



A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

CHAPTER ONE

The Australian Gambling Environment

2019/20

A Guide to Australasia's Gambling Industries

Published and Prepared by the Australasian Gaming Council (AGC).



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Chapter 1

Australia's Gambling Environment

GAMBLING IN AUSTRALIA.....	1
DEFINITIONS	2
FORMS OF GAMBLING IN AUSTRALIA	3
GAMING IN AUSTRALIA	4
CASINOS.....	4
ELECTRONIC GAMING MACHINES.....	6
KENO	13
LOTTERIES, LOTTO AND INSTANT LOTTERIES	15
ONLINE/INTERACTIVE GAMBLING IN AUSTRALIA	17
RACING AND WAGERING IN AUSTRALIA	18
RACING	18
WAGERING.....	23
BETTING EXCHANGES	23
BOOKMAKERS	23
SPORTS BETTING	24
TOTALISATOR AGENCY BOARD (TAB/TOTE).....	25
LICENCE AND EXCLUSIVITY ARRANGEMENTS.....	27
CASINOS.....	27
KENO	29
LOTTERIES.....	30
WAGERING.....	31

Version Control

Version	Date	Explanation
2016-17	July 2019	2016-17 Edition. Updated with statistics from <i>Australian Gambling Statistics</i> , 34th Edition.
2017-18	January 2020	2017-18 Edition. Updated with statistics from <i>Australian Gambling Statistics</i> , 35th Edition.
2018-19	July 2021	2018-19 Edition. Updated with statistics from <i>Australian Gambling Statistics</i> , 36th Edition.
2019-20	January 2023	2018-20 Edition. Updated with statistics from <i>Australian Gambling Statistics</i> , 37th Edition

GAMBLING IN AUSTRALIA

Definitions

Gambling

Gambling is the placement of a wager or bet on the outcome of a future uncertain event. Gambling in this guide refers to gaming and wagering activities that are legally provided.¹

Gaming

Gaming refers to all legal forms of gambling other than wagering (i.e. race and sports betting), such as lotteries, Electronic Gaming Machines (EGMs), casino games, keno, poker and minor gaming (which is the collective name given to raffles, bingo and lucky envelopes etc...).²

Interactive Gambling/Gaming

Interactive gambling is a term used to describe gambling activities conducted via the internet. In Australia the *Interactive Gambling Act 2001* strictly prohibits the offer of gaming activities (e.g. casino games, EGMs) via the internet to Australians.³ An exception is made for the provision of wagering activities on racing and sports.

Lotteries/Instant Lotteries

Lotteries are conducted in Australia by both government and commercial operators. There are three components to a lottery – the purchase of a ticket, the draw and a prize. Lottery prizes are based on the total amounts wagered after deduction of a set percentage by the operator to cover costs. Lottery tickets are sold at various outlets around Australia – such as newsagents. The same operators may also conduct lotto and instant lottery.⁴

Instant lotteries, also known as scratch cards, “scratch-its” or “scratchies”, operate in the same manner as lotteries. Prizes, which are revealed by the player scratching the ticket, are paid on a set return to player based on the number of tickets in any set, the cost to purchase the tickets and the percentage retained by the operator to cover costs.⁵

Football pools was withdrawn from the lottery market on 23 June 2018.⁶

Race betting

Comprises legal betting with bookmakers and totalisators, both on and off-course, where bets are placed on the outcome of local, national or international horse and/or greyhound races.⁷

Social gaming

Social games are the activity or practice of playing an online game on a social media platform. While some social games may have gambling related themes (casino style games) others do not. These games typically operate on a freemium, free, paid or subscription model.⁸ Gambling games, in contrast, are licenced services offering people the possibility of placing a stake or bet with the chance of winning or losing money. Social games are not covered in this guide.

Sports betting

Sports betting is wagering on approved types of local, national or international sporting activities (other than horse and/or greyhound racing), whether on or off-course in person, via telephone or via the internet.⁹

Wagering

Wagering refers to all legal forms of gambling on racing and sporting events.¹⁰

¹ Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20* (37th edition).

² Ibid

³ The term 'via the internet' refers to sundry internet connected devices – including mobile devices.

⁴ Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20* (37th edition).

⁵ Ibid

⁶ Ibid

⁷ Ibid

⁸ For a more detailed definition and further information regarding social games see: <http://www.i-sga.org/about-social-games/>

⁹ Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20* (37th edition).

FORMS OF GAMBLING IN AUSTRALIA

Table 1-1 Forms of gambling in Australia by state/territory

Gambling Form	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Betting exchange	Tasmania's betting exchange (Betfair) surrendered its licence in November 2016. Betting exchange wagering is currently only undertaken in the Northern Territory.							
Casino gaming	✓	✓	✓	✓	✓	✓	✓	✓
Gaming machines	Hotels and Clubs only ¹¹	✓	✓	✓	✓	✓	✓	Casino only
Keno	✓	✓	✓	✓	✓	✓	✓	Casino only
Lotteries	✓	✓	✓	✓	✓	✓	✓	✓
Minor gaming	✓	✓	✓	✓	✓	✓	✓	✓
Online/Interactive gambling	Interactive gambling in Australia is governed by the <i>Interactive Gambling Act 2001</i> . The Act prohibits the offer of interactive gaming (online casinos, EGMs etc...) to Australian residents but makes an exception for wagering in the form of race and sports betting. Lotteries may also offer ticket sales online. Interactive gaming exists in the Northern Territory but is available only to customers overseas.							
Racing and betting	✓	✓	✓	✓	✓	✓	✓	✓
Sports betting	✓	✓	✓	✓	✓	✓	✓	✓

Source: Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20* (37th edition). Refer to *Australian Gambling Statistics Explanatory Notes* for further information. 2019-20 status verified by the AGC.

¹⁰ Ibid

¹¹ The ACT government has passed legislation (2 November 2017) that will allow the ACT Casino to acquire up to 200 EGMs and 60 Fully Automated Table Games (FATGs), under strict conditions, from within the existing state-wide cap. To date the casino does not offer EGMs.

GAMING IN AUSTRALIA

Casinos

Thirteen casinos operated throughout Australia in the period from 2019-20, many offering a number of other amenities alongside gaming opportunities including:

- hotel and accommodation facilities;
- cultural and entertainment facilities – such as theatres, cinemas and showrooms;
- recreational facilities - such as games arcades, mini-golf, ten-pin bowling, pools and gyms;
- business facilities - such as conference centres and meeting rooms; as well as
- fine/casual dining options, bars, bistros and retail shopping outlets.

The provision of gaming at Australian casinos is highly regulated. Comprehensive rules and fixed odds (approved by the relevant jurisdictional regulatory authorities) are in place.

Bets at casinos may be placed on various table games, fully and/or semi-automated table games, and electronic gaming machines (which are available at all casinos in Australia with the exception of Casino Canberra in the ACT¹²).

Some of the table game varieties available at casinos in Australia include Baccarat, Roulette, Blackjack, Sic Bo, Pai Gow, Poker and Big Wheel.

Some casinos may also provide outlets for race wagering and sports betting, keno and bingo.

Table 1-2 Number of casinos in Australia by state/territory

Location	Property Name	Number of casinos
Australian Capital Territory	Canberra	Casino Canberra
		1
New South Wales	Sydney	The Star Sydney
		Crown Sydney ¹³
		2
Northern Territory	Darwin	Mindil Beach Casino & Resort ¹⁴
	Alice Springs	Lasseters Casino
		2
Queensland¹⁵	Brisbane	Treasury Brisbane
	Cairns	The Reef Hotel Casino
	Gold Coast	The Star Gold Coast
	Townsville	The Ville Resort - Casino
		4
South Australia	Adelaide	SkyCity Adelaide
		1
Tasmania	Hobart	Wrest Point Casino
	Launceston	Country Club Casino
		2
Victoria	Melbourne	Crown Melbourne
		1
Western Australia	Perth	Crown Perth
		1
Total		14

¹² The ACT government has passed legislation (2 November 2017) that will allow the ACT Casino to acquire up to 200 EGMs and 60 Fully Automated Table Games (FATGs), under strict conditions, from within the existing state-wide cap. To date the casino does not offer EGMs.

¹³ On 8 July 2014, Liquor and Gaming NSW issued a restricted gaming licence to Crown Resorts Limited to operate a restricted gaming facility at Barangaroo South, Crown Sydney Hotel Resort (Crown Sydney). Crown Sydney, also referred to as One Barangaroo, was opened in December 2020 (excluding gambling operations). A provisional permit to open the gaming floors was issued in June 2022 and commenced operations in August 2022. Sydney Morning Herald (2022) *Crown finally opens its Sydney casino*, 8 August 2022.

¹⁴ The SKYCITY Entertainment Group sold the Darwin casino to Delaware North in 2018. On 4 April 2019, a share sale agreement in respect of SKYCITY Darwin Pty Ltd was formally completed, and Delaware North Northern Territory Gaming and Entertainment Pty Ltd (Delaware North) is now the owner of the Darwin Casino, trading as Mindil Beach Casino & Resort.

¹⁵ In July 2015 the *Destination Brisbane Consortium* was announced as the preferred proponent to develop and operate an integrated resort at Queen's Wharf Brisbane. Once complete the Treasury Brisbane casino will be repurposed.

Table 1-3 Estimated number of casino table games and EGMs in Australia (2019-20)

Please note that figures in the following table are a snapshot, current only for the period stated. Total EGM figures recorded are those reported as operational by the Queensland Government Statistician in the national statistical volume as at 30 June 2020.

Location	Venue	Tables	EGMs ¹⁶
Australian Capital Territory¹⁷	Casino Canberra	49	Nil
New South Wales	The Star Sydney	323	1,500
	Crown Sydney	160 ¹⁸	Nil
Northern Territory¹⁹	Mindil Beach Casino & Resort ²⁰	54	660
	Lasseters Casino ²¹	22	301
		76	961
Queensland²²	The Star Gold Coast	140	1,386
	Treasury Brisbane	78	1,632
	The Ville Resort - Casino	21	351
	The Reef Hotel Casino	37	454
		276	3,823²³
South Australia	SkyCity Adelaide	82 ²⁴	852 ²⁵
Tasmania	Wrest Point Casino	16	N/A
	Country Club Casino	12	N/A
		28²⁶	1,221²⁷
Victoria	Crown Melbourne	540 ²⁸	2,628
Western Australia	Crown Perth	350 ²⁹	2,483
Total		1,724	13,468

Source: Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

¹⁶ Operational EGMs as at 30 June 2020 as reported by Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

¹⁷ The ACT government has passed legislation (2 November 2017) that will allow the ACT Casino to acquire up to 200 EGMs and 60 Fully Automated Table Games (FATGs), under strict conditions, from within the existing state-wide cap. To date the casino does not offer EGMs.

¹⁸ Up to 70 additional automated table games are permitted. Sydney Morning Herald (2022) *Crown's Sydney casino set to open for gaming on August 8, 25 July 2022*.

¹⁹ Northern Territory Government (2021) *Director-General of Licensing Annual Report 2019-20*.

²⁰ The SKYCITY Entertainment Group sold the Darwin casino to Delaware North in 2018. On 4 April 2019, a share sale agreement in respect of SKYCITY Darwin Pty Ltd was formally completed, and Delaware North Northern Territory Gaming and Entertainment Pty Ltd (Delaware North) is now the owner of the Darwin Casino, trading as Mindil Beach Casino & Resort.

²¹ Iris Capital purchased Lasseter's Hotel Casino in April 2021. The Hotel Conversation (2021) *Lasseters Hotel Casino sold to Sam Arnaout Iris Capital for \$105m*, 21 April 2021.

²² Queensland Office of Liquor and Gaming Regulation (2021) *2019-20 Statistical Report*. Figures refer to operational rather than approved numbers.

²³ Data as at 29 February 2020. No electronic gaming machines were operating from March to June 2020 due to COVID-19 venue closures.

²⁴ SkyCity (2021) *Annual Report: Year Ended 30 June 2020*. Note: Amendments to the *Approved Licensing Agreement* for Casino Adelaide in February 2014 limit the maximum number of tables in operation at any one time to 200.

²⁵ In February 2014, the South Australian Government implemented reforms that will allow SkyCity Adelaide to increase the number of EGMs that can be operated from 995 to 1,500. To allow for the operation of any additional EGMs, the casino will be required to purchase additional entitlements through the Approved Trading Scheme.

²⁶ Tasmanian Government Department of Treasury and Finance, *Table Gaming Activities in Tasmanian Casinos*. Status as at 30 June 2021. All tables may not be in operation.

²⁷ Please note that Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)* reports a total of 1,221 operational EGMs in Tasmania's two casinos at 30 June 2020. This figure differs from the data available on the website of the Tasmanian Liquor and Gaming Commission which reports that the number of casino EGMs stands at 1,054. Owing to this discrepancy statistics are reported as published by the Queensland Government Statistician's Office which are referenced but are not differentiated by property.

²⁸ Crown Resorts Ltd (2020) *Annual Report 2020*. Please note these are approved rather than operational numbers.

²⁹ Crown Resorts Ltd (2020) *Annual Report 2020*. Please note these are approved rather than operational numbers.

Electronic Gaming Machines

All states and territories in Australia have Electronic Gaming Machines (also known as gaming machines, EGMs, poker machines or 'pokies') available at licensed venues (with the exception of Western Australia which permits EGMs only at the casino).

Gaming machines can be defined as a device designed for the playing of a game of chance that pays out money or tokens or registers a right to an amount of money to be paid.³⁰

Bets are placed on an EGM by selecting the lines to be played, the bet per line and then pushing a button that places machine reels in motion.

Prizes are paid out according to the position of symbols displayed when the machine reels halt.

All EGM game results are determined by a Random Number Generator (RNG). The style of game and game characteristics may vary somewhat between jurisdictions but are determined by state/territory government legislation and regulations.

Restrictions on EGM availability (including EGM caps) apply throughout Australian jurisdictions - whether on a state-wide, regional and/or venue basis.

Caps vary according to jurisdiction. Many have been accompanied by forfeiture requirements upon redistribution and/or other arrangements.

Table 1-4 State-Wide EGM Caps

Location	Clubs/Hotels	Casino(s)	Cap arrangements
Australian Capital Territory	4,000 (by 2020) ³¹	200 ³²	<p>Changes to the <i>Gaming Machine Act 2004</i> commenced on 31 August 2015 as part of the Government's EGM reform package. The changes introduced a phased reduction in the number of EGMs operating in the Territory from 5,022 to 4,000 or fewer by 2020.</p> <p>The ACT has undergone a process of surrender of authorisations to meet the reduced limit applicable by 2020.</p> <p>Number of authorisations in place:³³</p> <ul style="list-style-type: none"> - 4,989 as at 30 June 2016 - 4,985 as at 30 June 2017 - 4,947 as at 30 June 2018 - 4,001 as at 30 June 2019 - 3,997 as at 30 June 2020 - 3,864 as at 30 June 2021 - 3,853 as at 30 June 2022
New South Wales	97,500	1,500	<p>A state-wide cap of 99,000 electronic gaming machines is permitted in NSW, of which 97,500 are distributed amongst clubs and hotels, and 1,500 permitted at The Star casino.³⁴</p> <p>In March 2018 the NSW Government introduced a cap on existing gaming machine numbers in high-risk areas.³⁵</p>

³⁰ Adapted from the *Gaming Machines Act 2001* (NSW).

³¹ On 23 August 2018 the ACT Government tabled the Pathway to reduce the number of gaming machine authorisations in the ACT via a two-step approach of voluntary and compulsory surrender of gaming machine authorisations. <https://www.gamblingandracing.act.gov.au/industry/gaming-machines/pathway-to-4000-gaming-machines> (accessed 22 January 2020).

³² The ACT *Casino (Electronic Gaming) Act 2017* introduced legislation that would allow the Canberra Casino to operate up to 200 EGMs, subject to strict conditions, to be acquired through the existing trading scheme. To date the casino does not offer EGMs.

³³ ACT Government, Gambling and Racing Commission (2018) *Gaming Machine Reform Package: Trading Scheme Statistics* <https://www.gamblingandracing.act.gov.au/publications> (accessed 24 November 2022)

³⁴ NSW Government, *Gaming Machines Act 2001*.

³⁵ NSW Government, Minister Paul Toole, *Gaming machine numbers will not rise under new laws: Media Release*, 12 March 2018.

Location	Clubs/Hotels	Casino(s)	Cap arrangements
Northern Territory	1,699	No cap	<p>There is a limit on how many gaming machines are allowed to operate in pubs and clubs in the Northern Territory.</p> <p>On 16 November 2016 a territory-wide cap on machines of 1,852 was announced.</p> <p>On 1 June 2018 the Northern Territory Government announced a lowering of the cap on community gaming machines from 1,852 to 1,734.³⁶</p> <p>As at 2021, the maximum number allowed is 1,699.³⁷</p> <p>Gaming machines in the Territory's two casinos are outside the cap limit and not included in the total.³⁸</p>
Queensland	44,205	Limited by ratio	<p>A state-wide cap of 19,500 EGMs for hotels and a cap of 24,705 EGMs for clubs applies.³⁹</p> <p>Casinos are limited by ratio of 12 gaming machines per table game.⁴⁰</p> <p>The Queen's Wharf Brisbane (QWB) casino operator will have an entitlement to 2,500 gaming machines, although not all machines may be installed at opening.⁴¹</p>
South Australia	12,086	995 to 1,500	<p>A state-wide objective of 13,081 EGMs, across all sector venues, has been established for the State. Forfeiture requirements are in place to reduce the number of EGMs to achieve a cap of 12,086 electronic gaming machines in clubs and hotels in South Australia.⁴²</p> <p>Under a new licensing agreement, the SkyCity Adelaide casino will undertake an expansion that will allow it to increase the maximum number of EGMs it can operate from the current 995 to 1,500.</p> <p>The additional 505 entitlements granted to the casino are initially required to be purchased from within the existing Approved Trading Scheme.⁴³</p>
Tasmania ⁴⁴	2,500	1,180	<p>The maximum number of gaming machines that may be installed in Tasmania, across all premises, is 3,680, of which a maximum 2,500 are allocated to clubs and hotels.</p> <p>Under the <i>Tasmanian Future Gaming Market</i> policy, from 1 July 2023 the operation of electronic gaming machines in hotels and clubs will move from the current single gaming operator model to an individual venue operator model.</p> <p>As part of the government's new policy, the cap allocated to clubs and hotels will be reduced by 150 EGMs to a total 2,350 EGMs.⁴⁵</p>

³⁶ NT Government (2018) *Less Pokies and Tackling Gambling Related Harm: Media Statement*, Natasha Fyles, Attorney-General and Minister for Justice.

³⁷ NT Government (2021) <https://nt.gov.au/industry/gambling/licences/gaming-machines-in-clubs-pubs> (accessed November 2021)

³⁸ Ibid.

³⁹ Queensland Government, Office of Liquor and Gaming Regulation (2021) *2019-20 Statistical Report*.

⁴⁰ QLD Government, *Gaming Machine Regulation 2002*.

⁴¹ Queensland Government, Office of Liquor and Gaming Regulation (2021) *2019-20 Statistical Report*.

⁴² SA Government (2020) *Gambling Reform Update - Gaming Machine Licensing: Key Reforms for Gaming Licensees*.

⁴³ SA Government, Department of Treasury and Finance (2015) *Approved Licence Agreement (SkyCity Adelaide)*, Government of South Australia, Consumer and Business Services (2018) *The Approved Trading System Explained: Gaming Machines Act 1992*.

⁴⁴ Tasmanian Government, *Gaming Control Act 1993*.

⁴⁵ Tasmanian Department of Treasury and Finance, Liquor and Gaming Branch (2022) *Hotel and Club Changes The Future of Gaming in Tasmania*.

Location	Clubs/Hotels	Casino(s)	Cap arrangements
Victoria	27,372	2,628	<p>A state-wide cap of 30,000 gaming machines is mandated in Victoria of which 2,628 are allocated to the casino, and 27,372 are allocated to clubs and hotels.</p> <p>From 16 August 2022, new 20-year gaming machine entitlements begin for clubs and hotels.</p> <p>The post-2022 gaming machine entitlements were allocated to venue operators through a process undertaken in October 2018.</p> <p>This process resulted in the allocation of:</p> <p>13,211 club entitlements and 14,099 hotel entitlements.⁴⁶</p> <p>For EGM entitlements that take effect on or after 16 August 2022: 48.49% of those entitlements will be allocated to clubs; and 51.51% will be allocated to hotels.⁴⁷</p> <p>Further caps – including regional and municipal caps – and ownership restrictions also apply.⁴⁸</p>
Western Australia	N/A	2,500	Western Australia's casino has been allocated a cap of 2,500 electronic gaming machines.

Table 1-5 EGM cap arrangements in club venues by state/territory

Location	Year legalised	Cap arrangements
Australian Capital Territory	1976	No venue cap.
New South Wales	1956	Clubs must abide by a Gaming Machine Threshold (GMT) applicable at each venue. Clubs may apply to increase their allocated GMT but must satisfy associated regulatory requirements, including a local impact assessment.
Northern Territory	2014	55 EGMs per venue.
Queensland	1992	300 EGMs per venue.
South Australia	1994	40 EGMs per venue.
Tasmania	1997	40 EGMs per venue.
Victoria	1992	105 EGMs per venue.
Western Australia	N/A	Not applicable.

⁴⁶ Victorian Government (2022) <https://www.justice.vic.gov.au/safer-communities/gambling/gaming-machine-entitlements> (accessed January 2023)

⁴⁷ Victorian Government (2018) *Ministerial Order: Number of Gaming Machine Entitlements* Victorian Government Gazette No. S 330, Monday 9 July 2018.

⁴⁸ Regional caps were the first introduced in 2001 and there are currently 25 purpose-defined regions with specific caps. Municipal limits have been calculated using the 2017 adult population, with the municipal limit set in most cases at 10 gaming machine entitlements per 1,000 adults. There are exceptions for the Melbourne CBD, Southbank and Docklands areas. https://www.vcqlr.vic.gov.au/gambling/gaming-venue-operator/understand-your-gaming-licence/caps-and-limits?_cf_chl_jschl_tk=__pmd_78a2ebef55703af96be10522c06e2eae7475582e-1627405118-0-qgNtZGzNAjicnBsZQIQ (accessed July 2021)

Table 1-6 EGM cap arrangements in hotel venues by state/territory

Location	Year legalised	Cap arrangements
Australian Capital Territory	1988	Taverns in the ACT are allowed a maximum of 2 Class B (draw poker) gaming machines. Hotels with 12 or more units of accommodation are allowed a maximum of 10 Class B gaming machines, while hotels with less than 12 units of accommodation are allowed a maximum of 2 Class B gaming machines.
New South Wales	1992	30 EGMs per venue.
Northern Territory	2014	20 EGMs per venue.
Queensland	2001	45 EGMs per venue.
South Australia	1994	40 EGMs per venue
Tasmania	1997	30 EGMs per venue.
Victoria	1992	105 EGMs per venue.
Western Australia	N/A	Not applicable.

Table 1-7 Estimated number of venues with EGMs in Australia (2019-20)

Location	Hotels	Clubs	Casino(s)	Total
Australian Capital Territory ⁴⁹	5	45	0	50
New South Wales ⁵⁰	1,390	1,102	1	2,493
Northern Territory ⁵¹	46	22	2	70
Queensland ⁵²	707	386	4	1,097
South Australia ⁵³	451	44	1	496
Tasmania ^{54 55}	87	6	2	95
Victoria ⁵⁶	257	235	1	493
Western Australia	N/A	N/A	1	1
Total	2,943	1,840	12	4,795

Note: Refers to *operational* gaming sites

Sources: ACT Gambling and Racing Commission, Licencing NT, Queensland Government Office of Liquor and Gaming, SA Department of Consumer and Business Services, Tasmanian Liquor and Gaming Commission, Victorian Commission for Gambling and Liquor Regulation.

Table 1-8 Estimated number of EGMs in Australia by venue type (2019-20)⁵⁷

Location	Hotels	Clubs	Casino(s)	Total
Australian Capital Territory	30	3,818	N/A ⁵⁸	3,848
New South Wales	22,530	67,645	1,500	91,675
Northern Territory	640	743	961	2,344
Queensland ⁵⁹	19,127	21,968	3,823	44,918
South Australia	10,532	1,136	852	12,520
Tasmania ⁶⁰	2,203	97	1,221	3,521
Victoria	13,598	12,814	2,628	29,040
Western Australia	N/A	N/A	2,483 ⁶¹	2,483
Total	68,660	108,221	13,468	190,349

Source: Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

⁴⁹ ACT Gambling and Racing Commission (2020) *Annual Report 2019-20*

⁵⁰ Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information. Figures as at 30 June 2020.

⁵¹ Northern Territory Government (2020) *Licencing NT Annual Report 2019-20*.

⁵² Queensland Government, Office of Liquor and Gaming Regulation (2020) *19-20 Statistical Report*.

⁵³ South Australian Department of Consumer and Business Services, *Gaming Machine Licence Statistics 2019-20 Qtr 4*.

⁵⁴ Tasmanian Liquor and Gaming Commission (2020) *Annual Report 2019-20*, as at 30 June 2020.

⁵⁵ The data excludes the two Spirit of Tasmania licences as gaming operations have ceased aboard both vessels.

⁵⁶ <https://www.treasury.tas.gov.au/liquor-and-gaming/publications-and-research/gambling-industry-data/gaming-and-wagering-industry-data> (accessed February 2023)

⁵⁷ Victorian Commission for Gambling and Liquor Regulation (2020) *Current Gaming Expenditure by Venue 2019-20*. Figures as at 30 June 2020.

⁵⁸ Operational EGMs as at 30 June 2020 as reported by Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

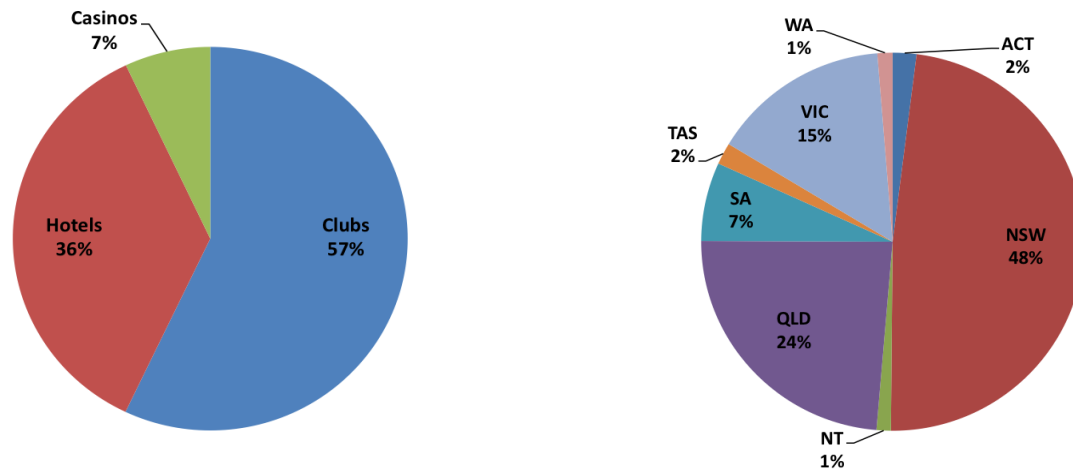
⁵⁹ The *Casino (Electronic Gaming) Act 2017* has introduced legislation that would allow the casino to operate up to 200 EGMs, to be acquired through the existing trading scheme. To date the casino does not offer EGMs.

⁶⁰ Data as at 29 February 2020. No electronic gaming machines were operating from March to June 2020 due to COVID-19 venue closures.

⁶¹ The data excludes the two Spirit of Tasmania licences as gaming operations have ceased aboard both vessels.

⁶² <https://www.treasury.tas.gov.au/liquor-and-gaming/publications-and-research/gambling-industry-data/gaming-and-wagering-industry-data> (accessed February 2023)

⁶³ In December 2012 Crown Perth received approval for 500 additional gaming machines (to be phased in at 100 machines per year over five years) and 100 additional tables (to be phased in at 25 tables per year over four years), which has taken the total number of gaming machines to a maximum allowable of up to 2,500 in 2018.

Figure 1-1 Estimated EGM distribution in Australia by venue type and state/territory (2019-20)**Australian EGM distribution by venue type****Australian EGM distribution by state/territory**

Source: Queensland Government Statistician's Office, Queensland Treasury (2022) Australian Gambling Statistics 1994-95 to 2019-20 (37th edition). Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

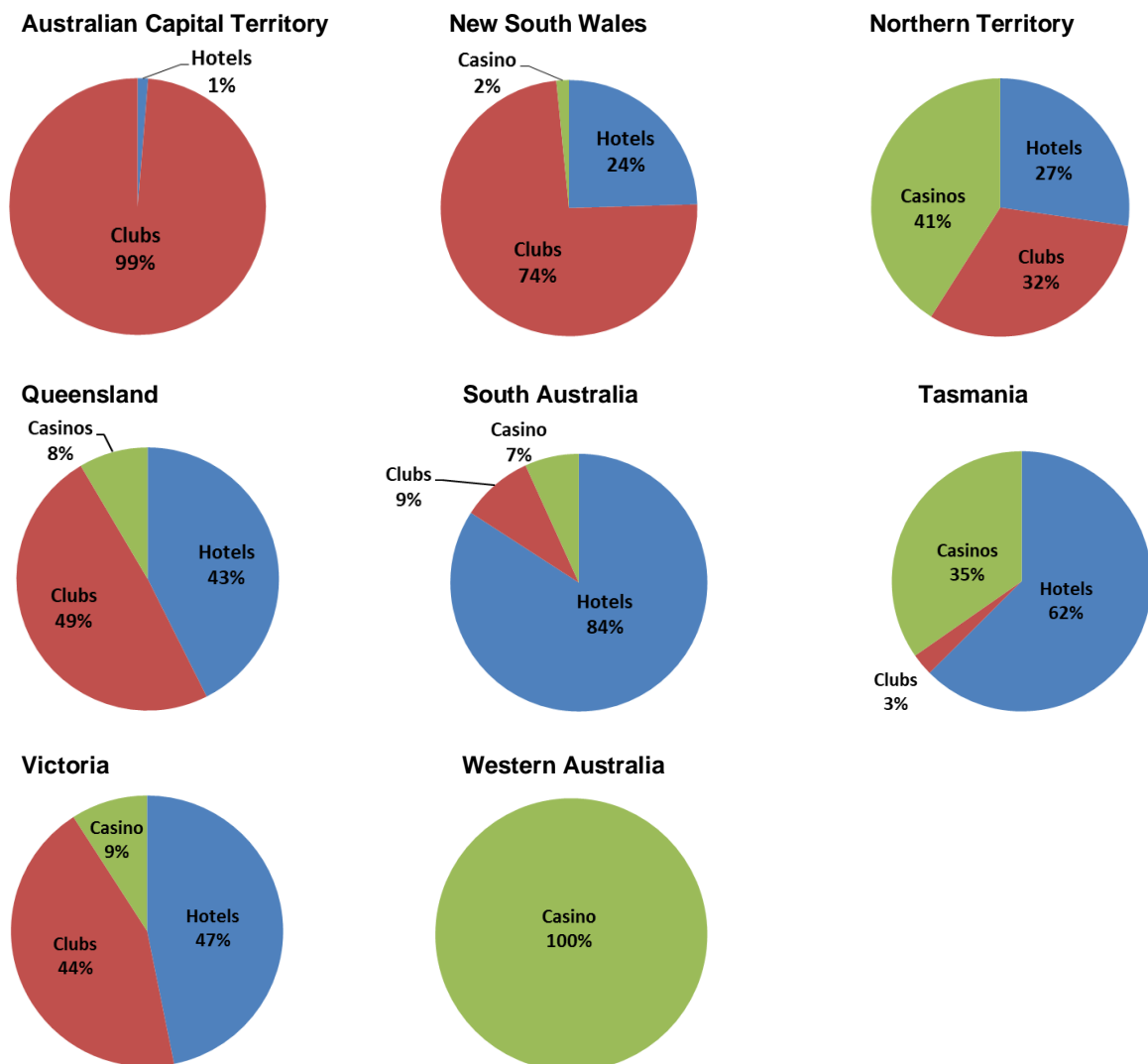
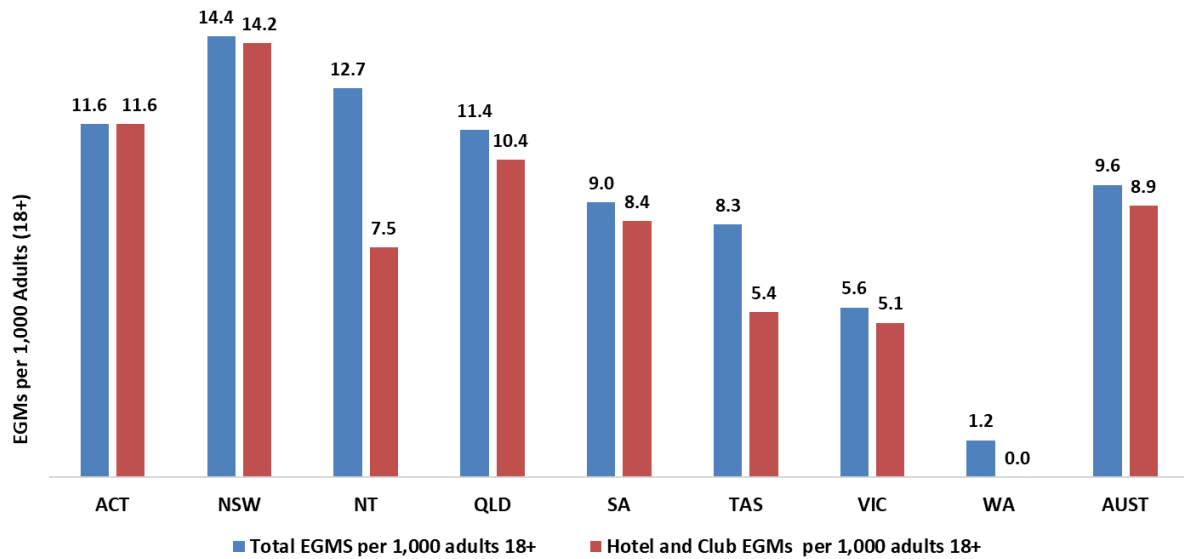
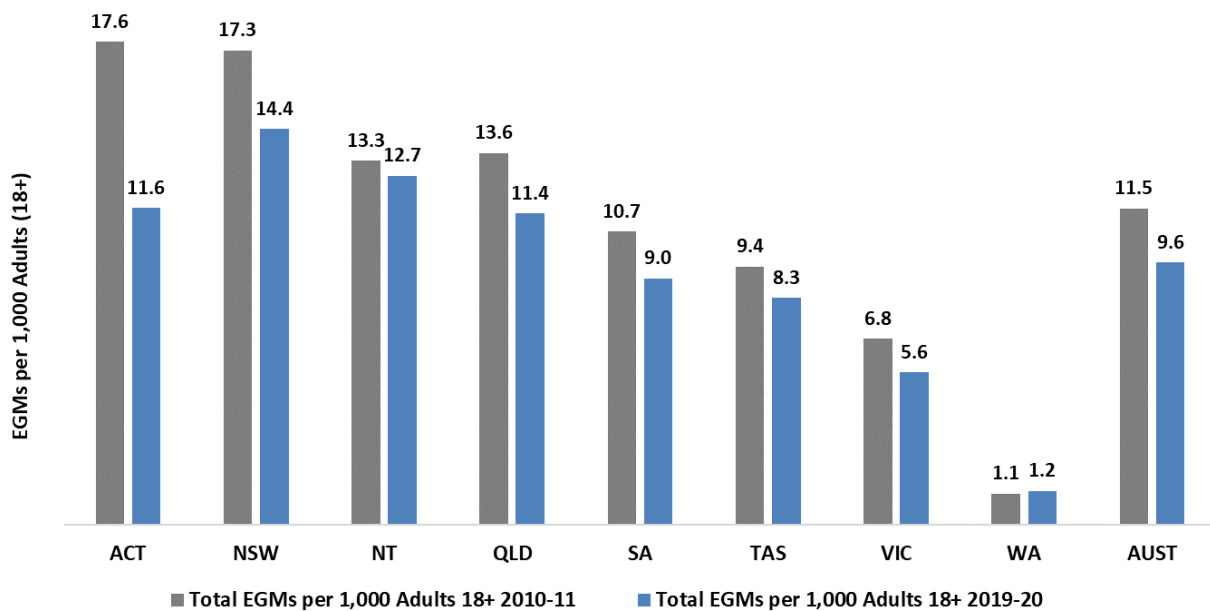
Figure 1-2 Estimated EGM Distribution within Australian States/Territories (2019-20)

Figure 1-3 Estimated EGMs per 1,000 adults (18+) in Australia (2019-20)



Source: Queensland Government Statistician's Office, Queensland Treasury (2022) Australian Gambling Statistics 1994-95 to 2019-20 (37th edition). Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

Figure 1-4 Comparison of Estimated EGMs per 1,000 adults (18+) in Australia 2010-11 and 2019-20



Source: Queensland Government Statistician's Office, Queensland Treasury (2022) Australian Gambling Statistics 1994-95 to 2019-20 (37th edition). Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

Keno

Keno is a game where a player wagers that their chosen numbers match any of the 20 numbers randomly selected, via a computer system or a ball draw device, from a group of 80 numbers. Keno has a fixed pay scale. The pay-out for each wager is established by rules and is independent of the total wagers made on the game.⁶²

A computerised Keno system operates in clubs/hotels in a number of Australian jurisdictions and Keno is also available at a number of casinos. In Western Australia the Crown Perth casino is the only Keno provider in the state. Keno games may also be offered online or via lottery and TAB providers (e.g. SA Lotteries offers Keno at its lottery outlets and at selected SA TAB outlets).

Table 1-9 Estimated number of Keno outlets (land-based) in Australia by state/territory (2019-20)

Location	Keno Outlets
Australian Capital Territory	34
New South Wales	1,768
Northern Territory	68 ⁶³
Queensland	1,047
South Australia	614 ⁶⁴
Tasmania	152 ⁶⁵
Victoria	540
Western Australia	1
Total	4,223

Source: Tabcorp Holdings Limited, Northern Territory Government - Licensing, Lotteries Commission of South Australia, Tasmanian Government Department of Treasury and Finance, Crown Perth.

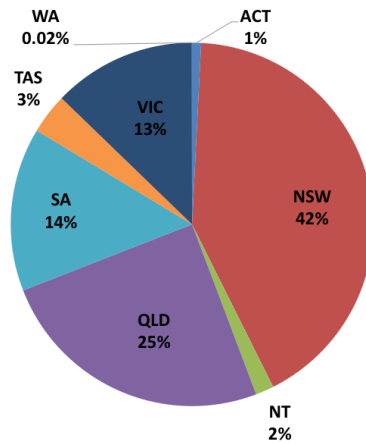
⁶² Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

⁶³ Northern Territory Government, (2021) *Licensing NT Annual Report 2019-20*.

⁶⁴ Government of South Australia (2020) *Lotteries Commission of South Australia 2019-20 Annual Report*.

⁶⁵ Tasmanian Government, Department of Treasury and Finance, Liquor and Gaming, <http://www.treasury.tas.gov.au/liquor-and-gaming/legislation-and-data/gambling-industry-data/gaming-and-wagering-industry-data> (status as accessed on November 2022).

Figure 1-5 **Estimated Keno outlet distribution (land-based) in Australia by state/territory 2019-20**



Source: Tabcorp Holdings Limited, Northern Territory Government - Licensing, Lotteries Commission of South Australia, Tasmanian Government Department of Treasury and Finance, Crown Perth.

Lotteries, Lotto and Instant Lotteries

Lotteries are conducted in Australia by both government and commercial operators although over recent years there has been a trend towards the privatisation of previously state-run lottery operations with Western Australia hosting the only remaining state-run lottery.

There are three components to a lottery; the purchase of a ticket, the draw and the prize. A person whose ticket is selected in a lottery wins a prize based on the total amounts wagered after deduction of a set percentage by the operator to cover costs.

Lottery operators may also conduct lotto and instant lottery – and in some states, such as South Australia, Keno.

Lotto players select any six numbers from 1-45 in anticipation that their chosen numbers will be among eight subsequently drawn at random. Players win when their selected numbers match those randomly drawn in a set combination.

There are a variety of lotto games available in Australia, some common product titles including TattsLotto, Gold Lotto, Lotto, X-Lotto or Powerball (depending on the jurisdiction).

Instant lotteries are also known as scratch tickets, scratch-its or 'scratchies'. Prizes in the instant lottery are paid on a set return to player based on the number of tickets in a set, the cost to purchase a ticket and a set percentage retained by the operator to cover costs.

Although lottery licensing regimes are state-based, Australia has a number of lottery games that may also be operated as a bloc - where games are conducted nationally, pooling entries and winnings.

Lottery providers in Australia⁶⁶

Lottery, lotto and instant lottery tickets are commonly sold at stand-alone stores or through agencies – such as newsagents and convenience outlets. Lottery products are also made available online and via mobile applications.

Tatts Group Ltd was once the largest lottery operator in Australia with licences in all states and territories of Australia, with the exception of Western Australia.

Following the combination of Tatts Group Ltd and Tabcorp Holdings Ltd on 22 December 2017, Tabcorp, under the umbrella brand "the Lott", was licenced to operate lotteries in the following states and territories: Australian Capital Territory (in perpetuity) New South Wales (to 2050), the Northern Territory (to 2032), Queensland (to 2072), South Australia (to 2052), Tasmania (to 2025)⁶⁷ and Victoria (to 2028)⁶⁸.

The Lott was originally created in 2016 by Tatts Group to encompass all its jurisdictional lottery brands (including Golden Casket, NSW Lotteries, Tatts, TattsLotto, SA Lotteries and Tatts NT) under a single entity.

The Lott's game brands include TattsLotto, Powerball, Oz Lotto, Set for Life, Lucky Lotteries and Instant Scratch-Its.

In 2022 The Lottery Corporation™ was created following a demerger by Tabcorp and is now home to The Lott and Keno brands, effective from 23 May 2022.⁶⁹

The West Australian lottery, trading as Lotterywest, is currently the only government operated lottery entity in Australia and was initially constituted under the *WA Lotteries (Control) Act 1954*.

Lotterywest now operates under the *WA Lotteries Commission Act 1990*, with profits from the lottery operation benefitting WA Health, Sports, the Arts and other eligible organisations.⁷⁰

⁶⁶ Australian Competition Tribunal (2017) *Proposed acquisition of Tatts Group Limited by Tabcorp Holdings Limited: Tatts Group Limited Statement*, 8 March 2017.

⁶⁷ Tasmanian lotteries operate under renewable five year permits.

⁶⁸ Tabcorp Holdings Limited (2020) *Annual Report 2020*.

⁶⁹ <https://www.thelotterycorporation.com/> (accessed February 2023)

⁷⁰ Lotterywest (2020) *Lotterywest Annual Report 2019-20*.

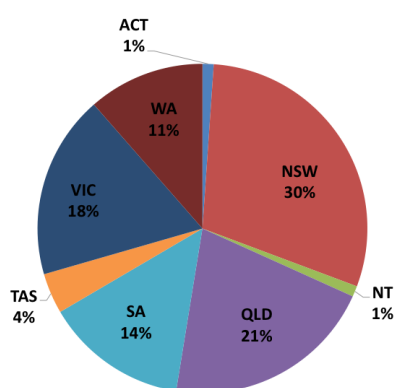
Table 1-10 Lottery/instant lottery providers in Australia by state/territory⁷¹

Location	Licensee (Brand)
Australian Capital Territory	The Lottery Corporation (The Lott – NSW Lotteries)
New South Wales	The Lottery Corporation (The Lott – NSW Lotteries)
Northern Territory	The Lottery Corporation (The Lott – Tattersall's Sweeps & Golden Casket)
Queensland	The Lottery Corporation (The Lott – Golden Casket)
South Australia	The Lottery Corporation (The Lott – Tatts Lotteries SA)
Tasmania	The Lottery Corporation (The Lott – Tattersall's Sweeps & Golden Casket)
Victoria	The Lottery Corporation (The Lott – Tattersall's Sweeps)
Western Australia	Lotterywest

Lottery Outlets in Australia (Land-Based)**Table 1-11 Estimated number of lottery/instant lottery outlets (land-based) in Australia by state/territory (2019-20)**

Location	Lottery Outlets
Australian Capital Territory	48
New South Wales	1,297
Northern Territory	46
Queensland	911
South Australia	613
Tasmania	174
Victoria	790
Western Australia	501 ⁷²
Total	4,380

Source: Tabcorp Holdings Limited, Lotterywest.

Figure 1-6 Estimated lottery and instant lottery land-based outlet distribution in Australia by state/territory (2019-20)

Source: Tabcorp Holdings Limited, Lotterywest

⁷¹ On the 19 October 2016 the proposed combination of Tabcorp Holdings Ltd and Tatts Group Ltd was announced. On the 22nd December 2017 Tabcorp officially combined with Tatts. *Tabcorp Annual Reports 2017 and 2018*.

⁷² Lotterywest (2020) *Lotterywest Annual Report 2019-20*.

ONLINE/INTERACTIVE GAMBLING IN AUSTRALIA

Interactive gambling (also commonly termed Internet or online gambling) can be defined as gambling on activities conducted via the Internet and is governed in Australia by the *Interactive Gambling Act 2001* – which is Commonwealth, rather than state/territory, legislation.

Interactive gambling is a broad term and can include various forms of remote gambling generally conducted via digital means (such as digital television or mobile gambling platforms).

The *Interactive Gambling Act 2001* prohibits the offer of interactive gambling services to Australians however it contains an exception for wagering in the form of racing, sports-betting and lotteries.

The provision of internet casino gaming (such as poker, blackjack and roulette) and online EGM gaming to Australians remains strictly prohibited.

The [Federal Government Department of Communications](#)⁷³ and the [Australian Communications and Media Authority \(ACMA\)](#) provide information about online gambling services, prohibited content and resources for consumers in Australia.

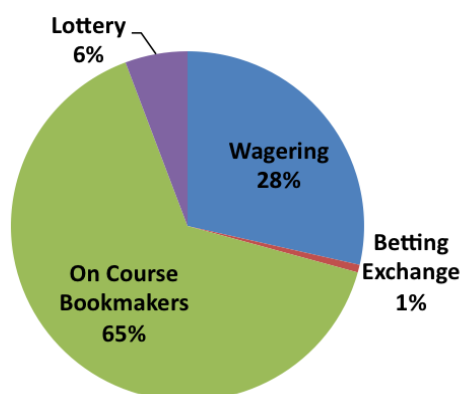
A list of licensed online wagering providers (TABs and corporate bookmakers), Betting Exchange and on-course bookmakers, registered to offer their services online, is available on the website of the [Australian Communications and Media Authority \(ACMA\)](#).

Table 1-12 Licensed Online Gambling Providers in Australia by Regulatory Jurisdiction⁷⁴

Location	Wagering ⁷⁵	On Course Bookmakers	Betting Exchange ⁷⁶	Lotteries	Total
Australian Capital Territory	1	0	0	1	2
New South Wales	4	31	0	1	36
Northern Territory	29	0	1	1	31
Queensland	1	0	0	1	2
South Australia	1	4	0	1	6
Tasmania	1	0	0	1	2
Victoria	2	35	0	1	38
Western Australia	1	21	0	1	23
Total	40	91	1	8	140

Source: Australian Communications and Media Authority (ACMA), Tabcorp Holdings Ltd, Lotterywest.

Figure 1-7 Legal Online Gambling Providers in Australia by Service Type⁷⁷



Source: Australian Communications and Media Authority (ACMA), Tabcorp Holdings Ltd, Lotterywest.

⁷³ Federal Government Department of Infrastructure, Transport, Regional Development and Communications.

⁷⁴ Current at July 2021.

⁷⁵ Includes online TABs and corporate bookmakers.

⁷⁶ The betting exchange Betfair moved to the Northern Territory licensing regime in September 2016 after betting exchange platforms were legalised by the NT Government in April 2016.

⁷⁷ Current at July 2021.

RACING AND WAGERING IN AUSTRALIA

Racing

Race betting on horse and greyhound races with bookmakers and totalisators, at racecourses and off-course is legal in Australia.⁷⁸

Betting on the outcome of horse races was one of the first legal gambling activities in Australia. By the mid 1800's horse racing was a popular recreational activity and the first Melbourne Cup was run in 1861. Today the Australian thoroughbred racing industry is second in size only to that of the United States.

Thoroughbred Racing

Table 1-13 **Number of thoroughbred race clubs, tracks, meetings and races in Australia by state/territory (2019-20)**

Location	Clubs ⁷⁹	Racetracks ⁸⁰	Meetings	Total Races
Australian Capital Territory	1	2	23	184
New South Wales	129	97	729	5,313
Northern Territory	5	3	67	396
Queensland	117	81	620	4,401
South Australia	25	21	178	1,391
Tasmania	4	5	58	460
Victoria	69	67	540	4,367
Western Australia	37	31	270	2,097
Total	387	307	2,485	18,609

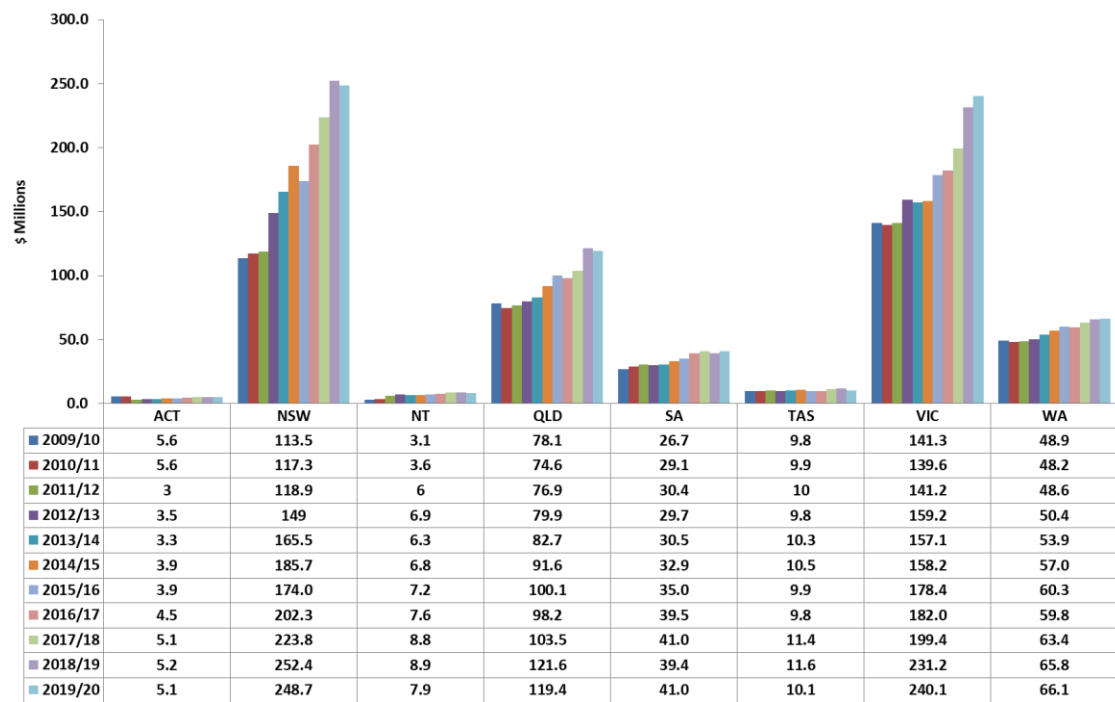
Source: *Racing Australia (2020) Fact Book 2019-20*.

⁷⁸ Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

⁷⁹ Total reflects number of clubs that conducted a meeting during the season.

⁸⁰ Total reflects number of unique racetracks that conducted a meeting during the season.

Figure 1-8 Thoroughbred prize money (\$ millions) in Australia by state/territory (2009-10 to 2019-20)



Source: Racing Australia (2020) Fact Book 2019-20.

*Harness Racing***Table 1-14** **Number of harness racing tracks, meetings and races in Australia by state/territory (2019-20)⁸¹**

Location	Racetracks	Meetings	Races
Australian Capital Territory⁸²	N/A	N/A	N/A
New South Wales	25	478	3,874
Northern Territory⁸³	N/A	N/A	N/A
Queensland	4	292	2,518
South Australia	8	125	921
Tasmania⁸⁴	8	76	566
Victoria	27	445	3,689
Western Australia	12	259	2,152
Total	84	1,675	13,720

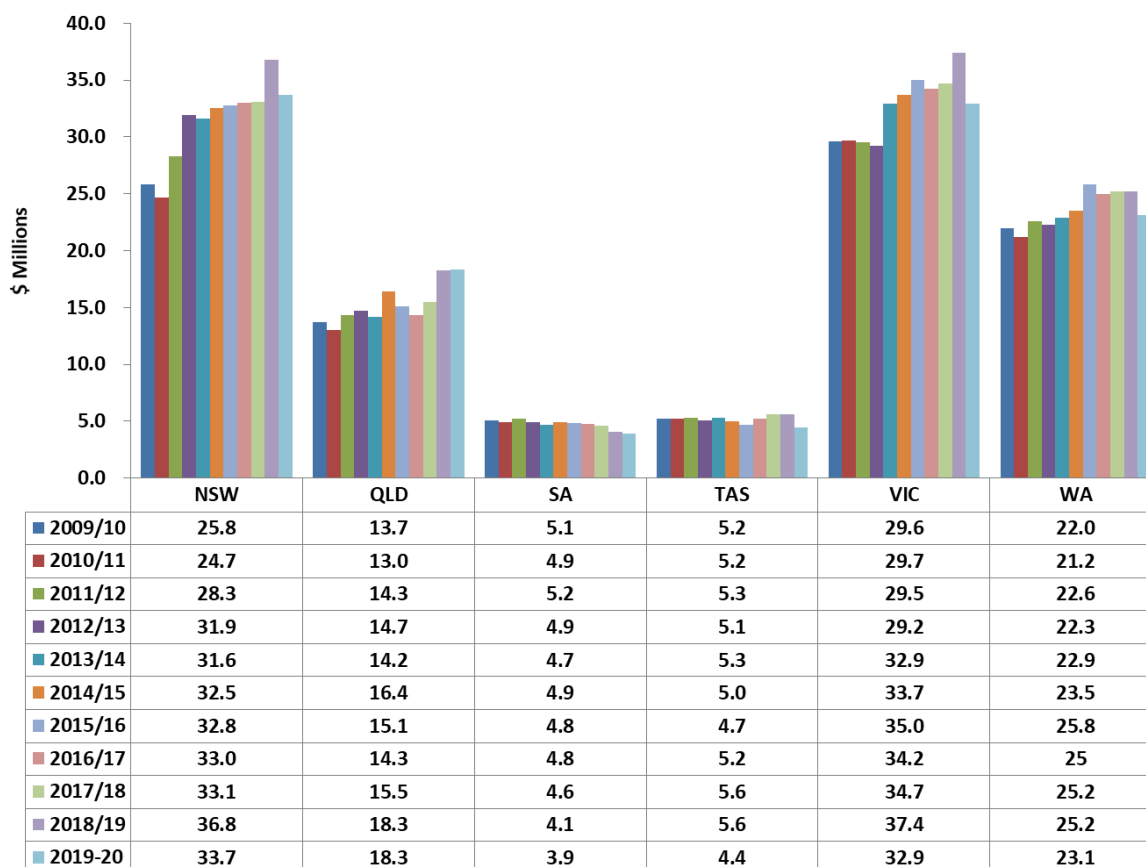
Source: *Harness Racing Australia, Annual On-Line National Stakemoney Statistics, 2019-20.*

⁸¹ *Harness Racing Australia Annual Online Stakemoney Statistics.* Please note that Harness Racing Australia provides stakemoney and racing statistics on a tracks basis rather than on a clubs basis.

⁸² No information available.

⁸³ No information available.

⁸⁴ Tasracing, after consultation with the Industry Group, have determined that Trotting races will no longer be included as part of the Tasmanian program from 1 October 2021. <https://tasracingcorporate.com.au/2021/04/01/trotting-to-cease-in-tasmania/> (accessed July 2021)

Figure 1-9 Harness racing total stakemoney (\$ millions) in Australia by state/territory (2009-10 to 2019-20)

Source: Harness Racing Australia, Annual On-Line National Stakemoney Statistics, 2019-20.

Greyhound Racing

Table 1-15 Number of greyhound racing clubs, meetings and races in Australia by state/territory (2019-20)

Location	Clubs	Meetings	Races ⁸⁵
Australian Capital Territory ⁸⁶	1	N/A	N/A
New South Wales	32	1,103	10,890
Northern Territory	1	50 ⁸⁷	N/A
Queensland	6	575	5,893
South Australia	5	400	4,393
Tasmania	3	130	1,252
Victoria	13	1,198	N/A
Western Australia	3	328	3,731
Total	64	3,784	N/A

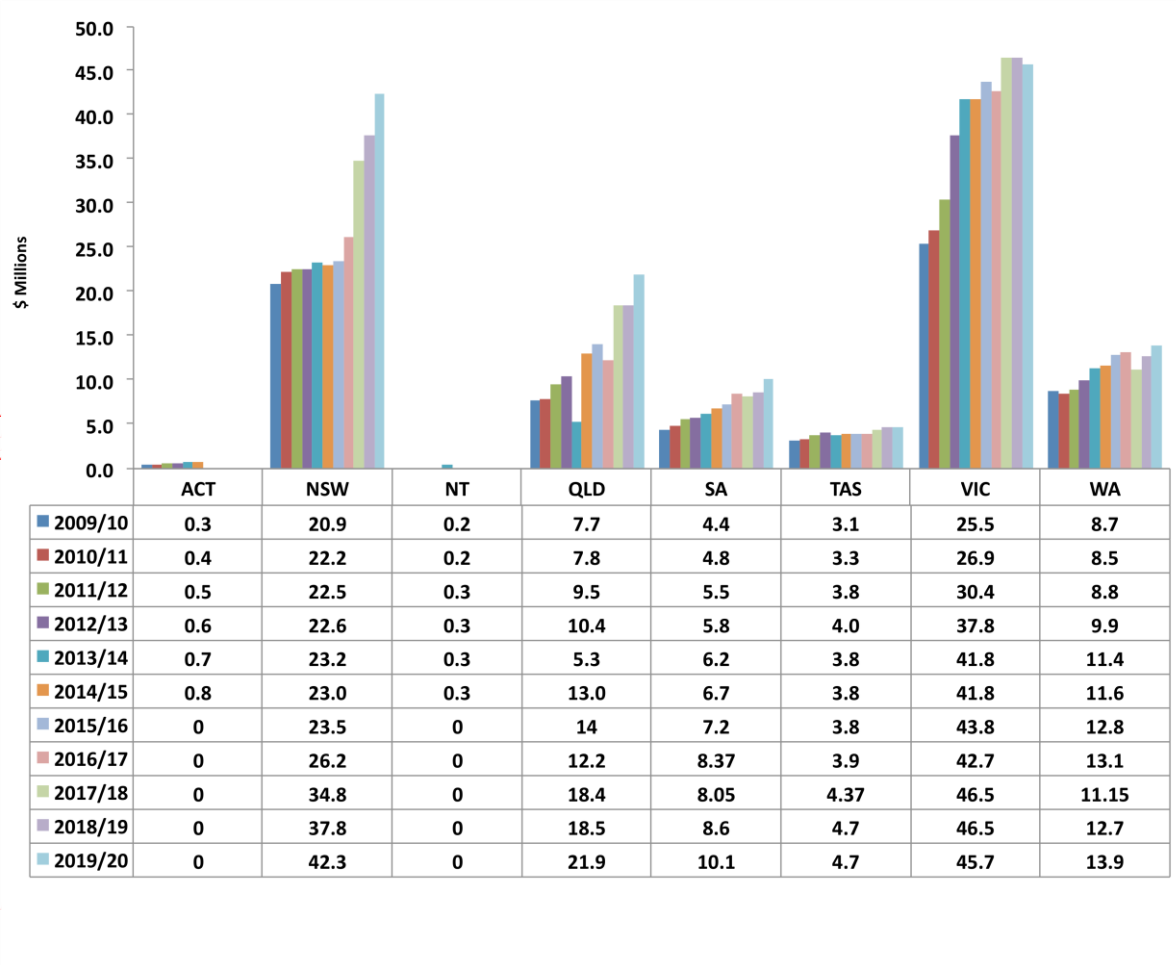
Source: GRNSW Annual Report 2020, Darwin Greyhound Association, GRSA Annual Report 2020, Tasracing Annual Report 2020, Racing Queensland Annual Report 2019-20, GRV Annual Report 2019-20, WAGRA Annual Report 2019-20.

⁸⁵ Figures not available for the NT, SA and Victoria.

⁸⁶ Figures not available for the ACT. The ACT Legislative Assembly passed laws to prohibit the racing and trialling of greyhounds in the ACT from 30 April 2018. The Canberra Greyhound Racing Club (CGRC) is still active using their Symonston track as a training facility but the club races at Goulburn in NSW. <https://www.act.gov.au/greyhound> (accessed July 2021).

⁸⁷ Approximate figure only. Darwin Greyhounds racing at Winnellie Park are conducted on a weekly basis.

Figure 1-10 Greyhound racing stakemoney paid (\$ millions) in Australia by state/territory (2009-10 to 2019-20)⁸⁸



⁸⁸ Figures not available for the NT.

Wagering

Betting Exchanges

Betting exchanges offer a market place for gamblers to trade wagers and bet against each other (peer to peer wagering platform) rather than against a bookmaker. The betting exchange then matches participant wagers and earns revenue by charging a commission on net winning positions on a particular market.

Betfair is the only licensed betting exchange in Australia (licensed in Tasmania from November 2005 until September 2016 and thereafter in the Northern Territory) and operates nationally.

Betfair customers pay a Betfair Commission. Each market bet on has a Market Base Rate. This rate is the maximum percentage of winnings that are paid in commission and varies according to the market.

Bookmakers

On-course bookmakers

Wagering with bookmakers at a racetrack on horse and greyhound racing allows a player to wager any amount above a set minimum and receive the odds at the time of making the wager. Those odds stand, irrespective of whether the bookmaker alters the odds at a later time. Alterations to odds are calculated to reflect the weight of betting on different race competitors. Bookmakers are licensed in each jurisdiction.⁸⁹

Off-course bookmakers

Wagering via off-course bookmakers allows a player to wager any amount above a set minimum and receive the odds at the time of making the wager. Those odds stand, irrespective of whether the bookmaker alters the odds at a later time. Bookmakers are licensed in each jurisdiction.⁹⁰

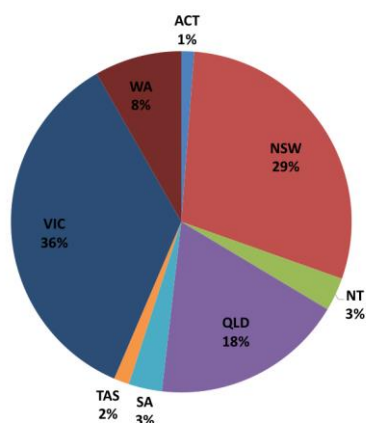
Table 1-16 Number of bookmakers in Australia (2015-16 to 2019-20)

Location	2015-16	2016-17	2017-18	2018-19	2019-20
Australian Capital Territory	10	9	7	7	5
New South Wales	157	144	129	129	120
Northern Territory	32	25	14	14	13
Queensland	72	77	77	77	75
South Australia	12	13	12	12	13
Tasmania	8	8	6	6	6
Victoria	180	163	162	162	145
Western Australia	N/A	34	26	26	34
Total	471	473	433	433	411

Source: Racing Australia: Fact Book 2015-16, 2016-17, 2017-18, 2018-19, 2019-20.

⁸⁹ Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

⁹⁰ Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

Figure 1-11 Estimated distribution of bookmakers in Australia (2019-20)

Source: Racing Australia: Fact Book 2018-19, 2019-20.

Sports betting

Sports betting refers to wagering on all types of local, national or international sporting activities (other than the established forms of horse and greyhound racing), whether on or off-course, in person, by telephone or via the internet. Bets may be laid on a variety of sporting events domestically and/or overseas.⁹¹

In December 1992 the Northern Territory approved Australia's first sports bookmaker, Centrebet in Alice Springs. Centrebet commenced the provision of internet wagering in August 1996.

Today the Northern Territory hosts the majority of online sports betting providers in Australia with corporate bookmakers allowed to trade 24/7.

Sports-betting is an area of significant growth in the Australian gambling environment and has seen increased spend over the past decade as well as an ongoing shift from traditional offline betting channels to online channels (internet, mobile, tablet).

Table 1-17 Australian Wagering Turnover (TAB and Bookmaker) By Code (2016-17 to 2019-20)

	2016-17	%	2017-18	%	2018-19	%	2019-20	%
	\$ mill		\$mill		\$mill		\$mill	
Thoroughbred Racing	18,063.53	55	19,554.22	55	20,944.19	55	21,087.71	51
Harness Racing	1,666.95	5	1,644.54	5	1,468.52	4	3,447.67	8
Greyhound Racing	3,200.56	10	3,265.41	9	3,136.37	8	6,997.80	17
Sports Betting	9,666.81	30	11,230.49	31	12,359.03	33	10,160.39	24
Total	32,597.85	100	35,694.67	100	37,908.11	100	41,693.57	100

Source: Racing Australia: Fact Book 2016-17, 2017-18, 2018-19, 2019-20.

⁹¹ Queensland Government Statistician's Office, Queensland Treasury (2022) *Australian Gambling Statistics 1994-95 to 2019-20 (37th edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

Totalisator Agency Board (TAB/Tote)

The term 'TAB' or 'Tote' commonly refers to the wagering totalisators that are licensed in each Australian state/territory.

TAB's were first established in Australia between 1961 and 1985 and now offer a range of wagering products including fixed odds betting on races and sports as well as pari-mutuel wagering.⁹²

Pari-mutuel wagering is where a player makes a unit wager (a unit being any multiple of 50 cents or one dollar, depending on the jurisdiction) with monies then being placed into a pool for each bet type on each race. The prices change as the amount of money on each runner is invested. The more money on a runner, the shorter the price, or odds, it will be.

After the deduction of tax and operating costs the remainder of pool is shared by those customers who have selected winners, place getters or correct combinations in the case of multiple-bet types (such as Trifectas and Quinellas). Dividends (winnings) are paid to players in multiples of the unit wagered.

Fixed Odds wagering means that the price of the runner when the bet is placed is the price the consumer receives, regardless of whether that price should later change or not

Wagering is conducted Australia-wide at TAB retail outlets which may be stand alone or located within a club, hotel, casino or on-course.

TAB customers can also bet using internet and telephone services – including self-service terminals and applications created for mobile devices.

The major TAB operator in Australia is Tabcorp (which licences to operate in the ACT, NSW, Victoria, Queensland, South Australia, the Northern Territory and Tasmania after combining with Tatt's Group Ubet in 2018).

In Western Australia the TAB is operated by a government-owned organisation.⁹³

Pooling of totalisator pools is the process where one or more totalisator organisations, combines its wagering pool with another. International pooling extends this process of combining wagering pools to include international totalisator organisations.

The Victorian TAB pool (known as the Super TAB, to which the Australian Capital Territory and Western Australia are parties) is an example of pooling. Each jurisdiction retains deductions from wagers made in that particular jurisdiction.

International pooling parties in Super TAB are New Zealand, Singapore and South Africa. The Super TAB pool is the largest of Australia's pari-mutuel betting pools.⁹⁴

⁹² Government Statistician, Queensland Treasury and Trade (2014) *Australian Gambling Statistics 1997-98 to 2014-15* (32nd edition).

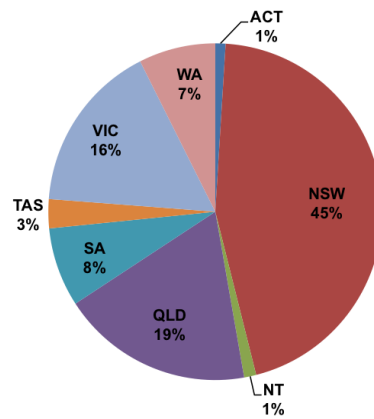
⁹³ In July 2013 a *Future Options Feasibility Study of ACTTAB* recommended that the government not retain ownership and that ACTTAB be sold by way of a trade sale. The acquisition of ACTTAB was completed by Tabcorp Holdings Limited in the 2014-15 period.

⁹⁴ Tabcorp Holdings Limited (2012) *Victorian TAB enters into new pooling arrangements with RWWA*, Media Release 3 August 2012.

Table 1-18 Estimated number of TAB retail outlets (land-based) in Australia by state/territory (2019-20)

Location	Total
Australian Capital Territory	44
New South Wales	1,992
Northern Territory	50
Queensland	817
South Australia	340
Tasmania	123
Victoria	722
Western Australia	320 ⁹⁵
Total	4,408

Source: Tabcorp Holdings Limited, Racing and Wagering Western Australia (RWAA).

Figure 1-12 Estimated distribution of TAB outlets (land-based) in Australia (2019-20)

Source: Tabcorp Holdings Limited, Racing and Wagering Western Australia (RWAA).

⁹⁵ Racing and Wagering Western Australia (2020) 2020 Annual Report.

LICENCE AND EXCLUSIVITY ARRANGEMENTS

Casinos

Table 1-19 Casino licence/exclusivity arrangements in Australia by state/territory

Location	Casino	Duration
Australian Capital Territory	Casino Canberra	Established in 1992, the casino's licence provides for a 99-year term. Exclusivity expired in 2012.
New South Wales	The Star Sydney	Established in 1994. A 99-year licence with a 12-year exclusivity right to operate the only casino in New South Wales from the time the temporary casino opened. In late 2007 the exclusivity arrangement was extended for another 12 years until 2019. In November 2013 the NSW Government announced that a Restricted Gaming Facility will be permitted to operate after the exclusivity period for 'The Star' has expired in 2019. The facility will provide VIP table games only. ⁹⁶
	Crown Sydney ⁹⁷	On 8 July 2014, Liquor and Gaming NSW issued a restricted gaming licence to Crown Resorts Limited to operate a restricted gaming facility at Barangaroo South, Crown Sydney Hotel Resort (Crown Sydney), effective 15 November 2019.. Crown Sydney, also referred to as One Barangaroo, was opened in December 2020 (excluding gambling operations). A provisional permit to open the gaming floors was issued in June 2022 and commenced operations in August 2022. ⁹⁸ The original restricted gaming licence was granted for a period of 99 years from the date of issue. ⁹⁹
Northern Territory	Mindil Beach Casino & Resort ¹⁰⁰	The Darwin casino was established in 1979. The licence term expires in 2031, with an option for an extension for a further five-year period. ¹⁰¹
	Lasseters Casino ¹⁰²	Established in 1982. The licence term expires in 2031. An application can be made to extend the term from June 2026. ¹⁰³
Queensland¹⁰⁴	Treasury Brisbane	Established in 1995. 75-year licence awarded in 1995. A 10-year regional casino gaming exclusivity agreement (within a 60 kilometre radius) which expired in 2005.
	The Ville Resort - Casino	Established in 1986. Exclusivity within a 400 km radius granted in 1986 for 15 years (with the exception of Cairns which was only excluded for five years).

⁹⁶ Crown Sydney, also referred to as One Barangaroo, was opened in December 2020 (excluding gambling operations). Crown Resorts is working with the Independent Liquor and Gaming Authority (ILGA), the NSW regulator, to satisfy casino licence requirements to commence gambling operations.

⁹⁷ Crown Resorts Limited was acquired by Blackstone in June 2022 <https://www.blackstone.com/news/press/blackstone-completes-acquisition-of-crown-resorts-in-the-firms-largest-investment-to-date-in-asia/> (accessed February 2023)

⁹⁸ Sydney Morning Herald (2022) *Crown finally opens its Sydney casino*, 8 August 2022.

⁹⁹ NSW Independent Liquor and Gaming Authority (2014) *Restricted Gaming Licence* https://www.liquorandgaming.nsw.gov.au/documents/other/Restricted_Gaming_Licence.pdf

¹⁰⁰ The SKYCITY Entertainment Group sold the Darwin casino to Delaware North in 2018. On 4 April 2019, a share sale agreement in respect of SKYCITY Darwin Pty Ltd was formally completed, and Delaware North Northern Territory Gaming and Entertainment Pty Ltd (Delaware North) is now the owner of the Darwin Casino, trading as Mindil Beach Casino & Resort.

¹⁰¹ SKYCITY Entertainment Group (2018) *Annual Report: Year ended 30 June 2017*.

¹⁰² Iris Capital purchased Lasseter's Hotel Casino in April 2021. The Hotel Conversation (2021) *Lasseters Hotel Casino sold to Sam Arnaout Iris Capital for \$105m*, 21 April 2021.

¹⁰³ *Lasseters Hotel Casino Operators Agreement* <https://www.territorystories.nt.gov.au> (accessed 20 Jan 2020).

¹⁰⁴ In October 2013 the Queensland Government announced the potential release of another three casino licences in the state, provided they form part of an integrated hotel and resort development. In July 2015 the *Destination Brisbane Consortium* was announced as the preferred proponent to develop and operate an integrated resort at Queen's Wharf Brisbane. Once complete the previous Treasury Casino and Hotel will be repurposed.

Location	Casino	Duration
	The Reef Hotel Casino	Established in 1996. The 1996 licence provided for a ten-year exclusivity period for casino gaming within a 120 kilometre radius. ¹⁰⁵
	The Star Gold Coast	Established in 1985. Licence awarded in perpetuity. A 10-year regional casino gaming exclusivity agreement which expired in 1996.
South Australia	SkyCity Adelaide	Established in 1986. The current licence term is until 2085 unless terminated earlier. Exclusivity until 30 June 2035 (extended from 2015 in 2013). ¹⁰⁶
Tasmania	Country Club Casino	Established in 1973 (Wrest Point) and 1982 (Country Club). The Deed of Agreement between the Crown and Federal Hotels Pty Ltd provided exclusive rights for the Federal Group to operate table gaming, gaming machines and keno throughout the state until 30 June 2018.
	Wrest Point Casino	<p>As part of the Tasmanian Government's <i>Future Gaming Market</i> policy, announced in 2018, the exclusivity arrangements under the Deed with the Federal Group to conduct casino operations, operate electronic gaming machines and conduct games of keno in Tasmania will end on 30 June 2023.¹⁰⁷</p> <p>It was announced in November 2019 that Federal Group would retain their Tasmanian casino licences.¹⁰⁸ The licences will be issued for a period of 20 years as of 1 July 2023. The licence holder will be able to apply for the renewal of the casino licence up to five years before their licence expires.¹⁰⁹</p>
Victoria	Crown Melbourne ¹¹⁰	Established in 1994. Licensed until 2050.
Western Australia	Crown Perth ¹¹¹	Established in 1985. The State must not grant another licence to a casino and hotel of similar size and standard as Crown Perth within a 100km radius of Crown Perth.

¹⁰⁵ Cairns Casino Agreement Act 1993 (QLD)

¹⁰⁶ SKYCITY Entertainment Group (2011) *Annual Report* and SKYCITY Entertainment Group Ltd (2013) *Full Year Results Presentation*.

¹⁰⁷ As part of its Future Gaming Market policy, the Tasmanian government has released proposed amendments to the *Gaming Control Act 1993* which would allow for the following: two licences to be available for high-roller non-resident casinos, one each in Hobart and Launceston; the creation of individual licences to operate Electronic Gaming Machines (EGMs) in hotels and clubs; and a separate licence for Statewide Keno.

<https://www.treasury.tas.gov.au/liquor-and-gaming/gambling/future-gaming-market> (accessed July 2021)

¹⁰⁸ Tasmanian Government, http://www.premier.tas.gov.au/data/assets/pdf_file/0006/499857/2019_12_09_-_Fact_Sheets_Gaming_Tas.pdf (accessed 20 January 2020).

¹⁰⁹ *Gaming Control Amendment (Future Gaming Market) Act 2021*

¹¹⁰ Crown Resorts Limited was acquired by Blackstone in June 2022 <https://www.blackstone.com/news/press/blackstone-completes-acquisition-of-crown-resorts-in-the-firms-largest-investment-to-date-in-asia/> (accessed February 2023)

¹¹¹ Crown Resorts Limited was acquired by Blackstone in June 2022 <https://www.blackstone.com/news/press/blackstone-completes-acquisition-of-crown-resorts-in-the-firms-largest-investment-to-date-in-asia/> (accessed February 2023)

Keno

Table 1-20 Keno licence/exclusivity arrangements in Australia by state/territory

Location	Licensee	Duration
Australian Capital Territory	The Lottery Corporation	The Lottery Corporation has approval to conduct Keno in the ACT that expires in October 2072.
New South Wales	ClubsKeno Holdings Pty Limited The Lottery Corporation	ClubKeno Holdings Pty Limited (a subsidiary of ClubsNSW) and The Lottery Corporation, as joint licensees, hold the current licence for the game of Keno in NSW, which expires in April 2050.
Northern Territory	Delaware North Northern Territory Gaming and Entertainment Pty Ltd (Delaware North) ¹¹²	Mindil Beach Casino & Resort is licensed to operate NT Keno throughout hotels and clubs in the NT until 2031. NT Keno is run at Lasseters Casino under licence from Mindil Beach Casino & Resort.
Queensland	The Lottery Corporation	Licensed until June 2047.
South Australia	The Lottery Corporation	Keno operates under an agency agreement with the Lotteries Commission of South Australia until December 2052.
Tasmania	Federal Group	As part of the Tasmanian Government's The Future of Gaming in Tasmania (Future Gaming Market) policy, announced in 2018, the exclusivity arrangements under the Deed with the Federal Group to conduct casino operations, operate electronic gaming machines and conduct games of keno in Tasmania will end on 30 June 2023. ¹¹³ From 1 July 2023, there will be one dedicated keno operator licence issued to Federal Group. The duration of the keno operator's licence will be for 20 years. ¹¹⁴
Victoria	The Lottery Corporation Lottoland	On 21 February 2022, the Minister for Consumer Affairs, Gaming and Liquor Regulation granted Victoria's Keno licences to both Tabcorp and Lottoland. ¹¹⁵ Effective from 23 May 2022, The Lottery Corporation was created following a demerger by Tabcorp. The 20-year licence term commenced on 15 April 2022, to expire in 2042.
Western Australia	Crown Perth	Operates in casino only.

¹¹² The SKYCITY Entertainment Group sold the Darwin casino to Delaware North in 2018. On 4 April 2019, a share sale agreement in respect of SKYCITY Darwin Pty Ltd was formally completed, and Delaware North Northern Territory Gaming and Entertainment Pty Ltd (Delaware North) is now the owner of the Darwin Casino, trading as Mindil Beach Casino & Resort. The Mindil Beach Casino & Resort is licensed under an agreement with the Northern Territory Government to operate NT Keno throughout hotels and clubs in the Northern Territory. <https://nt.gov.au/industry/gambling/gambling/casinos> (accessed November 2022)

¹¹³ As part of its Future Gaming Market policy, the Tasmanian government has released proposed amendments to the *Gaming Control Act 1993* which would allow for the following: two licences to be available for high-roller non-resident casinos, one each in Hobart and Launceston; the creation of individual licences to operate Electronic Gaming Machines (EGMs) in hotels and clubs; and a separate licence for statewide Keno. <https://www.treasury.tas.gov.au/liquor-and-gaming/gambling/future-gaming-market> (accessed July 2021)

¹¹⁴ Tasmanian Department of Treasury & Finance (2022) *Future of Gaming in Tasmania Paper 4 - proposed Future Gaming Market legislative provisions – keno*.

¹¹⁵ Victorian Department of Justice & Community Safety (2022) <https://www.justice.vic.gov.au/safer-communities/gambling/keno> (accessed November 2022)

Lotteries

Table 1-21 Lottery licence/exclusivity arrangements in Australia by state/territory

Location	Licensee (Brand)	Duration
Australian Capital Territory	The Lottery Corporation (The Lott - NSW Lotteries)	Non-exclusive lottery licence in perpetuity / until revoked.
New South Wales	The Lottery Corporation (The Lott - NSW Lotteries)	Exclusive lottery licence and various product licences until April 2050.
Northern Territory	The Lottery Corporation (The Lott – Tattersall's Sweeps & Golden Casket)	Non-exclusive lottery licence until June 2032.
Queensland	The Lottery Corporation (The Lott - Golden Casket)	Non-exclusive lottery license until July 2072.
South Australia	The Lottery Corporation (The Lott – Tatts Lotteries SA)	Exclusive <i>Master Agent Agreement</i> with the Lotteries Commission SA until December 2052.
Tasmania	The Lottery Corporation (The Lott - Tattersall's Sweeps & Golden Casket)	Tasmanian lotteries operate under renewable five-year permits. Current permit valid to 2025.
Victoria	The Lottery Corporation (The Lott – Tattersall's Sweeps)	Exclusive lottery licence until June 2028.
Western Australia	Lotterywest	No fixed term – government owned and operated.

There are exceptions to exclusivity, which vary in each State and Territory, relating to charitable lotteries and lotteries conducted offering prizes below a certain monetary threshold.

Wagering

Table 1-22 TAB licence/exclusivity arrangements in Australia by state/territory

Location	Licensee ^{116 117118}	Duration
Australian Capital Territory	Tabcorp Holdings Limited	<p>Tabcorp ACT Pty Ltd (a member of the Tabcorp Holdings Limited group) acquired ACTTAB on 14 October 2014.¹¹⁹</p> <p>The ACT Government issued Tabcorp a 50-year exclusive totalisator licence (until October 2064) and a sports bookmaking licence for an initial term of 15 years (until October 2029) with further rolling extensions to a total term of 50 years (until October 2064).</p>
New South Wales	Tabcorp Holdings Limited	Wagering licence expires in March 2097 with retail exclusivity to expire in June 2033.
Northern Territory	Tabcorp Holdings Limited	<p>All on-course and on-premises betting in the Northern Territory (NT) is controlled by the NT Government through the awarding of a single totalisator licence.</p> <p>The licence gives exclusive rights to operate a totalisator in the Territory and conduct retail betting on racing and sports through the totalisator.</p> <p>The 20-year licence was held by UBET NT Pty Ltd - part of the Tatts Group – now Tabcorp Holdings Ltd. It was awarded in 2015 and expires in October 2035.</p>
Queensland	Tabcorp Holdings Limited	Wagering and sports betting licences to 30 June 2098, exclusivity until 30 June 2044.
South Australia	Tabcorp Holdings Limited	UBET SA Pty Ltd – now Tabcorp Holdings Limited - is licensed for wagering and sports-betting until June 2100 with retail exclusivity to expire in December 2032.
Tasmania	Tabcorp Holdings Limited	Licensed for race and sports wagering until March 2062.
Victoria	Tabcorp Holdings Limited	Licence/exclusivity until August 2024. (At the discretion of the responsible minister, the licence may be extended for a further two years).
Western Australia	WA TAB	Perpetual exclusivity.

¹¹⁶ On the 19 October 2016 the proposed combination of Tabcorp and Tatts Group Ltd was announced. On the 22nd December 2017 Tabcorp officially combined with Tatts.

¹¹⁷ With the merging of the Tabcorp and Tatts businesses, UBET has been rebranded as TAB in NT, QLD, SA and TAS. <https://help.ubet.com/hc/en-us/articles/360019809352-TAB-retail-rollout-begins> (accessed 30 July 2019).

¹¹⁸ Tabcorp Holdings Limited (2020) *Annual Report 2019-20*.

¹¹⁹ ACTTAB has been rebranded as TAB as part of the consolidation of brands under the one Tabcorp Holdings Limited umbrella. <https://www.tab.com.au/info/hellocanberra> (accessed 8 August 2019).