

IMPACT OF THE LICENSED LAND-BASED CASINO INDUSTRY IN EUROPE

Presented by European Casino Association

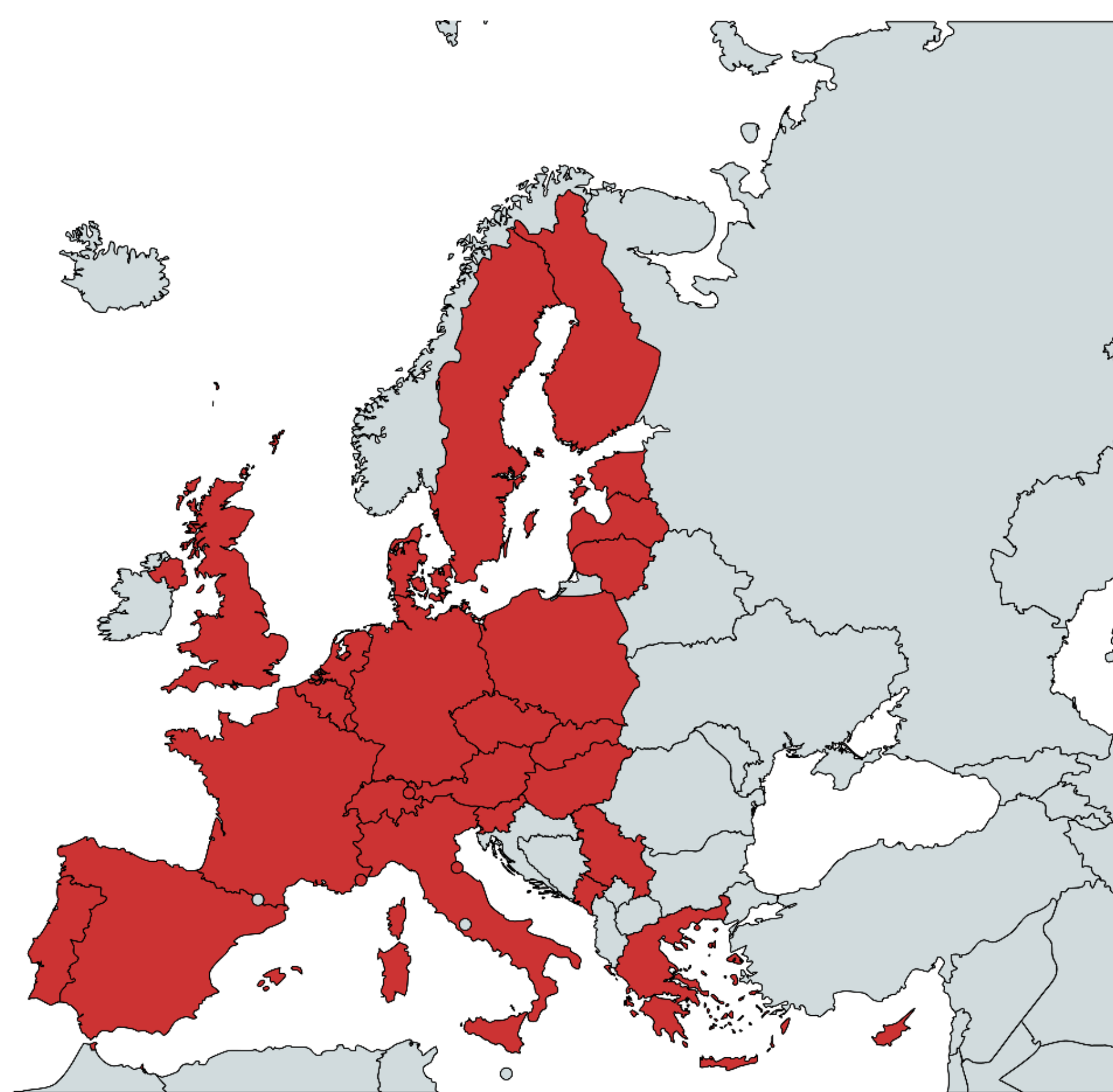


OVERVIEW

- There is no harmonisation of gambling legislation at EU level
- The sector is regulated according to the **principle of subsidiarity**, meaning that regulation is decentralised at national and regional level
- **National licenses** are required for the provision of gambling service
- The licensed land-based casino industry is one of the **most strictly regulated economic sectors**
- Compliance focuses on the General Data Regulation (GDPR), Anti-Money Laundering and player protection, responsible advertising

ABOUT ECA

- ECA represents **941** licensed land-based-casinos across **29 European countries** (2019)
- Aim: Supporting and promoting the values and principles of the **nationally licensed land-based casino industry** in Europe towards a sustainable future based on **national regulation**
- Providing tangible benefits for members



WHAT DO YOU KNOW ABOUT THE LICENSED LAND-BASED CASINO INDUSTRY IN EUROPE?

- How many employees?
- What is the economic impact ?
- What is the contribution to society ?

CREATING EMPLOYMENT

- Total employment in the European licensed land-based casino industry was 337 246
- Represents almost the entire population of Iceland
- The industry offers a wide variety of jobs across the skills spectrum



Waiters



Security



Technicians



Cooks

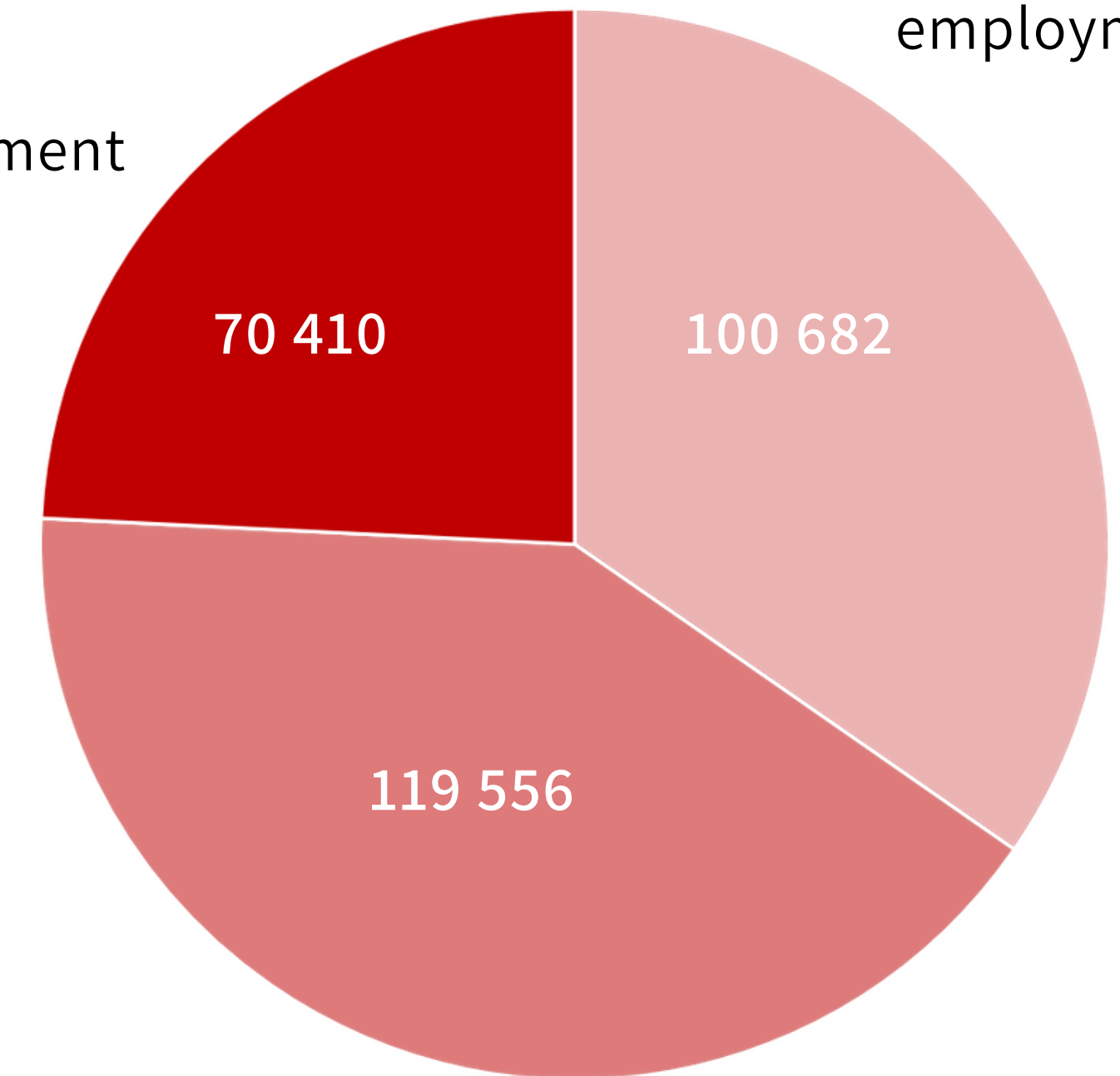


Croupiers



Compliance offices

Direct
employment

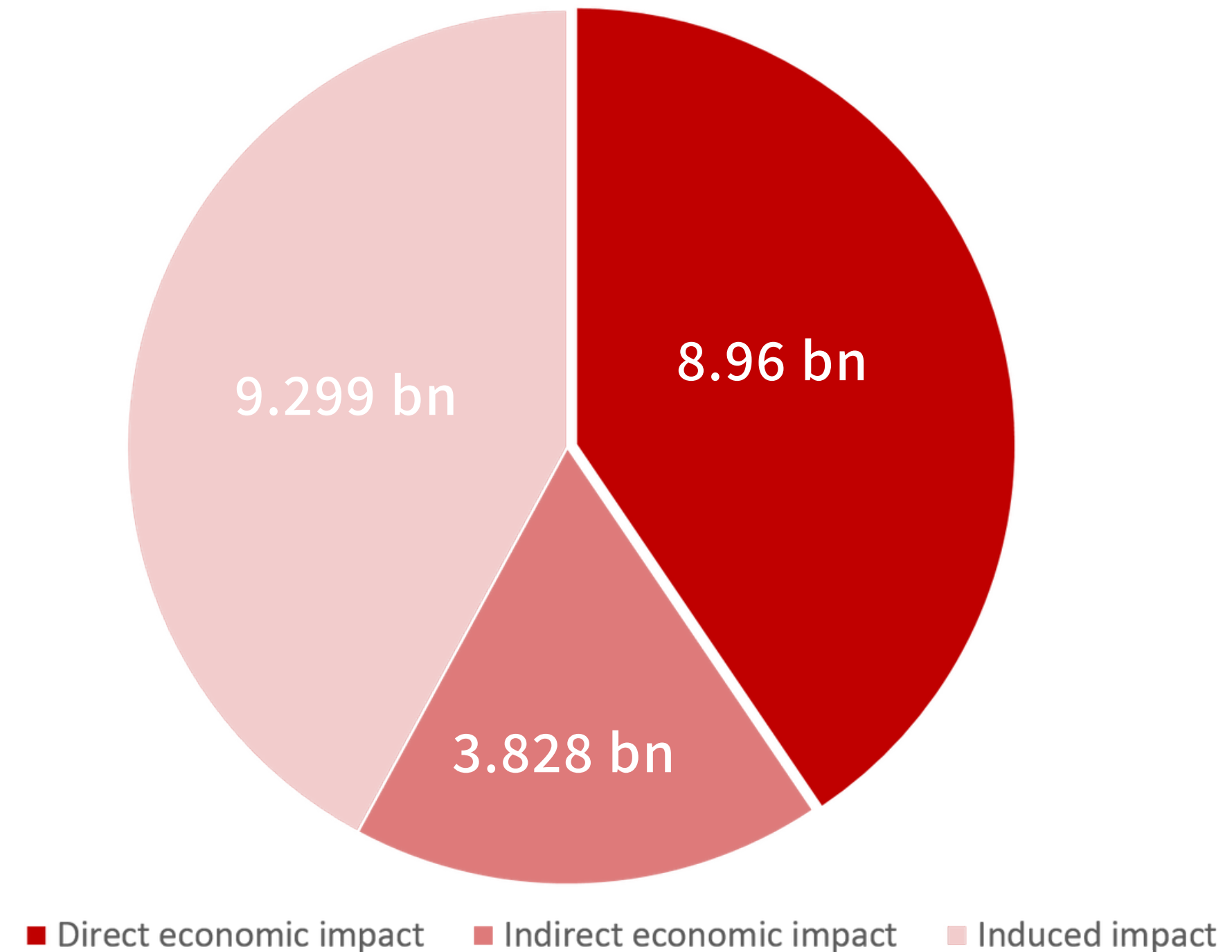


Induced
employment

Indirect
employment

POSITIVE ECONOMIC IMPACT

- Total economic impact of Europe's licensed land-based casinos represented by the ECA is estimated at **€22.1 bn**
- On average each casino generates an economic impact of almost **23 million per year**



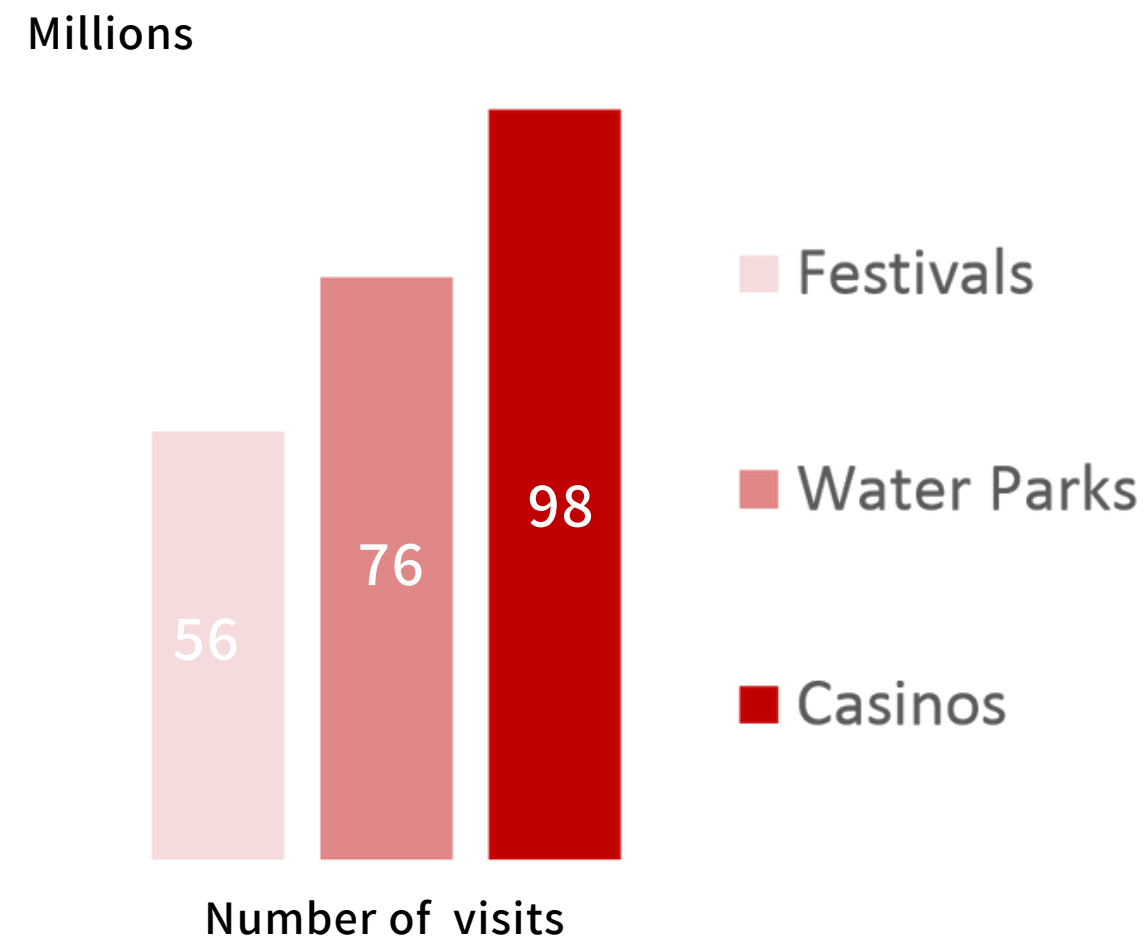


HERITAGE, TRADITION AND CULTURE

- Land-based casinos play an important role in preserving **Europe's cultural and architectural heritage**
- **Infrastructure investment** by licensed land-based casinos in the past 10 years amounted over to **€11.2bn**
- Casinos offer an all-round **entertainment experience** with hotels, restaurants, entertainment infrastructures, sports and wellness facilities

A MAJOR LEISURE PURSUIT

- Almost 100 million visits per year
- Industry is an important element in leisure expenditure that attracts customers into the local economies



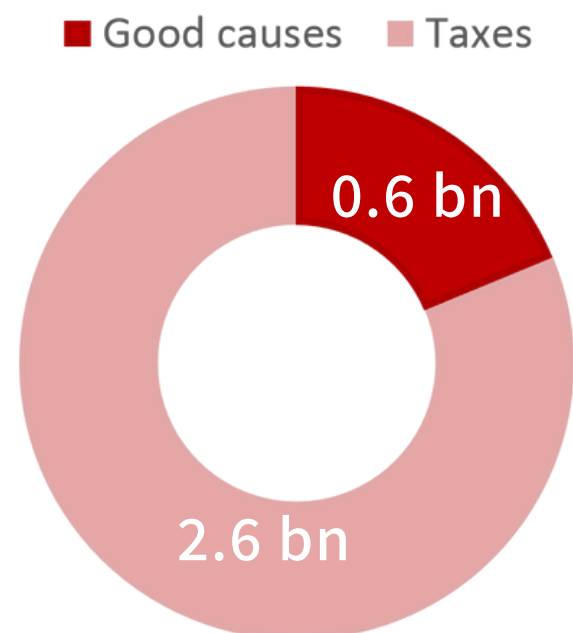
TOURISM CREATION



- Casinos play an important role for tourism, not only through their offer of games, but also through their **hotels, restaurants, sports and wellness facilities**
- The total spend by international casino tourists outside the industry is estimated at **almost €3.5 bn**
- Tourism numbers at casinos are further projected **to grow**

SOCIETAL CONTRIBUTION

- In many countries, the industry is among the largest sponsors for **art, sports and culture**
- Total contribution to society by the industry is over **€3.2 bn**



ETHICS AND COMPLIANCE



- The industry is closely concerned with compliance, anti-money laundering, responsible gambling and tackling illegal gambling
- Spend by industry on compliance is almost €200 million per year
- ECA is a member of the UN Global Compact and supports the Sustainable Development Goals

**SUSTAINABLE
DEVELOPMENT
GOALS**



ECA Responsible Gambling Framework

The ECA Responsible Gambling Framework is an industry standard for the effective management of Responsible Gambling, available to ECA members only.

Certification is granted to ECA members after a stringent independent third party has been conducted. The Framework was developed together with leading experts in addiction prevention. It includes the following categories:

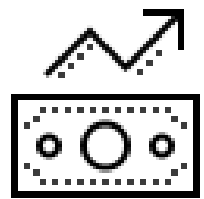
1. Awareness and Employee Training
2. Player Education
3. Entrance policies and processes
4. Serving Alcohol Policy
5. Staff Problem Gambling
6. Stakeholder Engagement & Reporting
7. Advertising & marketing
8. Research and Awareness on Risk Factors and on Game Design



POSITIVE IMPACT OF THE CASINO INDUSTRY IN EUROPE



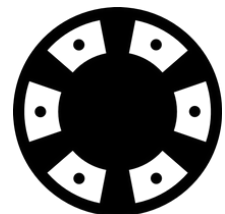
Employment generated for 340 000 people



Total economic impact of over €22 bn per year



Total contribution to society by the industry is over €3.2 bn per year



Almost €200 million invested in compliance per year



Investment in infrastructure by casino industry over the past 10 years amounts to €11.2 bn



Almost 100 million visits to casinos per year



ECA directly supports the Sustainable Development Goals



METHODOLOGY

- Economic Impact Study compiled with careful attention by **EACON Group** for the European Casino Association (ECA)



- Numbers provided via a survey of ECA members carried out in spring/summer 2018

- **22 EU member countries and 5 non-EU countries** were included in the study
- Economic impact has been calculated through **input-output model**
- Some figures are conservative estimates, due to lack of data in some areas and some assumptions based on averages and simple economic modelling

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