AUSTRALASIAN
Gaming Council

A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

CHAPTER SEVEN

The Contribution of Australia's Gambling Industries

2018/19

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A Guide to Australasia's Gambling Industries

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Chapter 7
The Contribution of Australia's Gambling Industries

Version Control

Version	Date	Explanation
2015-16 (2.0)	May 2018	2015-16 Edition updated with further industry data as available.
2016-17	Febuary 2020	2017-18 Edition updated with further industry data as available.
2018-19	June 2021	2018-19 Edition updated with further industry data as available.

CONTRIBUTION TO THE AUSTRALIAN ECONOMY

Estimated Industry Value Added

Industry Value Added (IVA) is the market value of goods and services produced by the industry minus the cost of goods and services used in production. IVA is also described as the industry's contribution to GDP, or profit plus wages and depreciation.[1]

IBISWorld Pty Ltd[2] estimates that the following industry sectors (the majority of members of which provide gaming and/or wagering services and/or products) contributed significantly to the Australian economy in the 2018-19 period.

Table 7-1 Industry Sector Estimated Value Added (2018-19)

Industry Sector[3]	Revenue ($million)	Industry Value Added (IVA) ($million)
Casinos[4]	6,394	3,523
Gaming and Vending Machine Manufacturers[5]	505	160
Horse and Dog Racing[6]	3,487	753
Horse and Sports Betting[7]	5,153	1,211
Lotteries[8]	8,289	1,078
Pubs, Bars and Nightclubs[9]	18,956	5,933
Social Clubs[10]	10,601	5,672

Source: IBISWorld Industry Reports: R9201 Casinos in Australia, C2499b Gaming and Vending Machines Manufacturing in Australia, R9120 Horse and Dog Racing in Australia, R9209 Horse and Sports Betting in Australia, R9202 Lotteries in Australia, H4520 Pubs, Bars and Nightclubs in Australia and H4530 Social Clubs in Australia.

Gambling industry contributions also assist in maintaining economic sustainability and supporting jobs in related sectors. For example, in 2018-19 Tabcorp paid $1 billion the Australian racing industry and a further $800 million was contributed to retail partners with TAB facilities.[11]

[1] IBISWorld Industry Report R9201 *Casinos in Australia,* July 2021.
[2] http://www.ibisworld.com.au
[3] It should be noted that not all establishments may provide gaming and/or wagering services and/or products. Please see references defining the scope of each of the sectors listed.
[4] IBISWorld Industry Report R9201 *Casinos in Australia,* July 2021. The casino sector includes 13 casinos operating throughout Australia. Revenues include revenues from table games, EGMs and associated entertainment and accommodation facilities directly owned or operated by casinos.
[5] IBISWorld Industry Report C2499b *Gaming and Vending Machines Manufacturing in Australia*, November 2020. Companies in these industries primarily manufacture gaming machines and vending machines that dispense various packaged goods. Gaming machine manufacturers account for the majority of the industry sector, vending machine manufacturers account for a lesser group.
[6] IBISWorld Industry Report R9120 *Horse and Dog Racing in Australia*, March 2021. This sector includes horse and dog racing operators with horse racing including thoroughbred and trots racing. Breeding, wagering and other ancillary services are not included in this sector.
[7] IBISWorld Industry Report R9209 *Horse and Sports Betting in Australia*, July 2021. Businesses in this industry provide totalisator, betting and other gambling services, excluding casino and lottery operation. The industry includes TABs, on-course totes, bookmakers and wagering websites.
[8] IBISWorld Industry Report R9202 *Lotteries in Australia*, August 2021. Businesses in this category operate lotteries or sell lottery tickets and include lotto, traditional lottery draws, instant scratch tickets, soccer pools, bingo and keno.
[9] IBISWorld Industry Report H4520 *Pubs, Bars and Nightclubs in Australia*, July 2021. Operators in this industry sector operate licensed bars, hotels, nightclubs and wine bars with their main activities being the sale of liquor for consumption both on and off premise, the provision of meals and the provision of gaming and wagering facilities.
[10] IBISWorld Industry Report H4530 *Social Clubs in Australia, May 2021.* This sector includes clubs or associations in the gambling, sporting, social or recreational areas that generate income predominantly from the provision of hospitality services. Clubs that mainly provide sporting services (including racing clubs are not included). The sector covers both licensed and unlicensed clubs and clubs with gambling licences.
[11] Tabcorp Holdings Limited (2019) *Annual Report 2019.*

CAPITAL EXPENDITURE

Capital expenditure is spending made in acquiring or upgrading physical assets such as buildings and machinery. This spending contributes to GDP and creates third party employment outside of direct business employees.

Casinos

Australian casinos invested over $794 million in capital works in the 2015-16 period and a further $645 million in the 2016-17 period.[12].

Table 7-2 Australian Casino Capital Expenditure (2015-16 and 2016-17)

Capital Expenditure	2015-16	2016-17
	($m)	
Expansion, refurbishments. redevelopments	620.6	463.9
Other capital expenditure	174.2	181.1
Total	**794.7**	**645.0**

Source: Australasian Gaming Council (2019) Australasian Casino Industry Survey 2015-16 & 2016-17. Please note that the total does not include The Reef Hotel Casino & The Ville Hotel Casino as figures were unavailable at the time of survey.

Clubs and Hotels

Since the introduction of EGMs clubs and hotels have increased capital expenditure and community sponsorship, as well as expanded and improved their food and meal offerings.

Results of a survey undertaken by PricewaterhouseCoopers in 2009, on behalf of the Australian Hotels Association (AHA), indicated 90% of the respondents reportedly undertook capital expenditure to improve hotel facilities, with the average spend being approximately $2.3 million dollars.[13]

A more recent survey of the hotel industry in South Australia (2016) indicates that in the past five years $664 million in capital expenditure was invested to improve hotel facilities: $503 million (76%) on venues in the metropolitan area; and $161 million (24%) on non-metropolitan venues.[14]

Table 7-3 Average amount spent on building projects/facility improvements by hotels and clubs in Queensland (2006-07)

		Venue	
Venue size	Clubs	Hotels	Total
		($)	
Small	114,353	213,408	141,888
Medium	328,237	381,404	362,216
Large	1,031,460	874,784	943,828
Total	**492,468**	**578,697**	**535,767**

Source: Queensland Office of Liquor, Gaming and Racing (2009) Results of the 2007 Gaming Machine Venue Survey.

[12] Australasian Gaming Council (2019) *Australasian Casino Industry Survey 2015-16 & 2016-17*. Please note that the total does not include staff at The Reef Hotel Casino & The Ville Hotel Casino as figures were unavailable at the time of survey.
[13] PricewaterhouseCoopers (2009) *Australian Hotels, More Than Just a Drink and a Flutter: An Overview of the Australian Hotels Industry*, *Report for the Australian Hotels Association*.
[14] South Australian Centre for Economic Studies, University of Adelaide (2016) *Economic Contribution of the Hotel Industry in South Australia*, commissioned by the Australian Hotels Association, South Australia.

EMPLOYMENT

National

Reliable employment estimates for Australia's gambling industries are often dated and/or difficult to source.

IBISWorld Pty Ltd[15] provides national data estimates regarding employment within the various sectors of the gambling industry as follows:

Table 7-4 Industry Sector Estimated Employment, Wages and Average Wages (2018-19)

Industry Sector[16]	Establishments	Employment[17]	Wages ($million)[18]	Average Wage($)
Casinos[19]	13	28,209	1,982	70,261
Gaming and Vending Machine Manufacturers[20]	101	1,916	102	53,288
Horse and Dog Racing[21]	2,304	19,720	456	23,129
Horse and Sports Betting[22]	988	9,828	423	43,000
Lotteries[23]	451	3,242	190	58,637
Pubs, Bars and Nightclubs[24]	8,972	77,891	4,016	51,563
Social Clubs[25]	3,872	81,020	3,980	49,122

Source: IBISWorld Industry Reports: R9201 Casinos in Australia, C2499b Gaming and Vending Machines Manufacturing in Australia, R9120 Horse and Dog Racing in Australia, R9209 Horse and Sports Betting in Australia, R9202 Lotteries in Australia, H45020 Pubs, Bars and Nightclubs in Australia and H4530 Social Clubs in Australia.

Apart from the broad national sector estimates provided, data is available from previous periods specific to employment within different gambling industry sectors.

[15] http://www.ibisworld.com.au
[16] It should be noted that not all establishments may provide gaming and/or wagering services and/or products. Please see references defining the scope of the sectors listed.
[17] The number of permanent, part-time, temporary and casual employees, working proprietors, partners, managers and executives within the industry.
[18] This refers to the gross total wages and salaries of all employees in the industry. Benefits and on-costs are included in this figure.
[19] IBISWorld Industry Report R9201 Casinos in Australia, July 2021.The casino sector includes 13 casinos operating throughout Australia and associated entertainment and accommodation facilities directly owned or operated by casinos.
[20] IBISWorld Industry Report C2499b *Gaming and Vending Machines Manufacturing in Australia*, November 2020. Companies in these industries primarily manufacture gaming machines and vending machines that dispense various packaged goods. Gaming machine manufacturers account for the majority of the industry sector, vending machine manufacturers account for a lesser group.
[21] IBISWorld Industry Report R9120 *Horse and Dog Racing in Australia*, March 2021. This sector includes horse and dog racing operators with horse racing including thoroughbred and trots racing. Breeding, wagering and other ancillary services are not included in this sector.
[22] IBISWorld Industry Report R9209 *Horse and Sports Betting in Australia*, July 2021. Businesses in this industry provide totalisator, betting and other gambling services, excluding casino and lottery operation. The industry includes TABs, on-course totes, bookmakers and wagering websites.
[23] IBISWorld Industry Report R9202 *Lotteries in Australia*, August 2021. Businesses in this category operate lotteries or sell lottery tickets and include lotto, traditional lottery draws, instant scratch tickets, soccer pools, bingo and keno.
[24] IBISWorld Industry Report H4520 *Pubs, Bars and Nightclubs in Australia*, July 2021. Operators in this industry sector operate licensed bars, hotels, nightclubs and wine bars with their main activities being the sale of liquor for consumption both on and off premise, the provision of meals and the provision of gaming and wagering facilities.
[25] IBISWorld Industry Report H4530 *Social Clubs in Australia,* May 2021. This sector includes clubs or associations in the gambling, sporting, social or recreational areas that generate income predominantly from the provision of hospitality services. Clubs that mainly provide sporting services (including racing clubs) are not included. The sector covers both licensed and unlicensed clubs and clubs with gambling licences.

Casinos

The Australasian Gaming Council conducted a survey of casinos in Australia examining the economic contribution and activities of the industry, including data relating to employment. The survey, completed in 2019, covers the periods 2015-16 and 2016-17, with results from 11 of 13 Australian casinos.[26]

Table 7-5 Casino employment by work type (2016-17)

Work Type	Number	Percentage (%)
Full time	11,213	46.9%
Part time	5,574	23.3%
Casual	6,128	25.6%
Trainees	996	4.2%
Total	**23,911**	**100%**

Source: Australasian Gaming Council (2019) Australasian Casino Industry Survey 2015-16 & 2016-17. Please note that the total does not include staff at The Reef Hotel Casino & The Ville Hotel Casino as figures were unavailable at the time of survey.

Staffing costs, including wages, salaries and allowances, represent the largest expense for the casino industry, comprising 49% of total operating expenditure in 2016-17.[27]

Owing to the diversity of the hospitality offered at most casinos and integrated resorts, occupational categories cover a wide range of roles.

Table 7-6 Casino employment by occupational grouping (2016-17)

Occupation	Number	Percentage (%)
Corporate (including Management, Administration, Clerical, Marketing, Human Resources and Training)	4,408	18.4
Casino Operations (including Licensed Gaming Staff, Cage & Count)	8,771	36.7
Security and Surveillance	1,455	6.1
Hospitality (including Chefs, Bar Managers and Attendants, Wait Staff, Kitchen Hands)	5,631	23.5
Property and Grounds (including Entertainment & A-V, IT, Maintenance, Cleaners)	1,849	7.7
Hotels and Accommodation (including Managers, Concierge, Clerks, Front-of House Staff and Housekeeping)	1,797	7.5
Total	**23,911**	**100.0%**

Source: Australasian Gaming Council (2019) Australasian Casino Industry Survey 2015-16 & 2016-17. Please note that the total does not include staff at The Reef Hotel Casino & The Ville Hotel Casino as figures were unavailable at the time of survey.

[26] Numbers reported are direct figures only and do not include indirect contributions such a flow on impacts from employment, purchasing and other activities undertaken by the sector.
[27] Australasian Gaming Council (2019) *Australasian Casino Industry Survey 2015-16 & 2016-17.*

Clubs

A National Club Census, conducted in 2015, estimated clubs employ approximately 130,000 people across a variety of roles.[28]

Table 7-7 Estimated employment at clubs in Australia by state/territory (2015)

Jurisdiction	No. of Clubs	Employees
Australian Capital Territory	49	1,745
New South Wales	1,300	40,700
Northern Territory	N/A	N/A
Queensland	1,111	22,164
South Australia	1,272	19,800
Tasmania	N/A	N/A
Victoria	1,430	27,900
Western Australia	975	14,900

Source: KPMG (2016) 2015 National Club Census: Detailed Report – Final, August 2016.

Tasmania and the Northern Territory are not included in the 2015 National Club Census due to an inadequate sample size for reporting purposes.

Figure 7-1 Average number of employees per club in Australia by state/territory (2015)

Source: KPMG (2016) 2015 National Club Census: Detailed Report – Final, August 2016.

[28] KPMG (2016) *2015 National Club Census: Detailed Report – Final, August 2016*.

Hotels

PricewaterhouseCoopers Consulting were engaged to conduct a survey of members of the Australian Hotels Association (AHA) for the 2016-2017 period.[29]

The survey estimates that AHA member venues employed approximately 215,000 people as at the end of June 2017[30]

Table 7-8 Categories of Employment in AHA Venues (2016-17)

Type	Employees %
Casual	55
Full-time	30
Part-time	12
Fixed term	3

Source: Australian Hotel Association (2018) 2018 Member Survey: Results and findings.

The survey reports that 60% of employees are female and the largest employee age category is the 25-44 year old age group.

Table 7-9 Employee age groups (2016-17)

Type	Employees %
18-24 years	36
25-44 years	39
45-64 years	24
65+ years	1

Source: Australian Hotel Association (2018) 2018 Member Survey: Results and findings.

[29] A survey sample of 699 respondents to the survey were collated, representing 1,047 member venues (approximately 20% of AHA member venues). Results have been extrapolated across the AHA's entire member population of 5,000+ members where appropriate.
[30] Australian Hotel Association (2018) *2018 Member Survey: Results and findings.*

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Table 7-10 Estimated employment at hotels in South Australia by type and region (2015)

Type	EGMs Total Number Employed			No EGMs Total Number Employed			Total
	Metro	Non-Metro	Total	Metro	Non-Metro	Total	
Full-time (Permanent)	1,742	1,770	3,512	2,819	347	3,167	6,679
Part-time (Permanent)	281	156	436	3,088	116	3,204	3,640
Casual	5,570	7,107	12,677	2,251	1,004	3,255	15,932
Total	**7,593**	**9,032**	**16,625**	**8,158**	**1,467**	**9,625**	**26,250**

Source: South Australian Centre for Economic Studies, University of Adelaide (2016) Economic Contribution of the Hotel Industry in South Australia, commissioned by the Australian Hotels Association, South Australia.

The South Australian hotel industry had total employment of 26, 250 as at December 2015, representing 3.2 per cent of South Australia's total employment.[31]

Approximately 39.3% of all employees were engaged on a permanent full or part-time basis, and 60.7% on a casual basis.

Of those employed in the hotel industry, 15,751 (60%) were employed at hotels in the metropolitan area, and 10,499 (40%) in non-metropolitan areas.

Table 7-11 Average number of employees at hotels in South Australia by region (2015)

Region	Average number of employees
Metropolitan	36.7
Non-metropolitan	30.6
Total average	**33.2**

Source: South Australian Centre for Economic Studies, University of Adelaide (2016) Economic Contribution of the Hotel Industry in South Australia, commissioned by the Australian Hotels Association, South Australia.

Note – The average figure excludes Category 10 hotels (large, accommodation venues).

Table 7-12 Estimated employment at hotels in South Australia by occupation and region (2015)

Occupation	EGMs Total Number Employed			No EGMs Total Number Employed			Total
	Metro	Non-Metro	Total	Metro	Non-Metro	Total	
Gaming staff	1,496	1,552	3,048	0	0	0	3,048
Other	6,097	7,480	13,577	8,158	1,467	9,625	23,202
Total	**7,593**	**9,032**	**16,625**	**8,158**	**1,467**	**9,625**	**26,250**

Source: South Australian Centre for Economic Studies, University of Adelaide (2016) Economic Contribution of the Hotel Industry in South Australia, commissioned by the Australian Hotels Association, South Australia.

In total, 11.6 percent (n=3,048) of all hotel employees in South Australia are classified as gaming staff.

[31] South Australian Centre for Economic Studies, University of Adelaide (2016) *Economic Contribution of the Hotel Industry in South Australia, commissioned by the Australian Hotels Association, South Australia*.

Table 7-13 Estimated total wages and allowances paid to hotel employees in South Australia by region (2015)

Region	EGMs	No EGMs	Total
		$ Million	
Metropolitan	292	310	602
Non-metropolitan	339	17	356
Total average	**631**	**327**	**958**

Source: South Australian Centre for Economic Studies, University of Adelaide (2016) Economic Contribution of the Hotel Industry in South Australia, commissioned by the Australian Hotels Association, South Australia.

Racing and Wagering

In 2010 the Productivity Commission reported that jobs created by the racing and wagering industries include bookmakers, trainers, jockeys, racing stewards and breeders. Racing and wagering also provide employment for a wide range of staff required to run wagering and betting retail outlets, internet and phone bookmaking operations, racing clubs and racing authorities. [32]

The Commission found that racing industry sponsored research estimated the number of full time equivalent (FTE) jobs in the racing and wagering industry to be over 48,680 in 2004-05 – whereas the Commission itself estimated FTE jobs in a range between 12,500 and 15,000.

Subsequent reports to that of the Productivity Commission suggest a higher figure.

In 2016 a social and economic impact report commissioned by Racing and Wagering Western Australia (RWWA) concluded that the direct impact on employment generated by the activities of the racing industry in WA alone sustains more than 7,360 FTE positions each year. [33]

A 2018 report detailing the size and economic impact of the three major racing codes in Victoria (thoroughbred, harness and greyhound racing) found that the racing industry is directly responsible for sustaining 15,415 FTE jobs in the Victorian economy. The impact on employment increases to more than 33,800 FTE jobs when flow on benefits to other industries are taken into account, in areas such as retail trade, road transport and food services. Estimates for each racing sector in Victoria are reported as follows: 25,157 FTE (thoroughbred racing); 4,367 FTE (harness racing); and 4,302 FTE (greyhound racing).[34]

The following tables provide an overview of available employment estimates from various years and sectors in racing and wagering.

Table 7-14 Estimated employment in select thoroughbred racing industry sector occupations in Australia (2018-19)

Type	Estimated Number Employed
Amateur Jockeys	82
Apprentice Jockeys	191
Jockeys	576
Trainers	3,119
Total	**3,968**

Source: Australian Racing Board (2020) Australian Racing Fact Book 2018-19.

Harness Racing Australia released a comprehensive report in 2013 that focussed on the size and scope of the harness racing industry – estimating that this racing sector alone provides some 13,000 FTE job opportunities.[35]

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[32] Productivity Commission (2010) *Gambling, Report no 50*, Canberra p16.5
[33] IER (2016) *Western Australian Racing Industry: Economic and Social Impact Report - Highlights, prepared for Racing and Wagering Western Australia*.
[34] IER (2019) *Size and Scope of the Victorian Racing Industry: September 2018*.
[35] Harness Racing Australia (2013) *Annual Report 2013.*

Table 7-15 Estimated employment in select harness racing industry sector occupations in Australia (2011-12)

Type	Number employed
Barrier/Stable Attendants and Track Maintenance	514
Breeders	5,554
Breeders Staff	4,929
Casual/Contractor Club Staff	1,733
Farriers	181
Full-time Club Staff	124
Industry Administration Staff	170
Industry Vets	477
Part-time Club Staff	140
Registered drivers	1,184
Stable Staff	2,533
Stewards	56
Trainers (all classes)	2,384

Source: Harness Racing Australia (2013) Annual Report

Greyhounds Australasia provides the following figures regarding employment in specific occupations within the greyhound racing sector.

Table 7-16 Estimated employment in select dog racing industry sector occupations in Australia (2014)

Type	Number employed
Attendants	2,273
Trainers	5,316[36]
Total	**7,589**

Source: Greyhounds Australasia, 2016 (http://www.galtd.org.au)

[36] Excludes ACT.

TOURISM

Gambling venues in Australia are not only popular destinations for local residents; they also attract a number of interstate and international tourists, with the inflow of visitors having a positive impact on the local economy.

Direct tourism gross value added is measured as the value of the output of tourism products by industries in a direct relationship with visitors less the value of the inputs used in producing these tourism products.

Output is measured at 'basic prices', that is before any taxes on tourism products are added (or any subsidies on tourism products are deducted).

Taxes on tourism products include the GST, wholesale sales taxes and excise duties on goods supplied to visitors.

Direct tourism gross value added is directly comparable with estimates of the gross value added of 'conventional' industries such as mining and manufacturing that are presented in the national accounts.

Direct tourism GDP measures the value added of the tourism industry at purchasers' (market) prices. It therefore includes taxes paid less subsidies associated with the productive activity attributable to tourism.

Direct tourism GDP will generally have a higher value than direct tourism value added. Direct tourism GDP is a satellite construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP.

While direct tourism GDP is useful, the direct tourism gross value-added measure should be used when making comparisons with other industries or between countries.[37]

Table 7-17 Direct Tourism Gross Value Added

Tourism characteristic industries GVA	2015-16	2016-17	2017-18	2018-19	2019-20
			$ Million		
Casinos and other gambling services	661	690	730	773	587
Pubs, Clubs, Taverns and Bars	3,129	3,272	3,459	3,669	2,839

Source: Australian Bureau of Statistics (2021) 5249.0 Tourism Satellite Account: 2019-20

[37] Australian Bureau of Statistics (2020) *5249.0 Tourism Satellite Account: 2018/19 (Explanatory Notes).*

Domestic Tourism Expenditure

Tourism statistics from 2019 to 2020 similarly show that gambling attracts a significant proportion of Australia's domestic tourism dollar.

Table 7-18 Expenditure by day visitors: Total trip expenditure by item of expenditure

Expenditure items	Trip expenditure ($million)	
	Year ending Sept. 2019	Year ending Sept. 2020
Domestic airfares	870	624
Package Tours	np	np
Organised Tours	45	81
Rental vehicles	103	76
Petrol	5,903	5,311
Vehicle maintenance/repairs	170	285
Taxi	191	141
Other local public transport	217	164
Long distance public transport	73	80
Groceries for self-catering	1,386	1,343
Alcohol, drinks (not already reported)	1,168	1,114
Takeaways and restaurant meals	5,576	4,743
Shopping / gifts /souvenirs	6,197	5,956
Entertainment	1,118	943
Gambling	62	46
Education fees	np	112
Convention / Conference / Seminar / Trade fair	np	np
Other expenditure nfd	1,157	1,262
Total	**24,321**	**22,344**

Source: Tourism Research Australia (2020) Travel by Australians: Year Ending June 2020 from the National Visitor Survey.

Table 7-19 Expenditure by overnight visitors: Items of expenditure by main purpose of trip (2018-19)

Expenditure items	Holiday	Visiting friends & relatives	Business	Other	Total
	$ Million				
Domestic airfares	3,120	2,823	5,630	456	12,029
Package tours	1,113	80	642	np	1,898
Organised tours	532	np	np	np	619
Rental vehicles	572	217	474	np	1,304
Petrol/Fuel	3,507	2,204	2,292	389	8,391
Vehicle maintenance/Repairs	96	np	np	np	226
Taxis	254	155	641	np	1,079
Other local public transport	186	117	125	np	452
Long distance public transport	196	93	np	np	345
Accommodation	10,691	2,075	6,340	699	19,806
Groceries for self-catering	2,512	1,244	481	158	4,394
Alcohol, drinks (not already reported)	2,301	1,065	644	78	4,088
Takeaway and restaurant meals	6,416	3,092	2,796	447	12,750
Shopping/Gifts/Souvenirs	2,870	1,777	670	298	5,615
Entertainment	1,988	361	130	np	2,523
Gambling	157	np	np	np	243
Education fees	np	np	np	np	153
Convention/Conference/Seminar fees	np	np	310	np	347
Other expenditure, nfd	564	137	123	389	1,213
Total	37,115	15,590	21,557	3,214	77,476

Note: np - data is not publishable as the survey error is too high for practical purposes.
Source: Tourism Research Australia (2020) Travel by Australians: Year Ending June 2019

International Tourism Expenditure

Gambling venues in Australia, particularly large integrated resorts offering a variety of entertainment and hospitality options, attract a great number of interstate and international tourists, with the inflow of visitors having a positive impact on the local economy.

The COVID-19 pandemic has had a vast impact on the tourism industry across the world. With international borders all but closed in 2020 and 2021 there has been almost no international tourism for the past 18 months.

Table 7-20 Average expenditure for visitors by top 5 countries of residence & expenditure items (2018-19)

Country of residence	China	USA	UK	NZ	Japan	Other	Total
Package tour	3,432	7,774	6,751	1,716	3,301	3,845	3,881
Pre-paid international airfares	961	2,179	1,974	654	1,384	1,230	1,255
Organised tours	506	785	536	581	415	492	532
International airfares bought in Australia	799	855	914	451	740	840	806
Domestic airfares	377	386	369	np	np	349	359
Taxi and other public transport	284	135	160	86	128	207	185
Rental vehicles	387	352	520	265	np	478	421
Petrol and oil for vehicles	275	np	167	79	np	262	208
Shopping - items for use in Australia	983	193	260	181	243	410	437
Shopping - items to take home	1,038	236	187	308	239	386	443
Total shopping	*1,395*	*292*	*306*	*343*	*306*	*520*	*585*
Food, drink and accommodation	2,883	1,279	1,580	665	1,155	1,771	1,675
Gambling	660	np	np	np	np	405	350
Entertainment	234	123	147	117	np	143	150
Motor vehicles	12,148	np	3,508	np	np	5,155	5,977
Education fees	18,501	11,500	np	2,816	7,404	11,864	14,067
Phone, internet, fax and/or postage	125	np	np	np	np	99	96
Conference fees	np	2,072	np	1,190	np	900	1,120
Other	752	np	276	240	np	374	393
Total	**9,336**	**5,130**	**4,999**	**2,004**	**4,544**	**5,019**	**5,211**

Note: np - data is not publishable as the survey error is too high for practical purposes.
Source: Tourism Research Australia (2019) International Visitors Survey for the Year Ending December 2019.

Casino visitors

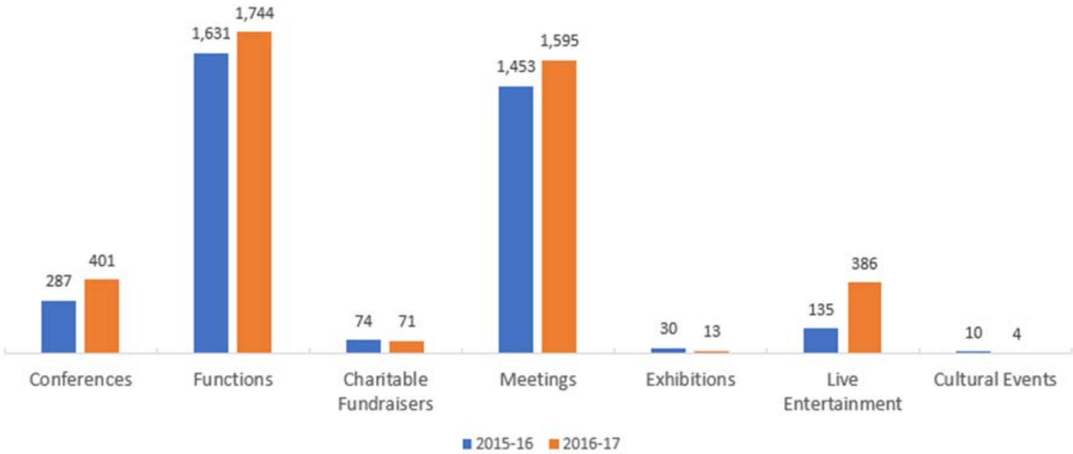
Tourists attending casino complexes is a difficult figure to capture and has been estimated in the past for Australia as between 40 – 50 million visitors per annum across all properties.[38]

Estimates generally include tourists attending multiple attractions offered at casino complexes such as hotels, function rooms, convention centres, restaurants, shops and other entertainment facilities.

Most casinos throughout Australia host a variety of events for which more precise figures can be captured. Events include conferences, weddings and other functions, as well as meetings, exhibitions, live entertainment acts and other events.

[38] Australian Casino Association (2011) *Casino Industry Survey 2009-10*.

Figure 7-2 Australian Casino Event Types 2015-16 and 2016-17



Source: Australasian Gaming Council (2019) Australasian Casino Industry Survey 2015-16 & 2016-17

Table 7-21 Casino patrons by Event Category

Event Type	2015-16		2016-17	
	Events Held	Attendee Numbers	Events Held	Attendee Numbers
Conferences	287	58,810	401	76,611
Functions	1,631	390,449	1,744	422,936
Charitable Fundraisers	74	33,730	71	31,003
Meetings	1,453	147,805	1,595	155,827
Exhibitions	30	7,855	13	4,891
Live Entertainment	135	169,559	386	87,583
Cultural Events	10	4,490	4	800
Total	**3,620**	**812,698**	**3,814**	**779,651**

Source: Australasian Gaming Council (2019) Australasian Casino Industry Survey 2015-16 & 2016-17

FACILITIES AND ENTERTAINMENT

Live Music

The Australasian Performing Rights Association (APRA) licences venues to provide live music entertainment and in 2014 released a report conducted by Ernst & Young assessing the economic contribution of venue-based live music performances in pubs/bars, clubs, restaurants, cafes and nightclubs in Australia.

The following table displays the estimated economic impact of live music in Australia.

Table 7-22 The Economic Impact of Live Music Making in Australia (2014)

	Demand Expenditure	Output Impact	Gross Value Added	Producers' Surplus
New South Wales	1,780.0	3,538.6	1,618.3	425.9
Victoria	1,432.9	2,873.1	1,284.5	352.9
Queensland	824.5	1,573.6	723.3	152.0
Western Australia	538.6	1,012.9	470.0	95.8
South Australia	310.1	591.4	263.7	57.7
Tasmania	29.7	51.3	22.5	4.8
Australian Capital Territory	46.4	59.5	28.1	6.4
Northern Territory	16.5	22.8	11.8	2.3
Australia	**4,978.8**	**9,723.1**	**4,222.2**	**1,230.2**

Source: APRA: The Economic & Cultural Value Of Live Music In Australia 2014

Table 7-23 Total number of live music performances for one month in Adelaide by licence type (2015)

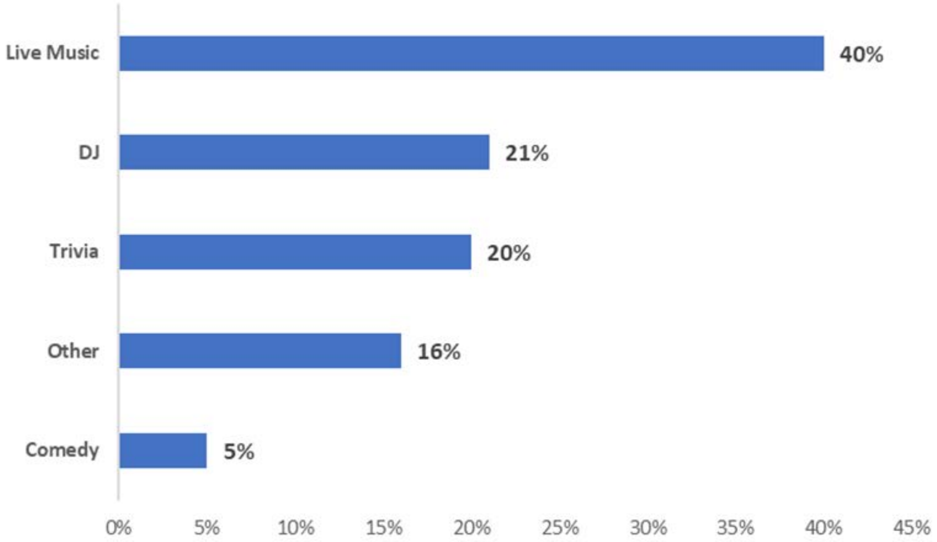
Licence type	Number of venues	Number of gigs	Percentage of total gigs
Club	8	39	4.1
Entertainment venue	3	17	1.8
Limited club	4	11	1.1
Producer	3	7	0.7
Restaurant	6	17	1.8
Small venue	1	3	0.3
Special circumstances	35	205	21.3
Total	**157**	**962**	**100**

Source: South Australian Centre for Economic Studies, University of Adelaide (2016) Economic Contribution of the Hotel Industry in South Australia, commissioned by the Australian Hotels Association, South Australia (extracted from Adelaide Live Music Census 2015).

A recent census of live music in Adelaide found that hotels hosted 663 gigs across 97 venues in the month of May 2015, representing 69% of gigs for the month.

Other Entertainment/Community Events

Figure 7-3 Entertainment Types in Australian Hotels 2016-17



Source: Australian Hotel Association - 2018 Member Survey –results and findings – July 2018

COMMUNITY CONTRIBUTIONS

Community Contributions and Community Benefit Programs

Most gambling sectors in Australia are legally required to make contributions to the community through various levies imposed on their operations. Resources are also provided to fund research into aspects of gambling in Australia.

Further to these sums, the industry makes a number of additional, significant voluntary contributions to a variety of local charities and community organisations throughout the nation as well as supporting involvement in volunteering activities and providing sponsorships.

National

Casinos

Australian casinos contribute funds via levies on gross profit to state government community benefit schemes established to support projects in local communities. In addition to these contributions, casinos voluntarily donate funds and resources via sponsorship and fundraising events to a broad range of community and sporting groups, charities and cultural events.

Australian casinos contribution to their local community also extends to employee initiatives and corporate partnerships with community organisations.

For example, in 2020 the Crown Resorts Foundation and Packer Family Foundation in concert contributed over $5 million to the bushfire relief effort, and raised more than $550,000 through various other fundraising efforts across the organisation. Crown Resorts, through the Crown Resorts Foundation, has allocated over $105 million to 330 grant recipients.[39]

In 2020, the Star Entertainment Group contributed over $7 million to various charitable efforts and groups via grants and sponsorships. These contributions across the community continued despite the lengthy venue shutdowns as a result of the COVID-19 shutdowns.[40]

A non-exhaustive selection of examples of Australian casino charitable contributions, sponsorships and events throughout various Australian jurisdictions include:

- **Charities and Sponsorships** – Glebe TreeHouse, Before and After School Care, Beehive Industries, The Freedom Hub, Culture at Work, PCYC Marrickville Club, Ultimo Public School P&C Association Fun Run, Seabin Project, National Gallery of Victoria, The Literature Centre, St Vincent's Hospital, Salvation Army, The Sheppard Centre, The Smith Family, Cancer Council, Maddie Riewoldt's Vision, Les Twentyman Foundation, Innari Inc., Currumbin Wildlife Hospital, Pyrmont Ultimo Chamber of Commerce and Volunteering Queensland.

- **Cultural events** - Sydney Gay & Lesbian Mardi Gras, City of Sydney Lunar New Year, Festival, Festitalia Italian Festival, Vietnamese Lunar Festival, Perth Telethon,

- **Special causes/events** – OzHarvest's 'Think. Eat. Save.', Children's Cancer Foundation's Million Dollar Lunch, CEO Sleepout.

[39] Crown Resorts Limited – Annual Report 2020
[40] The Star Entertainment Group – *Annual Report 2020.*

Wagering, Keno and Lotteries

Tabcorp - which is diversified across wagering and media services, gaming services and keno businesses - contributes funds in a number of Australian jurisdictions benefitting both the racing and broader community through various voluntary initiatives.

Tabcorp supports the racing industries efforts to promote animal welfare for thoroughbred racehorses by providing funding to rehoming efforts across Australia.

Tabcorp contributed approximately $12.6m to charitable organisations in 2019-20. Contributions were made to multiple parts of our community including supporting research into the COVID-19 pandemic, bushfire relief.

Australian Capital Territory

Problem Gambling Assistance Fund / Gambling Harm Prevention and Mitigation Fund

Prior to 1 July 2019, and for the period 2018-19, funds from mandatory levies on the gambling industry were distributed primarily via the ACT's Problem Gambling Assistance Fund (PGAF). As of 1 July 2019, as part of the ACT government's community contribution reform scheme, funds are largely distributed via the Gambling Harm Prevention and Mitigation Fund.

The Gambling Harm Prevention and Mitigation Fund was established under the *Gaming Machine Act 2004* to provide gambling support services to the ACT community as well as support associated projects, events and research initiatives. The fund works with key stakeholders across the board, from the community, industry and research sectors.

Under reforms to the community contribution scheme, funds are sourced from a 0.75% levy on gaming machine licensees gross gaming machine revenue, 0.4% from each club's net revenue, 0.4% from hotels *community contribution revenue*[41] and contributions on a voluntary basis from Tabcorp and Casino Canberra.[42]

Community Contribution Scheme

As of 1 July 2019, under the *Gaming Machine Act 2004*, licensed clubs are required to make a minimum level of community contributions equal to 8.8% of the club's Net Gaming Machine Revenue (NGMR).[43]

The minimum contribution requirements for clubs are:

- 0.4% of NGMR to the Gambling Harm Prevention and Mitigation Fund
- 0.4% of NGMR to the Chief Minister's Charitable Fund
- 8% of NGMR made as community purpose contributions.

Hotels are required to make a minimum level of community contributions equal to 0.8% of *Community Contribution Revenue* (CCR - gross gaming machine revenue less gaming machine tax paid).

The minimum contribution requirements for hotels are:

- 0.4% of CCR to the Gambling Harm Prevention and Mitigation Fund
- 0.4% of CCR to the Chief Minister's Charitable Fund.

[41] Community contribution revenue (CCR) – gross gaming machine revenue less gaming machine tax paid.
[42] ACT Gambling and Racing Commission (2021) Gambling Harm Prevention and Mitigation Fund - ACT Gambling and Racing Commission (Accessed August 2021)
[43] ACT Gambling and Racing Commission (2021) Community Contribution Reform Scheme - ACT Gambling and Racing Commission (accessed August 2021)

Registered Clubs

Table 7-24 Community contributions by registered clubs - ACT (2018-19)

Area	Total Contributions ($)
Charitable and Social Welfare	1,014,880
Problem Gambling	77,199
Problem Gambling Assistance Fund	1,250,575
Sport and Recreation	6,507,153
Women's Sport	783,855
Non-profit Activities	1,839,177
Community Infrastructure	57,684
Total	**11,530,523**

Source: ACT Gambling and Racing Commission (2020) Community Contributions made by Gaming Machine Licensees 2018-19.

Table 7-25 Community contributions by registered clubs – ACT comparison (2008-09 – 2018-19)

Financial Year	Total Approved Contributions $m (amended)	Total Club NGMR $m	Community Contributions as a % of NGMR[44]	% change of contributions from previous year
2018-19	11.531	94.515	12.21	-4.5
2017-18	12.080	95.321	12.7	+1.6
2016-17	11.883	94.646	12.6	+2.0
2015-16	11.736	94.235	12.45	+1.6
2014-15	11.841	94.109	12.58	-6.0
2013-14	12.591	95.779	13.15	-1.6
2009-10	13.236	97.635	13.56	+0.4
2008-09	13.669	98.647	13.86	+9.8

Source: ACT Gambling and Racing Commission (2020) Community Contributions made by Gaming Machine Licensees 2018-19.

Hotels and Taverns

Licensed hotels operating gaming machines in the Australian Capital Territory contributed $6,300 to the community in 2018-19 (5.27% of NGMR).[45]

New South Wales

Responsible Gambling Fund (RGF)

In New South Wales, the *Casino Control Act 1992* requires that the Sydney casino operator pay a responsible gambling levy of two per cent on gross gaming revenue.

The money generated by this levy is distributed by the NSW Responsible Gambling Fund (RGF) to support responsible gambling initiatives, including the provision of counselling and support services, awareness and education activities, and to conduct research.

The fund is overseen by Trustees, with the support of the Office of Liquor, Gaming & Racing in NSW, who make recommendations to the Minister for Gaming and Racing.

[44] NGMR is Net Gaming Machine Revenue as defined by the *Gaming Machine Act 2004.*
[45] ACT Gambling and Racing Commission (2019) *Community Contributions made by Gaming Machine Licensees 2018-19.*

The Responsible Gambling Fund distributes funds to a wide range of organisations to deliver problem gambling counselling and support services in NSW, including the following:

- 55 Gambling Help services in almost 250 locations across NSW;
- A multicultural problem gambling service, offering specialist assistance for people from culturally and linguistically diverse backgrounds;
- A dedicated women's gambling help service;
- Four Aboriginal specific Gambling Help services;
- 23 financial counselling services; and
- 24-hour national Gambling Help Online and telephone helpline services.

In 2018-19, $30 million has been committed from the RGF to support responsible gambling initiatives in New South Wales, of which $12,566,030 was distributed in counselling and treatment grants, and $441,855 distributed for research and other purposes.[46]

ClubGRANTS Scheme[47]

The ClubGRANTS scheme (formerly known as the Community Development and Support Expenditure or CDSE Scheme) is a shared State Government - Club Industry program, funded by a gaming machine tax rebate provided by the State Government to those registered clubs with gaming machine profits in excess of $1 million per annum.

Under the scheme, the marginal tax rate on clubs' earnings above $1 million can be decreased by up to 1.85% if a club contributes an equivalent amount on eligible community development and support projects.

There are two classes of expenditure eligible for rebate under the scheme:

Category 1 – expenditure on specific community welfare and social services, community development, community health services and employment assistance activities;

and

Category 2 – expenditure on other community development and support services.

To qualify for the total eligible rebate of 1.85% clubs must contribute at least 0.75% to Category 1 purposes, with the remainder allocated to Category 2 purposes (maximum 1.1%).

A third category was created from 1 September 2011, whereby a minimum of 0.40% of a club's gaming machine profits in excess of $1 million is allocated to the fund each tax year. This amount is automatically taken from the tax paid by clubs and transferred by the government on behalf of clubs into the fund.

Category 3 funding is pooled for state-wide purposes to support the development of large-scale sport, health and community infrastructure projects.

In 2018-19, a new scheme was implemented by the Office of Responsible Gambling whereby community benefit payments are administered through the Responsible Gambling Fund.[48]

[46] NSW Government, Department of Industry (2019) *Annual Report 2018-19*
[47] Liquor and Gaming NSW (2021) *ClubGRANTS Guidelines: Gaming Machine Tax Act 2001, August 2021.*
[48] NSW Department of Industry (2020), *Annual Report 2018-19.*

Northern Territory

Community Benefit Fund (CBF)

Under the *Gaming Control Act 1993*, the Director of Licensing must maintain a Community Benefit Fund to account for funds to be directed towards:

- promotion of community awareness and education in respect of problem gambling and provision of counselling, rehabilitation and support services for problem gamblers and their families;
- research into gambling activity, including the social and economic impact of gambling on individuals, families and the general community in the Northern Territory;
- funding of general community projects and services of benefit to communities throughout the Northern Territory; and
- fund management and administrative support.

The Fund receives a 10% levy of gross profits from electronic gaming machines in casinos and licensed hotels, unclaimed prizes paid to the Director of Licensing and proceeds from items forfeited under the *Act*. These funds are directed to community development projects and the amelioration of problem gambling.

In 2018-19 the Community Benefit Fund received $12.43 million from the levy on electronic gaming machines in casinos and licenced hotels in the Northern Territory.[49] A total of $11.98 million was distributed in grants.

Table 7-26 Northern Territory Community Benefit Grants 2018-19

Area	Total Contributions ($)
Gambling Amelioration Grants	$1,535,999
Gambling Research Grants	$772,040
Major Community Events Grants	$1,098,506
Major Community Grants	$6,840,757
Minor Community Organisation Grants	$1,714,989
Vehicle Gifts / Long Term Loans	$17,429
Total Grants Allocated	**$11,979,720**

Source: Northern Territory Government (2019) Community Benefit Fund Annual Report 2018-19

Licenced clubs operating gaming machines in the Northern Territory made contributions to the local community totalling $4.2 million in 2018-19, equal to 14% of net gaming machine revenue.[50]

[49] Northern Territory Government (2019) *Community Benefit Fund Annual Report 2018-19*.
[50] Ibid.

Queensland

Gambling Community Benefit Fund (GCBF)

On 20 May 2014, a Bill was passed to streamline and amalgamate the four community benefit funds previously operating in Queensland into one state-wide funding program, under the auspices of the Gambling Community Benefit Fund (GCBF). The GCBF replaced the Jupiters Casino Community Benefit Fund, Breakwater Island Casino Community Benefit Fund, Reef Hotel Casino Community Benefit Fund and the pre-existing Gambling Community Benefit Fund.[51]

Revenue for the GCBF is sourced from a percentage of the tax imposed on gambling operators, comprising lottery, wagering, keno and gaming machine operations. The funds are distributed to not-for-profit community groups on a quarterly basis, with the first grant application round under the new amalgamated program having commenced August 2014.

Grants are allocated to approved not-for-profit organisations to help provide services or activities that benefit the community. In 2018-19 more than $71 million dollars from the Gambling Community Benefit Fund was distributed to 3,355 approved applicants from local community organisations across Queensland.[52]

Health Services Levy

In Queensland hotels with gaming machines are required to pay a Health Services Levy, the percentage of which is based on monthly taxable metered wins over $100,000. The sole purpose of the fund it to benefit and support Queensland health services.

Table 7-27 Health Services Levy on Gaming Machines in Hotels

Monthly Taxable Metered Win ($)	Health Services Levy (% Monthly Taxable Metered Win)
$0 - $100,000	Nil
$100,001 - $140,000	3.5%
$140,001 - $180,000	5.50%
$180,001 - $220,000	7.50%
$220,001 - $260, 000	13.50%
> $260,000	20.00%

Source: Queensland Government, Office of Liquor and Gaming Regulation (2021) Fee and Charges 2021-22

Community Benefit Statement

In Queensland clubs with 51 or more gaming machines are required to submit a Community Benefit Statement to the Office of Liquor and Gaming Regulation as part of their annual reporting responsibilities.

The purpose of the Community Benefit Statement is to formally identify and recognise the nature and extent of contributions made by clubs to charitable, sporting, recreational and other community purposes and initiatives. Contributions of both a cash and non-cash nature are identified with dollar values.

In 2018 Queensland clubs contributed $47,529,004 in cash and $14,309,053 in non-cash contributions to community organisations – a total of $61,838,057.[53]

In 2019 Queensland clubs donated $48,150,239 in cash and $13,863,072 in non-cash contributions to community organisations – a combined total of $62,013,311.[54]

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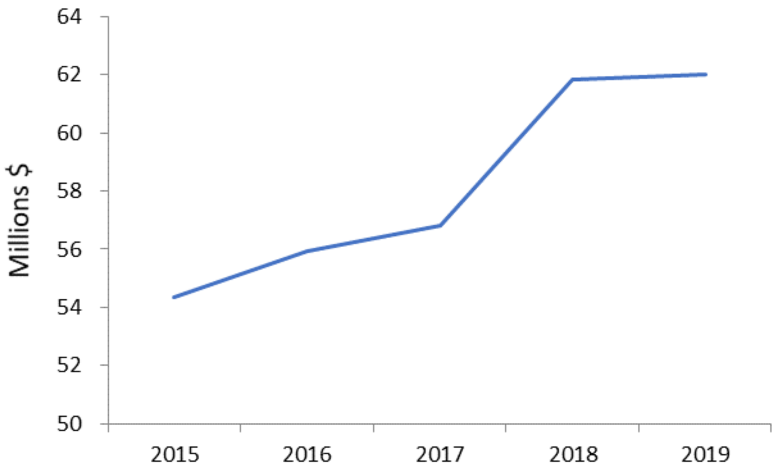
[51] Queensland Government, Department of Justice and Attorney- General (2014) *http://www.justice.qld.gov.au/corporate/sponsorships-and-grants/grants/community-benefit-funding-programs/bill-to-amalgamate-queensland-community-benefit-funds*
[52] Queensland Government, Office of Liquor and Gaming Regulation (2019) *2018-19 Statistical Report*.
[53] Queensland Government, Department of Justice and Attorney-General (2021) https://www.justice.qld.gov.au/publications-policies/reports/olgr-reports/cbf-statements (accessed September 2021).

Figure 7-4 Total Community Benefit Contributions by Queensland Clubs (2015-2019)



Source: Queensland Government, Department of Justice and Attorney-General, https://www.justice.qld.gov.au/publications-policies/reports/olgr-reports/cbf-statements (accessed September 2021)

South Australia

Gamblers Rehabilitation Fund (GRF)

The Gamblers Rehabilitation Fund (GRF) was established in 1994 to fund programs and initiatives which aim to minimise problem gambling and offer services to those affected by a gambling problem.

The GRF is a joint initiative, recurrently funded by contributions from the Australian Hotels Association (SA), Clubs SA, Adelaide Casino and the South Australian Government.

The GRF is administered by the Office for Problem Gambling within the Department of Human Services and supports Gambling Help Services, the 24-Hour Gambling Help Line, community education programs, research and evaluation, and administrative costs.

Over $6 million of funding was distributed by the GRF over the 2018-19 financial year.[55]

Tasmania

Community Support Levy (CSL)

The *Tasmanian Gaming Control Act 1993* requires a contribution of 4% of gross profit derived from gaming machines in hotels and clubs to be paid to the Community Support Levy (CSL).[56]

In addition, the *Act* requires 4% of Tasmanian monthly betting exchange commissions, derived from brokered wager events held in Australia, is paid to the CSL.[57]

Funds from the CSL are distributed in the following manner:-

- 25% via the Department of Communities, Sport and Recreation for the benefit of community sports and recreation clubs;
- 25% via the Gambling Support Program for the benefit of charitable organisations;
- 50% via the Gambling Support Program for the benefit of research, education, services and treatment in the area of problem gambling.

[54] Ibid.
[55] South Australian Government, Department of Human Services (2019) *2018-19 Annual Report*.
[56] Tasmanian Gaming Commission (2019) *Annual Report 2018-19*.
[57] Ibid.

In 2018-19, $4,179,878 was paid into the CSL from the operation of gaming machines in clubs and hotels.[58] A further $1,500,00 per annum from the CSL budget has been allocated to the Neighbourhood House Program.

Table 7-37 Community Support Levy Expenditure – Tasmania (2018-19)

Category	$
Gambling Support Services	$1,586,963
Charitable Organisations	$1,020,094
Sport and Recreation	$1,060,861
Total	**$4,179,878**

Source: Tasmanian Gaming Commission (2019) Annual Report 2018-19.

Victoria

Community Support Fund (CSF)

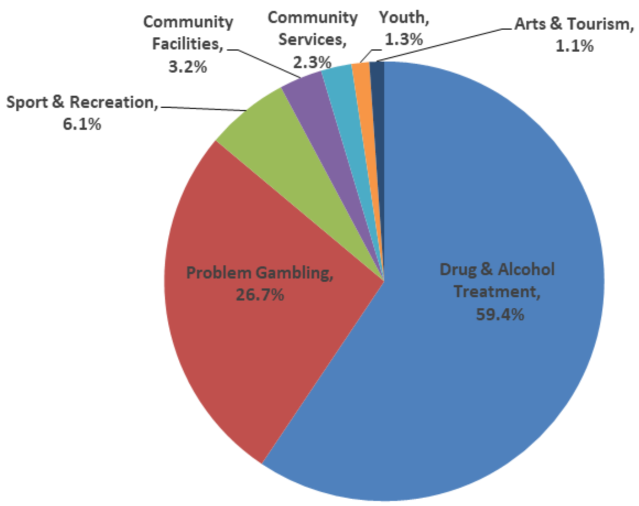
Established in 1991 by the Victorian Government and enforced by the *Gambling Regulation Act 2003*, the Community Support Fund (CSF) was created to direct a portion of gaming revenue back to projects that benefit the community.

The CSF receives funds generated from 8.33% of revenue from electronic gaming machines located in Victorian hotels.

In 2018-19, the CSF received $147.12 million in revenue from gaming machines in hotels. A further $0.5 million was received in interest and $0.12 million of receipts from forfeited winnings.[59] Total grant expenditure for the 2018-19 period was $143.06 million.

One day's revenue from the fund is paid to the Victorian Veterans Fund on 1 September each year. The remaining funds are then allocated to a variety of Government departments to support a range of community programs and projects.

Figure 7-5 Community Support Fund Grant Expenditure by Purpose 2018-19



Source: Victorian Department of Treasury and Finance https://www.dtf.vic.gov.au/community-support-fund/community-support-fund-financial-overview-2018-19 (accessed September 2021).

[58] Ibid.
[59] Victorian Department of Treasury and Finance https://www.dtf.vic.gov.au/community-support-fund/community-support-fund-financial-overview-2018-19 (accessed September 2021).

Table 7-28 Community Support Fund Expenditure – Victoria (2018-19)

Category	$
Drug & Alcohol Treatment	85,000,000
ANZAC Day Revenue to the Victorian Veterans Fund	397,932
Community Advancement Fund	1,009,246
Community Enhancement Developments	711,273
Community Facility Funding 2014-15	154,965
Community Facility Funding 2015-16	470,338
Community Sport and Recreation Infrastructure Developments	4,009,437
Victorian Responsible Gambling Foundation 2015-16 to 2018-19	16,574,386
Other	38,134,386
Total	**146,461,963**

Source: Victorian Department of Treasury and Finance (2019) Departmental grant expenditure by project in 2018-19.

Community Benefit Statement

In Victoria, a gaming venue operator with a club or racing club licence must lodge an annual audited Community Benefit Statement with the Victorian Commission for Gambling and Liquor Regulation (VCGLR).

The purpose of the Community Benefit Statement is to formally identify and recognise the work that clubs and club members have done for the wider local community.

Clubs are required to show that they contribute the equivalent of at least 8.33% of the venue's gaming revenue as a community benefit each financial year.[60]

For the 2018-19 financial year, the VCGLR reported a total figure of $273,732,000 was allocated for community purposes or activities.[61]

Western Australia

Problem Gambling Support Services Committee (PGSSC)

The Problem Gambling Support Services Committee was formed in 1995 to bring together gambling industry and government representatives to address issues associated with problem gambling in Western Australia.

Each member of the PGSSC makes a voluntary financial contribution which is held in a gambling support fund administered by the Department of Local Government, Sport and Cultural Industries.

As at 30 June 2019, members of the PGSSC include representatives from:

- Crown Perth
- Racing and Wagering Western Australia
- Lotterywest
- WA Bookmakers Association
- Department of Communities[62]

[60] Victorian Commission for Gambling and Liquor https://www.vcglr.vic.gov.au/gambling/gaming-venue-operator/understand-your-gaming-licence/your-obligations/community-benefit (accessed September 2021).
[61] Victorian Commission for Gambling and Liquor Regulation (2019) *Annual Report 2018-19*.
[62] Gaming and Wagering Commission of Western Australia (2019) *Annual Report 2018-19.*

Funds from the PGSSC are primarily used to provide gambling help counselling and support services, including:

- Problem Gambling Helpline – 24 hour helpline;
- Gambling Help WA – a face-to-face counselling service; and
- Gambling Help Online – online counselling.

Other areas of PGSSC funding cover gambling research, awareness campaigns and education resources, including the Gambleaware website.

A total $1,015,800 was allocated by the PGSSC in 2018-19.[63]

The Gaming Community Trust (GCT)

The Gaming Community Trust (GCT) was established in 2002 to provide advice and make recommendations to the Minister for Racing and Gaming on the distribution of funds derived from unclaimed gaming winnings for the benefit of the community.[64]

During the 2018-19 financial year, funding grants were distributed to the following community organisations:

- Showgrounds Community Men's Shed;
- Perth Rowing Club; and
- Feed the Little Children.

Lotterywest

The profits from the sale of lottery products in Western Australia are returned to the community in support of hospitals, the arts, sports and eligible not-for-profit community organizations.

The *Lotteries Commission Act 1990* mandates that 40% be allocated to the Hospital Fund, 5% to the Arts Lotteries Account and 5% to the Sports Lotteries Account. Funds are distributed to eligible organisations for charitable purposes and up to 5% reserved for the Perth International Arts Festival and the Western Australian commercial film industry.[65]

In 2018-19 Lotterywest provided $282 million worth of funding to the community.[66]

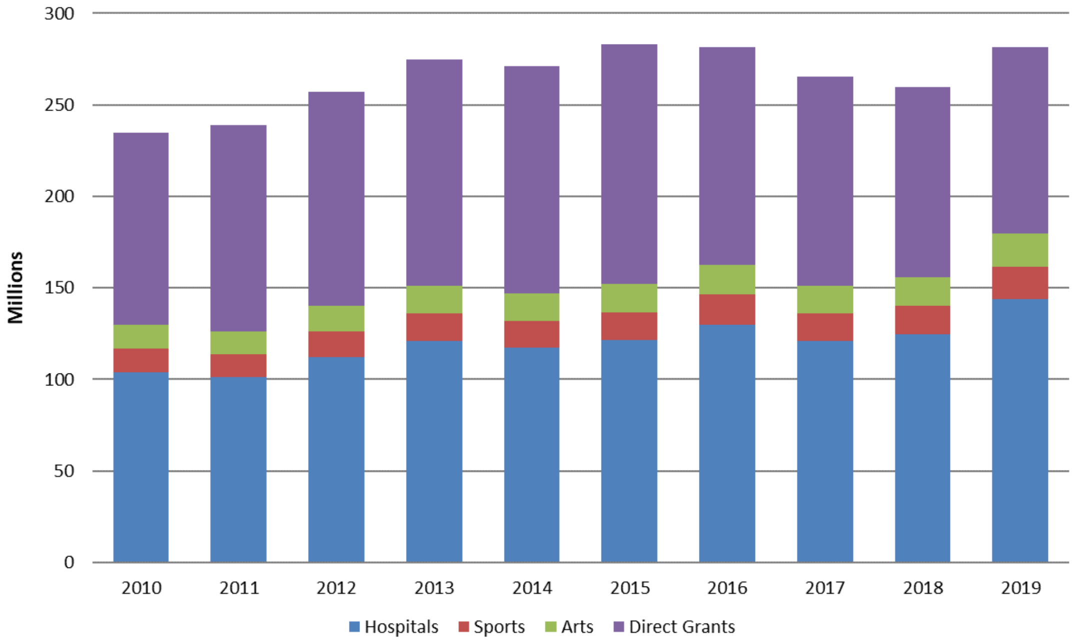
Table 7-29 Community funding by Lotterywest – Western Australia (2018-19)

Recipient	$ million
Hospitals and Health Services	$143.7
Culture and the Arts	$18
Sport and Recreation	$18
Direct Grants	$102
- Screenwest and Perth Festival $15.4 million	
- Protected Sustainable Ecosystems $5.6 million	
- Connected Cultural Experiences $15.4 million	
- Active Healthy People $1.9 million	
- Smart Innovative Society $3.5 million	
- Inclusive Thriving Community $60.2 million	
Total	**$281.7**

Source: Lotterywest (2019) Annual Report 2018-2019.

[63] Ibid.
[64] Gaming and Wagering Commission of Western Australia (2019) *Annual Report 2018-19.*
[65] Lotterywest (2019) *Annual Report 2018-19*.
[66] Lotterywest (2019) *Annual Report 2018-19.*

Figure 7-6 Lotterywest Grants Expenditure by Expense Type 2010-2019



Source: Lotterywest (2019) Annual Report 2018-19.