A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

CHAPTER SEVEN

The Contribution of Australia's Gambling Industries 2019/20

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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
2017-18	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.
2019-20	January 2023	2019-20 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]

Table 7-1 Industry Sector Estimated Value Added (2019-20)

Industry Sector[2]	Revenue ($million)	Industry Value Added (IVA) ($million)
Casinos[3]	5,114	2,491
Gaming and Vending Machine Manufacturers[4]	364	217
Horse and Dog Racing[5]	3,638	778
Horse and Sports Betting[6]	5,266	1,259
Lotteries[7]	8,988	1,995
Pubs, Bars and Nightclubs[8]	16,201	4,488
Social Clubs[9]	11,187	5,549

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.

[1] IBISWorld Industry Report R9201 *Casinos in Australia,* July 2021.
[2] 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.
[3] IBISWorld Industry Report R9201 *Casinos in Australia, March 2022*. Companies in the industry operate facilities that offer a range of gambling activities, such as table wagering games and electronic gaming machines. Firms also generate revenue from associated entertainment, hospitality and accommodation facilities.
[4] IBISWorld Industry Report C2499b *Gaming and Vending Machines Manufacturing in Australia*, August 2022. Industry firms primarily manufacture gaming and vending machines. Gaming machines allow people to bet money on a game of chance that offers a potential return greater than the amount originally wagered. Vending machines are automated machines that dispense various packaged goods.
[5] IBISWorld Industry Report R9120 *Horse and Dog Racing in Australia*, August 2022. Industry companies administer horse and dog racing activities or operate horse and dog racing venues. Firms that operate horseracing stables or dog racing kennels, own racehorses or greyhounds, or provide related training services are also included in the industry.
[6] IBISWorld Industry Report R9209 *Horse and Sports Betting in Australia*, August 2022.. Industry operators provide gambling services, including totalisator and betting services. Gamblers generally place wagers on horseraces and sports matches. The industry includes online gambling services but excludes casinos and lottery operations.
[7] IBISWorld Industry Report R9202 *Lotteries in Australia*, September 2022. Industry firms primarily operate lotteries and sell lottery tickets. A lottery is a prize draw that players pay to enter, with winners drawn randomly by lot. Firms that operate lotto-style games and football pools are also included in the industry.
[8] IBISWorld Industry Report H4520 *Pubs, Bars and Nightclubs in Australia*, November 2022. Industry operators sell alcoholic beverages for consumption either on the premises (e.g. bars) or off the premises (e.g. drive-through bottle shops). Industry venues sometimes also provide food service, live entertainment, and gaming and betting facilities.
[9] IBISWorld Industry Report H4530 *Social Clubs in Australia, March 2022.* The industry includes gambling, sporting, recreational and social (such as RSL) clubs or associations that predominantly generate income from hospitality services. Clubs that mainly provide sporting services, including racing clubs, are not included in the industry. The industry covers both licensed and unlicensed clubs, and clubs with gambling licences..

EMPLOYMENT

National

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

IBISWorld Pty Ltd[10] 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 (2019-20)

Industry Sector[11]	Establishments	Employment[12]	Wages ($million)[13]	Average Wage($)
Casinos[14]	13	25,203	1,780	70,619
Gaming and Vending Machine Manufacturing[15]	95	2,104	167	79,325
Horse and Dog Racing[16]	2,459	19,269	477	24,776
Horse and Sports Betting[17]	934	4,757	340	71,432
Lotteries[18]	490	3,501	216	61,697
Pubs, Bars and Nightclubs[19]	8,957	70,153	3,552	50,629
Social Clubs[20]	7,763	76,963	4,010	52,100

Source: IBISWorld Industry Reports: R9201 Casinos in Australia March 2022, C2499B Gaming and Vending Machines Manufacturing in Australia, August 2022, R9120 Horse and Dog Racing in Australia March 2022, R9209 Horse and Sports Betting in Australia, August 2022, R9202 Lotteries in Australia September 2022, H45020 Pubs, Bars and Nightclubs in Australia November 2022, and H4530 Social Clubs in Australia, March 2022.

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

[10] http://www.ibisworld.com.au
[11] 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.
[12] The number of permanent, part-time, temporary and casual employees, working proprietors, partners, managers and executives within the industry.
[13] This refers to the gross total wages and salaries of all employees in the industry. Benefits and on-costs are included in this figure.
[14] IBISWorld Industry Report R9201 *Casinos in Australia, March 2022..* Companies in the industry operate facilities that offer a range of gambling activities, such as table wagering games and electronic gaming machines. Firms also generate revenue from associated entertainment, hospitality and accommodation facilities.
[15] IBISWorld Industry Report C2499b *Gaming and Vending Machines Manufacturing in Australia*, August 2022. Industry firms primarily manufacture gaming and vending machines. Gaming machines allow people to bet money on a game of chance that offers a potential return greater than the amount originally wagered. Vending machines are automated machines that dispense various packaged goods.
[16] IBISWorld Industry Report R9120 *Horse and Dog Racing in Australia*, March 2022. Industry companies administer horse and dog racing activities, or operate horse and dog racing venues. Firms that operate horseracing stables or dog racing kennels, own racehorses or greyhounds, or provide related training services are also included in the industry.
[17] IBISWorld Industry Report R9209 *Horse and Sports Betting in Australia*, August 2022. Industry operators provide gambling services, including totalisator and betting services. Gamblers generally place wagers on horseraces and sports matches. The industry includes online gambling services but excludes casinos and lottery operations..
[18] IBISWorld Industry Report R9202 *Lotteries in Australia*, September 2022. Industry firms primarily operate lotteries and sell lottery tickets. A lottery is a prize draw that players pay to enter, with winners drawn randomly by lot. Firms that operate lotto-style games and football pools are also included in the industry.
[19] IBISWorld Industry Report H4520 *Pubs, Bars and Nightclubs in Australia*, November 2022. Industry operators sell alcoholic beverages for consumption either on the premises (e.g. bars) or off the premises (e.g. drive-through bottle shops). Industry venues sometimes also provide food service, live entertainment, and gaming and betting facilities..
[20] IBISWorld Industry Report H4530 *Social Clubs in Australia,* March 2022. The industry includes gambling, sporting, recreational and social (such as RSL) clubs or associations that predominantly generate income from hospitality services. Clubs that mainly provide sporting services, including racing clubs, are not included in the industry. The industry 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.[21]

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.[22]

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.

[21] 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.
[22] 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.[23]

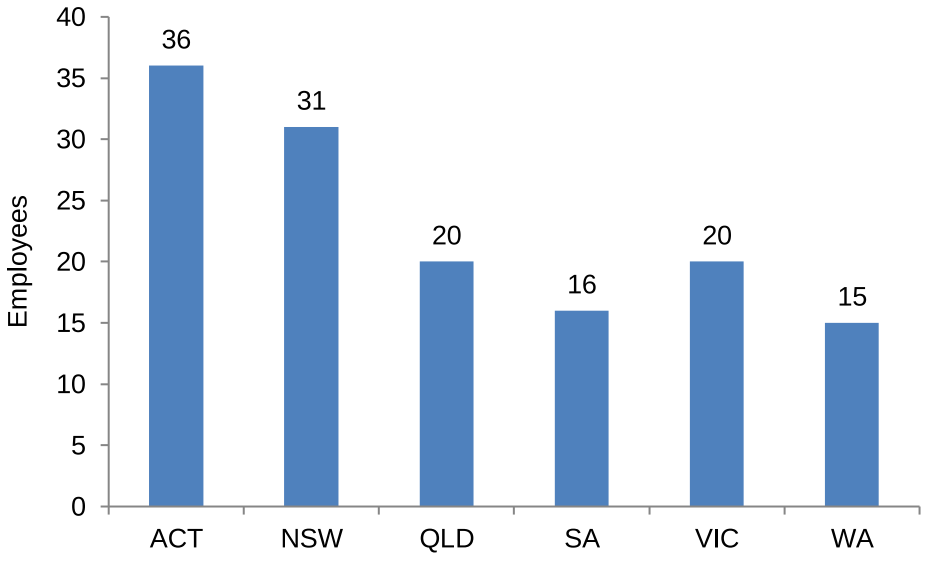
Table 7-7 Estimated employment at clubs in Australia by state/territory (2015)

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.

[23] 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.[24]

The survey estimates that AHA member venues employed approximately 215,000 people as at the end of June 2017[25]

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.

[24] 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.
[25] Australian Hotel Association (2018) *2018 Member Survey: Results and findings.*

The Hotel Industry in South Australia: A Case Study

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

Type	EGMs			No EGMs			Total
	Total Number Employed			Total Number Employed			
	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.[26]

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			No EGMs			Total
	Total Number Employed			Total Number Employed			
	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.

[26] 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. [27]

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 2021 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 8,452 FTE positions each year. [28]

A 2022 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 15,693 FTE jobs in the Victorian economy. The impact on employment increases to more than 34,900 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: 25,705 FTE (thoroughbred racing); 4,469 FTE (harness racing); and 4,726 FTE (greyhound racing).[29]

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 (2019-20)

Type	Estimated Number Employed
Amateur Jockeys	71
Apprentice Jockeys	193
Jockeys	580
Trainers	3,042
Total	**3,886**

Source: Australian Racing Board (2021) Australian Racing Fact Book 2019-20.

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.[30]

[27] Productivity Commission (2010) *Gambling, Report no 50*, Canberra p16.5.
28 IER (2021) *Size and Scope of the Western Australian Racing Industry: October 2021*.
29 IER (2022) *Size and Scope of the Victorian Racing Industry: April 2022.*
30 IER (2013) *Size and Scope of the Harness Racing Industry in Australia*.

Table 7-15 Estimated employment in select harness racing industry sector occupations in Australia

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: IER (2013) Size and Scope of the Harness Racing Industry in Australia.

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[31]
Total	**7,589**

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

[31] 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.[32]

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

[32] 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 (2019-20)

Expenditure items	Holiday	Visiting friends & relatives	Business	Other	Total
	$ Million				
Domestic airfares	3,264	2,690	5,381	453	11,789
Package tours	1,544	71	772	71	2,459
Organised tours	590	np	np	np	674
Rental vehicles	675	248	529	np	1,486
Petrol/Fuel	3,363	2,175	2,389	404	8,332
Vehicle maintenance/Repairs	np	np	np	np	151
Taxis	334	209	818	np	1,405
Other local public transport	133	96	86	np	333
Long distance public transport	201	106	np	np	364
Accommodation	10,950	2,120	6,259	733	20,061
Groceries for self catering	2,608	1,320	519	183	4,630
Alcohol, drinks (not already reported)	2,362	1,186	649	108	4,305
Takeaway and restaurant meals	6,451	3,099	2,815	480	12,845
Shopping/Gifts/Souvenirs	3,031	1,722	523	300	5,576
Entertainment	1,956	354	101	np	2,443
Gambling	126	np	np	np	194
Education fees	np	np	np	np	103
Convention/Conference/Seminar fees	np	np	276	np	320
Other expenditure	682	109	139	352	1,283
Total	**38,380**	**15,632**	**21,411**	**3,330**	**78,752**

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 March 2020.

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 (2019-20)

Country of residence	China	USA	UK	NZ	Japan	Other	Total
Package tour	544	501	341	144	465	1,067	3,062
Pre-paid international airfares	670	1,069	988	563	284	3,452	7,025
Organised tours	82	113	63	43	54	289	644
International airfares bought in Australia	189	35	55	24	28	367	699
Domestic airfares	57	36	35	8	9	148	293
Taxi and other public transport	160	56	60	52	35	436	800
Rental vehicles	35	27	49	42	8	228	389
Petrol and oil for vehicles	37	15	30	23	3	210	318
Shopping - items for use in Australia	304	27	62	52	24	452	922
Shopping - items to take home	686	97	68	187	77	867	1,983
Total shopping	*990*	*125*	*130*	*240*	*101*	*1,319*	*2,905*
Food, drink and accommodation	2,441	656	747	617	395	5,016	9,873
Gambling	31	7	3	12	9	65	128
Entertainment	76	31	32	36	15	159	350
Motor vehicles	105	np	22	np	np	294	468
Education fees	2,799	168	np	25	146	2,462	5,609
Phone, internet, fax and/or postage	57	9	11	9	12	140	238
Conference fees	14	16	np	38	np	48	124
Other	121	20	36	24	8	197	406
Total	**8,410**	**2,913**	**2,617**	**1,914**	**1,577**	**15,899**	**33,330**

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

Casino visitors

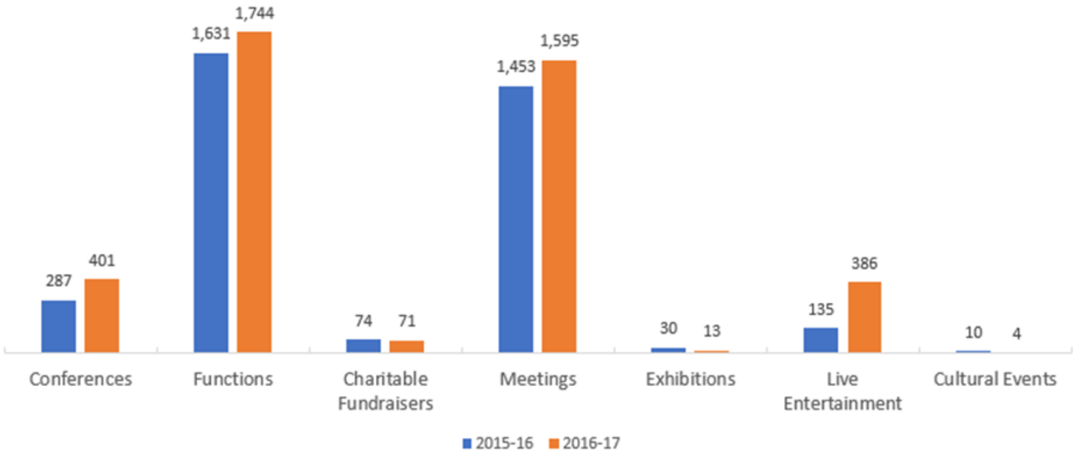
Tourists attending casino complexes is a difficult figure to capture and has been estimated in the past for Australia as between 40 – 50 million visitors per annum across all properties.[33]

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.

[33] 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)

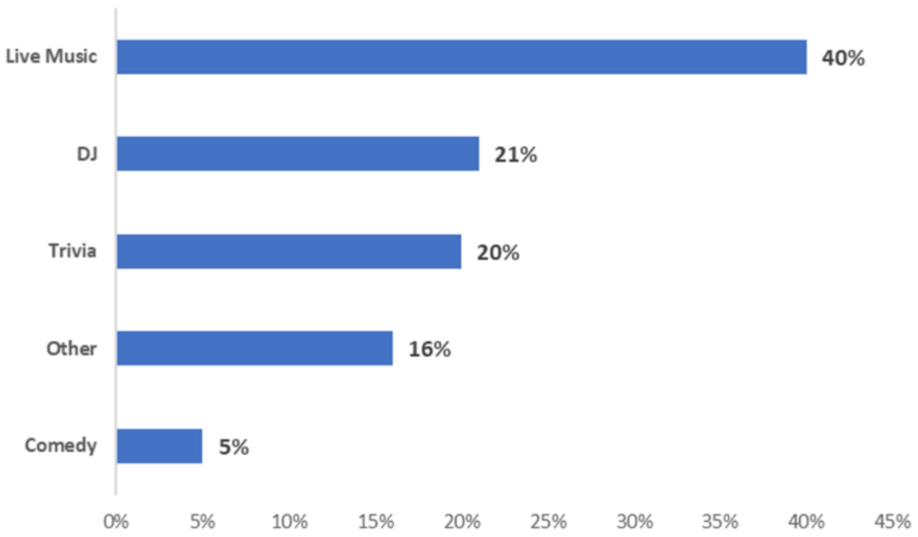
Licence type	Number of venues	Number of gigs	Percentage of total gigs
Club	8	39	4.1
Entertainment venue	3	17	1.8
Limited club	4	11	1.1
Producer	3	7	0.7
Restaurant	6	17	1.8
Small venue	1	3	0.3
Special circumstances	35	205	21.3
Total	**157**	**962**	**100**

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.[34]

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.[35]

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.

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[34] Crown Resorts Limited (2020) *Annual Report 2020.*
[35] The Star Entertainment Group (2020) *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.[36] Contributions were made to multiple parts of our community including supporting research into the COVID-19 pandemic and 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*[37] and contributions on a voluntary basis from Tabcorp and Casino Canberra.[38]

A total of $1,243,639 was paid into the Gambling Harm Prevention and Mitigation Fund for the period 2019-20. [39]

Table 7-24 Contributions to the Gambling Harm Prevention and Mitigation Fund - (2019-20)

Area	Total Contributions ($)
Registered Clubs	1,157,111
Hotels and Taverns	2,096
Casino Canberra	35,152
Tabcorp Pty Ltd	49,280
Total	**1,243,639**

Source: ACT Gambling and Racing Commission (2021) Annual Report 2019-20.

[36] Tabcorp (2020) *Annual Report 2020.*
[37] Community contribution revenue (CCR) – gross gaming machine revenue less gaming machine tax paid.
[38] ACT Gambling and Racing Commission (2021) Gambling Harm Prevention and Mitigation Fund - ACT Gambling and Racing Commission (Accessed August 2021).
[39] ACT Gambling and Racing Commission (2021) *Annual Report 2019-20.*

Table 7-25 Gambling Harm Prevention and Mitigation Fund – Projects and Funding (2019-20)

Financial Year	Amount $
ACT Gambling Counselling and Support Service	886,541
ACT Gambling Support Service: Environmental Scan and Gap Analysis	16,000
Training and Workshops for Non-Gambling Specific Community Sector Workers	2,363
ACT Gamblers Exclusion Database	6,282
Research Project: 2019 Gambling in the ACT Survey	181,903
Gambling Help Online	7,824
Gambling Research Australia	5,092
Gambling Harm Awareness Week	78,544
Gambling Contact Officer Training	34,702
Total	**1,219,251**

Source: ACT Gambling and Racing Commission (2021) Annual Report 2019-20.

The ACT Gambling and Racing Commission also collects revenue from gaming machine licensees for payments to the Chief Minister's Charitable Fund and the Diversification and Sustainability Support Fund.[40]

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).[41]

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.

[40] ACT Gambling and Racing Commission (2021) *Annual Report 2019-20*.
[41] ACT Gambling and Racing Commission (2021) Community Contribution Reform Scheme - ACT Gambling and Racing Commission (accessed August 2021).

New South Wales

The Office of Responsible Gambling supports and manages the administration of a number of grants and funding programs in NSW, including the following:

- Responsible Gambling Fund;
- Gambling Help Services;
- Community Benefit Payment Scheme
- Clubgrants Category 3 Fund; and
- Community Development Fund;

Responsible Gambling Fund (RGF)[42]

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 Responsible Gambling, who make recommendations to the NSW Government.

In 2019-20, the RGF distributed $386,676.50 in open grants to the community and $11,571,424 to support gambling help services and counselling in NSW.

A total $1,017,813 was paid out to fund gambling research including commissioned and grant funded research projects in 2019-20.

Comunity Benefit Payment Scheme[43]

Community benefit payments are made to the Responsible Gambling Fund (RGF) when a venue is approved by the Independent Liquor & Gaming Authority for an increase to its number of gaming machines entitlements.

In 2019-20, a total of $1,050,401 was paid by the RGF to various not for profit organisations and registered charities that support the social wellbeing of the local community.

ClubGRANTS Scheme[44]

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.

[42] NSW Government Department of Customer Service (2020) *Annual Report 2019/2020.*
[43] NSW Government Department of Customer Service (2020) *Annual Report 2019/2020.*
[44] Liquor and Gaming NSW (2021*) ClubGRANTS Guidelines: Gaming Machine Tax Act 2001, August 2021.*

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%).

Clubgrants Category 3: Infrastructure Grants[45]

The Clubgrants Category 3 fund is established under the *Gaming Machine Tax Act 2001*, and supports infrastructure projects for sport and recreation, arts and culture and emergency preparedness.

Contributions to the Category 3 Infrastructure Grants fund are automatically allocated by the Government from the gaming machine tax that a club pays each year and is managed by the Office of Responsible Gambling.

For the period 2019-20, a total of $6,119,506 was paid out by the Clubgrants Category 3 fund to support various infrastructure projects for non-government community organisations.

Community Development Fund[46]

The Community Development Fund is established under the *Gaming Machines Act 2001* and is funded from unclaimed jackpot prizes, gaming machine tickets and income from the transfer of poker machine entitlements and permits.

In 2019-20, the Community Development Fund distributed $459,435 to the community.

Northern Territory

Community Benefit Fund (CBF)[47]

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.

[45] NSW Government Department of Customer Service (2020) *Annual Report 2019/2020.*
46 Ibid.
[47] Northern Territory Government (2020) *Community Benefit Fund Annual Report 2019-20*.

In 2019-20 the Community Benefit Fund received $9.68 million from the levy on electronic gaming machines in casinos and licenced hotels in the Northern Territory.[48] A total of $12.55 million was distributed in grants.

Table 7-26 Northern Territory Community Benefit Grants 2019-20

Area	Total Contributions ($)
Gambling Amelioration Grants	1,851,683
Gambling Research Grants	924,321
Major Community Events Grants	1,298,602
Major Community Grants	6,142,408
Minor Community Organisation Grants	2,029,622
Vehicle Gifts / Long Term Loans	306,135
Total Grants Allocated	**12,552,771**

Source: Northern Territory Government (2020) Community Benefit Fund Annual Report 2019-20

In 2019-20, community support contributions from licensed clubs operating gaming machines totalled $2.7 million, equating to 9% of net gaming machine revenue received.

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.[49]

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 2019-20 more than $44 million dollars from the Gambling Community Benefit Fund was distributed to 2,021 approved applicants from local community organisations across Queensland.[50]

[48] Northern Territory Government (2020) *Community Benefit Fund Annual Report 2019-20*.
49 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*.
[50] Queensland Government, Office of Liquor and Gaming Regulation (2020) *Statistical Report 2019-20*.

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.

Gambling Community Statement

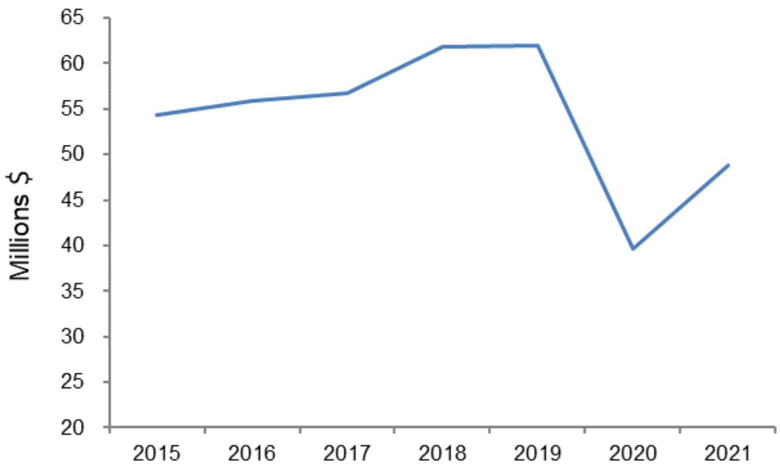
In Queensland clubs with 51 or more gaming machines are required to submit a Community Benefit Statement to the Office of Liquor and Gaming Regulation as part of their annual reporting responsibilities.

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 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.[51]

In 2020 Queensland clubs donated $30,385,198 in cash and $9,251,471 in non-cash contributions to community organisations – a combined total of $39,636,669.[52]

Figure 7-4 Total Community Benefit Contributions by Queensland Clubs (2015-2021)



Source: Queensland Government, Department of Justice and Attorney- General (2021) .https://www.justice.qld.gov.au/about-us/services/liquor-gaming/olgr-reports (accessed April 2023).

[51] Queensland Government, Department of Justice and Attorney- General (2021) . https://www.justice.qld.gov.au/about-us/services/liquor-gaming/olgr-reports (accessed April 2023).
[52] Ibid.

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 $5.3 million of funding was distributed by the GRF over the 2019-20 financial year.[53]

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).[54]

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.[55]

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

- 25% for the benefit of community sports and recreation clubs;
- 25% for the benefit of charitable organisations;
- 50% for the benefit of research, education, services and treatment in the area of problem gambling.

In 2019-20, $3,459,374 was received and paid into the CSL from the operation of gaming machines in clubs and hotels.[56]

Table 7-37 Community Support Levy Expenditure – Tasmania (2019-20)

Category	$
Gambling Support Services	$1,329,935
Charitable Organisations	$883,264
Sport and Recreation	$866,905
Total	**$3,080,104**

Source: Tasmanian Liquor and Gaming Commission (2020) Annual Report 2019-20.

[53] South Australian Government, Department of Human Services (2020) *2019-20* Annual Report.
54 Tasmanian Liquor and Gaming Commission (2020) *Annual Report 2019-20*.
[55] Ibid.
[56] Ibid.

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.

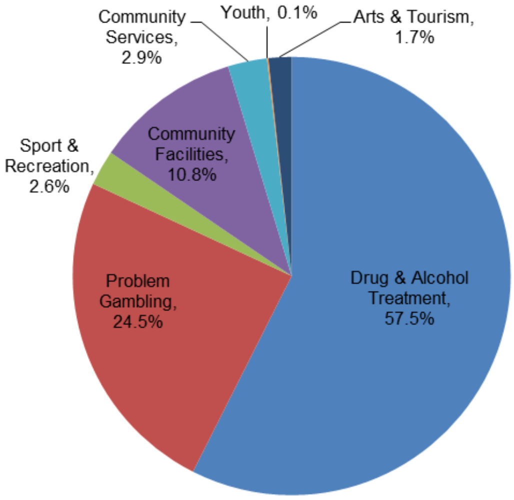
The CSF receives funds generated from 8.33% of revenue from electronic gaming machines located in Victorian hotels.

In 2019-20, the CSF received $112.23 million in revenue from gaming machines in hotels.

Total grant expenditure for the 2019-20 period was $147.79 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 2019-20



Source: Victorian Department of Treasury and Finance https://www.dtf.vic.gov.au/community-support-fund/community-support-fund-financial-overview-2019-20 *(accessed April 2023)).*

Table 7-28 Community Support Fund Grant Expenditure by Project – Victoria (2019-20)

Category	$
Drug & Alcohol Treatment	85,000,003
ANZAC Day Revenue to the Victorian Veterans Fund	379,705
Community Advancement Fund	506,738
Community Enhancement Developments	1,159,322
Pick My Project Grant program	8,275,000
Public Records Office Victorian Grants and Awards Program	73,000
Community Sport and Recreation Infrastructure Development projects	1,771,000
Victorian Responsible Gambling Foundation (VRGF) 2015-16 to 2018-19	223,248
Victorian Responsible Gambling Foundation (VRGF) 2019-20 (to 2022-23)	36,043,000
Total	**133,431,016**

Source: Victorian Department of Treasury and Finance (2020) Departmental grant expenditure by project in 2019-20.

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 Gambling and Casino Control Commission (VGCCC).

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.[57]

For the period 2019-20 (as at 3 December 2020), the VGCCC reported that $269,951,186 was allocated for community purposes or activities.[58]

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 2020, members of the PGSSC include representatives from:

- Crown Perth
- Racing and Wagering Western Australia
- Lotterywest
- WA Bookmakers Association
- Department of Communities[59]

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 $938,607 was allocated by the PGSSC in 2019-20.[60]

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57 Victorian Gambling and Casino Control Commission, https://www.vgccc.vic.gov.au/gambling/gaming-venue-operator/understand-your-gaming-licence/your-obligations/community-benefit (accessed May 2023).
58 Victorian Gambling and Casino Control Commisssion (2020) *Combined community benefit statement and summary figures for local government area as at 3 December 2020*..
59 Gaming and Wagering Commission of Western Australia (2020) *Annual Report 2019-20*.
60 Ibid.

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.[61]

During the 2019-20 financial year, funding grants were distributed to the following community organisations:

- Two Rocks State Emergency Service ($63,000);
- Jurien Bay Men's Shed ($62,000);
- Shine Community Services ($3,212);
- Kyilla Primary School Parents and Citizens' Association ($25,000);
- Showgrounds Community Men's Shed ($25,000);
- Town of Bassendean ($135,900); and;
- Pinjarra Community Men's Shed ($66,343).

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.[62]

In 2019-20 Lotterywest provided $292 million worth of funding to the community.[63]

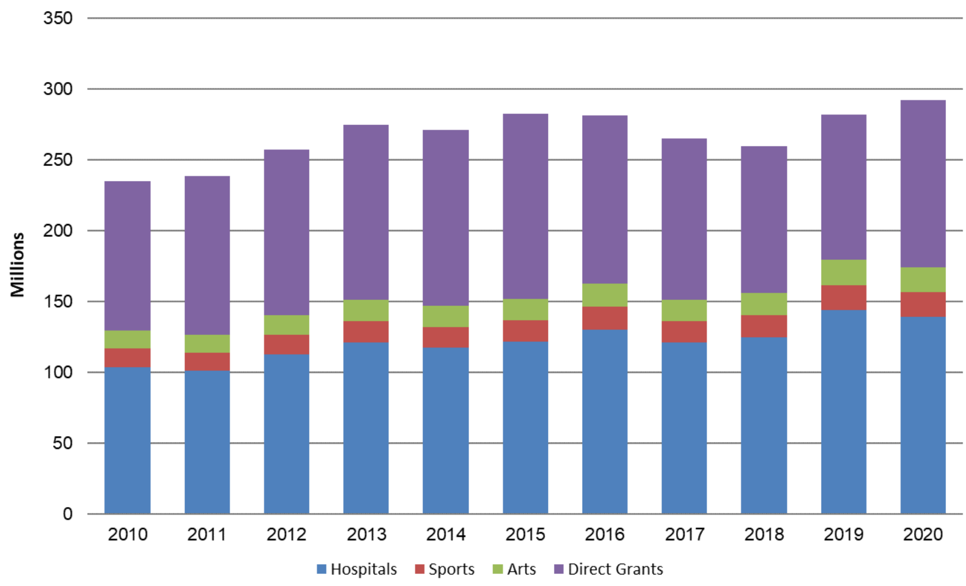
Table 7-29 Community funding by Lotterywest – Western Australia (2019-20)

Recipient	$ million
Hospitals and Health Services	$139
Culture and the Arts	$17.5
Sport and Recreation	$17.5
Direct Grants	$118
- Screenwest and Perth Festival $14 million	
- Community Investment Framework $66.7 million	
- Covid-19 Relief Fund $37.5 million	
Total	**$292**

Source: Lotterywest (2020) Annual Report 2019-20.

[61] Gaming and Wagering Commission of Western Australia (2020) *Annual Report 2019-20.*
62 Lotterywest (2020) *Annual Report 2019-20*.
[63] Ibid.

Figure 7-6 Lotterywest Grants Expenditure by Expense Type 2010-2020



Source: Lotterywest (2020) Annual Report 2019-20.