



The Canadian Gaming Association

The Canadian Gaming Association (CGA) is a national trade association that works to advance the evolution of Canada's gaming industry.

The association's mandate is to promote the economic value of **gaming in Canada**; use research, innovation, and best practices to help the industry advance; and create productive dialogue among stakeholders.

The association is committed to helping stimulate innovation in the gaming industry by creating opportunities to showcase, promote and advance new products, services, and ideas, both in Canada and worldwide.

The CGA represents an inclusive and diverse membership and our goal is to create alliances with operators, manufacturers, regulators, and other industry associations to encourage joint participation to advance issues of common cause.

More information on joining the CGA as well as membership fees and application forms are available at canadiangaming.ca

THE NATIONAL ECONOMIC BENEFITS OF THE CANADIAN GAMING INDUSTRY

Introduction

The National Economic Benefits of the **Canadian Gaming Industry**

was commissioned by the Canadian Gaming Association (CGA) to quantify the contributions that gaming makes in the Canadian economy.

This summary examines the size and growth of the industry, which is an indication of the advancement made by the Canadian gaming industry to deliver increased access to gaming options in response to market demands, consumer tastes, and societal and technological change.

A Large, Mature Industry

The Canadian gaming industry is present in every region of the country and continues to be a pillar of the broader hospitality industry and raise significant non-tax revenues to fund key government and charitable programs and initiatives.



The industry generated **\$16.1 billion** of gaming win in 2017



and an additional **\$1.0 billion** of non-gaming revenue (i.e., food and beverage, entertainment, accommodations, retail, etc.)



a total industry revenue base of **\$17.1 billion.**

Casinos accounted for approximately **51%** of total industry win in 2017.

In addition, casinos also accounted for approximately **91%** of the **\$1.0 billion** of non-gaming revenues that the industry generated.



Commercial lotteries accounted for approximately **25%** of total win followed by **VLTs** at approximately **16%** and **charity lotteries and bingo** at approximately **6%**.

Gaming Activity Across the Country

Gaming activity or sectors available in virtually all regions of the country include:

- **Casinos* and casino "style" facilities include 114 facilities** containing over **65,000 electronic gaming machines** and **2,000 tables** (all provinces except Newfoundland and Labrador).

- **VLTs (Video Lottery Terminals) – 4,680 sites** containing over **34,000 VLTs** (all provinces except British Columbia and Ontario).
- **Commercial lotteries – over 30,000 lottery ticket terminals** (all provinces)
- **Charity lotteries and bingo –** Almost **200 permanent bingo halls** and numerous facilities where bingo events are regularly held. British Columbia, Manitoba and Ontario also contain **over 12,000 electronic gaming machines** for bingo games and break-open tickets in designated bingo halls/casinos.
- **Pari-Mutuel or horse racing – 227 racetracks and tele-theatres locations** (all provinces except Newfoundland and Labrador).
- **Internet gaming**, while not considered a gaming sector, is currently available in all provinces except Saskatchewan and Alberta.

* Casinos include gaming machines at other gaming facilities such as racetracks and bingo halls and are operated like a casino.

Capital Expenditures

In addition to the economic benefits generated from the operation of gaming activity, the industry has also generated substantial benefits from the construction and redevelopment of facilities and the purchase of capital equipment.

Capital investment continues to increase as new facilities are constructed and existing facilities are expanded and/or "refreshed". Also, gaming and non-gaming equipment and furniture and fixtures are continually being replaced.



The industry had invested almost **\$13.0 billion** in capital assets by the end of 2017.

Total Economic Benefits of Canada's Gaming Industry



The operation of all gaming activity and spending of gaming profits by governments and charities in Canada generated:

- **\$33.5 billion** of total **Gross Output**
- **\$14.6 billion** of total **Purchases of Goods and Services**
- **\$18.9 billion** of total **Value Added GDP** (gross domestic product)

Labour Income/Employment/Average Salaries

The operation of all gaming activity and spending of gaming profits by governments and charities in Canada also generated

\$11.9 billion in total Labour Income, which supported almost **182,500 jobs** with an average annual salary of almost **\$65,000**.

