



Association of Gaming Equipment Manufacturers

**FOR RELEASE**

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# **AGEM ECONOMIC IMPACT STUDY SHOWS CONTINUED STRENGTH OF GAMING MANUFACTURER / TECHNOLOGY SECTOR**

*Gaming manufacturing companies achieve \$44 billion in economic impact;  
Impact rises 14.9% from 2020;  
Value-added impact reached \$24 billion, up 16.8%;  
Direct wages reach \$8 billion to 68,000 employees*

LAS VEGAS (April 3, 2023) – Suppliers to the global gaming industry generated a significant and improved total economic impact of more than \$44 billion through 2021, according to a comprehensive report released today by the Association of Gaming Equipment Manufacturers (AGEM). The supplier industry’s value-added economic impact rose 16.8% v. 2020, to \$24 billion. Further, gaming industry suppliers supported approximately 192,000 employees, including 68,000 direct employees, with a total of \$17 billion in wages and salaries, up 14.7% over the prior year.

The report, “Impact Analysis: Global Gaming Supplier Industry, 2021,” shows the findings of an independent study commissioned by AGEM and conducted by Nevada-based research firm Applied Analysis. Click here to download the full report (<https://bit.ly/Econ-Impact>).

### **Summary of Economic Impact of Global Gaming Supplier Industry in 2021**

<i>(\$ in Billions)</i>	<u>Direct</u>	<u>Indirect</u>	<u>Induced</u>	<u>Total</u>
Economic Output	\$17.0	\$11.4	\$16.1	<b>\$44.4</b>
Value Added	\$9.5	\$5.7	\$9.1	<b>\$24.3</b>
Wages and Salaries	\$8.0	\$3.6	\$5.3	<b>\$16.9</b>
Employment	67,565	43,179	81,227	<b>192,000</b>

While the impact of the global gaming industry spans domestic and international markets, companies doing business in Nevada generated \$8.3 billion in direct global economic output (\$21.7 billion in total output). Other impact measures include \$11.9 billion in total value added, \$5.9 billion in wages and salaries and over 67,000 employees for companies that have operations in Nevada.

Highlights of the report:

- **Economic Output:** The global gaming supplier industry directly generated approximately \$17 billion in economic output during 2021. Total output reached over \$44 billion (+14.9 percent)
- **Value Added:** The value-added total impacts (including indirect and induced) equated to \$24 billion in 2021 (+16.8 percent)
- **Wages and Salaries:** Employers paid nearly \$8 billion in direct wages to employees, while total earnings throughout the economy reached nearly \$17 billion in 2021 (+14.7 percent)
- **Employment:** Direct jobs in the industry reached nearly 68,000, and the multiplier effect resulted in nearly 192,000 positions around the globe in 2021 (+4.2 percent)

“The gaming supplier story is one of innovation, technology, and global reach. The ripple effect of this industry is something all our member companies can be proud of,” said AGEM Executive Director Daron Dorsey. “Globally, the gaming supplier industry is a key source of technological innovation and advanced manufacturing investment. We are exporting valuable, legal products to meet high consumer demand in regulated gaming jurisdictions worldwide, with economic impacts and operations that fit well with objectives of key stakeholders in terms of economic expansion and opportunity.”

Among AGEM Voting Member companies surveyed for the report:

- 72.2% experienced increased revenues in 2021
- 55.6% indicated the number of employees in their company increased from 2020
- 50% expect to maintain staffing levels, and 43 % expect to increase workforce over the next 12 months
- 61% indicated salaries and wages paid increased in 2021
- 82% reported 75%+ of their employees are covered by employer-sponsored health care plans
- 93% indicated they made purchases from local vendors in 2021

The report reflects a recurring update and the most comprehensive review to date of the global gaming supplier industry that analyzes the size and scope of this technology-driven sector, specifically identifying AGEM members’ global reach spanning every regulated gaming market in the world.

With over 150 member companies based in 23 countries, AGEM is anchored by the world’s largest gaming equipment manufacturing companies and AGEM Gold Members AGS, Ainsworth Game Technology, Aristocrat Technologies, Everi, International Game Technology PLC (IGT), Konami Gaming, Light & Wonder, Merkur Gaming, NOVOMATIC Group, Scientific Games and Sega Sammy Creation. The AGEM membership also includes companies active in regulated gaming activities, including systems, table games, online / interactive, sports betting, lotteries, mobile apps, game development, machine components and support products and services for the gaming industry.

#### **About the Association of Gaming Equipment Manufacturers (AGEM)**

AGEM is a non-profit international trade association representing manufacturers and suppliers of electronic gaming devices, lotteries, systems, table games, online technology, sports betting, key components and support products and services for the gaming industry. AGEM works to further the interests of gaming equipment suppliers throughout the world. Through political action, regulatory influence, trade show partnerships, educational alliances, information dissemination and good corporate citizenship, the members of AGEM work together to create benefits for every company within the organization. Together, AGEM has assisted regulatory agencies and participated in the legislative process to solve problems and create a business environment where AGEM members can prosper while providing a strong level of support to education and responsible gaming initiatives. For more information, visit [www.AGEM.org](http://www.AGEM.org).

#### **About Applied Analysis and Methodology**

The 2021 edition of the *Impact Analysis: Global Gaming Supplier Industry* reports the annual economic impacts of the industry from 2017 to 2021. The latest report incorporates the most recent available information regarding the industry as whole and the companies operating within the market space. Applied Analysis utilized economic modeling techniques to quantify the ripple effect of the industry on the global economy. The current report is not necessarily comparable to prior editions due to certain factors, including, but not limited to, technological advancements and the expansion of product offerings. Overall, the current research provides the most comprehensive reporting on the industry. Applied Analysis conducts numerous economic and gaming-related analyses. For more information, visit [www.AppliedAnalysis.com](http://www.AppliedAnalysis.com).

**AGEM Gold Members:** AGS, Ainsworth Game Technology, Aristocrat Gaming, Everi, International Game Technology PLC (IGT), Konami Gaming, Merkur Gaming, NOVOMATIC Group, Playtech, and Sega Sammy Creation.

**AGEM Silver Members:** Aruze Gaming America, Betson Enterprises, Crane Payment Innovations (CPI), Gaming Partners International (GPI), Global Payments Gaming Services, Inspired Entertainment, JCM Global, Ortiz Gaming, Quixant PLC, Suzo-Happ Group, TCSJohnHuxley, TransAct Technologies, and Zitro.

**AGEM Bronze Members:** Abbiati Casino Equipment, Acres Gaming, Action Gaming, Alfastreet, APEXgaming, Bet Construct, Bluberi, Cammegh Limited, Century Gaming Technologies, Cole Kepro International, Competition Interactive, DR Gaming Technology (DRGT), Eclipse Gaming, Empire Technological Group (ETG), Euro Games Technology (EGT), Exacta Systems, FBM, Galaxy Gaming, Gaming Arts, Gaming Support, Glory Global Solutions, Grand Vision Gaming, High 5 Games, Incredible Technologies, Interblock USA, Jumbo Technology, Matsui Gaming Machine Co., Next Gaming,

Patriot Gaming & Electronics, PDS Gaming, Play 'n GO, Prometeo IT Solutions, Spintec, Table Trac, Weike Gaming Technology, Wells-Gardner Technologies, and Win Systems.

**AGEM Associate Members:** ADLINK Technology, Advantech-Innocore, Agilysys, AmericanChecked, Aon, ArdentSky, Arrow International, Axiomtek, BDO, Bragg Gaming, CAMS, Carmanah Signs, Catapult Global, CDC Gaming Reports, CMC Trading Engineering (International) Ltd, Cooper Levenson, CS-1 Transportation, Deloitte LLP, DiTronics Financial Services, Duane Morris LLP, eConnect, EFCO Technology Corporation, Eilers & Krejcik Gaming, Elite Gaming Technology, Entropy Cabinet Solutions, Fantalooks, Fantini Research, Fennemore Craig, Fox Rothschild, Gambling Compliance, Gamesman, Gaming Capital Group, Gaming Publishing/G3Magazine, GAN, Ganlot, Gary Platt Manufacturing, Gasser Chair Company, General Touch, Genesis Gaming Solutions, Global Gambling Guidance Group (G4), Global Gaming Business (GGB) Magazine, Global Market Advisors, Greenberg Traurig, GSL Gaming Group, Howard & Howard, Impact Components, Innovum Technologies, iPro, IPS, James Industries, Jones Walker, JP Morgan Chase, KEY-BAK, Kiron Interactive, Kontron, KPMG, Lazcano Sámano, Lewis Roca, Lightstone Solutions, LOTREC Games, MarkerTrax, MicroTouch TES, Nanoptix, Nutanix, Omron, Outpost Creative, Passport Technology, Patir Casino Seating, Plan A Technologies, Portilla Ruy-Díaz y Aguilar, Posiflex Business Machines, Regulatory Management Counselors (RMC), Rising Digital, RSM US LLP, RX, SAGSE, SCA Gaming, Sightline Payments, Softweave, southfi, Sports Betting Community (SBC), StylGame USA, Super Book Sports, Taft Stettinius & Hollister, Talent Associates, The Bright Group, The Innovation Group, The United States Playing Card Company, Touch Dynamic, TOVIS, UL, Unity Technologies, USI Insurance Services, Veridocs, Wells Fargo, and Yogonet.

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