



Association of Gaming Equipment Manufacturers

AGEM ECONOMIC IMPACT STUDY SHOWS RESILIENCE OF GAMING MANUFACTURER / TECHNOLOGY SECTOR

Gaming manufacturing companies achieve \$59.9 billion in economic impact; Impact rises 8.1% from 2022; Value-added impact reached \$32 billion, up 7.3%; Direct wages reach \$9.6 billion to 77,000 employees

LAS VEGAS (June 23, 2025) – Suppliers to the global gaming industry generated a significant and improved total economic impact of almost \$60 billion through 2023, according to a comprehensive report released today by the Association of Gaming Equipment Manufacturers (AGEM). The supplier industry’s value-added economic impact rose 7.3% v. 2022, to \$32 billion. Further, gaming industry suppliers supported approximately 225,000 employees, including 77,000 direct employees, with a total of close to \$30 billion in wages and salaries, up 11.8% over the prior year.

The report, “Impact Analysis: Global Gaming Supplier Industry, 2024,” 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.

Summary of Economic Impact of Global Gaming Supplier Industry in 2023

<i>(\$ in Billions)</i>	<u>Direct</u>	<u>Indirect</u>	<u>Induced</u>	<u>Total</u>
Economic Output	\$22.7	\$16.8	\$20.4	\$59.9
Value Added	\$11.7	\$8.6	\$12.1	\$32.4
Wages and Salaries	\$9.6	\$5.1	\$6.2	\$20.9
Employment	77,109	55,769	92,474	225,400

While the impact of the global gaming industry spans domestic and international markets, companies doing business in Nevada generated \$10.6 billion in direct global economic output (\$27.9 billion in total output). Other impact measures include \$15.1 billion in total value added, \$6.6 billion in wages and salaries and over 71,000 employees for companies that have operations in Nevada.

Highlights of the report:

- **Economic Output:** The global gaming supplier industry directly generated approximately \$23 billion in economic output during 2023. When the ripple effect of those impacts is considered, total output reached nearly \$60 billion, which represented an 8.1 percent increase from 2022.
- **Value Added:** Limiting the economic impact to the amount of value added, the total impacts (including indirect and induced) equated to \$32 billion in 2023, an increase of 7.5 percent from the prior year.
- **Wages and Salaries:** Employers paid nearly \$10 billion in direct wages to employees, while total earnings throughout the economy reached nearly \$21 billion in 2023 (+11.8 percent).

- **Employment:** Direct jobs in the industry reached over 77,000, and the multiplier effect resulted in nearly 225,000 positions around the globe in 2023 (+9.0 percent)

The report showed the following impacts of companies with operations in Nevada, specifically:

- **Direct Economic Impact** increased 10% in 2023 to \$10.6 billion
- **Total Value-Added Impact** increased 10% in 2023 to \$15.1 billion
- **Total Wages and Salaries Impact** rose to \$6.6 billion, a 10% increase over 2022, with nearly half of that being a direct impact on the state earnings
- **Total Employment Impact** reached over 71,000, an increase of 7.6% over 2022.

“The gaming supplier industry continues to be a global success story. AGEM’s member companies remain a critical source of technology, innovation, advanced manufacturing, economic development and workforce investments within regulated gaming jurisdictions around the world.” said AGEM President & CEO Daron Dorsey. “The most recent economic impact study shows our members are resilient in the face of global challenges and will continue delivering products, technologies and services to customers and consumers alike while remaining invested in the long-term success of their local communities.”

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 more than 135 member companies based in 23 countries, AGEM is anchored by the world’s largest gaming equipment manufacturing companies and 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.

About Applied Analysis and Methodology

The 2024 edition of the *Impact Analysis: Global Gaming Supplier Industry* reports the annual economic impacts of the industry from 2019 to 2023. 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.

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