



Untapped Potential

Expanding charity lottery fundraising into Northern Ireland



**LOCAL
HOSPICE
LOTTERY**

Featuring a charity lottery
sector case study from
Local Hospice Lottery



Contents

- 4 Welcome – Clara Govier, Managing Director, People's Postcode Lottery
Gary Hawkes, Local Hospice Lottery
- 6 About People's Postcode Lottery
- 7 How it works - for players
- 8 How it works - for charities and good causes
- 10 What People's Postcode Lottery could deliver for Northern Ireland
- 14 Support for charities in Northern Ireland
- 18 Sector Showcase – Local Hospice Lottery
- 20 Responsible Play
- 22 The National Lottery and Charity Lotteries – complementing not competing
- 26 A winning opportunity?



PUBLISHED IN OCTOBER 2023 BY:
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With generous thanks to our supported charities and the Local Hospice Lottery for their participation in this publication

Design: Katie White, www.whitecreativecompany.co.uk
 All images courtesy of the relevant organisations unless otherwise stated.



Welcome



CLARA GOVIER
MANAGING DIRECTOR,
PEOPLE'S POSTCODE
LOTTERY

Players of People's Postcode Lottery have raised over £1.2 billion for good causes since we were set up in 2005. This incredible sum has helped some 15,000 good causes of all sizes, from well-known major charities operating nationally, to grassroots organisations helping their local communities. As well as this incredible support, our players have together shared many millions of pounds worth of winnings with their friends and neighbours during this time.

Our players comprise of over 4 million people who are based across England, Scotland, and Wales. Due to the current Gambling Act 2005 not extending to Northern Ireland in respect of lotteries, and as a result of the provisions of the Betting, Gaming, Lotteries and Amusements (NI) Order, we are currently unable to offer our existing product in Northern Ireland.

This means that players and charities in Northern Ireland are missing out on prizes and much-needed additional funding, at a time where good causes are under unprecedented financial strain.

That's why we've called this report Untapped Potential – we know there is the opportunity for our players to win together with their neighbours, all while making a real difference to good causes in Northern Ireland.

We are calling on politicians to make a change to the Betting, Gaming, Lotteries and Amusements (NI) Order to allow Great Britain based charity lotteries to operate in Northern Ireland utilising the same model which they currently do in Great Britain. A simple change that will release the potential of charity lotteries to open up a vital funding stream to the third sector.

“This means that players and charities in Northern Ireland are missing out on prizes and much-needed additional funding”



GARY HAWKES
LOCAL HOSPICE
LOTTERY

Local Hospice Lottery is delighted to contribute to this important research report which highlights clearly the good that charity lotteries can do in Northern Ireland. For our part, Local Hospice Lottery has provided over £50 million of funding to hospices across Great Britain, and we would relish the opportunity to expand our operation into Northern Ireland, where local hospices are ready and willing to partner with us to raise vital funds supporting end-of-life care for local people.

Operating in Northern Ireland would be the next natural step for us in our mission to raise as much regular and reliable income for hospices as possible.



CIVIL SOCIETY SUPPORT FOR PEOPLE'S POSTCODE LOTTERY IN NORTHERN IRELAND

“I welcome the prospect of People's Postcode Lottery extending their operations to Northern Ireland. They are a well-known and respected funder, with a long history of supporting organisations championing volunteering. The charity sector in Northern Ireland faces a challenging fundraising environment as well as increasing demand for services. The opportunity to access the significant funds which People's Postcode Lottery can raise for good causes would be very beneficial to many organisations.”

DENISE HAYWARD, CHIEF EXECUTIVE OFFICER, VOLUNTEER NOW

“Chartered Institute of Fundraising Northern Ireland welcomes the prospect of People's Postcode Lottery operating here. We represent seventy members across a broad cross-section of charity and voluntary organisations and know that many of our members would support a well-respected and socially responsible fundraiser, generating funding for good causes. We also appreciate that this represents change, so encourage all charities to engage and understand the benefits this could bring. Charities are facing an incredibly challenging funding environment and need greater access to the funds that large fundraising organisations, such as the People's Postcode Lottery, can provide. Greater access would make a real difference to many local causes.”

PAUL MONTGOMERY, CHAIR, CHARTERED INSTITUTE OF FUNDRAISING NORTHERN IRELAND

“NICVA is pleased to offer its support to People's Postcode Lottery's desire to operate here. Set against an increasingly challenging financial landscape, the prospect of voluntary and community sector organisations across Northern Ireland gaining access to a sustainable new fundraising stream is too promising an opportunity to pass up. Charities and good causes of all sizes could benefit significantly from funding raised through Postcode Lottery's proven fundraising model and urge politicians to enact the legislative change needed to open up this much-needed funding to our member organisations.”

CELINE MCSTRAVICK, CHIEF EXECUTIVE OFFICER, NORTHERN IRELAND COUNCIL FOR VOLUNTARY ACTION

“As the representative body for the leaders of charities in Northern Ireland, CO3 is close to the challenges facing community & voluntary organisations with reduced statutory funding compounded by the loss of European Funding.

People's Postcode Lottery raising funds for civil society in Northern Ireland would help increase and diversify the funding opportunities available to charities here. As a well-established and respected fundraiser, they could make an immediate positive impact for many charities and their beneficiaries across Northern Ireland.

Furthermore their approach of trusting that charities are best placed to take decisions on how best to use the funding, through a focus on unrestricted multi-year funding, would be hugely valuable.”

VALERIE MCCONVILLE, CHIEF EXECUTIVE, CO3





SNAPSHOT

- Over **£1.2 billion** raised by players since 2005
- Some **15,000** charities and good causes supported
- Over **£183 million** to good causes in 2022
- **33%** to good causes from every ticket sold; **40%** to prizes and **27%** costs.
- Headquartered in Edinburgh, where we are a **valued local employer**.

People's Postcode Lottery is a not-for-commercial-gain External Lottery Manager (ELM) operating in England, Scotland and Wales and licensed by the UK Gambling Commission.

People's Postcode Lottery is part of the Postcode Lottery Group, an internationally renowned social enterprise supporting the introduction of our unique format across five European countries. The ultimate owner of People's Postcode Lottery is the Novamedia Foundation, a "Stichting" set up under Dutch law. A Stichting is a form of organisation often used in the Netherlands for charitable or not for profit organisations in order to protect their social mission. Our focus is on maximising funds raised for good causes.

The Postcode Lottery Group has been recognised as one of the world's largest private charity donors, with the scale of our charitable contributions recognised alongside the likes of the Gates Foundation and the Wellcome Trust¹.

POSTCODE LOTTERY GROUP



We manage lotteries with the sole purpose of raising funds for good causes. Charities are at the heart of everything we do, and our players now raise over £18 million a month for good causes.

Since People's Postcode Lottery launched in Britain in 2005, players have raised over £1.2 billion for some 15,000 good causes, including well-loved national charities as well as thousands of local community organisations across Britain. We fund charities and community groups in every corner of England, Scotland and Wales.

How it works for players

The incredible scale of our fundraising is made possible only thanks to the generosity of our players.

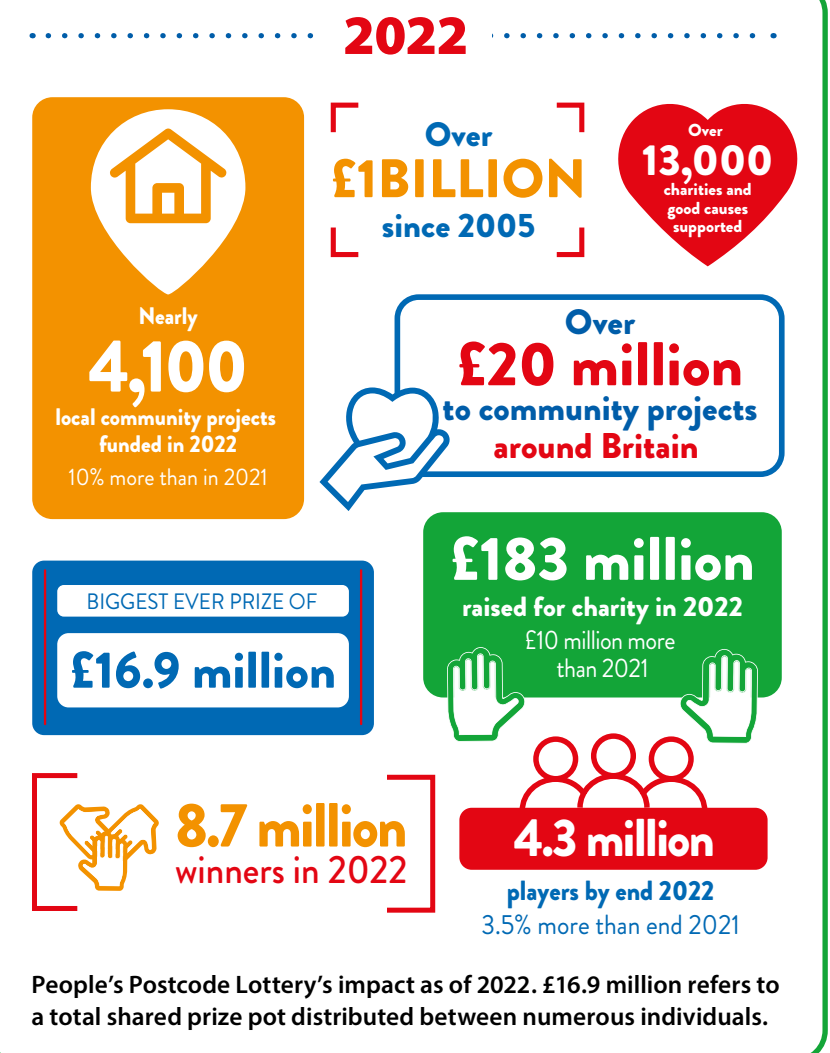
People's Postcode Lottery is entirely subscription-based. Players sign-up via our website or by telephoning our in-house contact centre.

A subscription costs £12 per month, which is paid via Direct Debit, debit card or PayPal. As our name suggests, a player's postcode acts as their ticket number. We do not sell tickets through any retail channels.



Tickets are automatically entered into every draw and the winning postcodes resulting from these draws are announced on a daily basis in accordance with the Prize Draw Calendar shown on our website.

When a postcode wins, all neighbours in this postcode with a qualifying subscription win.

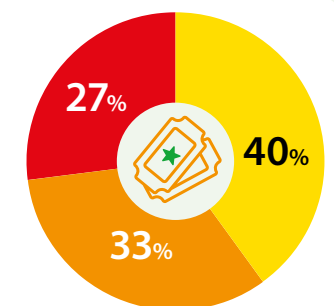


PRIZES

- ✓ Every day from Monday to Friday there are **£1,000** prizes to be won
- ✓ On Saturdays players can win a share of **£1 Million**, and on Sundays players can each win **£30,000**
- ✓ Every month players in a postcode sector share **£3 Million** or more

TICKETS

- Of each ticket is attributed to player prizes
- To good causes
- To costs



1. CityAM Charity Index, December 2021

How it works for charities and good causes

People's Postcode Lottery manages charity lotteries on behalf of 20 Postcode Trusts². Each trust is a registered independent charity in its own right. Each Trust has its own independent board of trustees and is licensed by the UK Gambling Commission. Unrestricted, long-term funding is a cornerstone of our collective approach, which sees the Trusts offer supported charities the freedom to plan, innovate and deliver their services with confidence.

LONG-TERM CHARITY BENEFICIARIES

Of the twenty Postcode Trusts, thirteen operate on a thematic basis supporting a wide range of well-known charities and good causes working across a number of areas, including care, culture, environment, human rights, education, arts, equality, health, sport and animal welfare among others [table 1 below].

Each trust is responsible for distributing funds to its

range of supported charities, which receive funding on a year-on-year basis of between £300,000 and £3 million per annum.

The type of funding provided by the Postcode Trusts is mostly long-term and unrestricted – it may be used to cover core costs, or to leverage more income. This flexibility can complement project-based funding such as that from the National Lottery.

TABLE 1
MEDIUM AND LARGE CHARITIES SUPPORTED BY 13 GRANT-GIVING POSTCODE TRUSTS

POSTCODE ACTIVE TRUST	POSTCODE ANIMAL TRUST	POSTCODE CARE TRUST	POSTCODE CHILDREN TRUST	POSTCODE CULTURE TRUST	POSTCODE EARTH TRUST	POSTCODE EDUCATION TRUST	POSTCODE GLOBAL TRUST	POSTCODE GREEN TRUST	POSTCODE INTERNATIONAL TRUST	POSTCODE JUSTICE TRUST	POSTCODE PLANET TRUST	POSTCODE SUPPORT TRUST
 CREATING SPACE	 BATTERSEA DOGS AND CATS HOME	 Alzheimer's SOCIETY	 Believe in Children BARNARDOS	 Edinburgh International Book Festival	 Canals & River Trust	 AfriKids	 amref health africa	 FAUNA & FLORA INTERNATIONAL	 ACTION AGAINST HUNGER	 AMNESTY INTERNATIONAL	 MARINE CONSERVATION SOCIETY	 Crisis
 Urban Wildlife Cancer Trust	 CATS	 BREAST CANCER NOW	 Children's Aid	 mac	 ClientEarth	 Book Aid International	 apocrypha	 Royal Botanic Gardens Kew	 ActionAid	 global witness	 The Wildlife Trusts	 DEPAUL
 Greenhouse Sports	 Dog Trust	 CARERS TRUST	 NATIONAL GALLERIES SCOTLAND	 National Museums Scotland	 ELLEN MACARTHUR FOUNDATION	 Save the Children	 NDOV	 THE ROYAL PARKS	 British Red Cross	 Helen Bamber Foundation	 RZSS	 Kinship
 Levens Tarn Trust	 Guide Dogs	 dementia adventure	 DAISY CHAIN	 National Museums Scotland	 Friends of the Earth	 Theirworld	 NDOV	 THE ROYAL PARKS	 care	 mary's meals	 The Wildlife Trusts	 missing people
 NEWCASTLE UNITED FOUNDATION	 Medical Detection Dogs	 MAGGIE'S	 AMGUEDDFA CYMRU	 National Museums Scotland	 GREENPEACE	 unicef	 Sightsavers	 WOODLAND TRUST	 OXFAM	 LIBERTY	 WWF	 Reengage
 RAMBLERS	 pdsa	 MAGGIE'S	 magic breakfast	 National Museums Scotland	 KEEP BRITAIN TIDY	 war child	 WaterAid	 WOODLAND TRUST	 OXFAM	 peace direct	 WWF	 Reengage
 STREET LEAGUE	 RDA	 RNIB	 NSPCC	 National Museums Scotland	 National Trust	 war child	 WaterAid	 WOODLAND TRUST	 OXFAM	 peace direct	 WWF	 Reengage
 Tottenham Hotspur	 RDA	 RNIB	 NSPCC	 National Museums Scotland	 National Trust	 war child	 WaterAid	 WOODLAND TRUST	 OXFAM	 peace direct	 WWF	 Reengage
 Tottenham Hotspur	 RDA	 RNIB	 NSPCC	 National Museums Scotland	 National Trust	 war child	 WaterAid	 WOODLAND TRUST	 OXFAM	 peace direct	 WWF	 Reengage
 Tottenham Hotspur	 RDA	 RNIB	 NSPCC	 National Museums Scotland	 National Trust	 war child	 WaterAid	 WOODLAND TRUST	 OXFAM	 peace direct	 WWF	 Reengage
 Tottenham Hotspur	 RDA	 RNIB	 NSPCC	 National Museums Scotland	 National Trust	 war child	 WaterAid	 WOODLAND TRUST	 OXFAM	 peace direct	 WWF	 Reengage
 Tottenham Hotspur	 RDA	 RNIB	 NSPCC	 National Museums Scotland	 National Trust	 war child	 WaterAid	 WOODLAND TRUST	 OXFAM	 peace direct	 WWF	 Reengage

2. People's Postcode Lottery acts as External Lottery Manager for the twenty Postcode Trusts. An ELM is defined in section 257 of the UK Gambling Act (2005) as someone that is a person or a body who makes arrangements for a lottery on behalf of a society or local authority but is not a member, officer or employee of the society or authority.

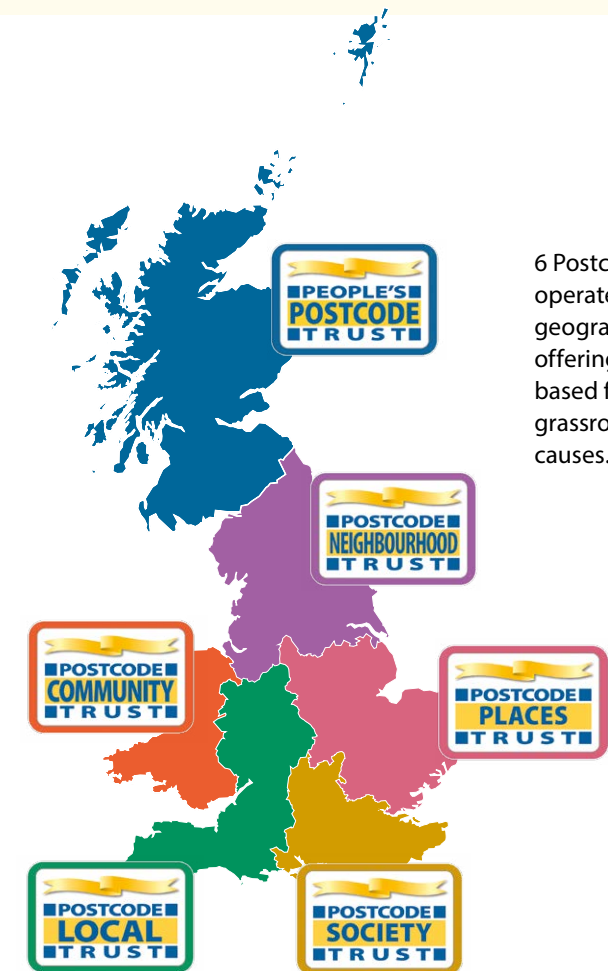
FUNDING FOR GRASSROOTS GOOD CAUSES

By supporting the communities that we are all part of, People's Postcode Lottery players are helping realise positive and lasting change at local level.

Six Postcode Trusts operate on a geographical basis, with each presently covering a different area of Britain.

The **People's Postcode Trust**, **Postcode Community Trust**, **Postcode Local Trust**, **Postcode Neighbourhood Trust**, **Postcode Places Trust**, and **Postcode Society Trust** are community focused grant-giving trusts, each award one-year funding between £500 and £25,000 to local community groups, voluntary projects and social enterprises that are creating change at a local level.

In 2023, over £100 million has been awarded to some 20,000 grassroots good causes.



6 Postcode Trusts operate on a geographical basis, offering application-based funding to grassroots good causes.

PARTNERSHIP PROGRAMMES

Players of People's Postcode Lottery also currently support two Partnership Programmes which offer the smallest charities and community groups modest one-off awards, which are funded through the six community programmes trusts:

Localgiving Local Giving offers 'Magic Little Grants' which give smaller charities and community groups the chance to apply online for a £500 grant via its simple 10-minute application process which offers an outcome within six weeks.

Learning through Landscapes Learning Through Landscapes Nature Grants give local schools and early-years settings access to £500 of outdoor learning equipment as well as two hours of free, expert-led training for up to 30 staff.

POSTCODE INNOVATION TRUST

The twentieth Trust supported by players of People's Postcode Lottery is the **Postcode Innovation Trust**, which has a mission to support charities and social enterprises to deliver impactful, innovative and engaging initiatives across Great Britain.

The Trust operates three programmes on a closed application basis and is composed of the following:

- **Social Investment Programme** - created to provide sustainable funding for social enterprises that are looking to increase their social and environmental impact.
- **Social Enterprise Support Programme** - supports social entrepreneurs to innovate and develop solutions to the challenges that face society, break down the barriers they face and help them to increase their revenues and achieve social impact.
- **Postcode Dream Fund** - The Dream Fund supports charities who wish to deliver transformational projects – see page 12 for an exciting case study on its most recent funding award!

What People's Postcode Lottery could deliver for Northern Ireland



The Postcode Lottery format has proven to be a unique, enduring and successful fundraising vehicle for charities and good causes across Britain, the Netherlands, Sweden, Germany and Norway. But we stand poised and willing to do even more. With the necessary change in the law in Northern Ireland, expanding our successful People's Postcode Lottery fundraising format to Northern Ireland could unlock millions in additional funding for civil society organisations, while offering the public their chance to win prizes together with their neighbours and local community.

WHAT WE COULD DO

People's Postcode Lottery is regulated in Great Britain under the Gambling Act (2005) which provides for the operation of charity lotteries. Lotteries are a policy area devolved to Northern Ireland, under the auspices of the Betting, Gaming, Lotteries and Amusements (Northern Ireland) Order 1985.

People's Postcode Lottery stands ready to utilise our fundraising model to deliver significant benefits to charities and good causes in Northern Ireland. **Our analysis shows that, based on People's Postcode Lottery's average rate of growth, we could deliver a significant funding boost for charities and good causes operating in Northern Ireland totalling over £7 million per year within just five years of operation** (see table 2).

DID YOU KNOW?

The projected £7 million People's Postcode Lottery could generate for good causes in Northern Ireland annually would come at no cost to the public purse. The funds would be entirely generated thanks to the generosity of an estimated 150,000 residents we anticipate would sign up to play People's Postcode Lottery - providing them the chance to win prizes together with their neighbours – all while funding good causes across the region!

TABLE 2
AN ILLUSTRATIVE FIVE-YEAR EXAMPLE OF THE POTENTIAL SCALE OF PEOPLE'S POSTCODE LOTTERY SHOULD IT BEGIN OPERATING IN NORTHERN IRELAND

	2024	2025	2026	2027	2028
N.I. – Total Households	759,156	763,976	768,472	772,903	777,247
Projected PPL-playing households	36,819	64,556	92,601	120,959	149,620
% Household penetration	4.85%	8.45%	12.05%	16.65%	19.25%
Funds raised for charities and good causes (33% per ticket)	£1,073, 745	£2, 715,550	£4,177,635	£5,656,166	£7,150,573



LARGE CHARITY PARTNERS

As detailed in the preceding section, People's Postcode Lottery manages lotteries on behalf of twenty Postcode Trusts, thirteen of which distribute long-term, unrestricted funding to medium and large charities, providing grants of between £300,000 and £3 million on an ongoing annual basis.

Some 29 of People's Postcode Lottery's existing charity partners operate their services across the entire United Kingdom – including Northern Ireland.

At a time of significant charitable need, People's Postcode Lottery's market expansion offers residents in the region the opportunity to play their part in increasing funding for the work of these good causes in their area, delivering a step-change in the level of support for the work of these 29 charities in Northern Ireland.



Long-term beneficiary charities operate in Northern Ireland and would stand to benefit from a significant increase in funding were People's Postcode Lottery able to begin fundraising in the region.

All 27 of these well-known charities – such as Alzheimer's Society, Young Lives Vs Cancer, the NSPCC, Girlguiding and the Woodland Trust – are fully supportive of People's Postcode Lottery's desire to expand into the region (See Table 3 for all charities) with many providing case studies on the real-world impact that People's Postcode Lottery funding could have on their operations there.

In addition to this benefit, there would be the opportunity for medium and large-scale charities headquartered in Northern Ireland themselves to become long-term partnership charities – providing a secure, unrestricted income stream for decades to come, facilitated by People's Postcode Lottery player fundraising in Northern Ireland, pooled together alongside funding raised by players in our existing market compromised of England, Scotland and Wales.

GRASSROOTS GOOD CAUSES

As per the preceding section, we operate lotteries on behalf of six community grant-giving Trusts across Great Britain, meaning it is not only well-known larger charities that stand to benefit from People's Postcode Lottery operating in Northern Ireland. At People's Postcode Lottery, we know that the opportunity to fund grassroots organisations working in their own cities, towns and villages provides a strong motivation for our player base.

As part of our expansion into Northern Ireland, players in the region would play their part in raising much-needed funds for grassroots charities and good causes in their local communities, who would be able to apply for Community Programmes grant funding of between £500 and £25,000.

POSTCODE LOTTERY DREAM FUND

The Dream Fund gives existing supported organisations the chance to deliver the project they have always dreamed of, but never had the opportunity to bring to life. Charitable organisations are asked to think big, be ambitious and collaborate with other not-for-profit partners to deliver their dream project.

In 2023, two major dementia charities – **Alzheimer's Society** and **Alzheimer's Research UK** – received £5 million in funding for a ground-breaking joint project that aims to revolutionise early dementia diagnosis - thanks to funds raised by players of **People's Postcode Lottery**.

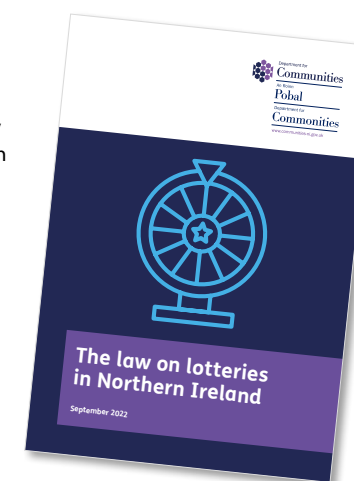


THE LEGISLATIVE CHANGE NEEDED

People's Postcode Lottery stands ready to deliver significant benefits for civil society in Northern Ireland. This is the case both for charities through the significant scale of our fundraising and for players who have the opportunity to win a variety of prizes while generating much-needed funding for charities and good causes in their area.

As it stands, formal guidance from Northern Ireland's Department of Communities advises that:

Current guidance on charity lotteries in Northern Ireland



"The law in Great Britain and Northern Ireland is not clear on whether the sale of a GB society's lottery tickets by post or telephone directly to a person in Northern Ireland is lawful..."

...Whilst the Lotteries (Amendment) Regulations (Northern Ireland) 2021 permits the online sale of tickets, these regulations only apply to lotteries that are permitted under the 1985 Order."

In order to deliver the scale of benefits detailed in this report, People's Postcode Lottery would require to extend our existing lottery to Northern Ireland, rather than establish a separate lottery which itself would not prove financially viable for us as an operator, for players seeking prizes or for charities in need of sustainable funding.

As a responsible operator, People's Postcode Lottery seeks legislative certainty in order to be able to extend our existing product into Northern Ireland. A clear precedent exists in the form of the National Lottery which operates

across all of the UK and is subject to regulation by the Gambling Commission.

Our research indicates that the operation of charity lotteries on a UK-wide basis could be made possible through secondary legislation tabled in the Assembly via an amendment to the existing Betting, Gaming, Lotteries and Amusements (Northern Ireland) Order 1985. This could, for example, provide for it to be lawful for charity lotteries licensed and regulated in mainland Great Britain to operate on the same basis in Northern Ireland.

While this report sets out the potential benefits of People's Postcode Lottery being able to operate in Northern Ireland, we of course remain flexible and willing to engage with policy makers as to how this objective might best be realised in order to benefit civil society in the region.

AT A GLANCE

Almost **150,000** households in Northern Ireland projected to play **PEOPLE'S POSTCODE LOTTERY**

RAISING OVER **£7 million** for **charities and good causes**



OPPORTUNITY FOR PLAYERS TO WIN PRIZES EACH AND EVERY MONTH

INCREASED INCOME for existing beneficiary charities, raised by **LOCAL PEOPLE**



Opportunity for **NORTHERN IRELAND-BASED CHARITIES** to become new **LONG-TERM CHARITY PARTNERS**

EXPAND EXISTING GB LOTTERY TO NI VIA REGULATORY ALIGNMENT



Support for charities in Northern Ireland

The following case studies highlight just some of the work of existing long-term charity partners, providing a showcase for a variety of projects that people in Northern Ireland could offer greater support to as players of People's Postcode Lottery. This section also highlights the broad-based charity sector support for a change in the law around charity lotteries in the region.

**YOUNG LIVES
vs CANCER**

Young Lives Vs Cancer

At Young Lives vs Cancer, we are there to support

children, young people and their families with the impact of cancer from the point of diagnosis through to life after treatment. In Northern Ireland we deliver innovative services to meet the changing needs of cancer survivors. One such innovation is MOVE Forward, a post-cancer treatment exercise programme that is led by young people with a lived experience of cancer. It would be fantastic if local people were able to play the likes of People's Postcode Lottery and raise funds for our work here in the region.



“A change in the law to allow People's Postcode Lottery to raise funds in Northern Ireland in the way they already do in Great Britain would allow for increased resources to engage with our families, letting Young Lives vs Cancer provide services that meet their needs by further involving them in service design and delivery in Northern Ireland.”

SIMON DARBY, SOCIAL WORK MANAGER, YOUNG LIVES VS CANCER NORTHERN IRELAND



Alzheimer's Society

In Northern Ireland alone, an estimated 24,049 people live with dementia. We at Alzheimer's Society provides life-changing

support for over 2,200 people and use cutting-edge research and influencing to push for breakthroughs that will change the lives of people affected by dementia. Take Sylvia Blair, from Bangor, who cared for her husband Ken, who lived with mixed dementia. Soon after Ken's diagnosis, Sylvia attended an Alzheimer's Society group for carers, run by Dementia Adviser Lynda Williams. Sylvia said: “We got a lot of information, and such friendliness, because people at the meetings, you know, we laughed together, we cried together. Lynda was always there if you needed her - pointing you in the right direction if you needed more help. She became more like a friend. I felt I could chat to her about anything.”



“The incredible generosity of People's Postcode Lottery enables Alzheimer's Society to support people affected by all types of dementia through some of the hardest and most frightening times. Changes to the gambling legislation in Northern Ireland will unlock new sources of civil society funding, which could help us make sure that almost 22,000 more people are not left to deal with dementia alone.”

ALEX HYDE-SMITH, DIRECTOR OF INCOME & ENGAGEMENT OF ALZHEIMER'S SOCIETY

The Conservation Volunteers



Established over thirty years ago, The Conservation Volunteers Tree Nursery remains Northern Ireland's only native, local provenance, community-driven tree nursery. We identify exemplar native tree and shrub species, or those classified at significant risk of loss, and engage a breadth of community volunteers in the collection and propagation of seed without the use of artificial pesticides, herbicides, or heavy machinery.

Investment and support of the nursery programme would enable significant growth in tree-planting stock, with a targeted 50,000 to 75,000 native trees leaving our site for planting each year.

Charity lottery funding would further allow us to expand our region-wide seed collection and community engagement programme and enable our staff to connect with communities from across Northern Ireland in environmental improvement works.



“Our Tree Nursery in Cultra provides so many benefits – for volunteers and for the environment. As a UK-wide charity, we could do so much more with greater funding from society lotteries and I hope changing the gambling legislation is supported to ensure this much-needed resource can benefit Northern Ireland.”

DEBBIE ADAMS, INTERIM CEO, THE CONSERVATION VOLUNTEERS



Dogs' Trust

The support received from People's Postcode Lottery and its generous players

is vital to ensure that we can continue to take in and care for dogs when they need us most. It currently contributes to provide essential staff at our British rehoming centres. Our rehoming centre in Ballymena is no exception and would also benefit from People's Postcode Lottery being able to raise funds in and for Northern Ireland. Ballymena can care for up to 50 dogs at any time, and their facilities include a training barn, some woodland and a large field for the dogs to enjoy, so we rely on our dedicated team to keep the centres in top condition for the dogs to enjoy.



“The last few years have been incredibly busy with unprecedented challenges with the pandemic and the cost of living crisis. In 2022 we cared for 406 dogs, which we wouldn't have been able to do without generous donations from the public. Through the challenges we have faced, the team work hard to rehabilitate and rehome dogs who are searching for a second chance. We are also very grateful to all our volunteers who help us take care of the dogs – as we have seen more dogs than ever needing our care, our foster carers are essential to us, to help look after as many dogs as possible.”

CONOR O'KANE, REHOMING CENTRE MANAGER AT DOGS TRUST BALLYMENA

Breast Cancer Now

**BREAST
CANCER
NOW** The research
& care charity

Every year, around 1,400 women are diagnosed with breast cancer in Northern Ireland. Each one will face anxiety, fear and uncertainty. But whatever happens, we're committed to being here for them.

Our specialist support services across England, Scotland and Wales have benefitted enormously from the fantastic funds raised by players of People's Postcode Lottery.

In Northern Ireland today, we're developing new partnerships and building the presence of our face-to-face services. We're also investing in some of the brightest minds in breast cancer research, to deliver crucial breakthroughs in detection, prevention and treatment. But there is so much more to do to make sure that no one in Northern Ireland has to face breast cancer alone. It's an ambitious goal, but it's one that society lottery funding could help us to achieve.



“Breast Cancer Now is just one organisation that's working hard to do more, and do better, for people in Northern Ireland. We've already seen the truly transformative impact that the People's Postcode Lottery funding has had in Britain. Changes to legislation could be the key to unlocking vital funds for positive changes across Northern Ireland too.”

BARONESS DELYTH MORGAN, CHIEF EXECUTIVE AT BREAST CANCER NOW

NSPCC

NSPCC

The NSPCC is the leading children's charity in the UK, fighting to end child abuse and neglect in every community. By investing in innovative services and solutions that no one else does, we have pioneered ways of working that combine practice, policy and research to deliver the most effective programmes. NSPCC also run Childline – the free 24-hour helpline and online chat service – giving children and young people a safe and confidential space to talk about their concerns, be listened to, and ask for support. Each year, they deliver counselling sessions to around a quarter of a million children about everything from sexual abuse to mental health problems.



“People's Postcode Lottery have been a major supporter of the NSPCC in England, Scotland and Wales for more than five years. Their funding has made a significant impact during that time, helping us to continue our important work with children and families across the rest of the UK.”

“We welcome the chance to bring People's Postcode Lottery to Northern Ireland, which would allow us to benefit from the funding raised by players here and help support children across our local communities when they need us the most.”

BRONAGH MULDOON, HEAD OF LOCAL SERVICES FOR NSPCC NORTHERN IRELAND

pdsa SINCE 1917
SAVING PETS CHANGING LIVES

PDSA

PDSA has been a lifeline for millions of pets for 100 years, providing treatments to more than 20 million beloved family pets. With 48 UK hospitals caring for over 388,000 pets each year, our charity is a true national treasure. Caring for pets whose owners can't afford the full cost of their veterinary treatment is the reason we're here. But we're also a leading authority on pet health, and we raise the status of animals by celebrating their contributions to our lives.

Funding from People's Postcode Lottery players currently enables the PDSA to provide emergency care and life-saving equipment in its GB-based Pet Hospitals. With the right change in the law to allow operation in Northern Ireland, People's Postcode Lottery player support could allow PDSA's care and expertise to touch the lives of thousands more deserving animals.



“Seeing all the amazing work funded across our network of Pet Hospitals in Great Britain that's been made possible thanks to the generosity of players of People's Postcode Lottery over the last few years has been amazing. I'm delighted to hear that they are looking to expand their lottery into Northern Ireland and raise even more money for good causes. Here at Belfast PDSA Pet Hospital we help 7,469 people and 8,616 pets every year who would be able to benefit hugely from funding

from People's Postcode Lottery if the current legislation was to change to enable this to happen.”
JULIE DAUNCEY, SENIOR VETERINARY SURGEON AT PDSA BELFAST PET HOSPITAL

**WOODLAND
TRUST**

The Woodland Trust

The Woodland Trust is the UK's largest woodland conservation charity. Northern Ireland is the least wooded area in Europe, ranks 12th out of 240 countries for biodiversity loss and doesn't enjoy the same open-access legislation as the rest of the UK. All Woodland Trust sites are free for visitors to enjoy ranging from small community woods in urban environments to large scale woodlands.

Postcode Lottery player funding could help The Woodland Trust work across a wide range of projects in the region from supporting essential maintenance on community woods to large-scale sites like Glas-Na-Bradán Wood – 98 hectares of land on the edge of

Belfast where 150,000 trees are being planted by the community, delivering outcomes for nature, climate and people – and making significant change in the Northern Ireland countryside and environment.



“For years now we've watched as our colleagues across Great Britain have achieved incredible outcomes for people and nature with ongoing, flexible funding from players of People's Postcode Lottery. We'd welcome the opportunity for communities across Northern Ireland to benefit too, with so much potential for real change, of particular relevance for us in tackling the climate and biodiversity crises being faced locally and globally.”

IAN MCCURLEY, THE WOODLAND TRUST'S DIRECTOR OF NORTHERN IRELAND

Charity Lottery Sector Showcase

Local Hospice Lottery



While People's Postcode Lottery is Britain's biggest External Lottery Manager, currently raising over £18 million each month for charities and good causes, we are not the only charity lottery operator who stands ready to raise funds for civil society in Northern Ireland. This section shares the opportunity open to expanding funds for Local Hospice Lottery.



ABOUT LOCAL HOSPICE LOTTERY

Local Hospice Lottery began life in 1996 as the lottery of Farleigh Hospice in England – providing a way of generating a regular and reliable income to help fund the care of people affected by cancer and other life-limiting illnesses across mid-Essex. After eleven years of running the weekly draw, the decision was made to develop the Lottery for the benefit of hospice care in other areas across Great Britain.

Our values see us strive to be Fair, Ambitious, Supportive and Professional and we aim to reflect each of them in all that we do.

Today, Local Hospice Lottery operates a society lottery that benefits over 30 individual hospices across England, Scotland & Wales whilst remaining a wholly owned subsidiary of Farleigh Hospice where the idea originated.

Our purpose is to be the leading lottery for hospices, providing additional funding and opportunities for growth by inspiring people to support their local hospice in a fair, open and affordable way.

Through sharing one prize fund, one lottery system and one experienced and knowledgeable



GARY HAWKES
CHIEF EXECUTIVE, LOCAL HOSPICE LOTTERY

“Local Hospice Lottery is immensely proud of the vital fundraising contribution we are able to deliver for hospices across Great Britain. We stand ready and willing to expand our fundraising to Northern Ireland and with the necessary change in the law believe we could generate an additional £1.4 million of direct support for patients and families.”

team – lots of expenditure can be saved and our partner hospices can enjoy a low-risk, low-input way of increasing their income.

Local Hospice Lottery's model of operation is based around partner hospices receiving more income from every £1 spent by players entering the draw in support of them than they would if they ran their own lottery. All profits are donated to hospice care.

Since 1997 Local Hospice Lottery has contributed in excess of £50 million to hospice care. In 2022, for each £1 entry in the weekly draw Local Hospice Lottery gave an average of 66p to hospice care.

DEMAND FOR FUNDRAISING IN NORTHERN IRELAND

Despite having been approached by hospices in Northern Ireland, Local Hospice Lottery is unable provide its fundraising services to the country's hospices due to the current legislative framework and licencing conditions.

Analysis of the 2021 accounts of all UK based³ hospices identified that hospice lotteries in Northern Ireland had the lowest turnover as compared to Scotland, Wales and all of the England regions.

Further analysis by Local Hospice Lottery, which takes account of the population sizes of each UK country and region, suggests there is significant scope for Northern Ireland's hospices to vastly increase lottery membership. In fact, this research suggests that, if Northern Ireland Hospice lotteries had similar membership levels to the average hospice in Great Britain, membership could increase ten-fold.

From a financial perspective, the difference these additional regular contributions from people wanting to support their local hospice in Northern Ireland would be hugely significant. In fact, based on performing in line with average hospice figures, local players in Northern Ireland could generate an additional £1.4 million of direct support for the patients and families the hospices strive to serve.



LAUREN DOHERTY
INTERIM DIRECTOR
OF COMMERCIAL
& BRAND
DEVELOPMENT
FROM NORTHERN
IRELAND HOSPICE

“We recently approached Local Hospice Lottery to help us raise extra funds through their lottery for the support & care we provide for babies, children and adults who are adjusting to life, living with life-limiting and life-threatening conditions. With the challenges of responding to the cost of living crisis and an increased demand for hospice care, eliminating the barriers to lottery fundraising in Northern Ireland would provide an additional income stream to help us, and the country's other hospices, face these challenges.”



3. ³ Hospice Accounts - Analysis of the Accounts of UK Charitable Hospices for the year ended 31 March 2021, (2022), Hospice UK

Responsible play

People's Postcode Lottery's game is a safe game. Despite the broad recognition of its low-risk profile, comprehensive policies are in place to protect vulnerable people. Committed to evolving in line with changing industry standards, we proactively work to ensure the continued recognition of the charity lottery sector as altogether different from the higher-risk offerings of the commercial gambling sector.

People's Postcode Lottery is a subscription lottery: players sign up in advance for entry into draws the following month. The number of monthly subscriptions for a single player is deliberately limited. Draws take place monthly, with results published throughout the month.

Despite being governed by the same legislative frameworks⁴ as commercial gambling, the monthly charity lotteries we manage are markedly different products from those offered by commercial betting and gaming companies.

The UK Government⁵ and Gambling Commission⁶, alongside a broad spectrum of politicians and academics, recognise the low-risk profile of charity lotteries.

Even so, People's Postcode Lottery continues to approach responsibilities around player protection with the utmost seriousness. Player safety is hard-wired into our DNA and we are committed to continually exploring how to further improve our model to ensure we adapt, not only to meet but to exceed industry standards on responsible gaming.



CAROLYN HARRIS MP
CHAIR OF WESTMINSTER ALL-PARTY
PARLIAMENTARY GROUP ON GAMBLING RELATED
HARM

“Not every organisation regulated under the UK's gambling legislation is the same. Charity lotteries are very different from the big international private companies which dominate the betting industry. This is true both in terms of what they exist for – charity fundraising versus private profit – but also the level of risk related to problem gambling.”



4. In Britain, charity lotteries are governed by the UK Gambling Act (2005) and in Northern Ireland by the Betting, Gaming, Lotteries & Amusements (NI) Order 1985 ("the Order") (the 1985 Order) as amended by the Betting, Gaming, Lotteries and Amusements (Amendment) Act (Northern Ireland) 2022

5. Review of the UK Gambling Act Terms of Reference and Call for Evidence, December 2020

6. Gambling Commission Society Lotteries advice, Phase 2, June 2018



OUR POLICIES TO PROTECT VULNERABLE PEOPLE

✓ Limits on tickets sales

Customers are limited to buying three £12 monthly subscriptions in a single transaction, and a maximum of six a month. This means the most an individual can spend a month is £72. In fact, 89% of players play with one subscription, with just 0.025% playing with six. Playing with one subscription equates to just 32.8p per day.

✓ No ability to gamble in real-time

Rapid event frequency is widely accepted as one of the most influential factors for vulnerable gamblers developing gambling problems. Our model provides no ability to gamble in real-time.

✓ Staff trained to identify vulnerable people

All our employees who interact with players receive regular training on identifying and tracking vulnerable people and taking the correct action when identified. We work with our supported charities and other organisations to develop knowledge and awareness of the key indicators, including around illnesses such as dementia.

✓ Self-exclusion

We operate a robust self-exclusion policy. Individuals can self-exclude by contacting us by email or by free phone. The minimum initial self-exclusion period for non-remote gambling is six months.

✓ Financial support to charities tackling problem gambling

We donate to a charity working on problem gambling. This is in addition to the donation made by the trade body the Lotteries Council, of which People's Postcode Lottery is a member.

✓ No scratch cards

In contrast to the National Lottery and some other operators, we do not sell scratch cards or instant wins.

✓ Proactively raising the age of play

We proactively raised our age of play from aged 16 to aged 18. We did so after the UK Government announced the change to the UK National Lottery's age of play, despite no requirement for charity lotteries to follow suit.

7. www.postcodelottery.info/media/1936/novamedia-postcode-lotteries-a-game-risk-assessment.pdf

8. www.postcodelottery.info/media/1933/responsible-play-charity-lotteries-and-gambling-related-harms.pdf

9. Gambling behaviour in Great Britain in 2016, Nat Cen Social Research, 2018.

RESEARCH ON CHARITY LOTTERIES AND RESPONSIBLE PLAY

Prof Mark Griffiths, Distinguished Professor of Behavioural Addiction and Director of the International Gaming Research Unit, categorises People's Postcode Lottery as:

“One of the least risky games (i.e. among the safest) in the worldwide gambling market.”

This categorisation is due to several elements including the discontinuous nature of the game, no illusion of control over the game, no chance to reinvest winnings and the fixed stake at a relatively low price.

Novamedia/Postcode Lotteries: A Game Risk Assessment, Nottingham Trent University, March 2021

“The evidence is clear that participation in charity lotteries, like the National Lottery, is significantly lower risk, even negligible, in comparison to participation in a number of other types of gambling...”

Responsible Play: Charity Lotteries and gambling-related harms, NFP Synergy, February 2021

“For both, low risk and moderate risk gambling, the lowest prevalence rates were found among those who participated in the National Lottery draws or other lotteries.”

Gambling behaviour in Great Britain in 2016, Nat Cen Social Research on behalf of the Gambling Commission, 2018



The National Lottery and Charity Lotteries

Complementing not competing

Policymakers have been known to enquire as to the relationship between charity lotteries and the much larger National Lottery. Official statistics show unequivocally that sales and return to good causes for both sectors have reached record levels. Moreover, National Lottery distribution bodies offer predominantly project-based funding, while charity lotteries provide core funding. Many well-known charities benefit from both funding streams, which strengthens their funding resilience.

The National Lottery operates on a much larger scale than the charity lottery sector and is governed by the more liberal legislative framework of the National Lottery Act. The Act provides the National Lottery with several unique features, such as monopoly status and the ability to operate on a UK-wide basis.

For the playing public, the primary differentiator of the National Lottery is its unique offer of ‘life-changing prizes’, with jackpots often running into tens or even hundreds of millions of pounds.

By contrast, the charity lottery sector is around 1/9th the size of the National Lottery. Governed by the Gambling Act 2005, the theoretical top prize for any charity lottery is just £500,000. However, the complexity of current prize limits means operators offer top prizes well below this theoretical maximum, to avoid inadvertently breaching the licence condition stating that prizes cannot constitute more than 10% of the value of tickets in a draw. Charity lotteries are also uniquely subject to annual fundraising caps (see table 3).

TABLE 3
CURRENT DISTINCTION BETWEEN LARGE CHARITY LOTTERIES AND THE NATIONAL LOTTERY

	Large charity lotteries	The National Lottery
Current geographical coverage	GB, excluding Northern Ireland and Isle of Man	All of UK and Isle of Man
Legislation	Gambling Act 2005	National Lottery Act 1993, 2006
Regulation	Regulated by the UK Gambling Commission	Regulated by the UK Gambling Commission
Sales per draw	Maximum £5m	Unlimited
Prize per draw	Maximum £25,000 or 10% of proceeds up to £5m (ie £500,000), whichever is greater	Unlimited (varies by game type and draw size). Highest jackpot to date (as at July 2023): £195 million
Annual sales	£250,000 – £50m	Unlimited
Percentage return to good causes	20% minimum; 44% average for all large charity lotteries	No minimum

COMPLEMENTING, NOT COMPETING

People’s Postcode Lottery is fully supportive of the National Lottery and embraces its role as a fundraising stream that complements, rather than competes with, National Lottery fundraising.

Indeed, a number of the charities that our players help to fund – such as Girlguiding, the British Red Cross and Young Lives Vs Cancer – also receive funding from the National Lottery. The unrestricted, flexible nature of charity lottery funding delivers impact alongside the predominantly project-based funding provided by National Lottery distribution bodies. In addition, our players support charities in certain fields that are not eligible for National Lottery funding at all, such as animal welfare.

The Gambling Commission itself investigated the interaction between the two lottery types on three separate occasions, prior to the 2020 reforms. In October 2017, an extensive update¹⁰ of the Commission’s 2012 and 2015 studies found the same conclusion as the earlier research – namely, that there is

“no statistically significant effect of charity lotteries affecting National Lottery sales.”

In April 2022, Westminster’s DCMS Select Committee heard evidence¹¹ from leading charity lottery stakeholders as part of its wider inquiry on the subject ‘What next for the National Lottery’. The resulting report concluded that

“We do not consider that society lotteries pose a threat to the charitable giving of the National Lottery, in line with the views of the Gambling Commission and the Department.”

UK DCMS SELECT COMMITTEE NATIONAL LOTTERY INQUIRY REPORT



Many charities, such as Girlguiding, received funding from charity lotteries and the National Lottery

GROWING IN TANDEM – SALES AND RETURN TO GOOD CAUSES

Following many years of concurrent growth, Gambling Commission industry statistics comparing both sectors demonstrate clearly that – in terms of sales and return to good causes – both the National Lottery and charity lottery sector have reached record levels¹².

At the end of June 2022, Camelot announced¹³ its results for the 2021/22 financial year. These showed its best-ever returns to good causes from National Lottery ticket sales for the second consecutive year, and sales again surpassing £8 billion following four consecutive years of growth.

“At a time when The National Lottery has faced uncertainty on a number of fronts, Camelot has once again raised a record amount for Good Causes from ticket sales...”

SIR HUGH ROBERTSON, CAMELOT CHAIRMAN

The concurrent success of both sectors chimes with the UK Government’s own commitment to see both lottery types thrive¹⁴ and it is clear that the charities and good causes each exist to fund only stand to benefit further from continued reform.

10. Gambling Commission, Review of Charity Lotteries Advice, October 2017
11. <https://www.parliamentlive.tv/Event/Index/690f0edc-0b4e-4768-aa55-d3a4d5c2b420>
12. <https://www.gamblingcommission.gov.uk/statistics-and-research/publication/industry-statistics-november-2021>
13. Camelot Group press release, 28 June 2022
14. DCMS Single Departmental Plan, 2019



2020 REFORMS OF CHARITY LOTTERY SALES AND PRIZE LIMITS

The continued success of both funding streams comes alongside the UK Government's partial 2020 liberalisation of charity lottery sales and prize limits. These reforms raised annual sales limits from £10m to £50m and the per-draw limit from £4m to £5m.

The Government's one-year review of charity lottery sales and prize limits, published in March 2022, noted unambiguously that the charity lottery sector does not threaten the National Lottery:

“...the increased limits are bedding in well and are beginning to have the intended effect of allowing the society lotteries sector to grow and return more to good causes, whilst also maintaining the unique position of the National Lottery.”

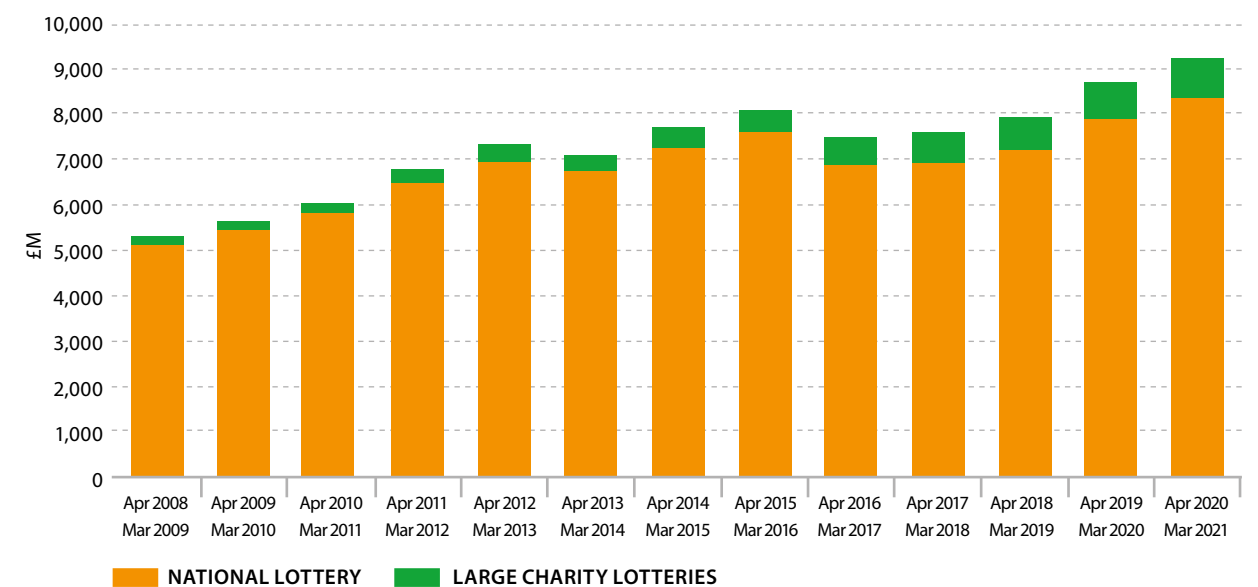
People's Postcode Lottery pursues continued reforms in this area in order to free up additional funding for charities at no cost to the taxpayer – an issue further explored in the 2022 Research report 'Limitless Potential – lifting the cap on our charity fundraising'.



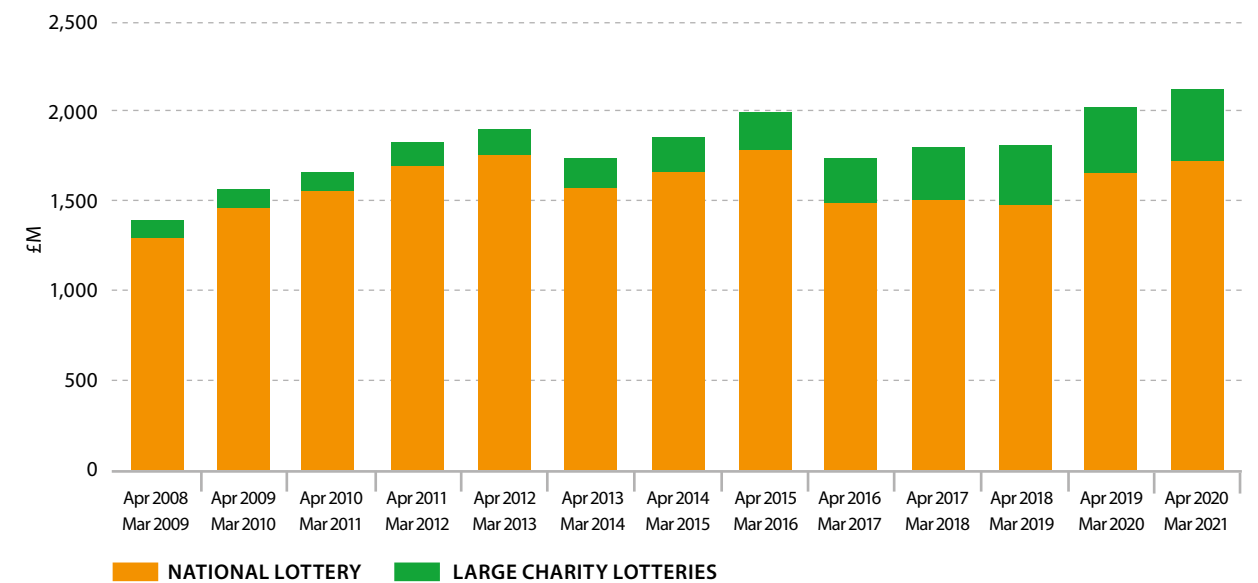
CLARA GOVIER, MANAGING DIRECTOR OF PEOPLE'S POSTCODE LOTTERY
speaking in an evidence session of the UK House of Commons Digital, Culture, Media and Sport Select Committee, April 2022.

“British Red Cross has received over £10 million from our players and that supports the core costs of their operations. Complementary to that, they have received over £10.5 million of National Lottery funding... for project-specific work which would not have been possible if they didn't have the core funding from us. That's where we can do more for charities through partnerships.”

ANNUAL LOTTERY PROCEEDS: NATIONAL LOTTERY AND LARGE CHARITY LOTTERIES



ANNUAL FUNDS TO GOOD CAUSES: NATIONAL LOTTERY AND LARGE CHARITY LOTTERIES



GAMBLING COMMISSION STATISTICS

Analysis of Gambling Commission statistics shows that, over the last decade or so, sales of both charity lotteries and the National Lottery have grown, delivering more funding for good causes. Nonetheless, the charity lottery sector remains just 1/9 the size of the National Lottery.

Though Graph 1 shows two notable dips in UK-wide National Lottery sales, neither can be attributed to competition from charity lotteries. In October 2013, Camelot doubled the Lotto ticket price from £1 to £2, and in October 2015 the number of balls in the draw increased from 49 to 59, significantly reducing a player's chance of winning.

A winning opportunity?

People's Postcode Lottery stands ready and willing to extend our fundraising to Northern Ireland, but are currently unable to do so due to the Gambling Act 2005 not extending to Northern Ireland in respect of lotteries, and as a result of the provisions of the Betting, Gaming, Lotteries and Amusements (NI) Order. With analysis indicating our model could raise over £7 million for good causes within five years, People's Postcode Lottery player funding could provide a much-needed new funding stream for civil society.

People's Postcode Lottery manages charity lotteries on behalf of 20 Postcode Trusts, each a registered independent charity. Unrestricted, long-term funding is a cornerstone of our collective approach, which sees the Trusts offer supported charities the freedom to plan, innovate and deliver their services with confidence.

The Postcode Lottery format has proven to be a unique, enduring and successful fundraising vehicle across Europe. But we stand poised and willing to do even more. With the necessary change in the law, expanding our successful fundraising format to Northern Ireland could unlock millions in additional funding for civil society organisations, while offering the public their chance to win prizes together with their neighbours.

The charity case studies in this report highlight just some of the projects that people in Northern Ireland could offer greater support to as players of People's Postcode Lottery. This report also highlights the broad-based charity sector support for a change in the law in the region as well as the desire for other operators to raise funds for civil society in Northern Ireland.

“This report also highlights the broad-based charity sector support for a change in the law in the region as well as the desire for other operators to raise funds for civil society in Northern Ireland”

People's Postcode Lottery's game is a safe game, with comprehensive policies in place to protect vulnerable people. While policymakers have been known to enquire as to the relationship between charity lotteries and the National Lottery, official statistics show that sales and return to good causes for both sectors have reached record levels.

We believe this change to therefore be a 'no brainer' and urge policymakers to engage with legislative change needed to open up a sustainable, flexible and much-needed new funding stream for good causes.





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