

# Canadian Gaming Industry Overview

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July 2010

# Industry Overview

## Gaming Availability in Canada by Gaming Sector

Province	Bingo	Casino	EGDs		Lotteries	Pari-Mutuel
			VLTs	Other*		
British Columbia	●	●	---	●	●	●
Alberta	●	●	●	●	●	●
Saskatchewan	●	●	●	---	●	●
Manitoba	●	●	●	●	●	●
Ontario	●	●	---	●	●	●
Quebec	●	●	●	●	●	●
New Brunswick**	●	●	●	---	●	●
Prince Edward Island	●	---	●	●	●	●
Nova Scotia	●	●	●	---	●	●
Newfoundland and Labrador	●	---	●	---	●	●

Source: HLT Advisory Inc.  
 \* Horse Racetracks, Bingo Halls and Other  
 \*\*Casino facility in Moncton opened in May 2010.

# Industry Overview

## Canadian Win by Sector, FY 2008/09

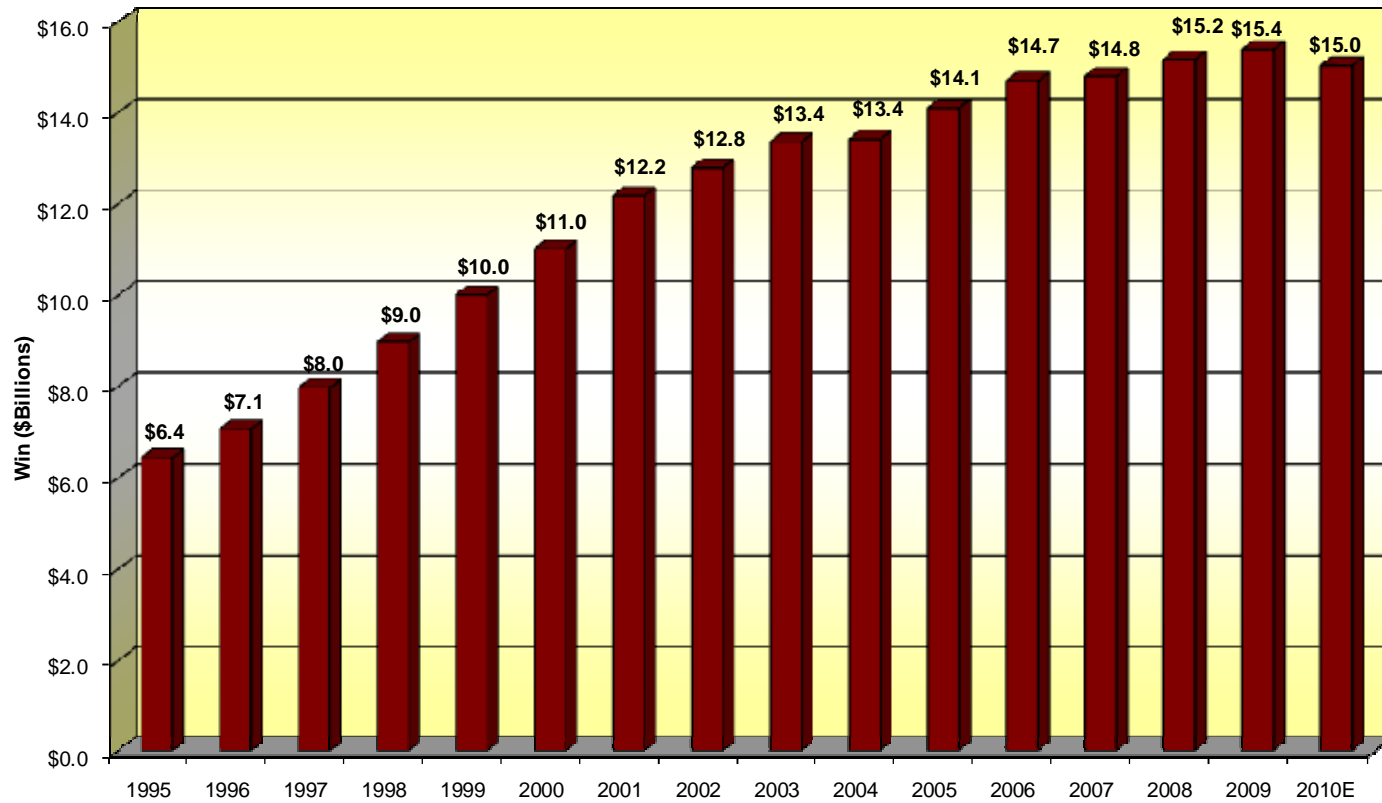
<b>Gaming Win by Type and Province FY 2008/09 (\$millions)</b>							
Province	Casino	EGD-VLTs	EGD-Other	Bingo	Lottery	Pari-Mutuel	Total Win
NFLD	\$0.0	\$122.7	\$0.0	\$3.7	\$91.5	\$0.3	\$218.3
PEI	\$0.0	\$19.5	\$11.5	\$3.4	\$13.8	\$1.7	\$49.9
NS	\$80.6	\$199.2	\$0.0	\$15.5	\$108.3	\$2.7	\$406.3
NB	\$0.0	\$148.2	\$0.0	\$12.1	\$77.5	\$1.3	\$239.1
QC	\$811.1	\$1,062.7	\$0.0	\$52.0	\$918.3	\$34.4	\$2,878.6
ON	\$1,837.1	\$0.0	\$1,709.7	\$160.9	\$1,551.0	\$240.1	\$5,498.8
MB	\$236.4	\$354.2	\$0.0	\$12.2	\$110.7	\$7.4	\$721.0
SK	\$355.1	\$241.0	\$0.0	\$17.8	\$102.8	\$3.3	\$720.0
AB	\$1,373.8	\$705.8	\$68.1	\$65.3	\$405.1	\$43.0	\$2,661.0
BC	\$1,341.2	\$0.0	\$126.0	\$50.8	\$432.4	\$50.2	\$2,000.7
<b>Total</b>	<b>\$6,035</b>	<b>\$2,853</b>	<b>\$1,915</b>	<b>\$394</b>	<b>\$3,811</b>	<b>\$384</b>	<b>\$15,394</b>

*Source: HLT Advisory Inc. based on most recent data available from various provincial government agency/corporation annual reports, subject to update as further information becomes available.*

# Industry Overview

## Canadian Win Trend

Canadian Gaming Industry Win Trends

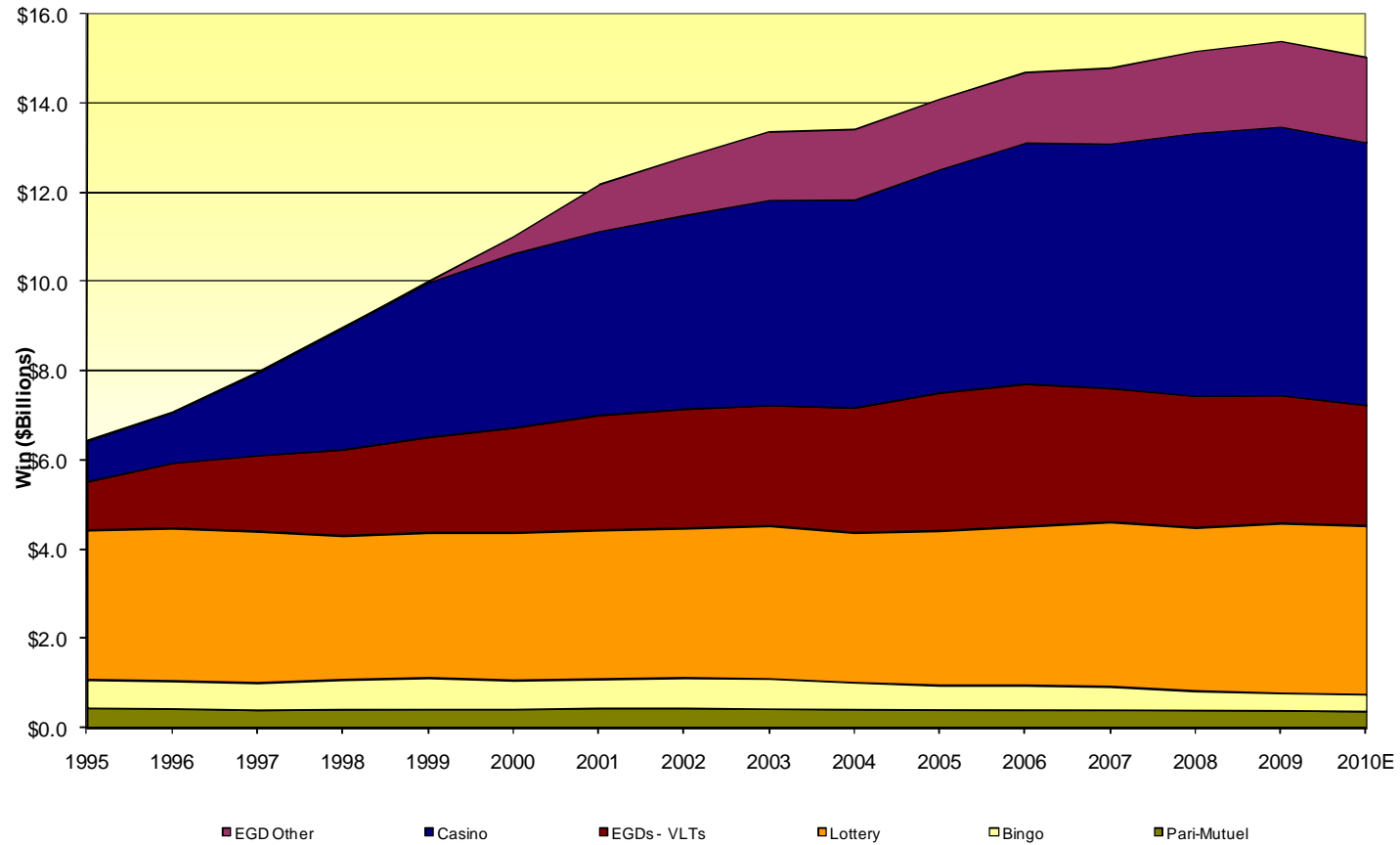


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# Industry Overview

## Canadian Win Trends by Sector

Canada Gaming Industry Win Trends by Sector

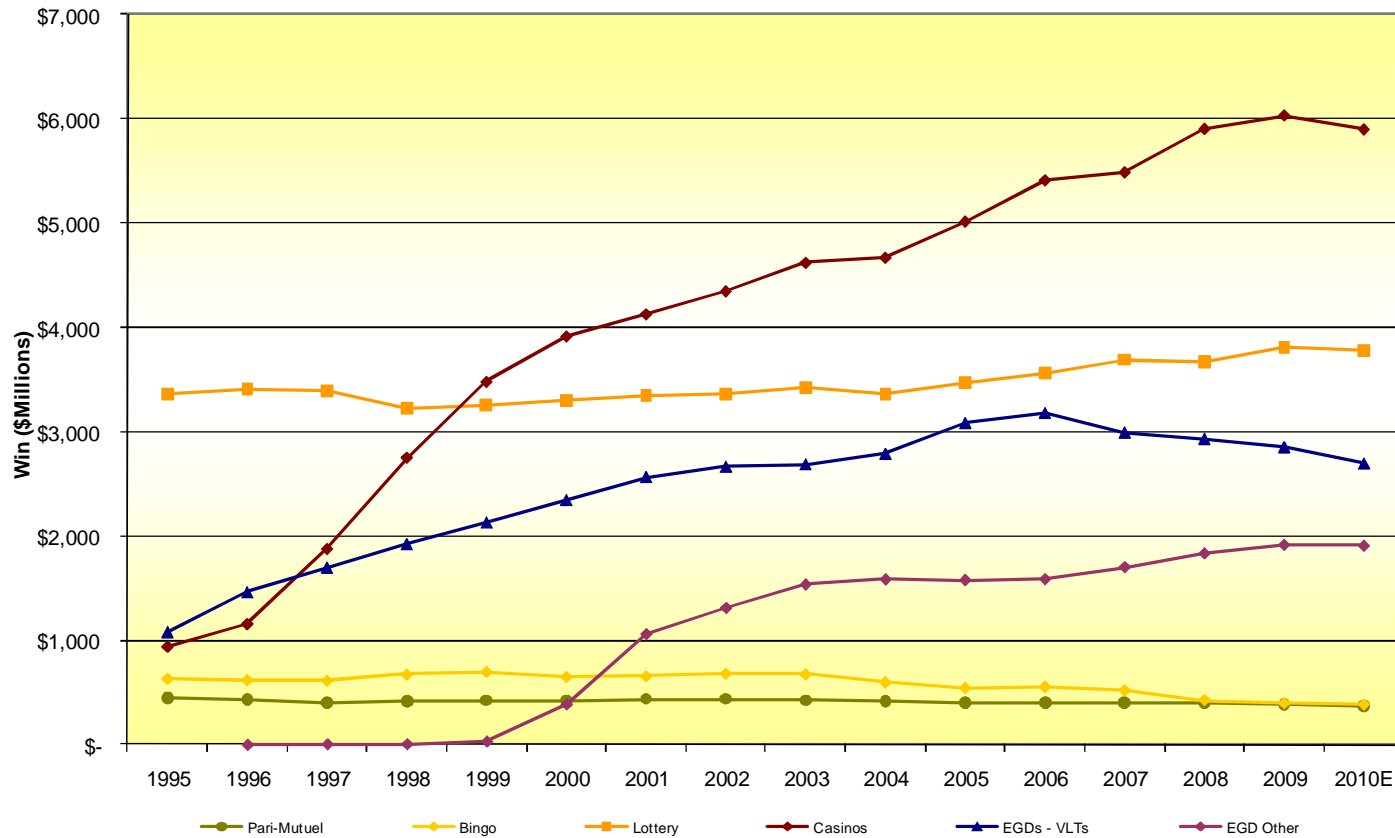


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## Canadian Win Trends by Sector

Canada Gaming Industry Win Trends by Sector



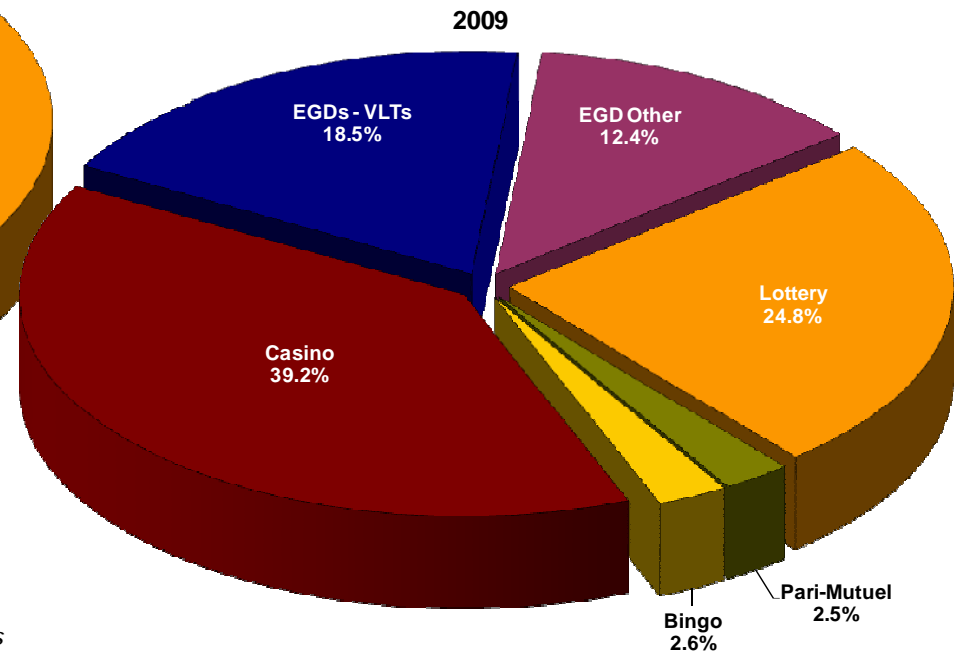
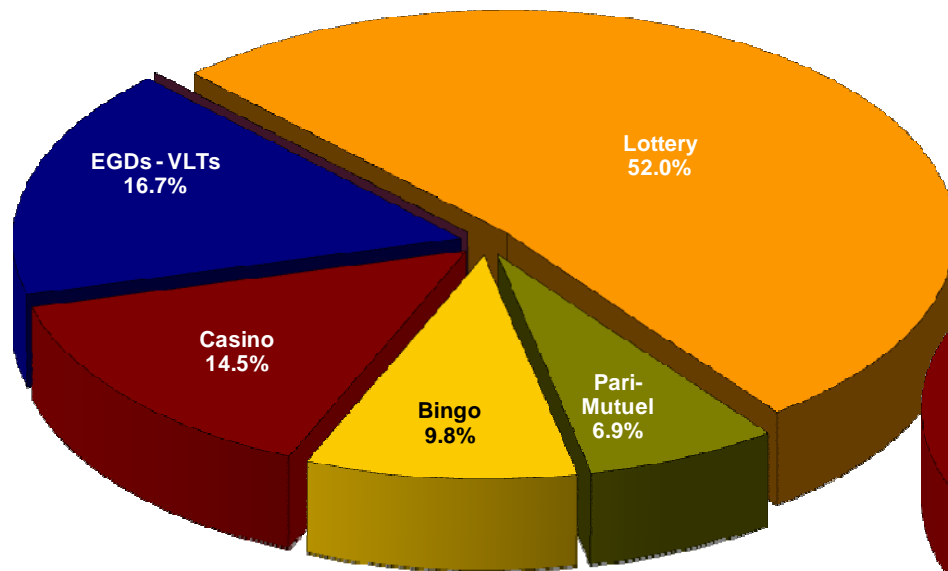
Source: HLT Advisory Inc. based on most recent data available from various provincial government agency/corporation annual reports, subject to update as further information becomes available.

# Industry Overview

## Canadian Market Share Change

### Canadian Win By Gaming Sector

1995



Source: HLT Advisory, Inc.

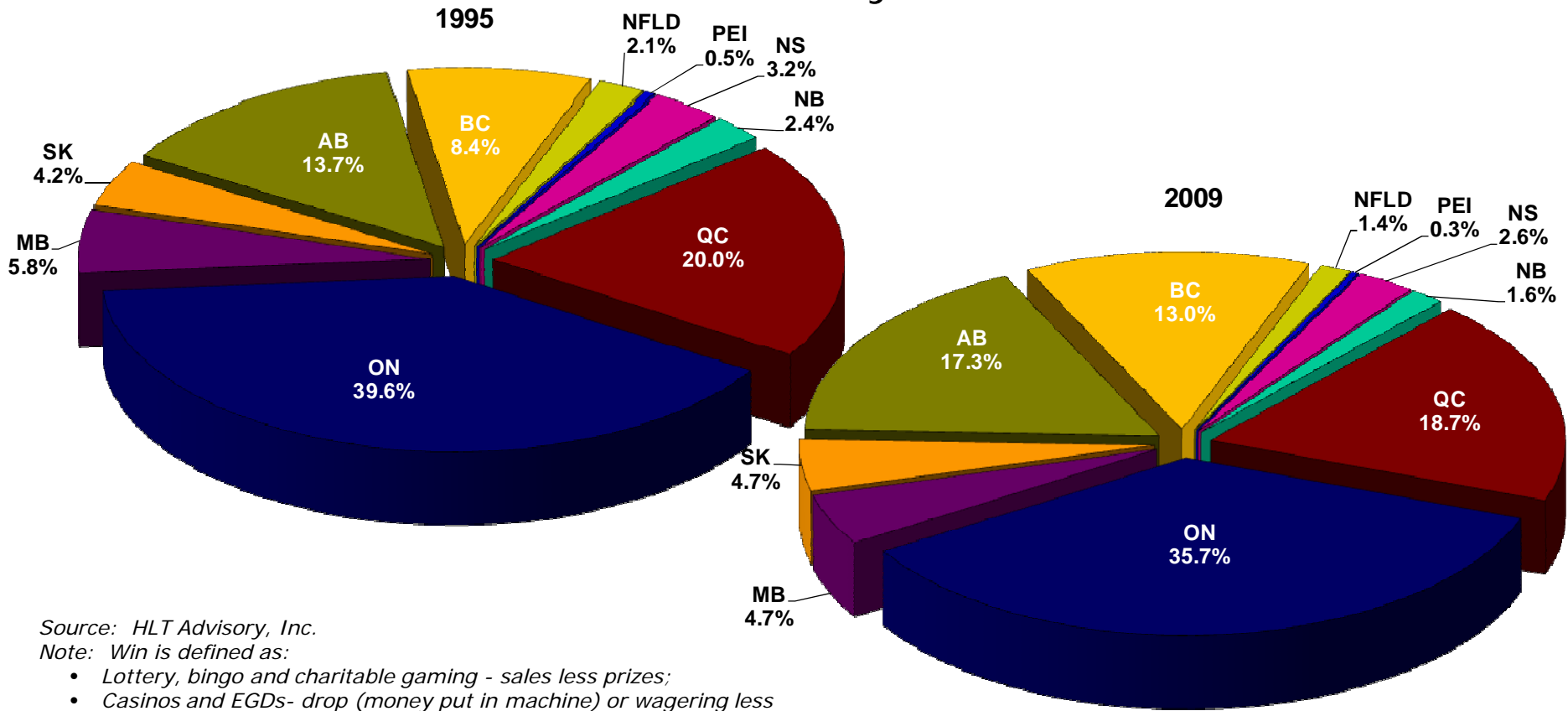
Note: Win is defined as:

- Lottery, bingo and charitable gaming - sales less prizes;
- Casinos and EGDs- drop (money put in machine) or wagering less prizes; and
- Pari-Mutuel - handle or wagering less prizes.

# Industry Overview

## Canadian Market Share Change

### Canadian Win By Province



Source: HLT Advisory, Inc.

Note: Win is defined as:

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- Casinos and EGDs- drop (money put in machine) or wagering less prizes; and
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