



ECONOMIC IMPACT OF THE CANADIAN GAMING INDUSTRY Key Findings Report



January 2008

Full Report



National Gaming Impact Study – Phase II Background

The National Gaming Impact study is the most comprehensive study ever conducted on the economic impact of gaming in Canada.

The first phase of the Economic Impact Study, released last April, outlined the gaming industry's economic contributions to government programs and services and charities. The initial findings revealed that gaming's economic benefits exceed other segments of the entertainment industry in terms of the direct impact on the economy. Gaming was found to be larger than magazines, books, spectator sport, movie theatre and performing arts sectors combined.

The second phase of the report, released April 27, 2008 focuses on:

- Employment
- Revenue generated for governments/charities
- Total economic value added to the industry, and
- Detailed analysis at both the provincial and sector level.

Methodology & Approach

The study was conducted by HLT Advisory Inc., a leading provider of research and information to the Canadian and international hospitality, leisure and tourism industries.

To complete the assessment, HLT undertook the following:

- Identified all gaming activity in Canada
- Collected and assembled all gaming activity revenue and expense data
- Compared the Canadian gaming industry to other Canadian entertainment and hospitality industries
- Reviewed gaming industry economic impact studies conducted in other jurisdictions around the world
- Reviewed economic impacts studies conducted for non-gaming industries
- Researched available economic models that focus on measuring economic impacts
- Selected an appropriate model (the Baseline Canada Input Output Model) and commissioned the tuning of that model

The report covers the following gaming sectors:

- Single
- Electronic Gaming Devices ("EGDs") - VLTs located in non-gaming facilities
- Casinos (include EGDs at racetracks)
- Lotteries
- Pari-Mutuel (horse racing)

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