 2.5 | 15 |
| Volunteering Supports – National | | | | | | 6 | 6 |
| Total | 10.5 | 10.5 | 10.5 | 10.5 | 10.5 | 17.5 | 72 |
| <i>Source: Department of Rural and Community Development</i> | | | | | | | |

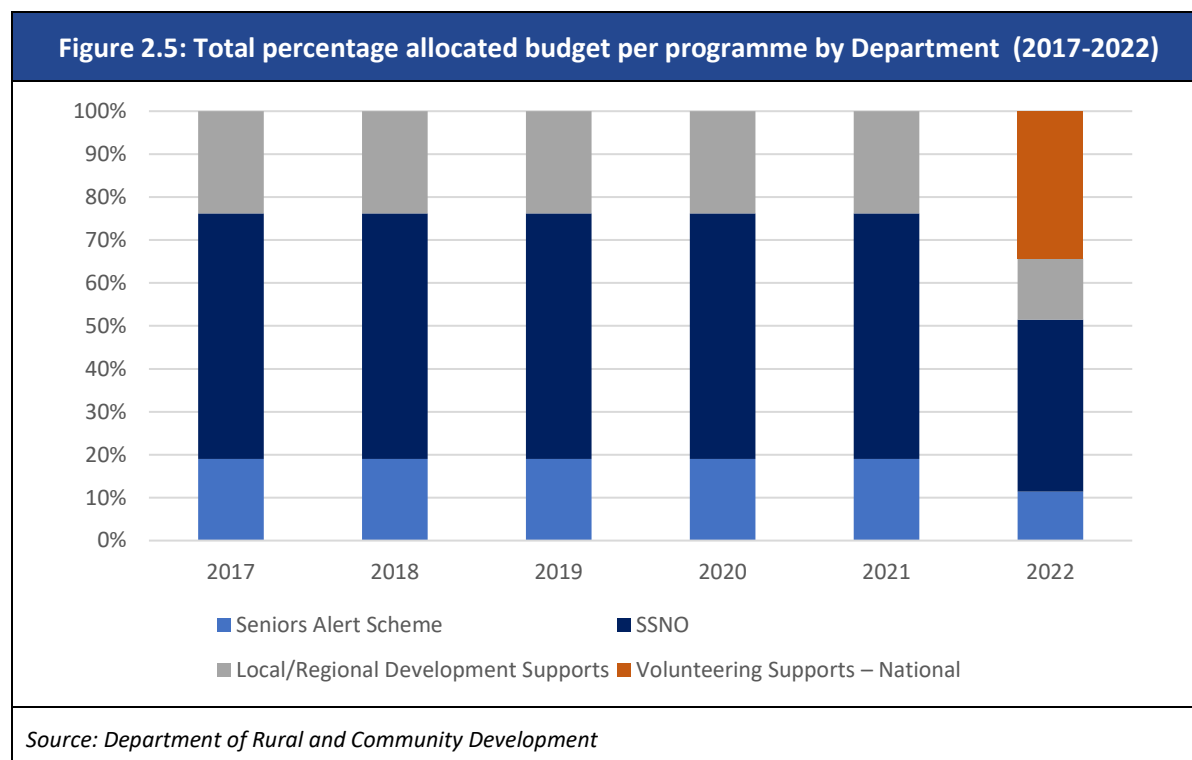
³² <https://www.pobal.ie/programmes/scheme-to-support-national-organisations-ssno-2022-2025/>

³³ <https://www.svp.ie/about-us.aspx>

³⁴ <https://protestantaid.org/>

³⁵ National Lottery element. Up to €3m additional from Dormant Accounts Fund each year.

The share of spending disbursed to each programme by the Department Rural and Community Development is shown in the next figure. Overall, SSNO funded bodies received the most funding annually, representing around half of all funding which is partially supported by the National Lottery within the Department of Rural & Community Development.



2.6 Department of Housing, Local Government and Heritage

The Department of Housing, Local Government and Heritage's mission is to support sustainable development, with a particular focus on strategic planning, the efficient delivery of well-planned homes in vibrant communities, the sustainable management of our water resources, the nurturing of Ireland's heritage and the promotion of effective local government.³⁶ The Department's total spend in 2021 was €5.234 billion. Three elements of the Department's expenditure, with funding amounting to €70 million in total in 2021, are part-funded by the National Lottery. Each of these are discussed below.

Communal Facilities in Housing Projects

This scheme contributes towards the capital cost of building or installing communal facilities in housing projects and is provided in the form of grants to approved housing bodies. The capital cost of acquiring, converting, renovating and refurbishing an existing building to be used as a communal facility is eligible for funding under the scheme. The relevant Housing authorities are charged with determining if an application for this programme complies with the particular qualifying conditions.

³⁶ <https://www.gov.ie/en/publication/9a047-statement-of-strategy-2021-2025/>

Mobility Aids Grant Scheme

The Mobility Aids grant scheme is a private housing grant scheme that provides aid to cover essential works to allow for mobility problems, mostly but not entirely, related to ageing³⁷. Administered by local authorities, the maximum grant that can be issued under the Mobility Aids Housing Grant Scheme is €6000, which is a fee that could cover the total cost of the works (exclusive of VAT). A means test also applies to the scheme. Examples of the use of this grant to improve access in the home can include the installation of grab rails, a ramp, an accessible shower and a stair lift.

The Heritage Council

An Chomhairle Oidhreachta or the Heritage Council is a public body that was established under The Heritage Act 1995. Its main aim is to develop a wide understanding of the contribution that Ireland's heritage makes to the country's social, environmental and economic welfare. The Heritage Council works with local communities, local authorities, voluntary groups, government departments, various agencies and national cultural institutions to promote the enjoyment, management and protection of heritage³⁸.

The funding allocation for each of these, part of which is through the National Lottery, is shown in the table below. The Communal Facilities in Housing Projects has consistently had budget allocations of €0.5 million annually over the last number of years. Private Housing Grants have experienced a steady year on year increase over the six-year period. In the case of Private Housing Grants the total includes allocations for Mobility Aids Grant and 2 other housing grant schemes (Housing Adaptation Grant for People with a Disability and the Housing Aid for Older People Grant. The Heritage Council has increased its level of funding received from the Department in recent years, from 2017 (€6 million) to 2022 (€12 million).

| Table 2.4: Department of Housing, Local Government and Heritage allocated budget allocation by programme €m (2017-2022) | | | | | | | |
|---|-------------|-------------|-------------|-------------|-------------|-------------|---------------------|
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Total (€) (2017-22) |
| Communal Facilities in Housing Projects | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 3 |
| Private Housing Grants | 34 | 53 | 57 | 59 | 60 | 65 | 328 |
| Heritage Council | 6 | 6 | 7 | 7 | 10 | 12 | 47 |
| Total | 40.5 | 59.5 | 64.5 | 66.5 | 70.5 | 77.5 | 379 |
| Source: The Revised Estimates Volumes for the Public Service ³⁹ | | | | | | | |

³⁷ <https://www.gov.ie/en/service/6636c-housing-adaptation-grants-for-older-people-and-people-with-a-disability/>

³⁸ <https://www.heritagecouncil.ie/about>

³⁹ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

2.7 Department of Children, Equality, Disability, Integration and Youth

The Department of Children, Equality, Disability, Integration and Youth's main objective is to improve the lives of children, young people, adults, families and communities, appreciating diversity and encouraging equal opportunities⁴⁰. The Department oversees funding from the National Lottery to part-fund grants to community groups and voluntary organisations. These include, 'UBU- Your Place Your Space', 'Youth Services Grant Scheme', 'Youth Information Centres' and a 'Transition Youth Funding Scheme (closed June 2020)'⁴¹. There is no mention of the National Lottery funded element in the most recent Annual Report of the Department⁴². Each of the relevant schemes is discussed briefly below.

UBU Your Place Your Space – This is a youth funded scheme that is directed at disadvantaged young people with evidence-based interventions and services. Funding is provided by UBU Your Place Your Space to over 250 targeted Youth Services across 16 Education and Training Boards.

Youth Services Grant Scheme - Annually funding is devoted to 30 voluntary organisations. Funding of voluntary youth organisations through this scheme is done to aid in the development of youth organisations and to programmes aimed at socially educating young people.

Youth Information Centres - The purpose of youth information centres is to create a place where young people can have access to information on rights, opportunities, benefits, health, welfare and other matters.

Transition Youth Funding Scheme and Revised Youth Funding Scheme - This funding comprised a transitional funding scheme and pre-UBU Your Place Your Space development scheme. The targeted or transitional scheme comprised funding previously reported under Special Projects for Youth, Young People's Facilities and Services Fund 1 & 2 and the Local Drug Task Force projects. TYFS and RYFS were phased out as UBU Your Place Your Space became operational.

As these funds are only partially funded by the National Lottery, it is not possible to directly link any specific activity with lottery funding. A small number of individual organisations have indicated to the Department that they do not want to receive lottery funding, and these receive Exchequer only funding. There is no open competition for the funds disbursed to many of the bodies supported by

⁴⁰<https://www.gov.ie/en/organisation-information/67f5eb-about-the-department-of-children-and-youth-affairs/>

⁴¹ <https://www.gov.ie/pdf/203767/?page=null>

⁴² <https://www.gov.ie/en/publication/c134f-department-of-children-and-youth-affairs-annual-report-2020/>

these funds. Youth Organisations and Services received €73 million in funding from the Department of Children and Youth Affairs in 2022, as shown in the table below.

| Table 2.5: Department of Children and Youth Affairs allocated budget by programme €m (2017-2022) | | | | | | | |
|--|------|------|------|------|------|------|-----------------|
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Total (2017-22) |
| Youth Organisations & Services | 60 | 60 | 63 | 66 | 70 | 73 | 392 |
| <i>Source: The Revised Estimates Volumes for the Public Service⁴³</i> | | | | | | | |

2.8 HSE/Department of Health

While the Department of Health has ultimate responsibility for a number of schemes which are part funded by the National Lottery, they have not directly drawn lottery funding since 2016. Health projects which receive funding from the National Lottery are currently managed by the HSE. The latest published estimates for 2022 shows that National Lottery funding was related to "Health Agencies and other Similar Organisations", with funding of almost €5m. Previous years have also shown funding for the Healthy Ireland fund, though no National Lottery funding has been connected with this scheme since 2018.

The HSE run an open application process for the disbursement of lottery funding, with applications invited through a dedicated webpage⁴⁴. Groups and organisations who provide Health and Personal Social Services can apply for funding, with amounts of between €500 and €10,000 available for suitable projects. The HSE also publish an annual report setting out the names of beneficiary bodies and their location, as well as the amount they received. The table below illustrates the breakdown of areas of expenditure by region. Examples of agencies in the East Coast receiving funding from the HSE include mental health services and disabilities services amongst others. The breakdown of expenditure by HSE area is set out in Table 2.6 below.

⁴³ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

⁴⁴ <https://www2.hse.ie/services/national-lottery-grants/national-lottery-grants.html>

Table 2.6: HSE National Lottery Grants per HSE Area in 2020

| HSE Area | Total Expenditure Per Region (%) |
|-----------------------|----------------------------------|
| East Coast | 9.9% |
| Midlands | 3.1% |
| North East | 11.8% |
| North West & Mid West | 10.4% |
| Northern Area | 14.2% |
| South | 6.0% |
| South East | 14.8% |
| South West (Dublin) | 20.1% |
| West | 9.7% |
| Total | 100.0% |

Source: HSE National Lottery Grants Analysis 2020⁴⁵

The breakdown of expenditure on schemes by year part-funded by the National Lottery is shown in the table below. It should be noted that the amount of money that the HSE has dispersed from Lottery funds has remained constant during the period in question. In each year, the nine Community Health Organisations (CHOs) within the HSE disperse the same level of funding (or very close to the same level of funding) as in the previous year.

Table 2.7: Department of Health allocated budget by programme €m (2019-2022)

| | 2019 | 2020 | 2021 | 2022 |
|--|-----------|----------|----------|----------|
| Health Agencies & Other Organisations | 8 | 8 | 5 | 5 |
| Building, Equipping & Furnishing of Facilities | 3 | - | - | - |
| Total | 10 | 8 | 5 | 5 |

Source: The Revised Estimates Volumes for the Public Service⁴⁶

2.9 Summary of Findings

In this section we set out the current disbursement practice across the relevant Departments and agencies that have a role in distributing lottery funding. The key findings are as follows:

- Funding for projects supported by the National Lottery is allocated to five Departments, though in the HSE manages the disbursement to health bodies. The Department of Tourism,

⁴⁵ <https://www2.hse.ie/file-library/national-lottery-grants/national-lottery-grants-analysis-2020.pdf>

⁴⁶ <https://www.gov.ie/en/collection/e20037-revised-estimates/>

Culture, Arts Gaeltacht, Sport and Media receives almost two-thirds of expenditure, mainly focused on The Arts Council, Sports Capital and Equipment Grants, and Sport Ireland.

- ❑ The Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media operates a number of schemes which are part-funded by the National Lottery, namely through the Arts Council, Irish language support schemes, grants for sporting bodies and the provision of sports and recreational facilities, and Sport Ireland. In total these accounted for €280m in allocated budget in 2022, relating mainly to Sports Ireland and Arts Council expenditure.
- ❑ Some of the Department of Rural and Community Development's community development schemes are part funded by the National Lottery, namely, the Senior Alerts Scheme, the Scheme to Support National Organisations, and local/regional community development supports. The governance applied to Lottery funded projects by the Department is the same as for other public funding they manage. For example, a Focused Policy Assessment was completed for the Senior Alerts Scheme.
- ❑ The Department of Housing, Local Government and Heritage has three schemes which are part funded by the National Lottery, Communal Facilities in Housing Projects, Mobility Aids Grant Scheme and funding for the Heritage Council. Most of the funding is for grants for investments in the homes of those who have limited mobility.
- ❑ The Department of Children, Equality, Disability, Integration and Youth oversees funding National Lottery part-funding to community groups and voluntary organisations which include, 'UBU- Your Place Your Space', 'Youth Services Grant Scheme', 'Youth Information Centres' and a 'Transition Youth Funding Scheme (closed June 2020)'. There is no mention of the National Lottery funded element in the most recent Annual Report of the Department.
- ❑ The HSE manages the process for the disbursement of National Lottery funding. The latest published estimates for 2022 shows that National Lottery funding was related to "Health Agencies and other Similar Organisations", with funding of almost €5m. Unlike other areas, the HSE run an open competition, invite submissions from organisations nationally, and report on who were the recipients.

3 International Review

3.1 Introduction

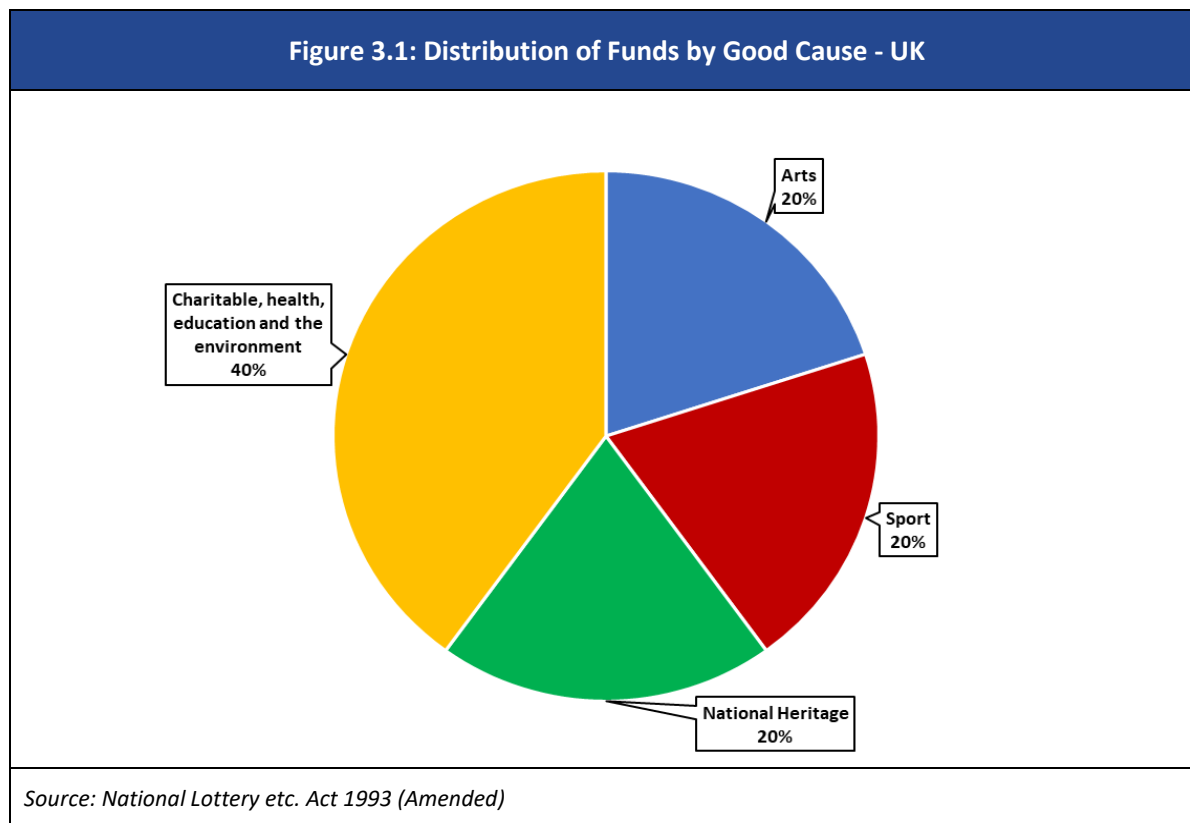
In this section we review the systems in place to allocate lottery money in a number of countries, namely, the UK, New Zealand and Finland. Some of the key features of the practice in these countries of most relevance to Ireland is shown in the table below, while a brief discussion of each country is outlined subsequently.

| Table 3.1: Summary matrix of selected features of international lotteries | | | |
|---|---|---|--|
| | UK | New Zealand | Finland |
| Structure of beneficiaries | While several organisations are part-funded by the lottery, 40% is allocated through the National Lottery Community Fund (NLCF) | Half of profits go to three statutory bodies; remainder distributed through a range of grants to individual and group applicants. | Divided across three departments, with almost half open to non-profit applicants |
| Reprioritisation | Distribution amounts set out in legislation, though NLCF can identify new priorities | System allows reprioritisation by project and by priority area | Some elements rigid, though re-prioritisation by project and priority area also possible |
| Application process | Open application process for NLCF element of funding | Open application process via online application process | Open application process via Funding Centre for Social Welfare and Health Organisations (STEA) |
| Impact Assessment | Has not been much evaluation of impact, though two recent evaluations published | No specific guidelines or requirements, other than social impact of gambling | Recipients required to provide information on impacts |
| % Distribution to Good Causes | 23% | 23% | 27% |
| Source: Indecon | | | |

3.2 The UK National Lottery

The UK's National Lottery supports projects in the arts, sport, heritage, charity, voluntary, health, education and environmental sectors, and distributes approximately £30 million per week for good

causes through 12 separate organisations.⁴⁷ For every £1 sales, 23% is spent on good causes, 58% on prizes, 12% on Government lottery duty, and the remainder on operating costs of both operator and retailers.⁴⁸ The allocation to good causes is undertaken by the National Lottery Distribution Fund (NLDF), with expenditure from the fund split based on the following:



Supported bodies have their own internal governance processes and procedures for granting awards and are generally only part-funded from Lottery funds.⁴⁹ However, the National Lottery Community Fund (NLCF) is dedicated to the dispersal of lottery funds and has established structures and principles set out in legislation for this dispersal⁵⁰. The NLCF is governed by a Board which is responsible for setting the Fund's long-term strategy and key policies.⁵¹ Within the wider structure is a National Lottery Community Fund Advisory Group made up of community groups, charities and other funders which meets regularly to identify and discuss key issues facing civil society, with recent discussions centering on the climate emergency, and the organisation's funding approach to young people.⁵² This allows for a reprioritisation of funding over time based on emerging need.

⁴⁷ <https://www.lotterygoodcauses.org.uk/coronavirus-pandemic-response>

⁴⁸ Derived from <https://www.national-lottery.co.uk/life-changing/where-the-money-goes>, accessed on 7th February 2022.

⁴⁹ A table showing the distributors of UK National Lottery funds and the share of total expenditure that they are responsible for is shown in the annex to this report.

⁵⁰ The annex to this document shows the front page of the UK's National Lottery Community Fund portal.

⁵¹ <https://www.tnlcommunityfund.org.uk/about>

⁵² <https://www.tnlcommunityfund.org.uk/about/our-people/advisory-group-membership>

On a project-by-project basis, the NLCF's operating model has been reformed over the past five years, with the process now more devolved to communities. For example, there is a funding officer for the Southeast of the UK who is charged with identifying need and establishing good local intelligence. Part of this involves regularly assessing what type of funding the area receives and what gaps remain. This is a relatively expensive means of distributing funding and requires an element of centralisation. The legislation which underpins the fund contains a range of considerations which the NLCF must take into account when distributing money, as set out below.

Table 3.2: Legislative Principles for UK National Lottery Community Fund

1. **Engagement** – the development of programmes should be based on the active engagement of public, private and voluntary and community sector and social enterprise partners.
2. **Representation** – the development of programmes should take account of those most in need by targeting inequality and improving the capability of people and communities to contribute to, participate in and benefit from outcomes funded through the Fund's programmes.
3. **Sustainability** – a programme's ability to improve the environment today and for future generations and reduce the impact on the environment.
4. **Longer-term benefit** – that projects can achieve longer term financial viability and resilience.
5. **Additionality and complementarity** – the development of programmes and funding of projects should complement, add value and be distinct from the work of other funders and parties working towards the Fund's goals.
6. **Collaborative working** – where this produces better results, the development of programmes and funding of projects should support collaborative action between funded organisations and public, private and civil society partners.

Source: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/141867/BI_G_Policy_Directions.pdf

Traditionally, there has not been much evaluation of the impact of the fund, though there have been recent evaluations conducted.^{53, 54} For example, an evaluation of the National Lottery COVID-19 Fund found that it achieved its objective to increase community support to vulnerable people affected by the COVID-19 crisis, through the work of civil society organisations.

⁵³ https://www.tnlcommunityfund.org.uk/media/insights/documents/NL-COVID_FINAL-REPORT.pdf

⁵⁴ <https://www.tnlcommunityfund.org.uk/insights/covid-19-resources/responding-to-covid-19/ccsf-grantholder-evaluation/ccsf-impact>

3.3 New Zealand: Lotto NZ

Established in 1987, the New Zealand Lotteries Commission is an autonomous Crown entity and operates under the authority of the NZ Gambling Act 2003 and Crown Entities Act 2004.⁵⁵ The commission trades as “Lotto NZ” and promotes, organises, and conducts lotteries; makes rules regulating the conduct and operation of those lotteries; and advises the Minister of Internal Affairs on matters relating to lotteries.⁵⁵ All net profits are transferred to the New Zealand Lottery Grants Board which distributes them to sporting and cultural agencies and other community recipients.

Of each dollar received, Lotto NZ spends 55c on prizes, 12c on taxes and 10c on costs and fees. The remaining 23c profit is distributed to public causes and projects in the form of grants by the NZ Lottery Grants Board.⁵⁶ Causes and projects receiving grants need to show they can contribute to the building of strong sustainable communities by encouraging or enabling:

- (a) Community self-reliance, capacity building, and stability; or
- (b) Opportunities for social, recreational, civil, or cultural participation and reducing or overcoming barriers to such participation; or
- (c) community and environmental health; or
- (d) development and preservation of New Zealand’s arts, culture, heritage, and national identity; or
- (e) sports and recreation.

The Department of Internal Affairs oversees the Lottery Grants Board and has a dedicated staff to support the applications process.⁵⁶ The board itself is not independent from Government, with membership of the board including a Minister, the Prime Minister, the Leader of the Opposition, and three appointees who are selected based on knowledge, skills, and experience relating to the functions and powers of the Board. According to the Lottery Grants Board, approximately half of all profits go to three statutory bodies, namely Creative New Zealand; Sport New Zealand; and the New Zealand Film Commission. The remaining profits are distributed through a range of grants to individual and group applicants.⁵⁷ The Board’s decisions are based on applications meeting at least one of the following criteria:

- Enhance capability and increase capacity among applicants and the community;
- Reduce community organisation funding gaps;
- Have regards to the needs and aspirations of Māori; or
- Meet needs of elderly, ethnic communities, women and youth, people with disabilities.

Grant requests should show how they will contribute to supporting volunteers; enable people to help themselves; promote community wellbeing and address disadvantage; or promote community participation, inclusion and identity. In distributing funds, the board can appoint distribution committees, which consist of 3-5 members who are all appointed by the Minister. There are currently 20 distribution committees distributing grants on behalf of the board.⁵⁸

⁵⁵ <https://www.treasury.govt.nz/information-and-services/commercial-portfolio-and-advice/commercial-portfolio/new-zealand-lotteries-commission>

⁵⁶ <https://mylotto.co.nz/community-funding>

⁵⁷ <https://www.communitymatters.govt.nz/lottery-grants-board/>

⁵⁸ <https://www.communitymatters.govt.nz/ask-us/view/564>

The system in New Zealand allows for a reprioritisation of resources, both across projects and by priority area. The flexibility in the underlying legislation for the Government to decide on an ad-hoc basis the manner of the distribution of funds can be seen in the creation of the COVID-19 Wellbeing Fund of \$40 million NZD (approximately €25m) administered by the Lottery Grants Board.

Table 3.3: New Zealand COVID-19 Wellbeing Fund

The Lottery COVID-19 Community Wellbeing Fund provides one-off grants for community or social initiatives that increase the strength and resilience of communities that are responding to the impacts of COVID-19. This Fund supports hapū, iwi and community organisations that have lost funding or have an increased demand on their services due to the COVID-19 pandemic, and community or social initiatives that strengthen community resilience and respond to the impacts of COVID-19. The COVID-19 Community Wellbeing Fund gave priority to supporting:

- Innovative and transformative community or social initiatives that respond to the impact of COVID-19;
- Collaborative community or social initiatives that strengthen and increase resilience in communities; and
- Hapū, iwi and community organisations that are delivering community and social initiatives that have been impacted by COVID-19 – either through the loss of funding sources or through extra or changed demand on their services.

Source: <https://www.communitymatters.govt.nz/lottery-covid-19-community-wellbeing-fund/>

Applications to the various funds that exist can be made directly to the Lottery Grants Board. The Community Matters website⁵⁹ provides a central point where organisations can apply for funding for National Lottery funds, while also distributing funds from other public and philanthropic sources. Projects that have had lottery grant funding must acknowledge the Lottery Grants Board's support in any publicity materials, such as event programmes or annual reports.

There is some evidence of beneficiaries being required to report on impacts as a condition of receipt of New Zealand Lottery grants. There is a results report which focuses on: what happened; who benefitted; what outcomes were achieved and evidence for same; how many people benefitted or participated; and details of any feedback received.

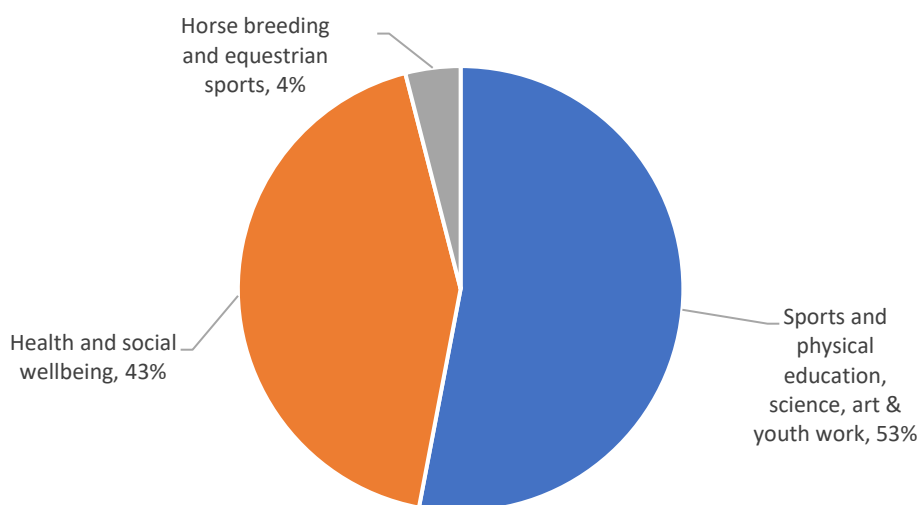
3.4 Finland: Veikkaus

Veikkaus is the Finnish government-owned betting agency, which holds a monopoly to provide gambling services in Finland. As well as the Finnish Lottery, Veikkaus is also responsible for electronic gambling machines, casinos and betting. It allocates 27% of money generated by ticket sales to good causes.⁶⁰ The allocation of this funding as determined by legislation is set out in the following graph:

⁵⁹ <https://www.communitymatters.govt.nz/>. An example of one of the pages of this website is shown in the annex to this report.

⁶⁰ <https://www.euro-jackpot.net/en/good-causes>

Figure 3.2: Distribution of Funds by Good Cause - Finland



Source: OECD

Three Government ministries are charged with distributing this funding, each of which are discussed briefly below.

The first, the Ministry of Education and Culture, allocates funds for the promotion of sports and physical education, science, art and youth work out of the proceeds. These are set out in specific shares as follows:

- 25% for the promotion of sports and physical education;
- 17.5% for the promotion of science;
- 38.5% for the promotion of art;
- 9% for the promotion of youth work; and
- 10% specified annually in the Government Budget.

As such, while the system has a certain degree of inflexibility in terms of allocation across priority area, the 10% annual allocation allows for the reprioritisation of funds on an annual basis.

The second tranche of money is distributed by the Funding Centre for Social Welfare and Health Organisations (STEA),⁶¹ which operates under the Ministry of Social Affairs and Health, and is tasked with preparing, paying, monitoring and overseeing grants for the promotion of health and social wellbeing.⁶² STEA is the most significant funding operator for Finnish organisational operations within

⁶¹ <https://www.stea.fi/en/applying-grants/who-can-apply/>. An example of one of the pages of the website are shown in the annex to this report.

⁶² European Commission (2020) "Social enterprises and their ecosystems in Europe – Comparative synthesis report."

social and health services. STEA receives some 2,500 funding applications per year. Non-profit associations that are listed on the Register of Associations, foundations, non-profit limited companies and cooperatives can apply for STEA funding if the purpose of their operations is to promote health and social wellbeing. Funding is not intended for the use of statutory public services, or anything that approaches a commercial activity. Organisations receive grants for general or targeted activities, investments, development projects, introductory projects, and other projects with a defined purpose.

The Ministry of Agriculture and Forestry decides on the distribution of the grants awarded for the promotion of horse breeding and equestrian sports out of the proceeds. The proportioning of this money is based on historical considerations, with at least 95% of the proceeds for the promotion of horse breeding and equestrian sports allocated to the Finnish trotting and breeding association and its member organisations. The Finnish trotting and breeding association presents an annual proposal to the Ministry setting out the proposed distribution of the funds.

In terms of social impact, as with New Zealand a lot of emphasis in Finland is placed on avoiding and reducing the economic, social and health-related harm resulting from participation in lotteries. However, STEA also monitors changes and the general development of health and social welfare and non-profit organisation sectors. The centre's long-term funding goal is to ensure that there will be an active and versatile breadth of organisations to promote the health and social wellbeing of Finnish citizens. The economic use of funds and operational transparency are basic preconditions for funding being granted.

3.5 Summary of Findings

This section reviewed the systems in place to allocate lottery money in a number of countries, namely, the UK, New Zealand and Finland. A summary of the key findings of this session are as follows:

- ❑ **The UK National Lottery:** Profits from the UK National Lottery support the operation of several organisations which are part-funded by the lottery, though 40% is allocated through the National Lottery Community Fund (NLCF). The NLCF operate an open application process⁶³ with a dedicated website, which includes examples of projects which have received funding. There has not been much systematic evaluation of the impact of National Lottery funding in the UK, though two recent evaluations have been published.
- ❑ **Lotto NZ:** Of every dollar spent on the lottery, 23c of profit is distributed to public causes and projects in the form of grants by the NZ Lottery Grants Board. Half of profits go to three statutory bodies, with the remainder distributed through a range of grants to individual and group applicants. The Community Matters website is an online application process where organisations can apply for grant funding for National Lottery and from other funding sources.
- ❑ **Veikkaus:** Veikkaus is the Finnish government-owned betting agency, which holds a monopoly to provide gambling services in Finland. The distribution of funding is based on specific shares, though with 10% specified annually in the Government Budget to allow flexibility for the reprioritisation of funds on an annual basis. An open application process is provided by STEA, which is charged with preparing, paying, monitoring and overseeing grants for the promotion of health and social wellbeing.

⁶³ <https://www.tnlcommunityfund.org.uk/>

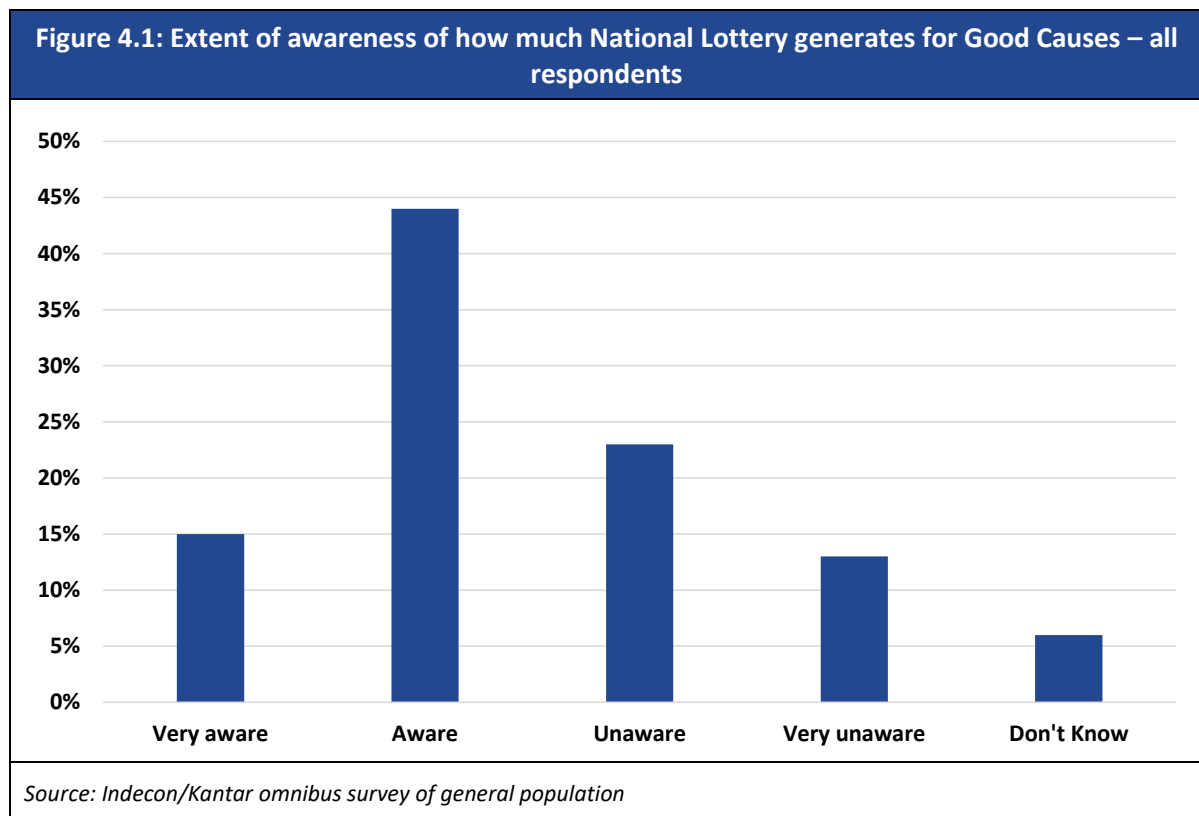
4 Connection Between Lottery Sales and Funding Allocation

4.1 Introduction

In this section we set out the perception of people between the decision to purchase a lottery ticket, and their understanding of the good causes that benefit from such sales. Indecon conducted an omnibus survey of the Irish population, with the aim of better understanding the link between the use of funds raised through purchase of Lottery products and expenditure by consumers on Lottery products. The survey was of 1,041 adults and included both regular Lottery players and non-players.

4.2 Awareness of Good Causes Funding

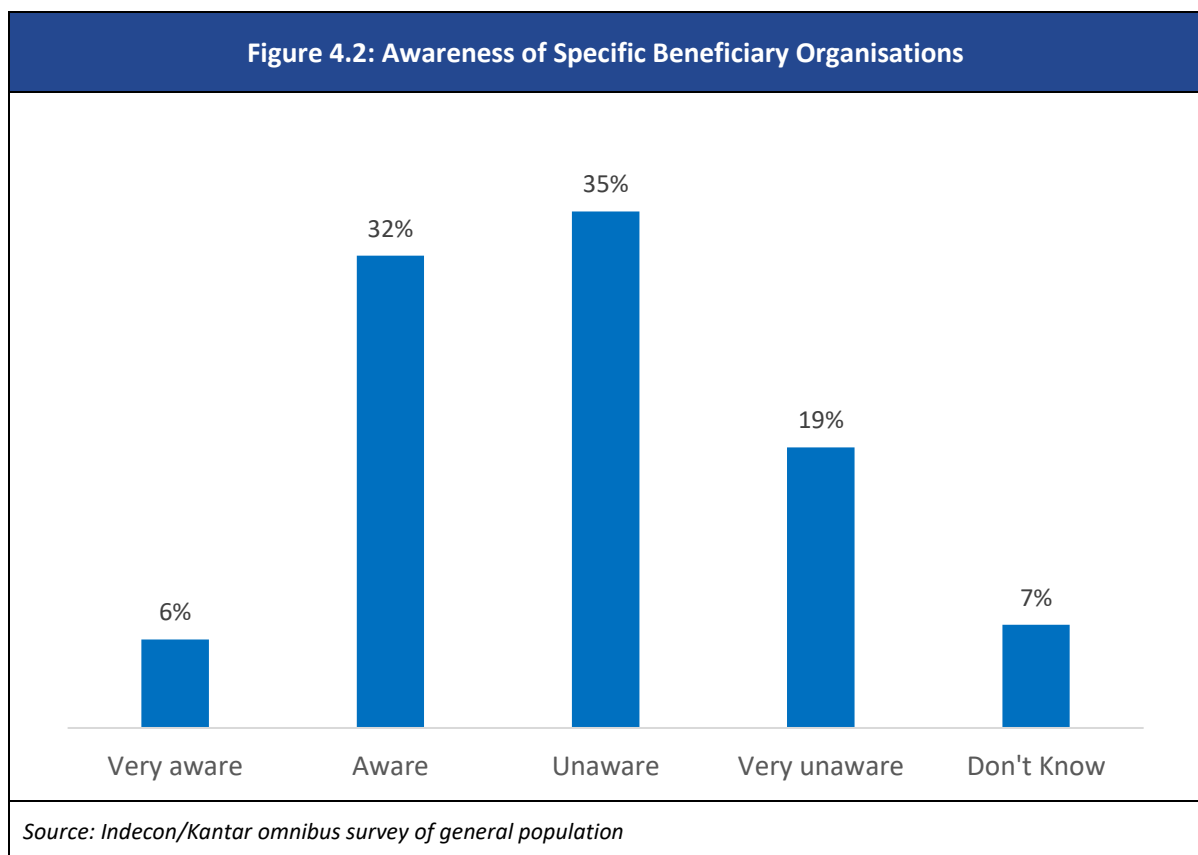
There was a high level of reported understanding that the National Lottery generated significant sums annually for good causes. This is illustrated in Figure 4.6 below. It shows that three in five members of the population said that they were aware or very aware of the extent of support that the National Lottery provides.



Regular lottery players report a greater awareness of the support that the National Lottery provides for good causes. Table 4.1 shows the net awareness (i.e., very aware plus aware) based on frequency of purchase, as well as net unawareness. This is consistent with the contention that a greater awareness of the use of lottery funds for good causes may be conducive to higher sales and therefore revenue.

| Table 4.1: Extent of Awareness of How Much National Lottery Generates for Good Causes – Responses Based on Frequency of Lottery Purchase | | | | |
|--|-------------------------------|------------------|---------|--------|
| | Frequency of Lottery Purchase | | | |
| | Never | Few times a year | Monthly | Weekly |
| Net Aware | 37% | 58% | 62% | 71% |
| Net Unaware | -49% | -38% | -35% | -26% |
| <i>Source: Indecon/Kantar omnibus survey of general population</i> | | | | |

While there was high reported awareness of overall good causes funding, members of the public were far less able to identify any specific beneficiary organisations which benefited, as illustrated in Figure 4.2.



Regular lottery players reported being better able to identify specific beneficiary organisations, though net awareness (very aware plus aware) was still lower than net unawareness (unaware plus

very unaware) for this cohort. For those who never, or irregularly, play the lottery, there is a relatively low level of awareness of specific beneficiaries. This is shown in Table 4.2.

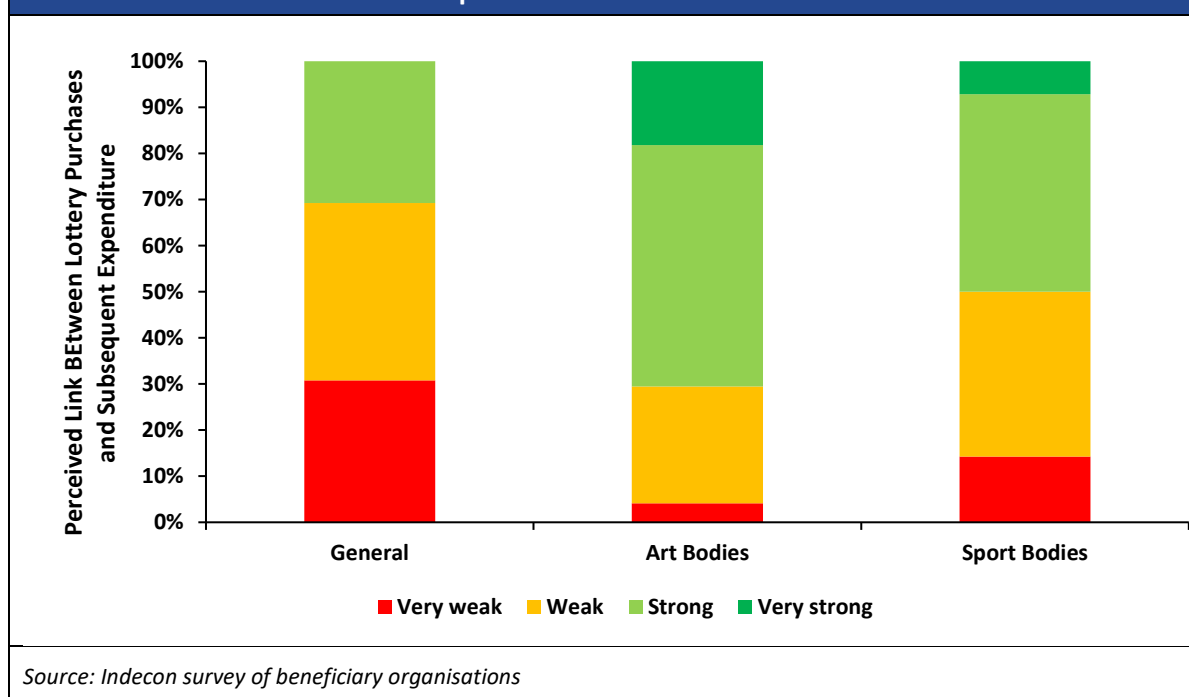
Table 4.2: Extent of Awareness of Specific Beneficiary Organisations – Responses based on Frequency of Lottery Purchase

| | Frequency of Lottery Purchase | | | |
|--------------------|-------------------------------|------------------|---------|--------|
| | Never | Few times a year | Monthly | Weekly |
| Net Aware | 20% | 40% | 42% | 46% |
| Net Unaware | -65% | -54% | -55% | -47% |

Source: Indecon/Kantar omnibus survey of general population

Indecon's survey of beneficiary organisations also suggested a belief that there was a lack of understanding of the link between the decision to purchase a lottery product and the expenditure which ultimately benefits good causes. This is illustrated in Figure 4.3 below.

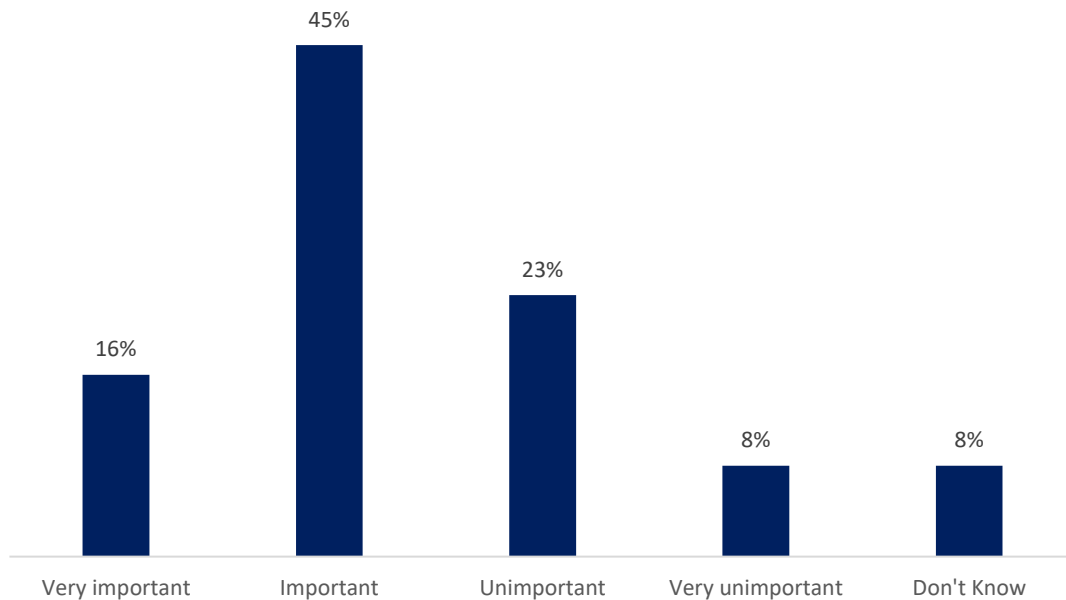
Figure 4.3: Link between funds raised by purchases of Lottery products and subsequent expenditure on Good Causes



The survey indicated that the decision whether to buy a lottery product was influenced by awareness of beneficiaries. Two in three respondents who expressed an opinion said that such an awareness

was either important or very important in deciding to purchase a lottery product. This suggests that by generating such an awareness among the public, greater funds for good causes could be raised.

Figure 4.4: Reported Importance in Knowing About Beneficiaries in Decision to Buy Lottery Product



Source: Indecon survey of beneficiary organisations

Beneficiary bodies indicated that lottery sales would be impacted by a greater connection with good causes, as shown below in Table 4.3.

Table 4.3: The impact that a lack of consumer understanding on connection between Good Causes and how funding is allocated has on lottery sales

| | No impact | Insignificant impact | Significant impact | Very significant impact | Don't know |
|----------------------|-----------|----------------------|--------------------|-------------------------|------------|
| General | 11% | 32% | 26% | 0% | 32% |
| Artist Bodies | 26% | 37% | 17% | 6% | 14% |
| Sport Bodies | 19% | 43% | 23% | 4% | 10% |
| Total | 19% | 42% | 23% | 4% | 12% |

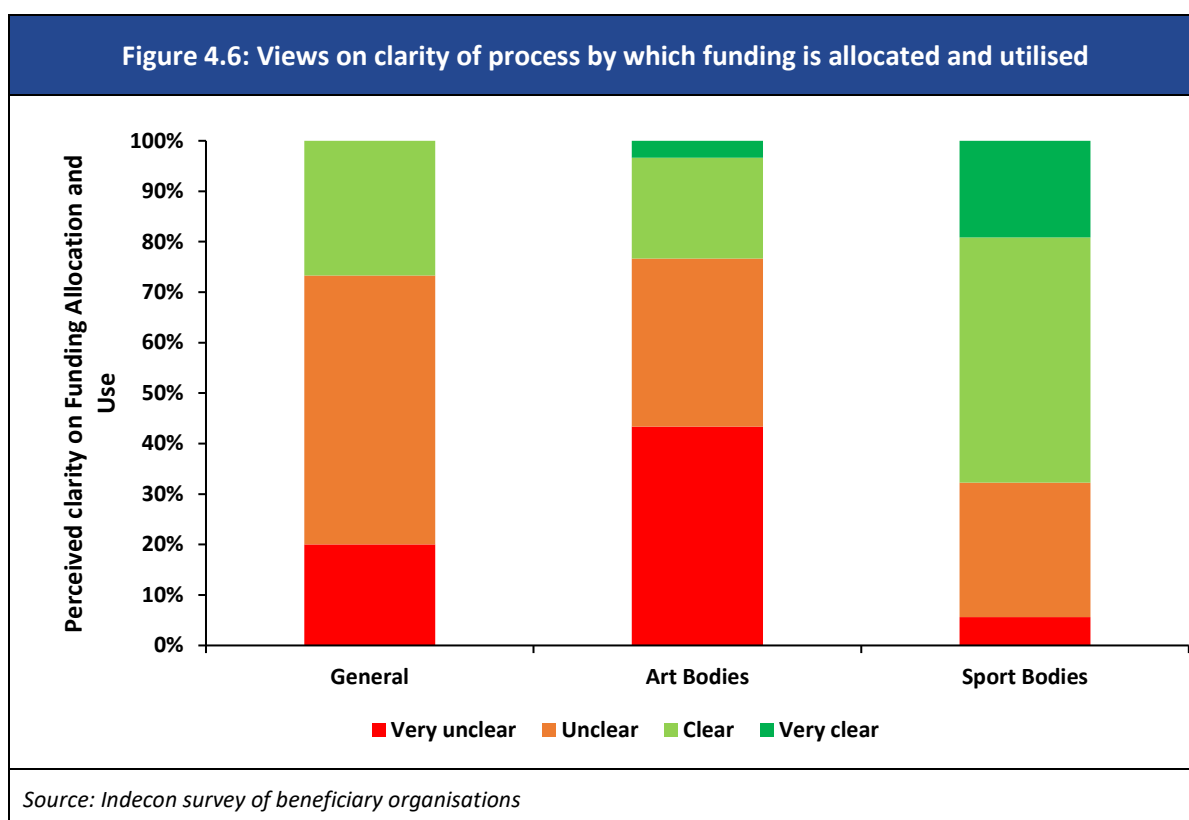
Source: Indecon survey of beneficiary organisations

The issue of the link between lottery sales and subsequent beneficiaries was raised by a number of stakeholders during the public consultation. Clarity and transparency of the allocation process was seen by a number of stakeholders as important for consumers as well as beneficiary organisations. Further, greater acknowledgement of funding received by beneficiary organisations was identified as being important, as the part-funding by the National Lottery was often not known by the beneficiary organisations themselves, let alone users of their services. The role of effective marketing to consumers highlighting the important role that National Lottery funding plays was raised as a means of improving the link between purchases and beneficiaries, as was the role that retailers have a role in highlighting local beneficiaries at point of sale. A selection of quotes from submissions received are shown in the figure below.

| Figure 4.5: Selected stakeholder quotes – Link between sales and good causes funding |
|--|
| <p>PEIN: Funded projects should seek to acknowledge the support of the National Lottery within their service and through at least one event per year to engage with local media and social media to promote their own work and acknowledge the National Lottery funding</p> <p>RGDATA: Information on how to allocate Good Causes funding being available from retail agents, and permission to be provided at point-of-sale material on local projects that have been supported.</p> <p>Philanthropy Ireland: Information on all aspects of the operation of the National Lottery funding could be published in an easily accessible public format. (there is a need to) look beyond the amount allocated and shed light on the outcomes and impact of the allocated funds.</p> <p>PLI: Demonstrating Transparency – it is vitally important that players and recipients can all see where Good Causes funding has gone and have confidence in the integrity of the assessment and distribution processes.</p> |
| Source: Submissions made to Public Consultation Process |

4.3 Process for Accessing Funding

In this section we set out the perception of beneficiaries of the process for the application of good causes. As discussed in Section 3, good causes funding is distributed by five government departments, with the HSE distributing funds on behalf of the Department of Health. In this section we set out the views of beneficiary bodies as to the process of allocation of funds. Beneficiary bodies generally reported that the process for accessing funding was unclear, though there were differences between recipient types. Among general organisations and arts bodies, a large majority of beneficiary respondents indicated that the process was 'unclear' or 'very unclear'. There was a much higher level of clarity among sports bodies who receive funding through the Sports Capital and Equipment Fund. The responses of beneficiary bodies is set out in Figure 4.6.



There was broad agreement among stakeholders who participated in the public consultation programme of the need to simplify and clarify the application processes and timelines for National Lottery funding. There was also support for an 'open call' for funding, such as with the UK's National Lottery Community Fund, which could also allow for flexibility in meeting emerging needs. Stakeholders also highlighted the need for multi-annual funding should become a feature of funding processes.⁶⁴

Indecon notes that in balancing the opportunity for an open fund and other means to meet the needs of new organisations or different societal challenges, and the need to protect existing beneficiaries if a portion of funding were to be reallocated. Some submissions also highlighted the potential to work with partners in philanthropy or other funders to maximise impact. The Department of Rural and Community Development, convened the first meeting of the National Advisory Group on the Development of a Government Policy on Philanthropy in Ireland in April 2022. Specific proposals were also made in the consultation for this review highlighting particular areas which should be of focus (e.g., early childcare).

⁶⁴ See for example the pre-Budget submission from the Charities Institute of Ireland: <https://www.charitiesinstituteireland.ie/news/news/293/293-Budget-2022-Submission>

Figure 4.7: Selected stakeholder quotes – Accessing Funding

Charities Institute Ireland: *It is vitally important that a centralised allocation process is developed which brings transparency, demonstrates equity, and removes the challenges currently faced by the Charity & Not-for-profit sector to access grants.*

The Wheel: *Increase the portion of funding for open call*

Ensuring that crucial services and supports (such as in the area of arts and sports) currently funded by the National Lottery remain fully funded by the exchequer if there is a move to a more open application process for a portion of Lottery funds.

PLI: *...potential Good Causes recipients indicates that they often face uncertainty and a heavy administrative burden in seeking Good Causes funding.*

Philanthropy Ireland: *The central aspect that needs to be established is clear and well-defined criteria and strategic areas for fund allocations.*

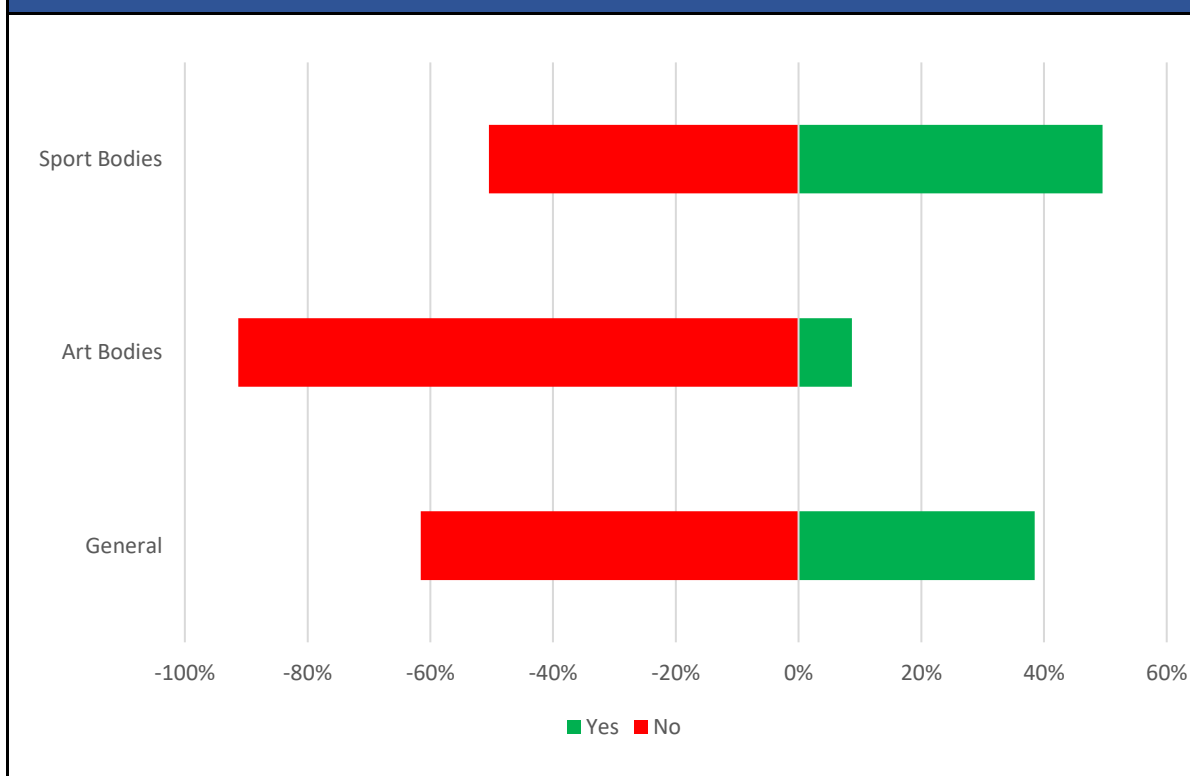
The policy framework could facilitate allocation of funding to an annual ‘open call’ which any community or non-profit organisation could apply for, such as with the UK’s National Lottery Community Fund.

PEIN: *Expertise in grant management and support either needs to be developed within the National Lottery or, preferably, should be contracted out, drawing on the existing skills of Pobal and of the Philanthropy sector.*

Source: Submissions made to Public Consultation Process

4.4 Governance and Reporting Process

Beneficiary organisations surveyed by Indecon as part of this project indicated a lack of clarity regarding how the process to allocate funding is run. This was reported across all categories of respondents. This is illustrated in Figure 4.8.

Figure 4.8: Views on extent to which there is clarity of overall policy goals which inform how allocation is determined

Source: Indecon survey of beneficiary organisations

As well as making decision as to where to allocate funding, the communication and reporting of these decisions is also important, though was highlighted as an issue by stakeholders. Almost half of beneficiary respondents who expressed an opinion indicated that the reporting on the impacts of National Lottery expenditures was either poor or very poor. This is shown in Table 4.4 below.

Table 4.4: Reporting clarity on expenditures of lottery funding and impacts of funding

| | Very poor | Poor | Good | Excellent | Don't know |
|---------------|-----------|------------|------------|-----------|------------|
| General | 5% | 26% | 47% | 0% | 21% |
| Artist Bodies | 23% | 23% | 14% | 0% | 40% |
| Sport Bodies | 4% | 32% | 45% | 6% | 13% |
| Total | 6% | 31% | 42% | 5% | 15% |

Source: Indecon survey of beneficiary organisations

Figure 4.9: Views of beneficiary bodies on governance and reporting process

"I think there could be lot more transparency about National Lottery Funding."

"Until now I was unaware that Lottery funding was part of our budget. This should be made public knowledge as this is a positive thing for the Lotto."

"An online portal for applications and reporting should be available in this day and age."

"No complaints - should be the model others follow." (Received from recipient of funding from Sports Capital and Equipment scheme).

Source: Indecon survey of beneficiary organisations

Stakeholders who engaged as part of the public consultation were in broad agreement that a greater level of governance and reporting was needed regarding the disbursement of National Lottery funds. In particular, the need for a centralised body to oversee distribution was a strong theme among submissions, though a variety of views were expressed as to whether this could take the form of a statutory or a non-statutory body. A secondary option of much greater coordination among Government Departments was also suggested. Numerous stakeholders highlighted the need for the governance process to be made more transparent, including through the active engagement of the voluntary and community sector and social enterprise partners. A selection of quotes from stakeholder submissions is shown in Figure 4.10 below.

Figure 4.10: Selected stakeholder quotes – Governance and Reporting Process

RGDATA: *There is a need for reform of this process, whether through a dedicated entity to allocate such funding (similar to the Dormant Accounts Board) or even greater co-ordination among existing entities through a central portal.*

The Wheel: *Improve the coordination and coherence between Government departments and state agencies by publishing a clear allocation framework and rationale*

Charities Institute Ireland: *An Independent board should be formed with appointed/elected representatives from the statutory, charitable, community and voluntary sectors. A wider sectoral forum with Departmental oversight should also be established to support the work of the Board.*

Philanthropy Ireland: *formal mechanisms of governance to oversee the allocation and utilisation of funding.*

PLI: *One option would be to create a statutory body Another option would be establishment of a non-statutory centralised entity with specific delegated responsibilities to advertise, administer and process the allocation of Good Causes funding on behalf of the relevant Departments and agencies.*

PEIN: *There should be clarity and transparency on the use of Lottery Funding with an annual impact report being presented to DPER and placed before the Oireachtas.*

Source: Submissions made to Public Consultation Process

4.5 Principles Which Could Underpin Future Framework

Stakeholders consulted as part of this project were also asked to identify potential principles which could underpin a future framework for the allocation of funds. A number of principles were identified, with a number highlighted in the table overleaf.

| Table 4.5: Principles Which Could Underpin Future Framework | |
|---|---|
| Transparency | <p>National Lottery Regulator: Greater transparency and assurance from the State regarding the allocation and utilisation of National Lottery funding would be beneficial to the long-term sustainability of the National Lottery.</p> <p>Philanthropy Ireland: Expand the focus to the stakeholders involved, the structure of the agencies, utilisation of funds, outcomes, and impact assessment with relation to funds distributed.</p> <p>Charities Institute Ireland: An Independent Body developed to manage Good Causes funding should have transparency as a key principle and objective about everything it does, not just the allocation process.</p> |
| Engagement | <p>The Wheel: Put formal engagement structures and processes in place to involve charities, beneficiary representative bodies, stakeholder groups and those that operate in the area of 'good causes' to develop a clear framework for the allocation of Lottery funds.</p> <p>Charities Institute Ireland: An Independent board should be formed with appointed/elected representatives from the statutory, charitable, community and voluntary sectors. A wider sectoral forum ... to support the work of the Board.</p> |
| Open call/ competition | <p>Charities Institute Ireland: We agree with this principle and propose that a digital-first approach is adopted to ensure accessibility and transparency.</p> <p>The Wheel: Open call ... would strengthen connection between National Lottery funding and the vibrant diverse landscape of community and voluntary organisations across Ireland who work towards good causes.</p> <p>Philanthropy Ireland: A percentage of the fund allocation could be set aside to enable creative/responsive line of funding to test and/or react to immediate and evolving needs.</p> |
| Acknowledgment | <p>Charities Institute Ireland: Agreed and centralised support should be provided by way of social media, branding and marketing collateral in order to amplify the funding and the impact.</p> <p>PLI: As part of a standardised process any recipient of Good Causes funding should be required to, where appropriate, highlight and acknowledge the source of funding and describe the benefits through available communications channels including digital, social, and local media.</p> |
| Setting standards | <p>Philanthropy Ireland: The National Lottery is a significant funder with a significant national profile. In this regard there is real opportunity to provide leadership in good giving processes. This should be evident in policy frameworks, demonstrating intent and commitment to standards for good giving.</p> <p>PLI: A single central entity which co-ordinates matters relating to the allocation of Good Causes funding, can stipulate efficacy KPIs which recipients of funding must return to the central entity periodically, facilitating sectoral as well as cumulative impact reporting, which in turn may be useful to government in informing funding policy.</p> |
| Managing Transition | <p>The Wheel: Increasing funding for open call applicants should not come at the expense of organisations that benefit from funding and if more funding is reallocated to open call treatment then currently funded organisations should continue to receive funding from the exchequer if necessary.</p> |
| Source: Submissions made to Public Consultation Process | |

4.6 Summary of findings

This section set out the link between the decision to purchase a lottery ticket, and the understanding of the good causes that benefit from such sales. A summary of the main findings of this section are as follows:

- ❑ Indecon and the Department of Public Expenditure and Reform conducted an extensive consultation exercise as part of this project, with responses from different stakeholder groups indicating a number of ways that current processes and procedures for the allocation of National Lottery funds could be improved.
- ❑ There was a high level of reported understanding that the National Lottery generated significant sums annually for good causes, though there was far less clarity as to which specific bodies had benefited. Awareness was higher among regular lottery players than it was amongst those who do not play or who only play irregularly.
- ❑ Good causes funding is distributed by five government departments, with the HSE distributing funds on behalf of the Department of Health. Beneficiary bodies generally reported that the process for accessing funding was unclear, though the extent of this view differed among different groups of beneficiaries. There was broad agreement among stakeholders who participated in the public consultation programme of the need to simplify and clarify application processes and timelines.
- ❑ There was a perceived lack of clarity among beneficiary bodies and other national stakeholders regarding how the process to allocate funding is run. Many stakeholders stated that there was a need for a centralised body to oversee allocation, though there was no strong agreement as to what form this would take. Numerous stakeholders highlighted the importance of the active engagement of the voluntary and community sector and social enterprise.
- ❑ A number of principles for the allocation of funding were identified by stakeholders engaged as part of this review, in particular regarding the need for greater transparency, greater engagement with the non-profit sector, the creation of an open call for some of the funds, a requirement that beneficiaries acknowledge National Lottery funds, and the need to manage transition to ensure that current beneficiaries do not lose out.

5 Policy Options for Reform

5.1 Introduction

In this section we set out three possible options for reform. These options are not mutually exclusive, and other options could also be considered in the future by the Government. These options are intended to build on each other, for example Option B is largely the same as Option A but includes some additional elements. A summary of each of the options is presented in the following sections, and each are discussed in the subsequent text.

The options have been developed based on a number of considerations, including the lessons learned from the review of international experience, as well as the principles identified by stakeholders as part of the consultation process for this study. The primary objective of the reform is to improve the transparency of the allocation process as follows:

- ❑ Strengthen the link between funds raised by purchases of Lottery products and the subsequent expenditure which ultimately benefits for good causes;
- ❑ Improve awareness in the non-for-profit sector as to the funding that exists, and how to apply for it; and
- ❑ Establish a defined process to govern how funding is allocated to new and emerging good causes projects, which were not part of the original pattern of allocations.

It is critical that transitioning arrangements to any new arrangement be put in place given the length of time some organisations have been in receipt of lottery funding. In particular, it is expected that reforms would have a negligible effect on existing funding lines.

5.2 Reform Option A

The first option, Option A, represents a series of measures that could be taken without significant changes to the overall structures that are in place to oversee the allocation of National Lottery funds. However, it should be noted that the measures, particularly regarding ensuring a greater acknowledgement of the National Lottery by beneficiaries, would require a significant level of communication and work to ensure that it becomes an engrained part of the culture of beneficiary organisations who are in receipt of National Lottery funding. The main elements of Option A are set out in Figure 5.1 below, which are further discussed in the subsequent text.

Figure 5.1: Summary of Option A

| |
|--|
| Governance <ul style="list-style-type: none"> <input type="checkbox"/> Continue current allocation of funds through estimates process. <input type="checkbox"/> Each Department/agency retain responsibility for overseeing and monitoring their own schemes. |
| Reduce and Refocus Supported Schemes <ul style="list-style-type: none"> <input type="checkbox"/> Concentrate resources on fewer schemes without impacting overall scheme funding. <input type="checkbox"/> Some schemes could cease to receive lottery funding, without affecting their overall budget/expenditure. |
| Implement Greater Acknowledgement of National Lottery Support <ul style="list-style-type: none"> <input type="checkbox"/> Beneficiary bodies will need to meet new DPER guidelines regarding funding acknowledgement. <input type="checkbox"/> Funding for capital projects over minimum level will need physical signage as part of scheme terms and conditions. <input type="checkbox"/> Beneficiary bodies website or social media platforms will need to display lottery symbol prominently. <input type="checkbox"/> Disbursement Departments/agencies will need to refer to National Lottery support in press releases; websites and on social media. |
| Source: Indecon |

Governance

As set out in Section 3, the current process for the allocation of National Lottery monies is conducted bilaterally by the Department of Public Expenditure and Reform with the relevant line Departments as part of the annual estimates process. Option A above assumes that this system will be maintained. However, the second two options set out in the table above will require a significant degree of coordination over the short to medium term between the Department of Public Expenditure and Reform and the relevant line Departments.

Reduce and Refocus Supported Schemes

As discussed in Section 3, a variety of schemes receive part-funding from the National Lottery. While the legislation that underpins the National Lottery⁶⁵ sets out that payments be made for "good causes", it does not define precisely what is a "good cause". However, the consultation programme indicated that some stakeholders considered that some of the that are currently part-funded by the National Lottery should be considered core public services, with all state funding coming from the exchequer. Option A includes the possibility of each of the relevant government departments with responsibility for schemes which receive funding from the National Lottery reviewing these schemes

⁶⁵ National Lottery Act 2013.

and deciding if funding they receive from the state should more appropriately come entirely from the exchequer. Such a process of review might be based on one of the following:

- ❑ Some schemes cease to receive National Lottery funding, without affecting their overall resources from the state, with the current National Lottery part-funding being met by the exchequer;
- ❑ Some existing or emerging schemes which currently do not receive National Lottery funding could be identified as beneficiaries;
- ❑ Schemes which continue to receive National Lottery part-funding might see the implicit proportion of lottery funding increase, again without affecting the overall resources allocated by the state to them.

As noted above, it is expected that reforms would have a negligible effect on existing funding lines. The continued practice of only part-fundings schemes has the advantage that it allows for the creation of certainty for scheme beneficiaries, as well as for the creation of multi-annual funding commitments which would not be possible if funding for a scheme were totally reliant on the value of National Lottery sales which can be sensitive to broader economic conditions. However, Indecon believe that any schemes supported by the National Lottery should largely be funded through the lottery (e.g., 75% share). Further, there would be greater transparency if the amount of National Lottery funds which were allocated to each scheme would be specified, for example as part of the estimates process. Currently the estimates process sets out how much funding each scheme is to be allocated, while noting that this is part-funded by National Lottery proceeds.

Implement Greater Acknowledgement of National Lottery Support

The evidence from the omnibus survey of the general population, the survey of beneficiaries, the public consultation process and the stakeholder engagement conducted by Indecon as part of this report all suggests that the link between funds raised by the National Lottery for good causes and the expenditure is currently weak. While for some schemes, notably the Sports Capital and Equipment Scheme, there is evidence of some good practice, for some other schemes there is a lack of an acknowledgement procedure or even awareness of part-funding by the National Lottery. To address this, Option A includes a proposal for the Department of Public Expenditure and Reform to develop a set of procedures to ensure that National Lottery funding is acknowledged. This can help strengthen the link between good causes funding and ultimate expenditure. The procedures would apply to government departments or agencies which oversee schemes, as well as to beneficiary bodies. The requirements would broadly be as follows:

- ❑ Requirements on departments/agencies: Department which oversee schemes should include reference to National Lottery support in relevant scheme documentation, communication with beneficiary bodies and external communication. For example, the above would include press releases; websites and on social media. Where appropriate, this should include the National Lottery logo.
- ❑ Beneficiary bodies will need to meet new DPER guidelines regarding funding acknowledgement. This could be subject to a minimum threshold (e.g. €5,000 in funding in any calendar year), and might only apply to organisations of a certain size. The guidelines could include a requirement for beneficiary bodies to prominently include the National Lottery logo on their website or social media platform, and to mention National Lottery funding in press releases directly related to the supported scheme.

- ❑ Capital Projects: Funding for capital projects over a minimum level should include physical signage as part of scheme terms and conditions. This is already a requirement of the Sports Capital and Equipment Scheme, though would be extended to all supported schemes. In the case of the Sports Capital and Equipment Scheme, part of the payment (5%) is withheld until proof is given that such signage has been erected, and such a mechanism could also be used by other departments and agencies.

5.3 Reform Option B

The second option, Option B, represents a further development on Option A, and should be understood to include a process to potentially reduce and refocus the number of supported schemes, and to ensure greater acknowledgement of lottery expenditures as set out in Section 5.2. In addition, Option B proposes the creation of a permanent Cross-Departmental liaison group, as well as the creation of a database of beneficiaries, and the publication of an annual report setting out information on the beneficiaries of good causes funding. The main elements of Option B are set out in Figure 5.2 below, which are further discussed in the subsequent text.

| Figure 5.2: Summary of Option B | |
|---|---|
| Liaison | <ul style="list-style-type: none"> ❑ Cross-Departmental liaison group, chaired by the Department of Public Expenditure and Reform. |
| Reduce and Refocus Supported Schemes | <ul style="list-style-type: none"> ❑ As in Option A (see Section 5.2) |
| Implement Greater Acknowledgement of National Lottery Support | <ul style="list-style-type: none"> ❑ As in Option A (see Section 5.2) |
| Create Centralised Database of Funding Beneficiaries | <ul style="list-style-type: none"> ❑ Create a single-database to track and highlight the disbursement of funds on good causes. ❑ Agreement on minimum data fields that disbursement bodies will need to populate. ❑ Database to be operated and maintained centrally, though departments and agencies will be required to update it regularly. |
| Publish Annual Report on the support provided to good causes by National Lottery | <ul style="list-style-type: none"> ❑ Publish an annual report setting out breakdown of good causes beneficiaries based on geography, activity area, etc. ❑ Develop regular/annual level of publicity around annual report as a way of highlighting impact on good causes of National Lottery support. |
| Source: Indecon | |

Liaison

Option B proposes the establishment of a cross-Departmental Liaison Group, chaired by the Department of Public Expenditure and Reform, to promote a greater acknowledgement of National Lottery support, data collection and any necessary coordination on any other operational issues.

Create Centralised Database of Funding Beneficiaries

To aid a process of tracking the use of good causes funding, a centralised database should be created to track and highlight the disbursement of funds on good causes. This would contain certain core data fields that disbursement department and agencies would need to populate. The database would be operated and maintained centrally, though departments and agencies would be required to update it regularly. The regularity of updating would depend on the nature of activities, though would likely be on an annual basis, to facilitate the oversight by the Cross-Departmental Working Group of expenditure, and the production of an annual report (see below). It is not expected that the creation and maintenance of this database would result in significant costs. An outline of the policy options for how the database could be operationalised is shown in the figure below.

Figure 5.3: Policy Options for Management and Operation of Database

| | |
|----------------------------|---|
| Managing body | <p>Depending on the Governance structure chosen, the database could be managed and maintained by the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> <i>Reform Option A:</i> Department of Public Expenditure and Reform <input type="checkbox"/> <i>Reform Option B:</i> Department of Public Expenditure and Reform <input type="checkbox"/> <i>Reform Option C:</i> If an open fund is created and delegated to a third party (e.g. Pobal), then the responsibility for maintaining the overall database could also be transferred to them. |
| Data Detail | <ul style="list-style-type: none"> <input type="checkbox"/> It would be expected that all organisations that receive more than a prescribed minimum amount in the calendar year (e.g. €5,000⁶⁶) would be included in the database. <input type="checkbox"/> A list of potential data fields is shown in Annex . |
| Frequency of update | <ul style="list-style-type: none"> <input type="checkbox"/> The database could be updated annually, capturing all activity in the calendar year. <input type="checkbox"/> The managing body would establish a deadline for returns, for example end of Q1 following the end of the calendar year in question. |
| Technology | <ul style="list-style-type: none"> <input type="checkbox"/> Excel-based database. <input type="checkbox"/> It is envisaged that the lead Department/agency will create a template excel file which will be filled out by each of the reporting Departments on an annual basis. |
| Operating Cost | <p>The cost of maintaining would be in terms of staff time:</p> <ul style="list-style-type: none"> <input type="checkbox"/> <i>Body with maintenance responsibility:</i> It would be expected that the database would require approximately 0.1-0.2 of an FTE to maintain. <input type="checkbox"/> <i>Other Departments/Agencies:</i> Other Departments and agencies would be required to update the database with their existing in-house databases which track schemes that they operate. These databases would have to be cleaned in advance. It is not expected that this will involve significant change, though there may be once-off cost in collecting baseline information. |
| Source: Indecon | |

A list of potential fields is shown in the table below. This has been developed to identify core data that should be collected for each beneficiary over a minimum level of benefit (e.g., €5,000 in a single calendar year). It is expected that most, if not all, of this data will already be available to Departments or agencies. The list of fields also contains some which could initially be classed as optional, though which Departments and agencies could fill out if they already collect the data. The manner of

⁶⁶ This is the cut-off selected by the HSE in its published database of recipients, see for example: <https://www2.hse.ie/file-library/national-lottery-grants/national-lottery-grants-analysis-2020.pdf>

developing the database should be fully consistent with the Open Data Directive which mandates the release of public sector data in free and open formats. It would also be possible in the future to build an on-line searchable database of projects, such as exists in the UK⁶⁷.

| Table 5.1: Potential Fields for Database for Each Recipient | | |
|---|---|---|
| Field | Unit | Comment |
| Compulsory Fields | | |
| Organisation Name | Text | |
| Category | High level category based on National Lottery Act 2013: a) Sports and recreation; b) National culture & heritage (incl Irish); c) The arts (as per Arts Act 2003); d) Health of the Community; e) Youth, welfare and amenities; f) Natural environment; g) Other | 'Other' captures the flexibility inherent in the legislation to identify new areas of focus of good causes funding. |
| Funding Scheme | | e.g. Senior Alert Scheme |
| Lead department /agency | | e.g. Department of Rural & Community Development |
| Geography | Administrative county or NUTS3 region, depending on data availability. | Some organisations will have activity nationwide, or across a region, while many will be more specific to a location (e.g. a local GAA club). |
| Amount received | Euro | Based on funds allocation. |
| Year | Numerical | Calendar year money paid. |
| Optional Fields | | |
| Sub-category | | e.g. by sport (GAA, Hockey). |
| Project description | Text description of approx. 50 words describing the project. | |
| Contact Details | Email Address | To facilitate future evaluation. |
| Charity Number | | Would facilitate data-cleaning/consolidation. |
| Purpose of support | | e.g. upgrade of equipment. |
| Source: <i>Indecon</i> | | |

⁶⁷ <https://www.tnlcommunityfund.org.uk/funding/grants>

Publish Annual Report on the support provided to good causes by National Lottery

Currently there is no publicly available source which summarises the activities of bodies which are supported by good-cause funding from the National Lottery. It is proposed as part of Option B that an annual report be published setting out breakdown of good causes beneficiaries based on geography, activity area, etc. This would be based on data produced through the centralised database as discussed above. This annual report would facilitate the greater dissemination of information regarding the extent and impact of good causes projects in receipt of National Lottery support.

5.4 Reform Option C

The third option (Option C), represents a further development on Options A and B. Most notably, it would entail a regular independent evaluation, and the creation of an open fund. The main elements of Option C are set out in Figure 5.4 below and are discussed in the subsequent text.

| Figure 5.4: Summary of Option C | |
|---|--|
| Liaison | <input type="checkbox"/> As in Option B (See Section 5.3) |
| Reduce and Refocus Supported Schemes | <input type="checkbox"/> As in Option A (see Section 5.2) |
| Implement Greater Acknowledgement of National Lottery Support | <input type="checkbox"/> As in Option A (see Section 5.2) |
| Create Centralised Database of Funding Beneficiaries | <input type="checkbox"/> As in Option B (see Section 5.3) |
| Publish Annual Report on the support provided to good causes by National Lottery | <input type="checkbox"/> As in Option B (see Section 6.3) |
| Independent Evaluation | <input type="checkbox"/> Independent evaluation of impact of National Lottery disbursement every three-five years. |
| Create Open Fund | <input type="checkbox"/> Establishment of an open call for funding, with clear application deadlines, process and reporting. |
| <i>Source: Indecon</i> | |

Independent Evaluation

In addition to conducting more regular monitoring and reporting of the activities regarding the use of National Lottery funding, the impact of that funding could be made subject of independent evaluation every three-five years. This evaluation process would use as a core source of information the centralised database of beneficiaries as discussed above, though in addition use other evaluation

techniques (e.g., detailed primary survey analysis and focus groups) to evaluate the impact of National Lottery funds. These evaluation exercises should, where appropriate, identify a set of actionable recommendations to improve the targeting and use of National Lottery funds to optimise impact.

Create Open Fund

A new 'Open Fund' could be introduced, with clear application deadlines, process, and reporting. This would be run as an open call, though might have specific funding elements or streams. For example, it might have a call focused more specifically on one of the areas identified for funding in the National Lottery Act 2013, for example, related to health of the community; youth, welfare, and amenities; or natural environment. An example of how open schemes work in other countries can be seen in the UK and New Zealand, as discussed in Sections 3.2 and 3.3 respectively. It should be noted that, as discussed in Section 2.8, that the HSE already disburse National Lottery funds by way of an open call.

Any open call fund could be run centrally by an individual government department, or operated by a separate agency, such as POBAL⁶⁸, on behalf of the Department of Public Expenditure and Reform. A submission made as part of this review by the philanthropic body Rethink Ireland proposed a 'Great Ideas Fund' which would identify 30 of the most innovative and impactful social innovation projects annually. Rethink Ireland already runs similar programmes in partnership with the Irish government, for example the Social Enterprise Start-up Fund⁶⁹ is financed by Dormant Accounts Fund. Any new open fund would need to be funded, which could be achieved in a number of ways:

1. Replace a proportion of funding from existing schemes which are currently part-funded by the National Lottery with a centralised open application process;
2. Additional exchequer resources to create new expenditure opportunities;
3. Ring-fence future increases in National Lottery sales revenue to allow for the creation of an open-fund;
4. Combination of the above

It is expected that a new fund, were it to proceed, would have a negligible effect on existing funding lines. Based on this, an Open Fund would not affect existing allocations, for example Arts Council or Sports Capital and Equipment Grants, and might only constitute a portion (e.g., 5-10%) of total National Lottery good causes funding. Examples of the websites of open funds which already exist in the UK, New Zealand, and Finland are shown in the annex to this report.

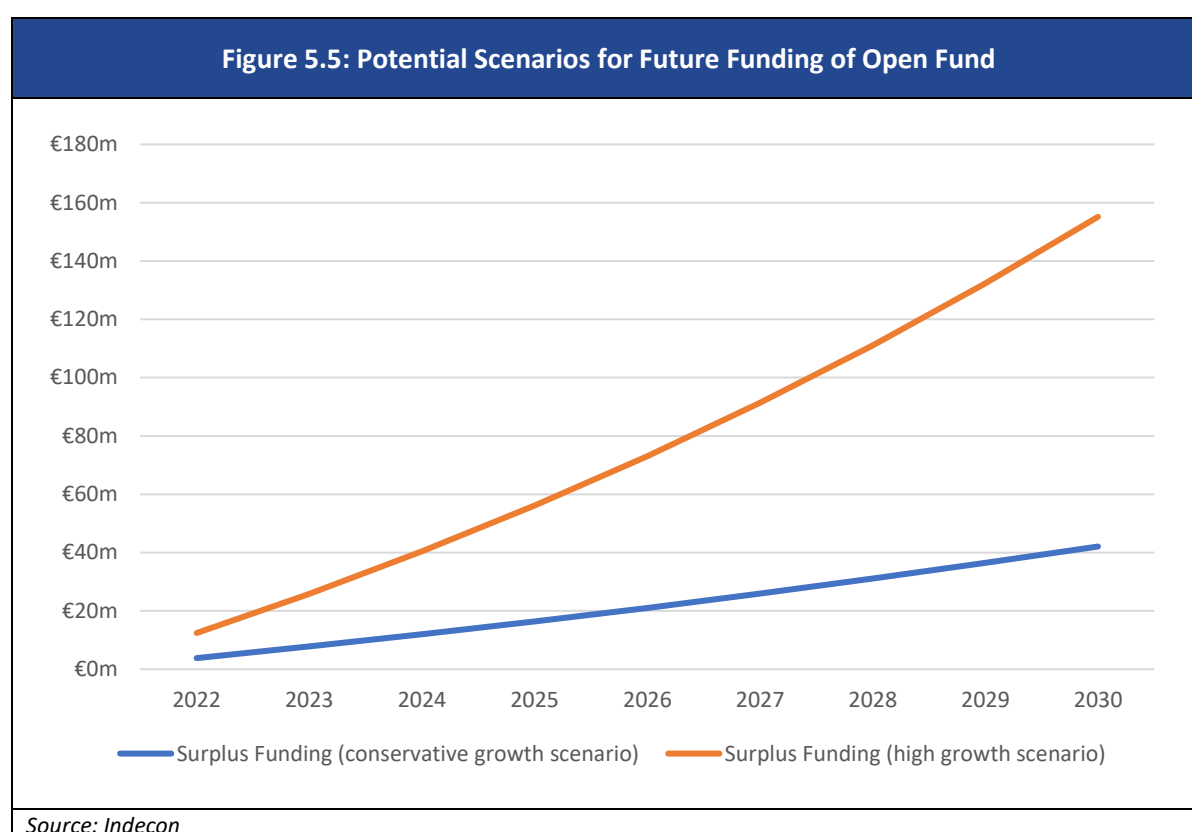
The use of future increase in National Lottery sales to create funds for an open-fund (as discussed in Option 3 above) may create sufficient revenue in a relatively short period of time based on some scenario estimates. The next figure shows two potential scenarios whereby increased sales generated by National Lottery sales created a surplus for an open fund. Both scenarios are calculated assuming an increase in payments to current recipients in line with ECB target inflation of 2% to protect the purchasing power of existing beneficiaries. The first scenario assumes that the average increase in good causes funding over the 25-year period from 1996-2021 of 3.3% continues in the next number of years. This would suggest that an open fund would constitute 5% of total National Lottery good

⁶⁸ Pobal, formerly known as Area Development Management, was established in 1992 by the Irish Government in agreement with the European Commission to manage an EU Grant for local development. Pobal already manages funding and provides support for around 38 programmes in the areas of Social Inclusion and Equality, Inclusive Employment and Enterprise, and Early Learning and Care, allocating €765 million in 2021.

⁶⁹ https://rethinkireland.ie/current_fund/social-enterprise-start-up-fund-2022/

causes expenditure by 2025, and 10% by 2030. The second scenario (the 'high growth' scenario) assumes that the rate of growth of good causes funding of 6.3% observed over the last five years continues in the medium term. This scenario suggests that an Open Fund could exceed €100m by 2028. Indecon note that future National Lottery sales and future inflation are both highly uncertain, and that this represents only one of many possible outcomes.

While the various schemes currently supported by the lottery are done on a part-funding basis, the open fund could be entirely funded by the National Lottery. For example, the monies raised in 2022 would provide the funds to operate the open fund in the subsequent year. This would strengthen the connection between the sales of lottery products and the subsequent benefit to good causes.



The open fund could operate as a single annual 'call' or be divided into a number of calls based on theme, geography, time period or other criteria. The decision as to the number and nature of calls will in part depend on total funds available and could grow as the total resources available to the open fund grew. They could also cover a specific area identified in the 2013 National Lottery Act, for example, a call focused on national culture and heritage; health of the community; youth, welfare, and amenities; and/or the natural environment.

By way of an example, the Annex reports on a selection of the calls currently open under the UK National Lottery Fund. This includes calls that are open-ended with no fixed application date, a call specifically targeted at homelessness and calls which are focused on particular geographic areas (for example Northern Ireland). The Annex also contains a list of calls listed on the 'Community Matters' website of New Zealand, which is responsible for allocating certain National Lottery funds, as well as

funds from other sources. As can be seen, the calls include those aimed at specific issues facing ethnic groups, in response to particular events, or challenges faced by the community and voluntary sector.

5.5 Potential Reform Timetable

As noted in the introduction of this chapter, this section set out three possible options for reform. These options are not mutually exclusive, and other options could also be considered. Importantly, if some or all of these options are implemented, this would best be done on a phased basis, with the initiation of some actions dependent on the completion of others. A potential sequencing of reform actions is set out in the table below.

| Table 5.2: Potential Sequencing of Reform Actions | |
|---|--|
| Reform Actions | Comment |
| Governance (Option A or Option B/C) | Establish initial project governance and liaison as per Option A or Option B/C to oversee basic reforms. |
| Reduce and refocus Supported Schemes | Review current schemes with a view to making any changes, which may include removing certain schemes and adding others. Important that this be completed before others to avoid imposing unnecessary work in relation to schemes which don't continue to receive NL funding. |
| Acknowledgement of NL Support | An agreed set of rules for beneficiaries should be agreed, with a view to it being fully implemented by all beneficiary bodies/Departments. |
| Centralised Database | Agreement on data on disbursement allocation to be collected with creation of first version of database relating to 2022 activities. |
| Annual Report | Publication of an annual report will be dependent on the availability of a centralised database which set out allocation as discussed above. |
| Create Open Fund | The timing of the initiation of an open fund would be dependent on sufficient resources being available to do so. If this is to be funded from future growth, it is possible that this would be sufficient to launch an open fund in 2024. |
| First periodic evaluation | An evaluation of the activities and impacts of National Lottery funding could be conducted relating to activities in 2023. Subsequent evaluations could be run every 3-5 years and cover a multi-annual evaluation period. |
| <i>Source: Indecon</i> | |

5.6 Conclusion

The evidence produced by Indecon as part of this review process indicates a need for an improvement in the oversight and operation of the allocation of National Lottery proceeds. This report has set out a number of policy options for reform which, if implemented, could result in a far more transparent allocation process. Indecon note however that a number of the proposals would take time to implement, and consideration would need to be given to introducing them on a phased basis.

Annex A: Detailed Results of Omnibus Survey

Table A.1: Omnibus Survey results to Question 1: How regularly do you play the National Lottery (weekly Lotto draw or scratch cards)? Part 1

| | Total | GENDER | | AGE | | | | | REGION | | | | SOCIAL GRADE | | | | | |
|------------------|-------|--------|--------|-------|-------|-------|-------|-------|------------|--------|---------|---------------|--------------|-------|-------|-------|-------|-------|
| | | Male | Female | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | Conn/Uls t | Dublin | Munster | Rest Leinster | AB | C1 | C2 | DE | ABC1 | C2DEF |
| Unwtd Base | 1041 | 510 | 523 | 158 | 220 | 269 | 222 | 172 | 155 | 317 | 296 | 273 | 334 | 309 | 156 | 225 | 643 | 398 |
| Weighted Base | 1041 | 519 | 514 | 175 | 216 | 263 | 218 | 170 | 184 | 292 | 282 | 283 | 331 | 304 | 160 | 229 | 634 | 407 |
| Never | 192 | 96 | 93 | 59 | 44 | 38 | 26 | 25 | 39 | 51 | 48 | 54 | 56 | 43 | 36 | 53 | 100 | 93 |
| | 18% | 18% | 18% | 34% | 20% | 15% | 12% | 15% | 21% | 18% | 17% | 19% | 17% | 14% | 23% | 23% | 16% | 23% |
| Few times a year | 350 | 153 | 196 | 64 | 81 | 83 | 66 | 56 | 65 | 103 | 91 | 91 | 118 | 107 | 35 | 85 | 226 | 124 |
| | 34% | 29% | 38% | 37% | 37% | 32% | 30% | 33% | 35% | 35% | 32% | 32% | 36% | 35% | 22% | 37% | 36% | 31% |
| Monthly | 190 | 101 | 89 | 32 | 41 | 56 | 37 | 24 | 28 | 61 | 56 | 45 | 64 | 54 | 32 | 36 | 118 | 72 |
| | 18% | 19% | 17% | 18% | 19% | 21% | 17% | 14% | 15% | 21% | 20% | 16% | 19% | 18% | 20% | 16% | 19% | 18% |
| Weekly | 308 | 169 | 136 | 20 | 50 | 85 | 89 | 65 | 53 | 76 | 87 | 92 | 92 | 99 | 57 | 55 | 191 | 118 |
| | 30% | 33% | 26% | 11% | 23% | 32% | 41% | 38% | 29% | 26% | 31% | 33% | 28% | 33% | 35% | 24% | 30% | 29% |
| Net At all | 849 | 423 | 421 | 116 | 172 | 225 | 192 | 144 | 145 | 241 | 234 | 229 | 274 | 260 | 124 | 176 | 535 | 314 |
| | 82% | 82% | 82% | 66% | 80% | 85% | 88% | 85% | 79% | 82% | 83% | 81% | 83% | 86% | 77% | 77% | 84% | 77% |
| Mean | 2.59 | 2.66 | 2.52 | 2.07 | 2.45 | 2.72 | 2.87 | 2.75 | 2.51 | 2.56 | 2.65 | 2.62 | 2.58 | 2.69 | 2.68 | 2.4 | 2.63 | 2.53 |
| Std Dev | 1.098 | 1.117 | 1.068 | 0.986 | 1.059 | 1.071 | 1.082 | 1.12 | 1.119 | 1.061 | 1.091 | 1.129 | 1.069 | 1.075 | 1.177 | 1.089 | 1.073 | 1.134 |
| Standard Error | 0.034 | 0.049 | 0.047 | 0.075 | 0.072 | 0.066 | 0.073 | 0.086 | 0.083 | 0.062 | 0.065 | 0.067 | 0.059 | 0.062 | 0.093 | 0.072 | 0.043 | 0.056 |

Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.2: Omnibus Survey results to Question 1: How regularly do you play the National Lottery (weekly Lotto draw or scratch cards)? Part 2

| | | WORKING STATUS | | HOUSEHOLD SIZE | | | | PRESENCE OF CHILDREN | |
|------------------|-------|----------------|-------------|----------------|-------|-------|-------|----------------------|-------|
| | Total | Working | Non Working | 1 | 2 | 3 | 4+ | Yes | No |
| Unwtd Base | 1041 | 766 | 259 | 129 | 252 | 227 | 433 | 399 | 642 |
| Weighted Base | 1041 | 761 | 265 | 131 | 248 | 224 | 438 | 398 | 643 |
| Never | 192 | 113 | 76 | 18 | 44 | 42 | 88 | 72 | 120 |
| | 18% | 15% | 29% | 14% | 18% | 19% | 20% | 18% | 19% |
| Few times a year | 350 | 258 | 86 | 53 | 87 | 73 | 138 | 121 | 229 |
| | 34% | 34% | 33% | 40% | 35% | 32% | 32% | 30% | 36% |
| Monthly | 190 | 150 | 39 | 18 | 46 | 48 | 79 | 81 | 110 |
| | 18% | 20% | 15% | 14% | 19% | 21% | 18% | 20% | 17% |
| Weekly | 308 | 239 | 63 | 42 | 71 | 62 | 133 | 124 | 184 |
| | 30% | 31% | 24% | 32% | 29% | 27% | 30% | 31% | 29% |
| Net: At all | 849 | 648 | 188 | 112 | 204 | 183 | 350 | 326 | 523 |
| | 82% | 85% | 71% | 86% | 82% | 81% | 80% | 82% | 81% |
| Mean | 2.59 | 2.68 | 2.34 | 2.64 | 2.58 | 2.58 | 2.59 | 2.64 | 2.56 |
| Std Dev | 1.098 | 1.071 | 1.132 | 1.079 | 1.086 | 1.083 | 1.12 | 1.104 | 1.093 |
| Standard Error | 0.034 | 0.039 | 0.07 | 0.094 | 0.069 | 0.072 | 0.054 | 0.055 | 0.043 |

Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.3: Omnibus Survey results to Question 1: How regularly do you play the National Lottery (weekly Lotto draw or scratch cards)? Part 3

| | Total | DOMESTIC STATUS | | | | | Play lottery | | | | |
|------------------|-------|-----------------------------|------------------------|------------------|---------------------|---|--------------|------------------|---------|--------|-------------|
| | | Married/living with partner | Never married (single) | Divorced/widowed | Living with parents | Domestic partner/living with other adults | Never | Few times a year | Monthly | Weekly | Net: At all |
| Unwtd Base | 1041 | 591 | 251 | 53 | 73 | 47 | 188 | 349 | 193 | 311 | 853 |
| Weighted Base | 1041 | 581 | 257 | 52 | 76 | 48 | 192 | 350 | 190 | 308 | 849 |
| Never | 192 | 84 | 58 | 9 | 25 | 11 | 192 | - | - | - | - |
| | 18% | 14% | 23% | 16% | 33% | 22% | 100% | - | - | - | - |
| Few times a year | 350 | 181 | 101 | 22 | 22 | 19 | - | 350 | - | - | 350 |
| | 34% | 31% | 39% | 41% | 29% | 38% | - | 100% | - | - | 41% |
| Monthly | 190 | 120 | 39 | 6 | 9 | 11 | - | - | 190 | - | 190 |
| | 18% | 21% | 15% | 11% | 12% | 23% | - | - | 100% | - | 22% |
| Weekly | 308 | 197 | 59 | 17 | 20 | 8 | - | - | - | 308 | 308 |
| | 30% | 34% | 23% | 32% | 26% | 17% | - | - | - | 100% | 36% |
| Net: At all | 849 | 498 | 199 | 44 | 51 | 38 | - | 350 | 190 | 308 | 849 |
| | 82% | 86% | 77% | 84% | 67% | 78% | - | 100% | 100% | 100% | 100% |
| Mean | 2.59 | 2.74 | 2.39 | 2.58 | 2.31 | 2.35 | 1 | 2 | 3 | 4 | 2.95 |
| Std Dev | 1.098 | 1.077 | 1.075 | 1.107 | 1.193 | 1.01 | - | - | - | - | 0.88 |
| Standard Error | 0.034 | 0.045 | 0.067 | 0.153 | 0.137 | 0.145 | - | - | - | - | 0.03 |

Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.4: Omnibus Survey results to Question 2: To what extent are you aware that the National Lottery generates circa €250m per year for Good Causes? Part 1

| | Total | GENDER | | AGE | | | | | REGION | | | | SOCIAL GRADE | | | | | |
|---|-------|--------|--------|-------|-------|-------|-------|-------|-----------|--------|---------|---------------|--------------|-------|-------|-------|-------|-------|
| | | Male | Female | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | Conn/Ulst | Dublin | Munster | Rest Leinster | AB | C1 | C2 | DE | ABC1 | C2DEF |
| Unwtd Base | 1041 | 510 | 523 | 158 | 220 | 269 | 222 | 172 | 155 | 317 | 296 | 273 | 334 | 309 | 156 | 225 | 643 | 398 |
| Weighted Base | 1041 | 519 | 514 | 175 | 216 | 263 | 218 | 170 | 184 | 292 | 282 | 283 | 331 | 304 | 160 | 229 | 634 | 407 |
| Very aware | 154 | 83 | 71 | 26 | 30 | 40 | 30 | 28 | 14 | 47 | 49 | 44 | 52 | 47 | 20 | 36 | 98 | 56 |
| | 15% | 16% | 14% | 15% | 14% | 15% | 14% | 17% | 8% | 16% | 17% | 16% | 16% | 15% | 12% | 16% | 16% | 14% |
| Aware | 454 | 227 | 223 | 48 | 82 | 119 | 120 | 85 | 82 | 128 | 123 | 121 | 169 | 130 | 65 | 79 | 299 | 155 |
| | 44% | 44% | 43% | 27% | 38% | 45% | 55% | 50% | 45% | 44% | 44% | 43% | 51% | 43% | 40% | 34% | 47% | 38% |
| Unaware | 243 | 126 | 116 | 46 | 60 | 61 | 41 | 35 | 61 | 60 | 60 | 63 | 63 | 67 | 52 | 57 | 130 | 114 |
| | 23% | 24% | 23% | 27% | 28% | 23% | 19% | 21% | 33% | 20% | 21% | 22% | 19% | 22% | 32% | 25% | 20% | 28% |
| Very unaware | 131 | 57 | 72 | 48 | 32 | 27 | 13 | 11 | 16 | 41 | 30 | 43 | 33 | 50 | 15 | 33 | 82 | 48 |
| | 13% | 11% | 14% | 27% | 15% | 10% | 6% | 7% | 9% | 14% | 11% | 15% | 10% | 16% | 10% | 14% | 13% | 12% |
| Don't Know | 58 | 26 | 31 | 6 | 12 | 16 | 14 | 10 | 10 | 17 | 20 | 11 | 14 | 11 | 9 | 24 | 25 | 34 |
| | 6% | 5% | 6% | 4% | 6% | 6% | 6% | 6% | 6% | 6% | 7% | 4% | 4% | 4% | 5% | 11% | 4% | 8% |
| Net Aware | 608 | 310 | 294 | 74 | 111 | 159 | 150 | 113 | 97 | 175 | 172 | 165 | 221 | 177 | 85 | 115 | 398 | 211 |
| | 58% | 60% | 57% | 43% | 52% | 61% | 69% | 67% | 53% | 60% | 61% | 58% | 67% | 58% | 53% | 50% | 63% | 52% |
| Net Unaware | 374 | 183 | 188 | 94 | 92 | 87 | 54 | 46 | 77 | 101 | 90 | 107 | 96 | 116 | 67 | 90 | 212 | 162 |
| Mean | 2.64 | 2.68 | 2.61 | 2.31 | 2.54 | 2.7 | 2.82 | 2.82 | 2.55 | 2.66 | 2.73 | 2.61 | 2.76 | 2.59 | 2.59 | 2.58 | 2.68 | 2.59 |
| Std Dev | 0.9 | 0.887 | 0.913 | 1.049 | 0.927 | 0.869 | 0.759 | 0.805 | 0.775 | 0.932 | 0.898 | 0.941 | 0.849 | 0.949 | 0.843 | 0.962 | 0.901 | 0.897 |
| Standard Error | 0.029 | 0.04 | 0.042 | 0.081 | 0.065 | 0.055 | 0.053 | 0.064 | 0.059 | 0.056 | 0.056 | 0.057 | 0.048 | 0.055 | 0.068 | 0.067 | 0.037 | 0.046 |
| Source: Omnibus survey conducted by Kantar on behalf of Indecon | | | | | | | | | | | | | | | | | | |

Table A.5: Omnibus Survey results to Question 2: To what extent are you aware that the National Lottery generates circa €250m per year for Good Causes? Part 2

| | Total | WORKING STATUS | | HOUSEHOLD SIZE | | | | PRESENCE OF CHILDREN | |
|----------------|-------|----------------|-------------|----------------|-------|-------|-------|----------------------|-------|
| | | Working | Non Working | 1 | 2 | 3 | 4+ | Yes | No |
| Unwtd Base | 1041 | 766 | 259 | 129 | 252 | 227 | 433 | 399 | 642 |
| Weighted Base | 1041 | 761 | 265 | 131 | 248 | 224 | 438 | 398 | 643 |
| Very aware | 154 | 114 | 40 | 21 | 36 | 32 | 66 | 56 | 99 |
| | 15% | 15% | 15% | 16% | 14% | 14% | 15% | 14% | 15% |
| Aware | 454 | 340 | 106 | 56 | 113 | 100 | 184 | 166 | 288 |
| | 44% | 45% | 40% | 43% | 46% | 45% | 42% | 42% | 45% |
| Unaware | 243 | 180 | 62 | 27 | 61 | 47 | 108 | 100 | 144 |
| | 23% | 24% | 23% | 21% | 25% | 21% | 25% | 25% | 22% |
| Very unaware | 131 | 89 | 40 | 17 | 20 | 30 | 63 | 53 | 78 |
| | 13% | 12% | 15% | 13% | 8% | 14% | 14% | 13% | 12% |
| Don't Know | 58 | 38 | 17 | 10 | 18 | 15 | 16 | 24 | 34 |
| | 6% | 5% | 6% | 8% | 7% | 7% | 4% | 6% | 5% |
| Net Aware | 608 | 454 | 147 | 77 | 149 | 132 | 250 | 222 | 386 |
| | 58% | 60% | 55% | 59% | 60% | 59% | 57% | 56% | 60% |
| Net Unaware | 374 | 269 | 102 | 44 | 81 | 77 | 172 | 152 | 222 |
| | 36% | 35% | 38% | 34% | 33% | 34% | 39% | 38% | 35% |
| Mean | 2.64 | 2.66 | 2.59 | 2.67 | 2.72 | 2.64 | 2.6 | 2.6 | 2.67 |
| Std Dev | 0.9 | 0.886 | 0.945 | 0.925 | 0.831 | 0.91 | 0.925 | 0.906 | 0.897 |
| Standard Error | 0.029 | 0.033 | 0.06 | 0.084 | 0.055 | 0.063 | 0.045 | 0.047 | 0.036 |

Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.6: Omnibus Survey results to Question 2: To what extent are you aware that the National Lottery generates circa €250m per year for Good Causes? Part 3

| | Total | DOMESTIC STATUS | | | | | Play lottery | | | | |
|---|-------|-----------------------------|------------------------|------------------|---------------------|---|--------------|------------------|---------|--------|-------------|
| | | Married/living with partner | Never married (single) | Divorced/widowed | Living with parents | Domestic partner/living with other adults | Never | Few times a year | Monthly | Weekly | Net: At all |
| Unwtd Base | 1041 | 591 | 251 | 53 | 73 | 47 | 188 | 349 | 193 | 311 | 853 |
| Weighted Base | 1041 | 581 | 257 | 52 | 76 | 48 | 192 | 350 | 190 | 308 | 849 |
| Very aware | 154 | 96 | 33 | 7 | 14 | 2 | 20 | 31 | 29 | 75 | 135 |
| | 15% | 16% | 13% | 14% | 18% | 4% | 10% | 9% | 15% | 24% | 16% |
| Aware | 454 | 262 | 113 | 23 | 24 | 22 | 52 | 171 | 88 | 143 | 402 |
| | 44% | 45% | 44% | 45% | 32% | 45% | 27% | 49% | 46% | 46% | 47% |
| Unaware | 243 | 139 | 53 | 13 | 20 | 12 | 51 | 86 | 46 | 60 | 192 |
| | 23% | 24% | 21% | 25% | 27% | 24% | 27% | 25% | 24% | 20% | 23% |
| Very unaware | 131 | 58 | 43 | 3 | 12 | 11 | 43 | 47 | 21 | 19 | 88 |
| | 13% | 10% | 17% | 5% | 16% | 24% | 22% | 13% | 11% | 6% | 10% |
| Don't Know | 58 | 27 | 15 | 6 | 5 | 2 | 27 | 15 | 6 | 10 | 32 |
| | 6% | 5% | 6% | 11% | 7% | 4% | 14% | 4% | 3% | 3% | 4% |
| Net Aware | 608 | 358 | 146 | 31 | 38 | 24 | 71 | 201 | 117 | 218 | 537 |
| | 58% | 62% | 57% | 58% | 50% | 49% | 37% | 58% | 62% | 71% | 63% |
| Net Unaware | 374 | 197 | 96 | 16 | 33 | 23 | 94 | 133 | 67 | 80 | 280 |
| | 36% | 34% | 37% | 30% | 43% | 48% | 49% | 38% | 35% | 26% | 33% |
| Mean | 2.64 | 2.71 | 2.56 | 2.75 | 2.56 | 2.3 | 2.29 | 2.55 | 2.68 | 2.92 | 2.72 |
| Std Dev | 0.9 | 0.871 | 0.938 | 0.794 | 1 | 0.893 | 0.984 | 0.844 | 0.877 | 0.843 | 0.865 |
| Standard Error | 0.029 | 0.037 | 0.06 | 0.117 | 0.119 | 0.131 | 0.076 | 0.046 | 0.065 | 0.049 | 0.03 |
| Source: Omnibus survey conducted by Kantar on behalf of Indecon | | | | | | | | | | | |

Table A.7: Omnibus Survey results to Question 3: How aware are you of specific organisations or projects which have received Lottery funding? Part 1

| | Total | GENDER | | AGE | | | | | REGION | | | | SOCIAL GRADE | | | | | |
|----------------|-------|--------|--------|-------|-------|-------|-------|-------|---------------|--------|---------|------------------|--------------|-------|-------|-------|-------|-------|
| | | Male | Female | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | Conn/ Ulst | Dublin | Munster | Rest Leinster | AB | C1 | C2 | DE | ABC1 | C2DEF |
| Unwtd Base | 1041 | 510 | 523 | 158 | 220 | 269 | 222 | 172 | 155 | 317 | 296 | 273 | 334 | 309 | 156 | 225 | 643 | 398 |
| Weighted Base | 1041 | 519 | 514 | 175 | 216 | 263 | 218 | 170 | 184 | 292 | 282 | 283 | 331 | 304 | 160 | 229 | 634 | 407 |
| Very aware | 67 | 36 | 31 | 18 | 11 | 16 | 14 | 8 | 10 | 16 | 18 | 24 | 22 | 23 | 9 | 12 | 45 | 22 |
| | 6% | 7% | 6% | 11% | 5% | 6% | 6% | 5% | 5% | 5% | 6% | 9% | 7% | 7% | 6% | 5% | 7% | 6% |
| Aware | 334 | 161 | 171 | 37 | 69 | 75 | 83 | 69 | 59 | 88 | 94 | 94 | 114 | 95 | 51 | 69 | 209 | 125 |
| | 32% | 31% | 33% | 21% | 32% | 29% | 38% | 41% | 32% | 30% | 33% | 33% | 35% | 31% | 32% | 30% | 33% | 31% |
| Unaware | 364 | 181 | 180 | 52 | 80 | 92 | 78 | 61 | 69 | 100 | 101 | 93 | 123 | 99 | 52 | 84 | 222 | 142 |
| | 35% | 35% | 35% | 30% | 37% | 35% | 36% | 36% | 38% | 34% | 36% | 33% | 37% | 33% | 33% | 37% | 35% | 35% |
| Very unaware | 199 | 103 | 94 | 51 | 42 | 55 | 29 | 22 | 31 | 69 | 47 | 52 | 54 | 70 | 34 | 40 | 124 | 75 |
| | 19% | 20% | 18% | 29% | 20% | 21% | 13% | 13% | 17% | 24% | 17% | 18% | 16% | 23% | 21% | 17% | 19% | 19% |
| Don't Know | 76 | 39 | 37 | 15 | 13 | 24 | 15 | 9 | 15 | 20 | 22 | 20 | 18 | 17 | 14 | 24 | 35 | 41 |
| | 7% | 7% | 7% | 9% | 6% | 9% | 7% | 6% | 8% | 7% | 8% | 7% | 5% | 6% | 9% | 10% | 6% | 10% |
| Net Aware | 401 | 197 | 202 | 56 | 80 | 92 | 97 | 77 | 68 | 104 | 112 | 118 | 137 | 118 | 60 | 81 | 254 | 147 |
| | 39% | 38% | 39% | 32% | 37% | 35% | 44% | 46% | 37% | 35% | 40% | 42% | 41% | 39% | 38% | 35% | 40% | 36% |
| Net Unaware | 563 | 283 | 275 | 104 | 123 | 147 | 107 | 83 | 101 | 169 | 148 | 146 | 176 | 169 | 86 | 124 | 345 | 218 |
| | 54% | 55% | 53% | 59% | 57% | 56% | 49% | 49% | 55% | 58% | 52% | 51% | 53% | 56% | 54% | 54% | 54% | 54% |
| Mean | 2.28 | 2.27 | 2.29 | 2.14 | 2.24 | 2.22 | 2.4 | 2.4 | 2.28 | 2.18 | 2.32 | 2.34 | 2.34 | 2.25 | 2.24 | 2.26 | 2.29 | 2.26 |
| Std Dev | 0.868 | 0.881 | 0.857 | 1.001 | 0.841 | 0.88 | 0.814 | 0.784 | 0.83 | 0.879 | 0.847 | 0.898 | 0.842 | 0.914 | 0.88 | 0.839 | 0.878 | 0.854 |
| Standard Error | 0.028 | 0.04 | 0.039 | 0.079 | 0.059 | 0.057 | 0.057 | 0.062 | 0.064 | 0.053 | 0.053 | 0.055 | 0.048 | 0.054 | 0.073 | 0.059 | 0.036 | 0.045 |

Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.8: Omnibus Survey results to Question 3: How aware are you of specific organisations or projects which have received Lottery funding? Part 2

| | Total | WORKING STATUS | | HOUSEHOLD SIZE | | | | HH SIZE | |
|----------------|-------|----------------|-------------|----------------|-------|-------|-------|---------|-------|
| | | Working | Non Working | 1 | 2 | 3 | 4+ | Yes | No |
| Unwtd Base | 1041 | 766 | 259 | 129 | 252 | 227 | 433 | 399 | 642 |
| Weighted Base | 1041 | 761 | 265 | 131 | 248 | 224 | 438 | 398 | 643 |
| Very aware | 67 | 55 | 12 | 15 | 9 | 13 | 30 | 28 | 39 |
| | 6% | 7% | 5% | 12% | 4% | 6% | 7% | 7% | 6% |
| Aware | 334 | 246 | 86 | 41 | 79 | 72 | 141 | 112 | 222 |
| | 32% | 32% | 32% | 32% | 32% | 32% | 32% | 28% | 35% |
| Unaware | 364 | 270 | 86 | 37 | 96 | 80 | 152 | 149 | 215 |
| | 35% | 35% | 33% | 28% | 39% | 35% | 35% | 37% | 34% |
| Very unaware | 199 | 139 | 58 | 24 | 44 | 46 | 84 | 79 | 120 |
| | 19% | 18% | 22% | 18% | 18% | 21% | 19% | 20% | 19% |
| Don't Know | 76 | 51 | 23 | 13 | 20 | 13 | 30 | 31 | 45 |
| | 7% | 7% | 9% | 10% | 8% | 6% | 7% | 8% | 7% |
| Net Aware | 401 | 301 | 98 | 56 | 88 | 85 | 172 | 140 | 262 |
| | 39% | 40% | 37% | 43% | 35% | 38% | 39% | 35% | 41% |
| Net Unaware | 563 | 409 | 144 | 61 | 140 | 126 | 236 | 228 | 336 |
| | 54% | 54% | 54% | 47% | 57% | 56% | 54% | 57% | 52% |
| Mean | 2.28 | 2.31 | 2.22 | 2.4 | 2.23 | 2.25 | 2.29 | 2.24 | 2.3 |
| Std Dev | 0.868 | 0.872 | 0.866 | 0.957 | 0.803 | 0.867 | 0.877 | 0.875 | 0.864 |
| Standard Error | 0.028 | 0.033 | 0.056 | 0.088 | 0.053 | 0.06 | 0.043 | 0.046 | 0.035 |

Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.9: Omnibus Survey results to Question 3: How aware are you of specific organisations or projects which have received Lottery funding? Part 3

| | Total | DOMESTIC STATUS | | | | | Play lottery | | | | |
|----------------|-------|------------------------------|------------------------|-------------------|---------------------|--|--------------|------------------|---------|--------|-------------|
| | | Married/ living with partner | Never married (single) | Divorced/ widowed | Living with parents | Domestic partner/ living with other adults | Never | Few times a year | Monthly | Weekly | Net: At all |
| Unwtd Base | 1041 | 591 | 251 | 53 | 73 | 47 | 188 | 349 | 193 | 311 | 853 |
| Weighted Base | 1041 | 581 | 257 | 52 | 76 | 48 | 192 | 350 | 190 | 308 | 849 |
| Very aware | 67 | 35 | 24 | 4 | 3 | 1 | 8 | 15 | 13 | 31 | 59 |
| | 6% | 6% | 9% | 8% | 4% | 3% | 4% | 4% | 7% | 10% | 7% |
| Aware | 334 | 206 | 76 | 14 | 19 | 13 | 31 | 125 | 67 | 111 | 303 |
| | 32% | 35% | 30% | 27% | 25% | 27% | 16% | 36% | 35% | 36% | 36% |
| Unaware | 364 | 210 | 90 | 19 | 26 | 11 | 60 | 127 | 73 | 103 | 304 |
| | 35% | 36% | 35% | 36% | 34% | 23% | 31% | 36% | 39% | 34% | 36% |
| Very unaware | 199 | 94 | 51 | 9 | 21 | 17 | 66 | 62 | 30 | 41 | 134 |
| | 19% | 16% | 20% | 18% | 28% | 35% | 34% | 18% | 16% | 13% | 16% |
| Don't Know | 76 | 36 | 15 | 6 | 7 | 6 | 28 | 21 | 6 | 21 | 48 |
| | 7% | 6% | 6% | 11% | 9% | 12% | 15% | 6% | 3% | 7% | 6% |
| Net Aware | 401 | 241 | 100 | 19 | 22 | 14 | 39 | 140 | 80 | 143 | 363 |
| | 39% | 41% | 39% | 35% | 29% | 30% | 20% | 40% | 42% | 46% | 43% |
| Net Unaware | 563 | 305 | 141 | 28 | 47 | 28 | 126 | 189 | 104 | 145 | 438 |
| | 54% | 52% | 55% | 53% | 62% | 58% | 65% | 54% | 55% | 47% | 52% |
| Mean | 2.28 | 2.33 | 2.3 | 2.29 | 2.05 | 1.97 | 1.89 | 2.28 | 2.34 | 2.46 | 2.36 |
| Std Dev | 0.868 | 0.834 | 0.915 | 0.896 | 0.874 | 0.92 | 0.879 | 0.819 | 0.836 | 0.87 | 0.844 |
| Standard Error | 0.028 | 0.036 | 0.059 | 0.131 | 0.105 | 0.141 | 0.069 | 0.045 | 0.062 | 0.051 | 0.03 |

Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.10: Omnibus Survey results to Question 4: In deciding to play the lottery, how important do you think it is to know which organisations or projects have received Lottery funding and the impact of the funding? Part 1

| | Total | GENDER | | AGE | | | | | Region | | | | SOCIAL GRADE | | | | | |
|------------------|-------|--------|--------|-------|-------|-------|-------|-------|---------------|--------|---------|------------------|--------------|-------|-------|-------|-------|-------|
| | | Male | Female | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | Conn/ Ulst | Dublin | Munster | Rest Leinster | AB | C1 | C2 | DE | ABC1 | C2DEF |
| Unwtd Base | 1041 | 510 | 523 | 158 | 220 | 269 | 222 | 172 | 155 | 317 | 296 | 273 | 334 | 309 | 156 | 225 | 643 | 398 |
| Weighted Base | 1041 | 519 | 514 | 175 | 216 | 263 | 218 | 170 | 184 | 292 | 282 | 283 | 331 | 304 | 160 | 229 | 634 | 407 |
| Very important | 163 | 80 | 80 | 26 | 27 | 36 | 48 | 26 | 30 | 45 | 46 | 41 | 51 | 50 | 22 | 38 | 101 | 62 |
| | 16% | 15% | 16% | 15% | 13% | 14% | 22% | 16% | 17% | 16% | 16% | 15% | 16% | 17% | 14% | 17% | 16% | 15% |
| Important | 472 | 219 | 249 | 85 | 104 | 120 | 91 | 71 | 91 | 117 | 126 | 138 | 156 | 131 | 81 | 98 | 288 | 184 |
| | 45% | 42% | 48% | 49% | 48% | 46% | 42% | 42% | 50% | 40% | 45% | 49% | 47% | 43% | 50% | 43% | 45% | 45% |
| Unimportant | 239 | 126 | 113 | 39 | 49 | 65 | 45 | 41 | 42 | 81 | 58 | 58 | 71 | 80 | 28 | 50 | 151 | 88 |
| | 23% | 24% | 22% | 23% | 23% | 25% | 21% | 24% | 23% | 28% | 20% | 20% | 21% | 26% | 18% | 22% | 24% | 22% |
| Very unimportant | 83 | 50 | 33 | 9 | 16 | 25 | 16 | 17 | 10 | 28 | 22 | 22 | 27 | 26 | 13 | 17 | 53 | 30 |
| | 8% | 10% | 6% | 5% | 7% | 10% | 7% | 10% | 6% | 10% | 8% | 8% | 8% | 9% | 8% | 7% | 8% | 7% |
| Don't Know | 84 | 44 | 39 | 16 | 19 | 16 | 19 | 14 | 9 | 20 | 30 | 25 | 25 | 16 | 16 | 25 | 41 | 43 |
| | 8% | 9% | 8% | 9% | 9% | 6% | 9% | 8% | 5% | 7% | 11% | 9% | 8% | 5% | 10% | 11% | 7% | 11% |
| Net Important | 635 | 299 | 329 | 111 | 131 | 156 | 139 | 98 | 122 | 163 | 172 | 179 | 208 | 182 | 103 | 137 | 389 | 246 |
| | 61% | 58% | 64% | 63% | 61% | 60% | 64% | 58% | 66% | 56% | 61% | 63% | 63% | 60% | 64% | 60% | 61% | 60% |
| Net Unimportant | 321 | 176 | 145 | 48 | 65 | 90 | 61 | 58 | 53 | 110 | 80 | 79 | 98 | 106 | 41 | 67 | 204 | 117 |
| | 31% | 34% | 28% | 28% | 30% | 34% | 28% | 34% | 29% | 38% | 28% | 28% | 30% | 35% | 26% | 29% | 32% | 29% |
| Mean | 2.75 | 2.69 | 2.79 | 2.8 | 2.72 | 2.68 | 2.86 | 2.69 | 2.81 | 2.66 | 2.78 | 2.77 | 2.76 | 2.71 | 2.78 | 2.78 | 2.74 | 2.76 |
| Std Dev | 0.839 | 0.873 | 0.801 | 0.772 | 0.801 | 0.846 | 0.877 | 0.881 | 0.79 | 0.878 | 0.847 | 0.818 | 0.834 | 0.858 | 0.816 | 0.848 | 0.846 | 0.828 |
| Standard Error | 0.027 | 0.04 | 0.037 | 0.061 | 0.057 | 0.054 | 0.062 | 0.071 | 0.06 | 0.053 | 0.053 | 0.051 | 0.048 | 0.051 | 0.068 | 0.059 | 0.035 | 0.043 |

Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.11: Omnibus Survey results to Question 4: In deciding to play the lottery, how important do you think it is to know which organisations or projects have received Lottery funding and the impact of the funding? Part 2

| | | WORKING STATUS | | HOUSEHOLD SIZE | | | | PRESENCE OF CHILDREN | |
|------------------|-------|----------------|-------------|----------------|-------|-------|-------|----------------------|-------|
| | Total | Working | Non Working | 1 | 2 | 3 | 4+ | Yes | No |
| Unwtd Base | 1041 | 766 | 259 | 129 | 252 | 227 | 433 | 399 | 642 |
| Weighted Base | 1041 | 761 | 265 | 131 | 248 | 224 | 438 | 398 | 643 |
| Very important | 163 | 119 | 41 | 30 | 24 | 35 | 74 | 69 | 95 |
| | 16% | 16% | 15% | 23% | 10% | 16% | 17% | 17% | 15% |
| Important | 472 | 336 | 130 | 46 | 120 | 101 | 205 | 179 | 293 |
| | 45% | 44% | 49% | 36% | 48% | 45% | 47% | 45% | 46% |
| Unimportant | 239 | 192 | 44 | 27 | 63 | 59 | 90 | 89 | 149 |
| | 23% | 25% | 17% | 20% | 26% | 26% | 21% | 22% | 23% |
| Very unimportant | 83 | 66 | 16 | 15 | 15 | 18 | 35 | 32 | 51 |
| | 8% | 9% | 6% | 12% | 6% | 8% | 8% | 8% | 8% |
| Don't Know | 84 | 48 | 34 | 13 | 25 | 12 | 34 | 30 | 54 |
| | 8% | 6% | 13% | 10% | 10% | 5% | 8% | 8% | 8% |
| Net Important | 635 | 455 | 171 | 76 | 145 | 136 | 279 | 248 | 388 |
| | 61% | 60% | 64% | 58% | 58% | 60% | 64% | 62% | 60% |
| Net Unimportant | 321 | 258 | 61 | 42 | 79 | 77 | 124 | 121 | 201 |
| | 31% | 34% | 23% | 32% | 32% | 34% | 28% | 30% | 31% |
| Mean | 2.75 | 2.71 | 2.84 | 2.77 | 2.69 | 2.72 | 2.79 | 2.77 | 2.73 |
| Std Dev | 0.839 | 0.853 | 0.793 | 0.973 | 0.757 | 0.838 | 0.84 | 0.85 | 0.832 |
| Standard Error | 0.027 | 0.032 | 0.052 | 0.09 | 0.051 | 0.058 | 0.042 | 0.044 | 0.034 |

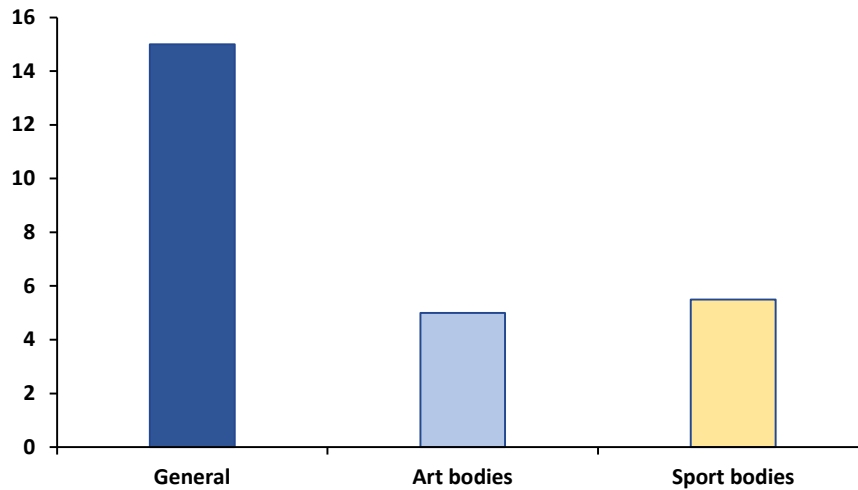
Source: Omnibus survey conducted by Kantar on behalf of Indecon

Table A.12: Omnibus Survey results to Question 4: In deciding to play the lottery, how important do you think it is to know which organisations or projects have received Lottery funding and the impact of the funding? Part 3

| | Total | DOMESTIC STATUS | | | | | Play lottery | | | | |
|---|-------|-----------------------------|------------------------|------------------|---------------------|---|--------------|------------------|---------|--------|-------------|
| | | Married/living with partner | Never married (single) | Divorced/widowed | Living with parents | Domestic partner/living with other adults | Never | Few times a year | Monthly | Weekly | Net: At all |
| Unwtd Base | 1041 | 591 | 251 | 53 | 73 | 47 | 188 | 349 | 193 | 311 | 853 |
| Weighted Base | 1041 | 581 | 257 | 52 | 76 | 48 | 192 | 350 | 190 | 308 | 849 |
| Very important | 163 | 90 | 44 | 9 | 11 | 7 | 20 | 45 | 26 | 72 | 143 |
| | 16% | 16% | 17% | 17% | 15% | 14% | 10% | 13% | 14% | 23% | 17% |
| Important | 472 | 255 | 120 | 24 | 38 | 25 | 78 | 163 | 97 | 134 | 394 |
| | 45% | 44% | 47% | 47% | 50% | 52% | 41% | 46% | 51% | 44% | 46% |
| Unimportant | 239 | 148 | 52 | 9 | 14 | 11 | 35 | 98 | 48 | 58 | 203 |
| | 23% | 25% | 20% | 17% | 18% | 23% | 18% | 28% | 25% | 19% | 24% |
| Very unimportant | 83 | 47 | 23 | 4 | 3 | 3 | 22 | 25 | 12 | 24 | 61 |
| | 8% | 8% | 9% | 8% | 4% | 6% | 11% | 7% | 7% | 8% | 7% |
| Don't Know | 84 | 41 | 19 | 6 | 10 | 2 | 37 | 20 | 7 | 20 | 47 |
| | 8% | 7% | 7% | 11% | 14% | 5% | 19% | 6% | 4% | 7% | 6% |
| Net Important | 635 | 345 | 164 | 34 | 49 | 32 | 98 | 208 | 123 | 207 | 537 |
| | 61% | 59% | 64% | 64% | 65% | 66% | 51% | 59% | 64% | 67% | 63% |
| Net Unimportant | 321 | 195 | 75 | 13 | 16 | 14 | 57 | 123 | 60 | 82 | 265 |
| | 31% | 34% | 29% | 25% | 22% | 29% | 30% | 35% | 32% | 26% | 31% |
| Mean | 2.75 | 2.72 | 2.78 | 2.83 | 2.88 | 2.78 | 2.62 | 2.69 | 2.74 | 2.89 | 2.77 |
| Std Dev | 0.839 | 0.845 | 0.857 | 0.851 | 0.738 | 0.776 | 0.882 | 0.8 | 0.782 | 0.878 | 0.829 |
| Standard Error | 0.027 | 0.036 | 0.055 | 0.125 | 0.091 | 0.114 | 0.071 | 0.044 | 0.058 | 0.052 | 0.029 |
| Source: Omnibus survey conducted by Kantar on behalf of Indecon | | | | | | | | | | | |

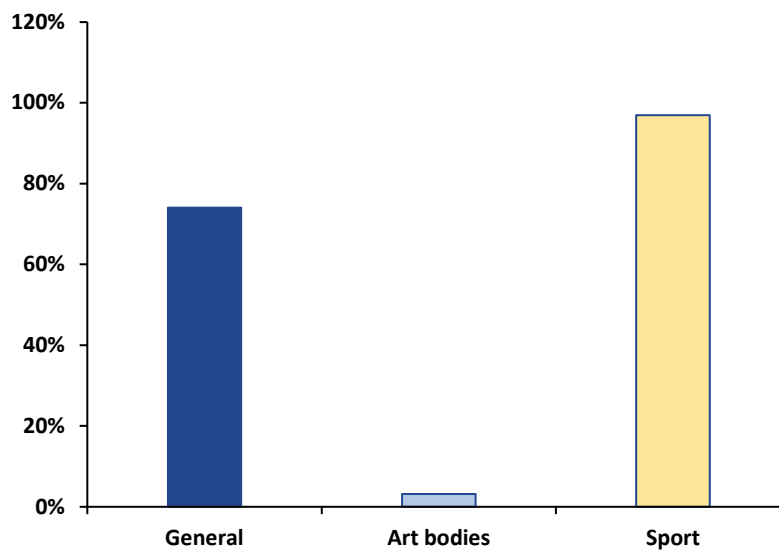
Annex B: Detailed Results of Beneficiary Survey

Annex B.1: Median FTE (full time equivalent) employees in organisations surveyed in 2021

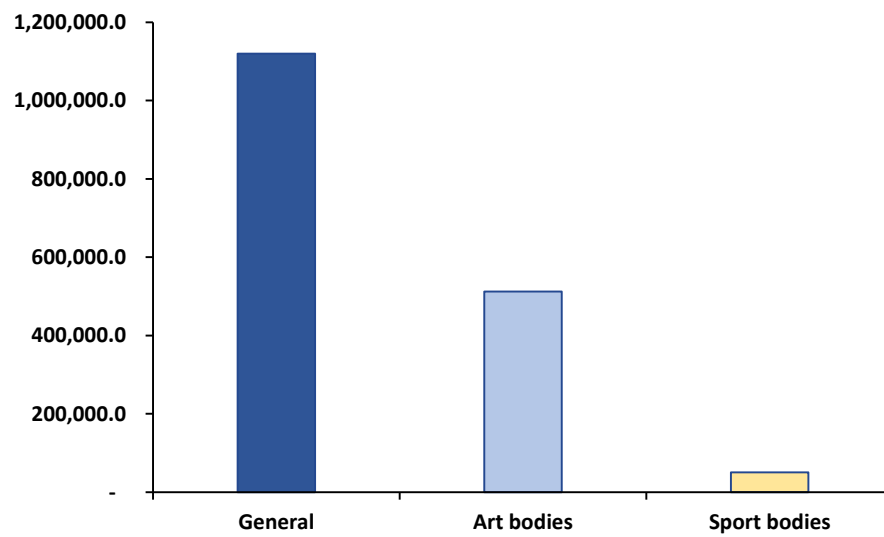
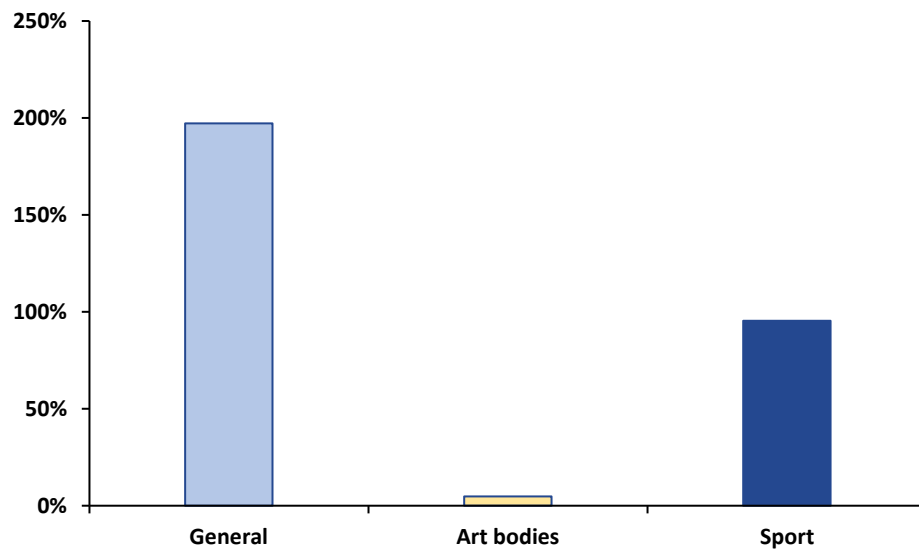


Source: Indecon Survey

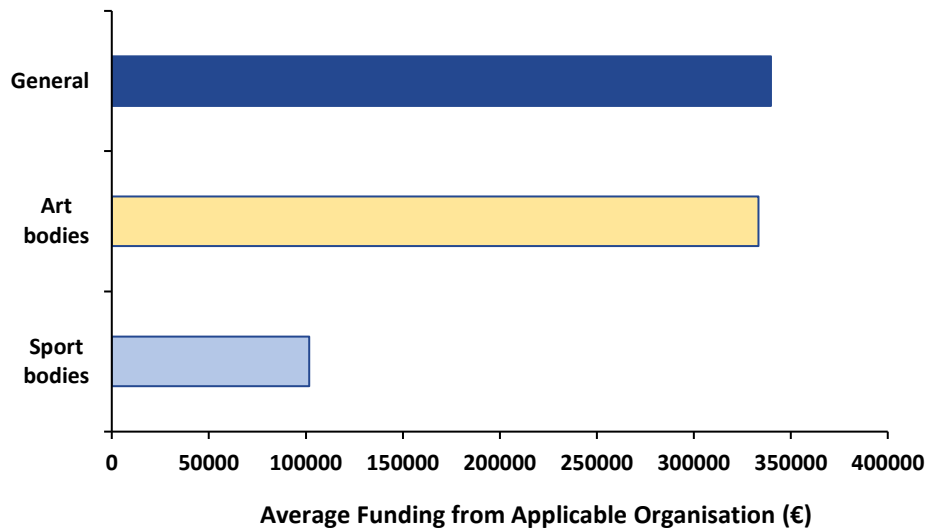
Annex B.2: Percentage FTE (full time equivalent) employees in organisations as a percentage of total surveyed in 2021



Source: Indecon Survey

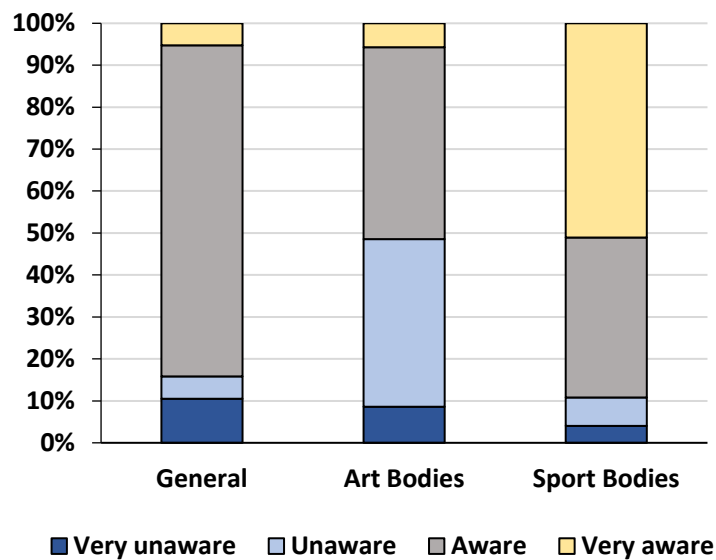
Annex B.3: Median annual total income of organisations surveyed in 2021*Source: Indecon Survey***Annex B.4: Percentage annual total income of organisations surveyed as a percentage of the total in 2021***Source: Indecon Survey*

Annex B.5: Average funding from applicable organisation (€) in 2021



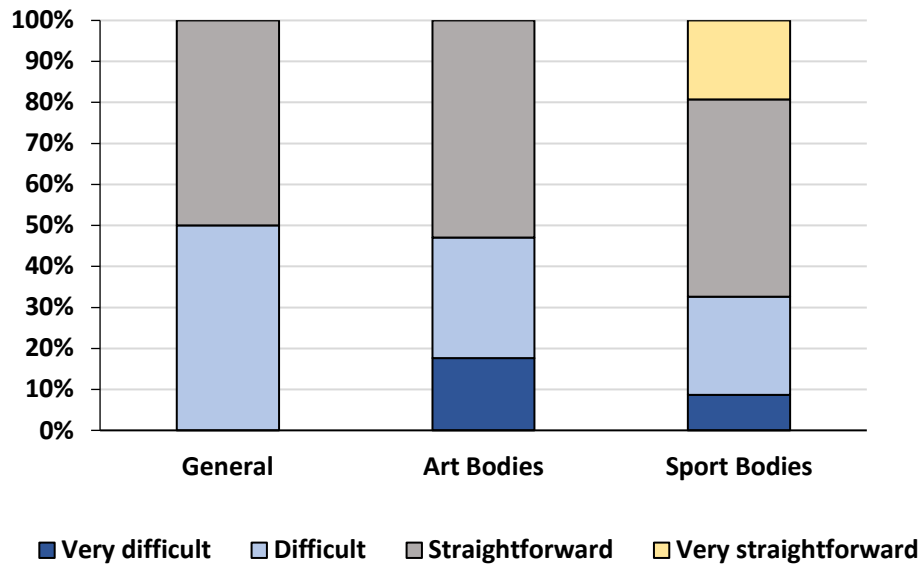
Source: Indecon Survey

Annex B.6: Awareness of the funding available from the National Lottery in 2021



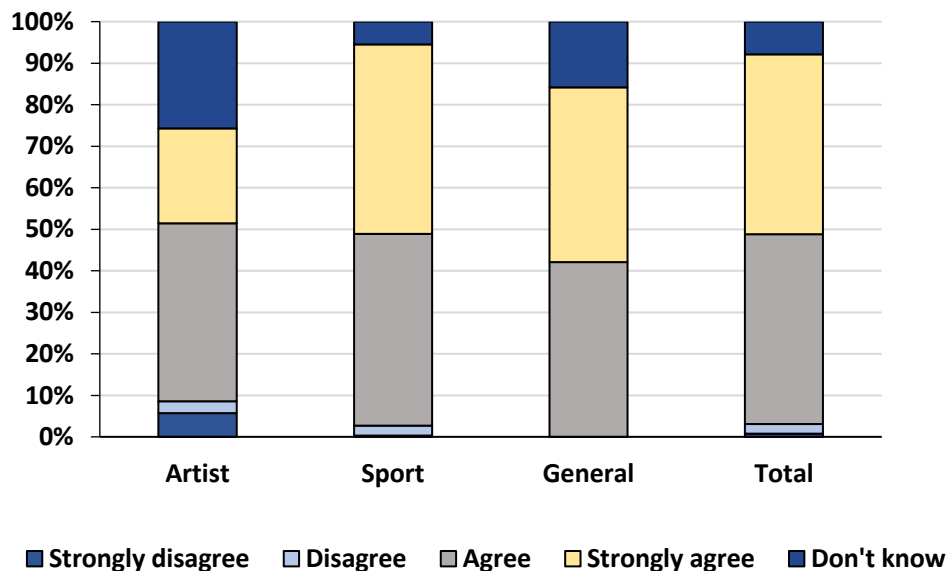
Source: Indecon Survey

Annex B.7: Level of difficulty with application process to access funding from the National Lottery in 2021

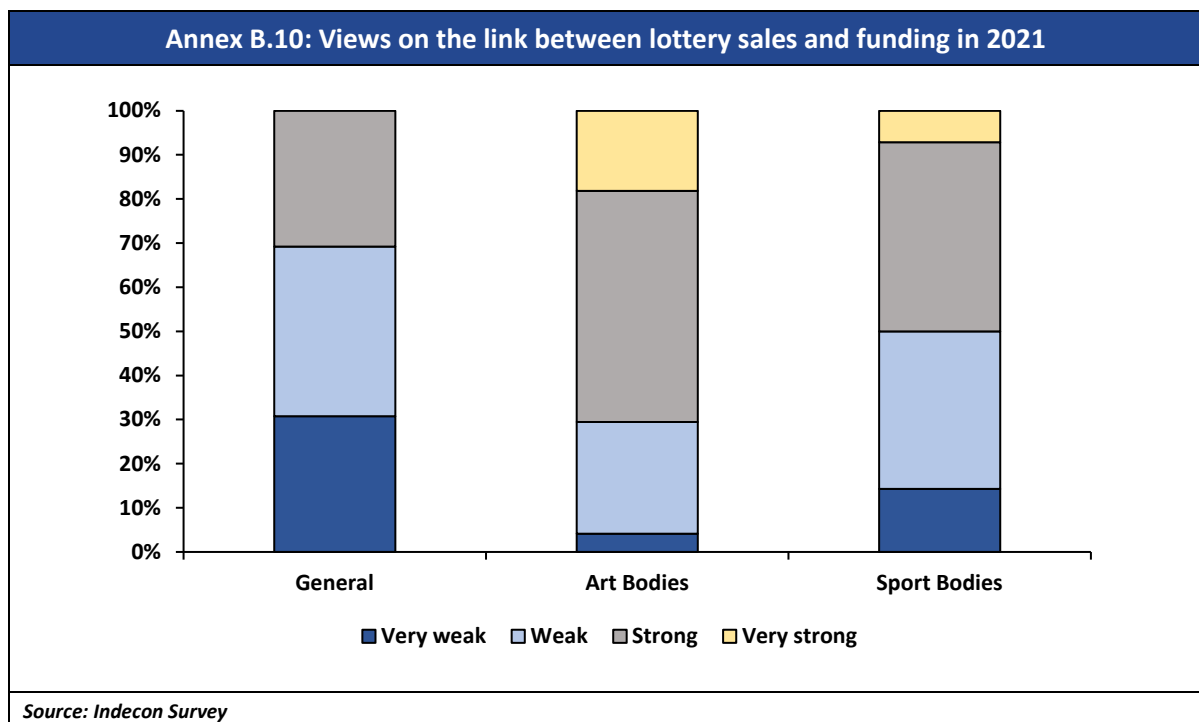
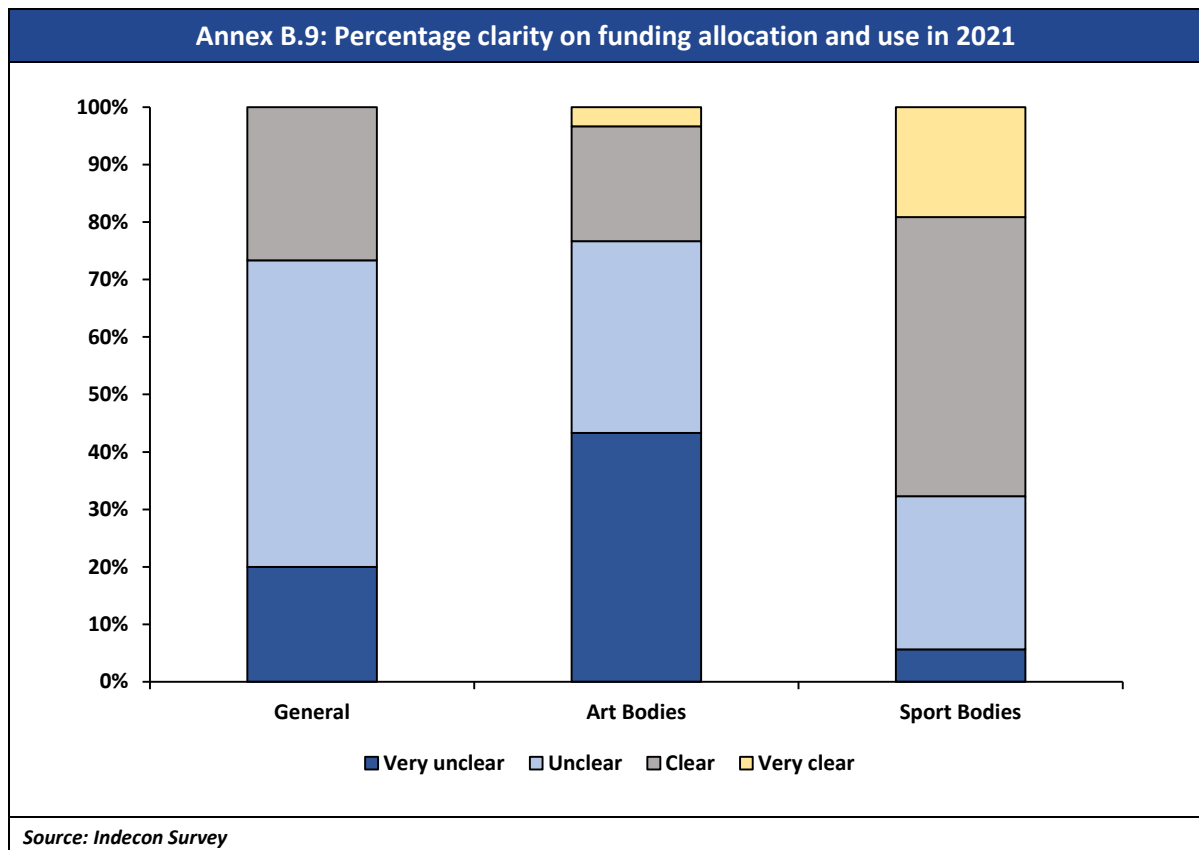


Source: Indecon Survey

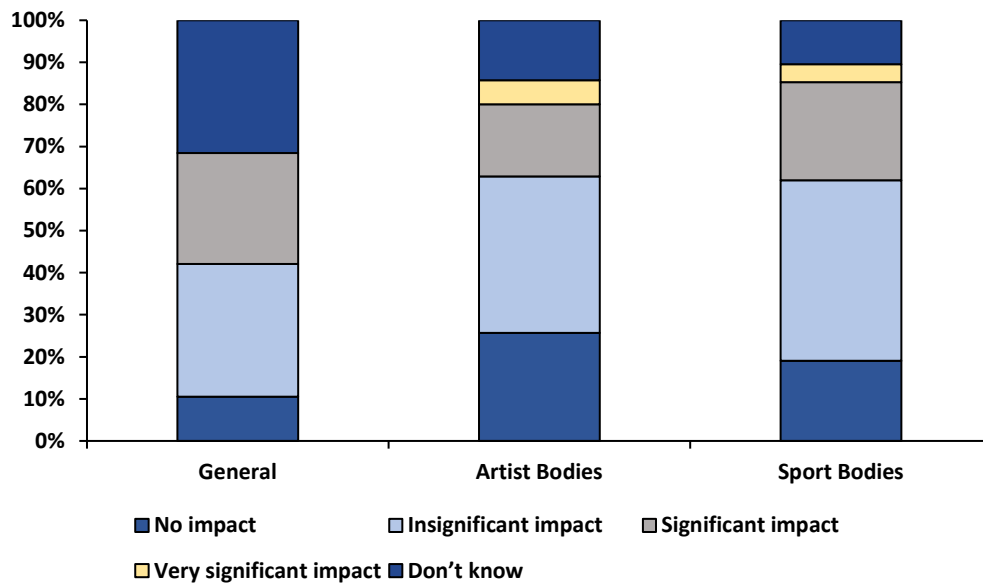
Annex B.8: Level of difficulty with application process to access funding from the National Lottery in 2021



Source: Indecon Survey

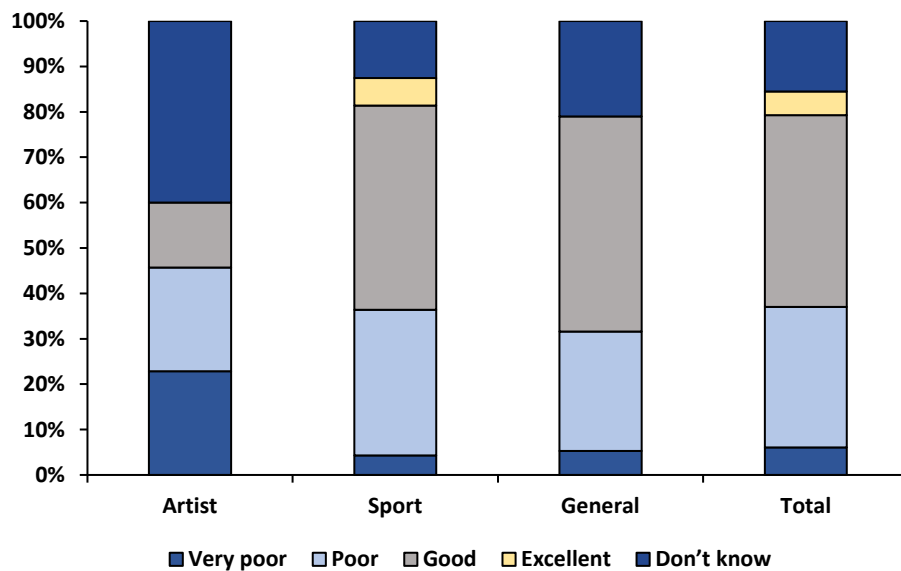


Annex B.11: Views on impact that a lack of consumer understanding on connection between Good Causes and how funding is allocated has on lottery sales in 2021



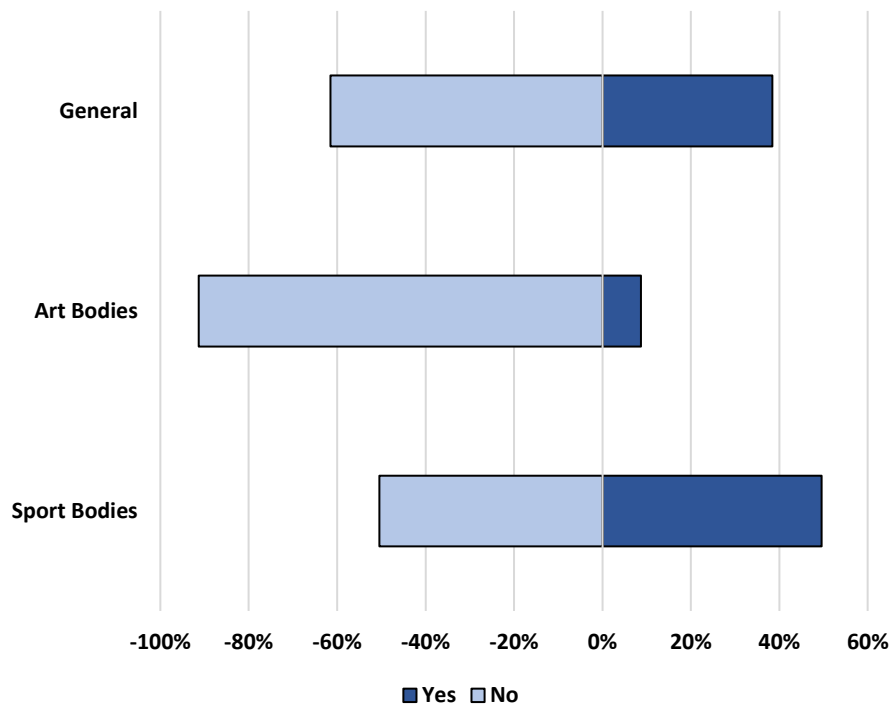
Source: Indecon Survey

Annex B.12: Views on impact that a lack of consumer understanding on connection between Good Causes and how funding is allocated has on lottery sales in 2021



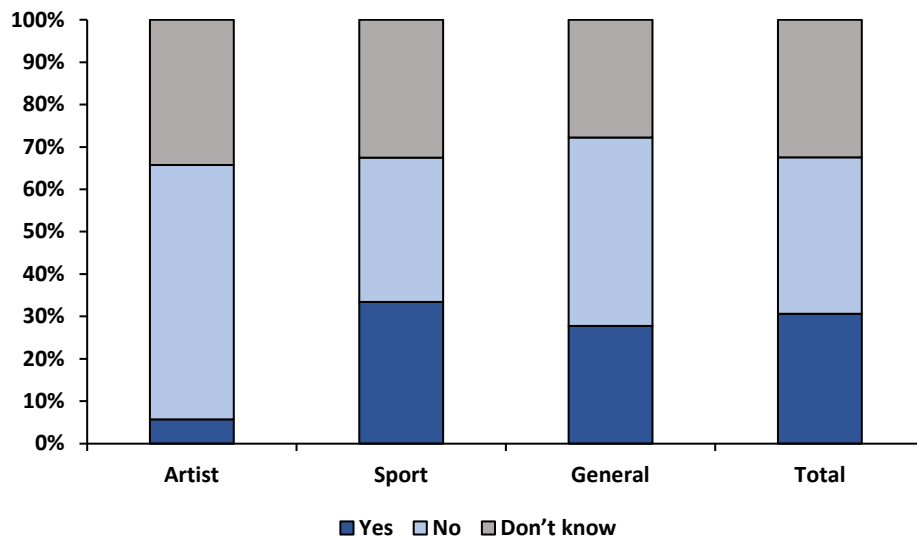
Source: Indecon Survey

Annex B.13: Views on clarity regarding the overarching policy goals which inform how funding is allocated in 2021



Source: Indecon Survey

Annex B.14: Views on clarity regarding the overarching policy goals which inform how funding is allocated in 2021



Source: Indecon Survey

| Annex B.15: Comments application process to access Good Causes funding from the National Lottery | | |
|---|---|---|
| General | Art bodies | Sports bodies |
| <p>"An online portal for applications and report should be available in this day and age."</p> <p>"The SSNO funding application form requires a lot of information and takes a considerable amount of time, particularly for an organisation with very limited staff resources. Yet, it is a critical piece of funding for our organisation. It is a paper heavy, inefficient process involving a lot of duplication. It needs to be better co-ordinated, particularly for national organisations, streamlined, more time responsive and supported by an online application system."</p> <p>"If there was a Local Representative or National Lottery Office in each County for the likes of promoting this funding locally to the different organisations or to identify the real needs at local level."</p> <p>"Would be great if all areas could accept applications via email."</p> <p>"The application process does not allow for the inclusion of an increase in funding to meet growing demand."</p> <p>"The application process is quite time consuming and sometimes not enough time is given before the deadline."</p> | <p>"The application process for arts centre funding from the Arts Council is extremely time consuming and challenging in terms of resources."</p> <p>"It's a hugely time-consuming project. Application can take me up to 40 hrs with onerous financial information being required in numerous different formats at different stages. I spend the same amount of time on my application as those receiving three and four times as much funding."</p> <p>"The process to apply for Strategic Funding is clear, but I am unclear how much Arts Council funding comes from the National Lottery or how much directly from the Government's allocation to the Department of Arts."</p> <p>"Although I am aware of Lottery Funding generally, I was not aware that the Arts Council's budget included Lottery Funding."</p> <p>"Largely unaware that funding we apply to the Arts Council for is part National Lottery funds."</p> <p>"Can be put off by the phrasing of the questions as they are more directed towards health or more traditional charities."</p> | <p>"We are situated in an area which is not designated as 'Disadvantaged' though we cater for children and adults who come from disadvantaged areas. We cannot be given points for this under the current application system."</p> <p>"Very time-consuming process. The need for 3 separate quotes for every item to be funded needs to be reviewed."</p> <p>"The online application process was very user friendly, and all information requests explained."</p> <p>"Very time consuming especially when legal documentation is required. Would be good to look at that area of application and make it easier."</p> <p>"Simplify the process, make applicants aware of the scoring process applied before the application rather than afterwards, experienced applicants have a big advantage learning from previous applications which makes it unfairly challenging to new applicants."</p> |
| Source: Indecon Survey | | |

| Annex B.16: Views on systems used in other jurisdictions for the allocation of Lottery funding | |
|---|---|
| Art Bodies | Sports Bodies |
| <p>“Arts Council England make a clear distinction between Exchequer funding and National Lottery Funding.”</p> <p>“National Lottery Funding in the UK seems to promote its connection to community funds very well.”</p> <p>“I look to the UK and get a stronger sense that a % of Lottery Funding benefits the Arts. I don't see that so much here in Ireland.”</p> <p>“Arts Council of Northern Ireland - there are very clear 'exchequer' funds to which you can apply (largely the regularly funded organisations) and then other project-based 'lottery' funds.”</p> <p>“Overseas organizations will often display several logos, including that of their national lottery, so that it is clear where their funding is coming from.”</p> <p>“Ensuring that the logo is used where Lottery Funding has been allocated. In the UK for example it is very clear where the National Lottery is a source of income - the logo and a tag line must be used.”</p> | <p>“Sweden for example reimburse clubs directly a portion of their fee when participants attend consistently.”</p> <p>“English lottery supporting the Olympics.”</p> <p>“Lottery in England. This funding does not go into the exchequer to be hived off before the remainder is distributed, should be the same in Ireland.”</p> <p>“There is better support in other countries in developing sports that have high participation but limited resources.”</p> <p>“More could be put towards education like Canada.”</p> <p>“The Football Foundation in England offers specific support funding to football only. This is based on a tri-bid approach with Government.”</p> |
| Source: Indecon Survey | |

| Annex B.17: Proposals for how the awareness of the connection between the Lottery and beneficiary organisations could be enhanced. | | |
|---|--|---|
| General | Art bodies | Sports bodies |
| <p>"The National Lottery's Good Causes Awards could be extended, beneficiary organisations strive to have their work recognised and awards help them to promote the work they do."</p> <p>"Through promotion in the national media and marketing materials at point of sale."</p> <p>"Distribution of information in the community and advertising/marketing targeting community groups and social workers."</p> <p>"Greater use of social media."</p> <p>"Perhaps make the public aware of how much was raised in a particular year and how it was spent."</p> | <p>"A clearer outline of what proportion of funds are allocated and if there are specific funding streams available."</p> <p>"A photographic artist could be commissioned every year to document the beneficiary's processes - not as a PR exercise - but as a genuine independent record made from a creative perspective."</p> <p>"Advise the organisations that part of their funding was raised by National Lottery."</p> <p>"Awareness through enhanced communication and perhaps use of Lottery logo/credit could work well."</p> <p>"Advertising campaign highlighting specific causes (arts & culture) that the NL funds."</p> | <p>"Publicise the awards and results of the capital grants."</p> <p>"The promotion of the link with Lottery Funds and the National Sports Capital Grants is not done very well. Most people are not aware of the link. This needs better promotion via the Sports Partnership bodies."</p> <p>"Perhaps Community workshops firstly promoting the NL scheme and then follow up reaching out to communities via webinars / NL rep visits."</p> <p>"More interaction between the fund and the NGO's who then can pass on the information to their members."</p> <p>"Perhaps a header on the Lotto ticket (or on-line screen) indicating the % of the ticket price which is directed to Good Causes."</p> |
| Source: Indecon Survey | | |

| Annex B.18: Views on the principles which should underpin any future framework to inform funding allocation. | | |
|--|---|--|
| General | Art bodies | Sports bodies |
| <p>"Transparency and accountability. The funding model should be realistic and capable of practical application. The funding model should be evidence-based, informed by existing data, research and literature, as well as international models of best practice."</p> <p>"It should be broken down in chart format, easy for anyone to understand."</p> <p>"Clarity, flexibility, transparency, accountability."</p> <p>"Long term multi annual funding is required for NGO's and community organisations to adequately plan and for sustainability."</p> <p>"Need for services, at the community level. Equitable access to funded services."</p> | <p>"Awarded organisations should follow the Charity Regulator Good Governance Code."</p> <p>"A less unwieldy and modernised application process please that is also proportionate in terms of the application and the reporting to the funding allocated."</p> <p>"Good governance, not necessarily professional bodies - voluntary and amateur groups too, ease of access, clarity of process."</p> <p>"Would like to see more funds going to the Arts and Artists. We have little philanthropy extended to the Arts and more funding would be beneficial."</p> <p>"What the benefit is - what impact it has - the track record of the organisation to guarantee the money is spent well."</p> | <p>"Give a clearer indication of the method to award grants."</p> <p>"Continue to ensure principles of fairness, inclusiveness, equity, diversity is valued."</p> <p>"I think that there should be committees to discuss and implement a framework, and essentially an SOP, for allocating funding."</p> <p>"Transparent, relevant, benefit to the community, measurable outcomes, etc."</p> <p>"The message about volunteering a person's time to an activity that befits a community, needs to be hyped and rewarded."</p> |
| Source: Indecon Survey | | |

| Annex B.19: Views on options for approaches which should be considered to the allocation of funds arising from the Lottery to Good Causes | | |
|--|---|---|
| General | Art bodies | Sports bodies |
| <p>"Have a certain amount of flexibility to adapt use of funds with a solid rationale if project differs slightly from project application."</p> <p>"Funding is distributed to Government Departments and appears to be allocated without open competition in certain Departments."</p> <p>"A Lottery office in each County in Ireland to identify the needs at local level. Share all local information with each relevant County - i.e., local newspaper or Radio station."</p> <p>"Gender expertise should be both valued and embedded among those responsible for administering grant schemes and an awareness of gender and equality budgeting frameworks that can ensure equality in outcomes for investment."</p> | <p>"Strategic capital investments in partnership with local and national bodies should be encouraged- and is badly needed in the arts."</p> <p>"A greater awareness of the proportion of Lottery funding received by individual companies would lead to an increased understanding of the Lottery's contribution to Good Causes."</p> <p>"Support for the non-profit, charitable sector is key. Consideration of the broad spectrum of areas from arts to sport and other charitable endeavours which contribute to society as a whole."</p> <p>"Scoring systems in an application process that reflect the objectives of the fund are preferred to the popularity approach that seeks to publicly pit good causes against each other."</p> | <p>"Consistency of delivery in servicing the community need and or an assessment of the 'gap' or cost to the State if the club/resource entity wasn't providing same for the community."</p> <p>"Funding for joint applications between various groups within a community, for the benefit of the community."</p> <p>"A separate funding strand for small or new clubs/organisations where there will be no requirement to match fund but instead the club would be required to submit a report and receipts by a certain date to prove expenditure."</p> <p>"More emphasis on sport for all. How do we involve people from other cultures / countries in our sport and social activities."</p> |
| Source: Indecon Survey | | |

| Annex B.20: Other views/comments that respondents held | | |
|--|--|---|
| General | Art bodies | Sports bodies |
| <p>"The funding availed of to date by our organisation, supported by the National Lottery (SSNO and HSE National Lottery), has been a critical and necessary income source supporting provision of services not provided by the State health system."</p> <p>"We are genuinely very grateful for lottery funding while we are core funded, we didn't receive project money. The lottery enables us to enhance our charitable organisation e.g., by providing relevant board and committee training and holding educational events."</p> <p>"Within my County there is not a lot of advertising of good causes and projects that are funded by the Lotto. It should be front and centre if someone/organisations are benefitting from Lotto funding."</p> | <p>"There is inadequate opportunity for small/young/emerging organisations to receive public funding. Critical that initial funding is front-loaded with real support and advice being provided. Also look at how the Ars Council of England have identified a specific region (Southwest) to support a consortium of visual arts organisations to really thrive with a required levels of funding to allow them to thrive."</p> <p>"Personally, I find there is an inherent conflict between gambling and good causes, and I think it needs careful marketing and many safety nets put in there to protect people."</p> <p>"It is all about being open and transparent, so that we are all part of the social contract. There is a lot of public money going into sports, and less so to the arts."</p> | <p>"The application and drawdown process is too complex for non-specialist volunteers to navigate. These processes often require incurring of legal expenses, the cost of which reduces any benefit obtained from the grant allocation."</p> <p>"This funding has provided vital support to sporting and community organisations. Funding at community level is vital to ensure participation is encouraged throughout the life cycle. Active participation as people age has been incredibly successful over the last 20 years."</p> <p>"We are hugely thankful for the funding received from national lottery which have assisted us in development of our running track and purchase of new equipment. Our only suggestion would be to make the application process a bit more user friendly."</p> |
| Source: Indecon Survey | | |

Annex C: International Review – Additional Tables

UK National Lottery

| Annex C.1: Allocation of Arts and Sport Funding by Distributing Body | | | |
|--|-------|------------------------|-------|
| Arts | | Sport | |
| Arts Council England | 69.8% | Sport England | 62.0% |
| Creative Scotland | 8.9% | Sport Scotland | 8.1% |
| Arts Council of Wales | 5.0% | Sport Wales | 4.5% |
| Arts Council of Northern Ireland | 2.8% | Sport Northern Ireland | 2.6% |
| British Film Institute | 13.5% | UK Sport | 22.8% |
| Source: National Lottery etc. Act 1993 (Amended) | | | |

Annex C.2: Selection of Distributor Bodies⁷⁰

Selection of distributors

Chosen by Parliament for their knowledge and expertise to help ensure the monies are appropriately spent on good causes.

Legal basis

Some of these organisations were established by Royal Charter (i.e. incorporated by order of the Queen on the advice of the Privy Council), whereas others were established by an Act of Parliament, either as charities or non-departmental public bodies. They generally predate the National Lottery and are listed on Companies House.

General structure

Overseen by a Board of Trustees/Governors, with day-to-day management delegated to Executive teams led by a Chief Executive. The Boards typically delegate certain functions, such as audit and risk, to smaller committees made up of non-executive members and external experts.

Appointments and Accountability

Boards and Senior management are often appointed by the relevant Minister and held accountable by their department (e.g. the Department for Digital, Culture, Media and Sport). This is true at both the UK level and at the national level (e.g., NI Executive, Scottish Government etc.), with some distributors responsible for a home country and others serving the entire UK. Recruitment may be carried out via open advertisement.

Research and data

Some of the distributors have research teams who analyse their area of work to identify issues that need to be addressed; others collect data and host analytical tools on the provision of facilities and/or participation in events in their areas to assist with strategic development including at the local government level.

Advisory Panels

Some distributors have advisory panels and host meetings with community groups to identify challenges/issues affecting a particular group. This helps with channelling support in the appropriate places. Enhancing equality, diversity and inclusion is often an important objective in this context.

Other:

One organisation commissions projects from a Register of Support Services to assist in the delivery of large projects, with consultants appointed via a tendering process.

Distribution of Funding:

Decisions on how and where funding is invested are made by the 12 specialist organisations. For the year ending 31 March 2021, the funds were shared as follows:

- Health, education, environment, and charitable causes – 40%
- Sport – 20%
- Arts – 20%
- Heritage – 20%

Source: *Indecon*

⁷⁰ <https://www.tnlcommunityfund.org.uk/>

| Annex C.3: Example of Sub-Funds Open for Funding through the UK National Lottery Communication Fund ⁷¹ | | | |
|--|---|---|--|
| National Lottery Awards for All England⁷² A quick way to apply for smaller amounts of funding between £300 and £10,000. Area: England Suitable for Voluntary or community organisations Funding size: £300 to £10,000, for up to one year Deadline: Ongoing | Reaching Communities England Offers a larger amount of funding (over £10,000) for projects that last up to five years. We're looking for projects that work with their community – whether that's a community living in the same area, or people with similar interests or life experiences. Area: England Funding size: £10,001 or more, for up to five years Deadline: Ongoing | Partnerships Offers a larger amount of funding (over £10,000) for organisations that work together with a shared set of goals to help their community thrive – whether that's a community living in the same area, or people with similar interests or life experiences. Area: England Funding size: £10,001 or more, for up to five years Deadline: Ongoing | People and Places: Medium grants⁷³ Funding capital and revenue community projects from £10,001 to £100,000. Area: Wales Funding size: £10001 to £100000 Total available: Up to £19 million each year through both strands of the People and Places programmes Deadline: Ongoing |
| Empowering Young People A larger amount of funding (between £10,001 and £500,000) for projects that work with young people (between the ages of 8 and 25) to face and overcome challenges. Area: Northern Ireland Funding size: £10001 to £500000 Deadline: Ongoing | Scottish Land Fund Supporting urban and rural communities to become more resilient and sustainable through the ownership and management of land and land assets. Area: Scotland Funding size: £5000 to £1000000 Deadline: Ongoing | #iwill Fund The #iwill Fund will enable more young people to take part in social action through high quality opportunities which create lifelong habits. Area: England | Sustainable Steps Wales: Action Grants Grants from £10,001 to £350,000 that address climate change in communities and help people live in a more sustainable way. Area: Wales Funding size: £10,001 to £350,000. Projects can be up to 5 years Total available: £3 million, around 10 to 20 projects Deadline: July 2022 |
| Source: https://www.tnlcommunityfund.org.uk/funding/programmes . These funds were open for applications as of 1 st June 2022. | | | |

⁷¹ <https://www.tnlcommunityfund.org.uk/>

⁷² Similar separate funds exist for Wales, Scotland and Northern Ireland.

⁷³ An equivalent funding also exists for community projects from £100,001 to £500,000.

Annex C.4: Example of Open Fund – The UK National Lottery Community Fund Application Portal⁷⁴



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The National Lottery Community Fund distributes over £600m a year to communities across the UK, raised by players of The National Lottery

[Apply for funding under £10,000](#) [Apply for funding over £10,000](#)

Thinking of applying for funding? ›

Managing and promoting your funding ›

Putting Communities First ›

Source: Indecon

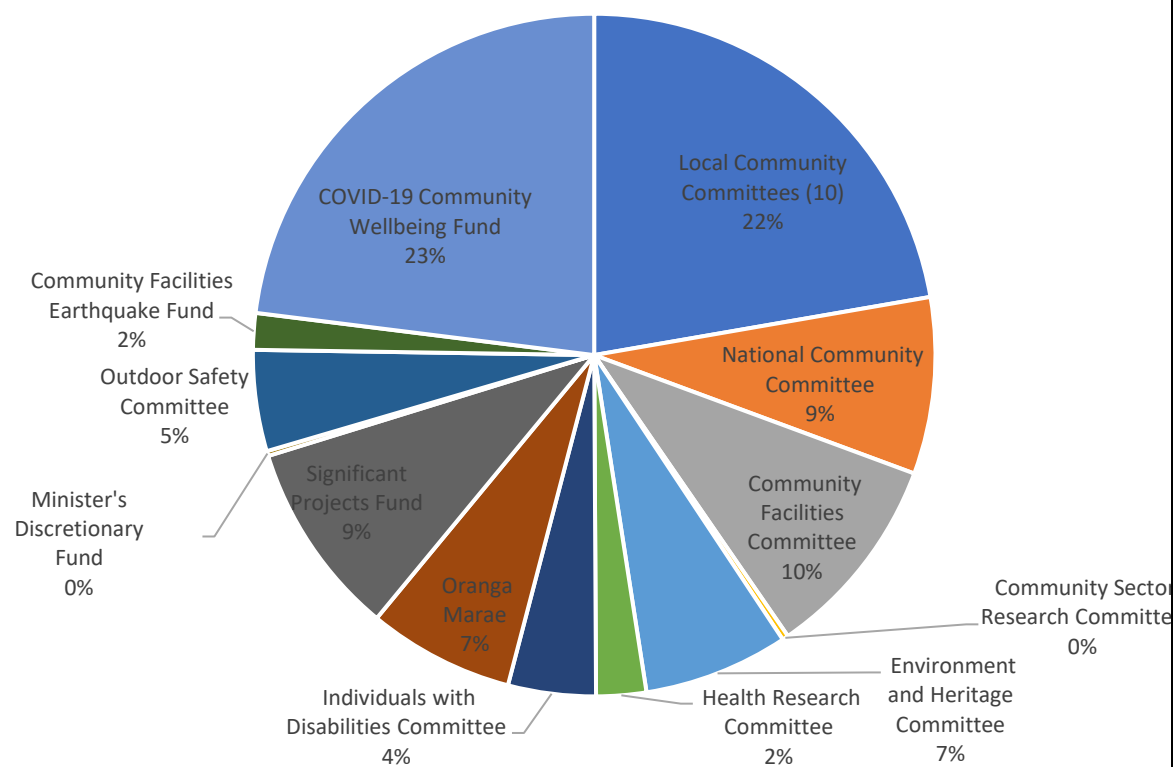
⁷⁴ <https://www.tnlcommunityfund.org.uk/>

Annex E – New Zealand

| Annex C.5: Example of Calls for Funding through New Zealand Community Matters Portal ⁷⁵ | | | |
|--|--|---|--|
| Grants for organisation costs Community Organisation Grants Scheme (COGS) Lottery Community Lottery Outdoor Safety Support for Volunteering Disarmament Education UN Implementation Fund Lottery Tai Tokerau/Northland Flood Relief Fund Community and Volunteering Capability Fund | Grants for projects Community Organisation Grants Scheme (COGS) Lottery Community Chinese Poll Tax Heritage Trust Pacific Development and Conservation Trust Support for Volunteering Lottery Environment and Heritage Lottery Community Facilities Oranga Marae Lottery Fund for Community Benefit Related to the 2021 America's Cup Ethnic Communities Development Fund Safer Communities Fund Community and Volunteering Capability Fund | Grants for NZ disaster relief Lottery Hurunui Kaikoura Marlborough Earthquake Relief Fund Lottery Rangitaiki River Stopbank Breach Recovery Fund Lottery Hurunui Kaikoura Marlborough Community Facilities Earthquake Fund Lottery Tai Tokerau/Northland Flood Relief Fund | Grants for community buildings and facilities Lottery Significant Projects Fund Lottery Community Facilities Lottery Community Lottery Environment and Heritage Lottery Hurunui Kaikoura Marlborough Community Facilities Earthquake Fund Oranga Marae Lottery Tai Tokerau/Northland Flood Relief Fund |
| Grants to develop the community and voluntary sector Community Leadership Fund Community and Volunteering Capability Fund | Grants for education Peace and Disarmament Education Trust Lottery Health Research Norman Kirk Memorial Trust | Grants for training Lottery Minister's Discretionary Fund Youth Worker Training Scheme | Grants for earthquake strengthening Lottery Significant Projects Fund Lottery Community Facilities Lottery Community Lottery Environment and Heritage Oranga Marae |
| Grants for organisation development Community Internship Programme Lottery Minister's Discretionary Fund Support for Volunteering Community and Volunteering Capability Fund | Grants for feasibility studies Lottery Community Facilities Lottery Environment and Heritage Oranga Marae | Grants for safety Racing Safety Development Fund Lottery Outdoor Safety | |
| Source: https://www.communitymatters.govt.nz/ | | | |

⁷⁵ <https://www.tnlcommunityfund.org.uk/>

Annex C.6: New Zealand Lottery Board Funding Allocations 2020/21



Source: <https://www.communitymatters.govt.nz/lottery-covid-19-community-wellbeing-fund/>

Annex C.7: Example of Open Fund – The New Zealand Community Matters Application Portal⁷⁶

Community Matters

Your Funders For Communities For Individuals For Organisations Log in here

Kia akiaki te mana o te tangata

Crown funded schemes
 Lottery Grants Board
 Lottery Grants Board Allocations
 Viet Nam Veterans and their Families Trust
 Ethnic Communities Development Fund
 Royal Commission of Inquiry Ethnic and Faith Community Engagement Response Fund

Peace and Disarmament Education Trust
 Norman Kirk Memorial Trust
 Winston Churchill Memorial Trust
 Safer Communities Fund
 Ethnic Communities Digital Inclusion Fund
 Mātauranga Māori Marae Ora Fund
 Pūkenga Wai Fund

Chinese Poll Tax Heritage Trust
 Pacific Development and Conservation Trust
 Financial statements
 Budgets
 Important Hāpai Hapori (Community Operations) funding dates
 Evolving the lottery grants system

What do you want to know? **Ask us**

Afio mai | Mālō e lava mai | 'ārikiriki | Haele Mai | Ulu tonu mai | 欢迎 | 歡迎 | こんにちは | बागद है

Working with communities

Mātauranga Māori

Source: Indecon

⁷⁶ <https://www.tnlcommunityfund.org.uk/>

Annex C.8: Governance of New Zealand Lottery Grants Board⁷⁷**New Zealand Lotteries Commission (Trading as Lotto NZ)**

Lotto NZ promotes, organises, and conducts New Zealand lotteries, makes rules regulating the conduct and operation of those lotteries, and advises the Minister of Internal Affairs on matters relating to lotteries. All net profits are transferred to the New Zealand Lottery Grants Board that distributes them to sporting and cultural agencies and other community recipients.

**New Zealand Lottery Grants Board**

- Give out profits from the New Zealand Lotteries Commission
- Set policies for grants, and
- Provide a direction on how funding decisions should be made.

The board, lottery distribution committees and the Minister's Discretionary Fund are serviced by the Department of Internal Affairs.

**Lottery Committees**

20 Lottery committees distributing grants on behalf of the Lottery Grants Board. Each Lottery committee considers how well a grant request:

- Meets its own outcomes and funding priorities
- Aligns with the Lottery Grants Board's key request criteria and funding objectives
- Responds to community needs.

Source: Indecon

⁷⁷ <https://www.tnlcommunityfund.org.uk/>

Annex 3 – Veikkaus (Finland)

Annex Figure C.10: Example of Open Fund – Finland’s STEA Application Portal⁷⁸

The screenshot shows the STEA Application Portal website. The header features the STEA logo (Funding Centre for Social Welfare and Health Organisations) on the left, a search bar on the right, and links for 'E-service' and 'FI'. Below the header, there are two main navigation tabs: 'Applying grants' and 'About STEA'. The 'Applying grants' tab is selected, and the page content is displayed under this tab. The main heading is 'Applying grants', followed by a sub-header 'When to apply?' and 'Who can apply?'. Below this, there are two sections: 'When to apply?' with an illustration of a person at a computer, and 'Who can apply?' with an illustration of a person at a computer. The source is cited as 'Source: Indecon'.

⁷⁸ <https://www.tnlcommunityfund.org.uk/>