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# A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

## CHAPTER ONE

The Australian Gambling Environment

2017/18

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# 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

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### Version Control

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Version	Date	Explanation
2015-16 (1.0)	November 2016	2015-16 Edition.
2015-16 (1.1)	March 2017	Corrections to Table 1-18.
2015-16 (2.0)	March 2018	2015-16 Edition updated with statistics from <i>Australian Gambling Statistics</i> , 33rd Edition.
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.

## 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.<sup>1</sup>

#### *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...).<sup>2</sup>

#### *Interactive Gambling/Gaming*

Interactive gambling is a term used to describe gambling activities conducted via the internet. In Australia the *Interactive Gambling Act 2001 (Cth)* strictly prohibits the offer of gaming activities (e.g. casino games, EGMs) via the internet to Australians.<sup>3</sup> 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, pools and instant lottery.<sup>4</sup>

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.<sup>5</sup>

#### *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.<sup>6</sup>

#### *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.<sup>7</sup> 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.<sup>8</sup>

#### *Wagering*

Wagering refers to all legal forms of gambling on racing and sporting events.<sup>9</sup>

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<sup>1</sup> Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition)*.

<sup>2</sup> Ibid

<sup>3</sup> The term ‘via the internet’ refers to sundry internet connected devices – including mobile devices.

<sup>4</sup> Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition)*.

<sup>5</sup> Ibid

<sup>6</sup> Ibid

<sup>7</sup> For a more detailed definition and further information regarding social games see: <http://www.i-sga.org/about-social-games/>

<sup>8</sup> Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition)*.

<sup>9</sup> Ibid

## FORMS OF GAMBLING IN AUSTRALIA

Table 1-1 Forms of gambling in Australia by state/territory (2017-18)

Gambling Form	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
<b>Betting exchange</b>	Tasmania's betting exchange (Betfair) surrendered its licence in November 2016. Betting exchange wagering is currently only undertaken in the Northern Territory.							
<b>Casino gaming</b>	✓	✓	✓	✓	✓	✓	✓	✓
<b>Football pools</b>	✓	✓	✓	✓	✓	✓	✓	✓
<b>Gaming machines</b>	Hotels and Clubs only <sup>10</sup>	✓	✓	✓	✓	✓	✓	Casino only
<b>Keno</b>	✓	✓	✓	✓	✓	✓	✓	Casino only
<b>Lotteries</b>	✓	✓	✓	✓	✓	✓	✓	✓
<b>Minor gaming</b>	✓	✓	✓	✓	✓	✓	✓	✓
<b>Online/Interactive gambling</b>	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 overseas visitors.							
<b>Racing and betting</b>	✓	✓	✓	✓	✓	✓	✓	✓
<b>Sports betting</b>	✓	✓	✓	✓	✓	✓	✓	✓

Source: Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18* (35<sup>th</sup> edition). Refer to *Australian Gambling Statistics Explanatory Notes* for further information.

<sup>10</sup> 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 2017-18 period 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, electronic gaming machines (which are available at all casinos in Australia with the exception of Casino Canberra in the ACT).

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 (2017-18)**

Location		Property Name	Number of casinos
<b>Australian Capital Territory</b>	Canberra	Casino Canberra	<b>1</b>
<b>New South Wales<sup>11</sup></b>	Sydney	The Star Sydney	<b>1</b>
<b>Northern Territory</b>	Darwin	SKYCITY Darwin <sup>12</sup>	1
	Alice Springs	Lasseters Casino	1
			<b>2</b>
<b>Queensland<sup>13</sup></b>	Brisbane	Treasury Brisbane	1
	Cairns	The Reef Hotel Casino	1
	Gold Coast	The Star Gold Coast	1
	Townsville	The Ville Resort - Casino	1
			<b>4</b>
<b>South Australia</b>	Adelaide	Adelaide Casino <sup>14</sup>	<b>1</b>
<b>Tasmania</b>	Hobart	Wrest Point Casino	1
	Launceston	Country Club Casino	1
			<b>2</b>
<b>Victoria</b>	Melbourne	Crown Melbourne	<b>1</b>
<b>Western Australia</b>	Perth	Crown Perth	<b>1</b>
<b>Total</b>			<b>13</b>

<sup>11</sup> In July 2014 Crown Resorts was granted a licence to operate a VIP-only Restricted Gaming Facility (without EGMs) in NSW at Barangaroo, Sydney from November 2019. This facility is expected to open in 2021.

<sup>12</sup> In November 2018 the SKYCITY Entertainment Group sold the SKYCITY Darwin casino to Delaware North. Effective at April 2019 the casino has been renamed the Mindil Beach Casino Resort.

<sup>13</sup> 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. The resort is due for completion in 2022. Once complete the previous Treasury Casino and Hotel will be repurposed.

<sup>14</sup> Referred to previously as SKYCITY Adelaide <https://www.adelaidecasino.com.au/> (accessed 12 July 2019).

**Table 1-3 Estimated number of casino table games and EGMs in Australia (2017-18)**

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 2018.

Location	Venue	Tables	EGMs <sup>15</sup>
<b>Australian Capital Territory<sup>16</sup></b>	Casino Canberra	49	Nil
<b>New South Wales</b>	The Star Sydney	323	1,500
<b>Northern Territory<sup>17</sup></b>	SKYCITY Darwin <sup>18</sup>	41	575
	Lasseters Casino	22	307
		<b>63</b>	<b>882</b>
<b>Queensland<sup>19</sup></b>	The Star Gold Coast	128	1,616
	Treasury Brisbane	79	1,598
	The Ville Resort - Casino	21	347
	The Reef Hotel Casino	37	486
		<b>265</b>	<b>4,047</b>
<b>South Australia</b>	Adelaide Casino	69 <sup>20</sup>	832 <sup>21</sup>
<b>Tasmania<sup>22</sup></b>	Wrest Point Casino	24	N/A
	Country Club Casino	14	N/A
		<b>38<sup>23</sup></b>	<b>894<sup>24</sup></b>
<b>Victoria</b>	Crown Melbourne	540 <sup>25</sup>	2,628
<b>Western Australia</b>	Crown Perth	350 <sup>26</sup>	2,419
<b>Total</b>		<b>1,697</b>	<b>13,202</b>

Source: Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition)*, with updates by the AGC. Refer to *Australian Gambling Statistics Explanatory Notes* for further information

<sup>15</sup> Operational EGMs as at 30 June 2018 as reported by Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition)*. Refer to *Explanatory Notes* for further information.

<sup>16</sup> 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.

<sup>17</sup> Northern Territory Government (2018) Director-General of Licensing Annual Report 2017-18.

<sup>18</sup> The SKYCITY Entertainment Group sold the Darwin casino to Delaware North in 2018. From April 2019 the casino has been renamed the Mindil Beach Casino Resort.

<sup>19</sup> Queensland Office of Liquor and Gaming Regulation (2019) *Annual Statistical Report 2017-18*. Figures refer to operational rather than approved numbers.

<sup>20</sup> Amendments to the *Approved Licensing Agreement* for the Adelaide Casino in February 2014 limit the maximum number of tables in operation at any one time to 200.

<sup>21</sup> In February 2014, the South Australian Government implemented reforms that will allow the Adelaide Casino 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.

<sup>22</sup> Tasmanian Government Department of Treasury and Finance, *Table Gaming Activities in Tasmanian Casinos*, <http://www.treasury.tas.gov.au/liquor-and-gaming/legislation-and-data/gambling-industry-data/table-gaming-activities-in-tasmanian-casinos> (accessed 22 January 2020)

<sup>23</sup> Status as at 1 October 2019. All tables may not be in operation.

<sup>24</sup> Please note that Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition)* reports a total of 894 operational EGMs in Tasmania's two casinos at 30 June 2018. This figure differs from the previous period where a total of 1,221 at 30 June 2017 is reported (revised from previous versions) and from data available on the website of the Tasmanian Liquor and Gaming Commission. Owing to this discrepancy statistics are reported as published in Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition)* are referenced but are not differentiated by property. The Tasmanian Government Department of Treasury and Finance reports that at 2 December 2019 the number of casino EGMS was 1,185.

<sup>25</sup> Crown Resorts Ltd (2018) *Annual Report 2018*. Please note these are approved rather than operational numbers.

<sup>26</sup> Crown Resorts Ltd (2018) *Annual Report 2018*. 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.<sup>27</sup>

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
<b>Australian Capital Territory</b>	4,000 (by 2020) <sup>28</sup>	200 <sup>29</sup>	<p>The ACT Parliamentary Agreement for the 9<sup>th</sup> Legislative Assembly of October 2016 included a commitment to reduce the number of EGM authorisations in the ACT to 4,000 by 2020.</p> <p>The ACT is now undergoing a process of surrender of authorisations to meet the reduced limit applicable by 2020.</p> <p>Number of authorisations in place:<sup>30</sup></p> <ul style="list-style-type: none"> <li>- 4,989 as at 30 June 2016</li> <li>- 4,985 as at 30 June 2017</li> <li>- 4,947 as at 30 June 2018</li> <li>- 4,001 as at 30 June 2019</li> </ul>
<b>New South Wales</b>	97,500	1,500	<p>A state-wide cap of 99,000 EGMs in total for the state with 1,500 EGMs permitted at The Star casino.<sup>31</sup></p> <p>In March 2018 the NSW Government proposed a cap on existing gaming machine numbers in high risk areas.<sup>32</sup></p>
Location	Clubs/Hotels	Casino(s)	Cap arrangements

<sup>27</sup> Adapted from the *Gaming Machines Act 2001* (NSW).



			On 16 November 2016 a territory-wide cap on machines of 1,852 was announced.
<b>Northern Territory</b>	1,734	No cap	On 1 June 2018 the Northern Territory Government announced a lowering of the cap on community gaming machines from 1,852 to 1,734. <sup>33</sup>  Gaming machines in the Territory's two casinos are outside the cap limit and not included in the total. <sup>34</sup>
<b>Queensland</b>	44,205	Limited by ratio	A state-wide cap of 19,500 EGMs for hotels and a cap of 24,705 EGMs for clubs applies. <sup>35</sup>  Casinos are limited by ratio of 12 gaming machines per table game. <sup>36</sup>  The Queen's Wharf Casino licence was issued in 2016, with 2,500 EGMs approved. Once commissioned, the current Treasury Casino will close, resulting in a net increase of 868 EGMs or an overall approved number of 5,164.
<b>South Australia</b>	12,086	995 to 1,500	A state-wide objective of 13,081 EGMs, across all sector venues, has been established for the State. Declines to a hotel/club cap of 12,086 EGMs are to be achieved through forfeiture requirements.  Under a new licensing agreement, the 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. The additional 505 entitlements granted to the casino are initially required to be purchased from within the existing Approved Trading Scheme. <sup>37</sup>
<b>Tasmania<sup>38</sup></b>	2,500	1,380	A state-wide cap of 3,680 for all EGMs (all premises), with a cap of 2,500 EGMs applicable to clubs and hotels. <sup>39</sup>
<b>Victoria</b>	27,372	2,628	A state cap of 30,000 EGMs applies. (27,372 EGMs in clubs and hotels, split evenly between the two venue types or 13,686 entitlements for clubs and 13,686 entitlements for hotels). An additional 2,628 EGMs are allowed at the casino. <sup>40</sup>  For EGM entitlements that take effect on or after 16 August 2022: 48.49% of those entitlements must be club EGM entitlements and 51.51% must be hotel EGM entitlements. <sup>41</sup>  Further caps – including regional and municipal caps – and ownership restrictions also apply <sup>42</sup>
<b>Western Australia</b>	N/A	2,500	Western Australia's casino has been allocated a cap of 2,500 electronic gaming machines.

<sup>28</sup> The ACT *Parliamentary Agreement for the 9<sup>th</sup> Legislative Assembly of October 2016* included a commitment to reduce the number of EGM authorisations in the ACT to 4,000 by 2020. 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).

<sup>29</sup> 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.

<sup>30</sup> ACT Government, Gambling and Racing Commission (2018) *Gaming Machine Reform Package: Trading Scheme Information* <https://www.gamblingandracing.act.gov.au/publications> (accessed 22 January 2020)

<sup>31</sup> NSW Government, Gaming Machines Act 2001.

<sup>32</sup> NSW Government, Minister Paul Toole, Pokie numbers will not rise under new laws: *Media Release, 12 March 2018*.

<sup>33</sup> NT Government (2018) *Less Pokie Machines and Tackling Gambling Related Harm: Media Statement, Natasha Fyles, Attorney-General and Minister for Justice*.

<sup>34</sup> NT Government, <https://nt.gov.au/industry/gambling/gaming-machines-in-clubs-pubs> (accessed 5 April 2018).

<sup>35</sup> QLD Government, Gaming Machine Regulation 2002.

<sup>36</sup> QLD Government, Gaming Machine Regulation 2002.

<sup>37</sup> SA Government, Department of Treasury and Finance (2015) *Approved Licence Agreement (Adelaide Casino)*, Government of South Australia, Consumer and Business Services (2018) *The Approved Trading System Explained: Gaming Machines Act 1992*.

<sup>38</sup> Tasmanian Government, Department of Treasury and Finance (2017) *Gaming and Wagering Industry Data*.

<sup>39</sup> The state-wide cap does not include gaming machines operated on vessels operated by the Trans-Tasman-Line (TT Line Ferries which operate 36 EGMs).

<sup>40</sup> On 22 August 2014 the Victorian Government reached an agreement with Crown Melbourne Limited on a broad number of changes including an increase of the maximum number of EGMs from 2,500 to 2,628. The increase in the number of EGMs permitted to be operated in the Melbourne casino reduced the number of EGMs permitted to be operated by Victorian hotels and clubs to 27,372. The state cap on EGMs in Victoria remains at 30,000.

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<sup>41</sup> Victorian Government *Gazette No. S 330*, 9 July 2018.

<sup>42</sup> 20% of Victorian EGMs must be located in regional areas (outside metropolitan Melbourne) and the proportion of EGMs in non-metro areas has consistently remained at approximately 27-29% of the total over the past decade. From 2012 the maximum density of EGMs in all municipal areas is capped at a maximum of 10 entitlements per 1,000 adults. There are exceptions for the Melbourne CBD, Southbank and Docklands areas. Regional caps also apply in areas identified as vulnerable to problem gambling and further limits apply to local government areas (LGAs). While EGM entitlements are split evenly between the club and hotel sectors further ownership restrictions require that no-one can hold more than 35% of hotel gaming entitlements and no-one can hold more than 840 club gaming machine entitlements.

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

Location	Year legalised	Cap arrangements
<b>Australian Capital Territory</b>	1976	No venue cap but see information on the reduction in ACT EGM numbers.
<b>New South Wales</b>	1956	Clubs must abide by a Gaming Machine Threshold (GMT) applicable at each venue. A local impact assessment is required in application to increase any threshold.
<b>Northern Territory</b>	2014	55 EGMs per venue.
<b>Queensland</b>	1992	300 EGMs per venue.
<b>South Australia</b>	1994	40 EGMs per venue.
<b>Tasmania</b>	1997	40 EGMs per venue.
<b>Victoria</b>	1992	105 EGMs per venue.
<b>Western Australia</b>	N/A	Not applicable.

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

Location	Year legalised	Cap arrangements
<b>Australian Capital Territory</b>	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.
<b>New South Wales</b>	1992	30 EGMs per venue.
<b>Northern Territory</b>	2014	20 EGMs per venue.
<b>Queensland</b>	2001	45 EGMs per venue.
<b>South Australia</b>	1994	40 EGMs per venue <sup>43</sup>
<b>Tasmania</b>	1997	30 EGMs per venue.
<b>Victoria</b>	1992	105 EGMs per venue.
<b>Western Australia</b>	N/A	Not applicable.

<sup>43</sup>From February 2005 profit organisations (i.e. hotels) have been allocated a reduction in EGM entitlements. Venues licensed for 28 or more EGMs receive eight less than the approved number; venues approved for between 21 and 27 EGMs receive 20 entitlements and venues licensed for less than 20 EGMs received entitlements equivalent to their approved number. An entitlement trading system is in place, allowing venues to trade up to their original licensed capacity, if the entitlements are available.

Table 1-7 Estimated number of venues with EGMs in Australia (2017-18)

Location	Hotels	Clubs	Casino(s)	Other	Total
Australian Capital Territory	5	45	0		50
New South Wales <sup>44</sup>	1,419	1,094	1		2,514
Northern Territory <sup>45</sup>	46	25	2		73
Queensland <sup>46</sup>	719	410	4		1,133
South Australia <sup>47</sup>	453	46	1		500
Tasmania <sup>48</sup>	88	7	2	2 <sup>49</sup>	99
Victoria <sup>50</sup>	261	237	1		499
Western Australia	N/A	N/A	1		1
<b>Total</b>	<b>2,991</b>	<b>1,864</b>	<b>12</b>	<b>2<sup>51</sup></b>	<b>4,867</b>

Note: Refers to operational gaming sites

Sources: ACT Gambling and Racing Commission Annual Report 2017-18, Northern Territory Director-General of Licensing Annual Report 2017-18, Queensland Government Office of Liquor and Gaming Regulation 2017-18 Statistical Report, SA Department of Consumer and Business Services, Tasmanian Liquor and Gaming Commission Annual Report 2017-18, Victorian Commission for Gambling and Liquor Regulation.

Table 1-8 Estimated number of EGMs in Australia by venue type (2017-18)<sup>52</sup>

Location	Hotels	Clubs	Casino(s)	Other	Total
Australian Capital Territory	50	4,412	N/A <sup>53</sup>		4,462
New South Wales	22,652	69,466	1,500		93,618
Northern Territory	651	841	882		2,374
Queensland	19,166	23,011	4,047		46,224
South Australia	10,369	1,773	832		12,974
Tasmania	2,218	127	894	36 <sup>54</sup>	3,239
Victoria	13,604	12,780	2,628		29,012
Western Australia	N/A	N/A	2,419 <sup>55</sup>		2,419
<b>Total</b>	<b>68,710</b>	<b>112,410</b>	<b>13,202</b>	<b>36<sup>56</sup></b>	<b>194,322</b>

Source: Government Statistician, Queensland Treasury and Trade (2019) Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition). Refer to Australian Gambling Statistics Explanatory Notes for further information.

<sup>44</sup> Government Statistician, Queensland Treasury and Trade (2019) Australian Gambling Statistics 1990-91 to 2017-18 (35<sup>th</sup> edition). Refer to Australian Gambling Statistics Explanatory Notes for further information. Figures as at 30 June 2018.

<sup>45</sup> Northern Territory Director-General of Licensing (2018) Annual Report 2017-18.

<sup>46</sup> Queensland Government Office of Liquor and Gaming Regulation (2019) 2017-18 Statistical Report.

<sup>47</sup> South Australian Department of Consumer and Business Services, Gaming Machine Licence Statistics 2017-18 Qtr 4.

<sup>48</sup> Tasmanian Liquor and Gaming Commission (2018) Annual Report 2017-18, as at 30 June 2018.

<sup>49</sup> Two Trans-Tasman Line Ferries are equipped with EGMs – please note that this figure is **not** included in the overall total

<sup>50</sup> Victorian Commission for Gambling and Liquor Regulation Current Gaming Expenditure by Venue at 30 June 2018.

<sup>51</sup> Please note the 2 TT Line Ferries that offer EGMs are not included in the national total of venues.

<sup>52</sup> Operational EGMs as at 30 June 2018 as reported by Government Statistician, Queensland Treasury and Trade (2019) Australian Gambling Statistics 1990-91 to 2017-18 (35<sup>th</sup> edition). Refer to Australian Gambling Statistics Explanatory Notes for further information.

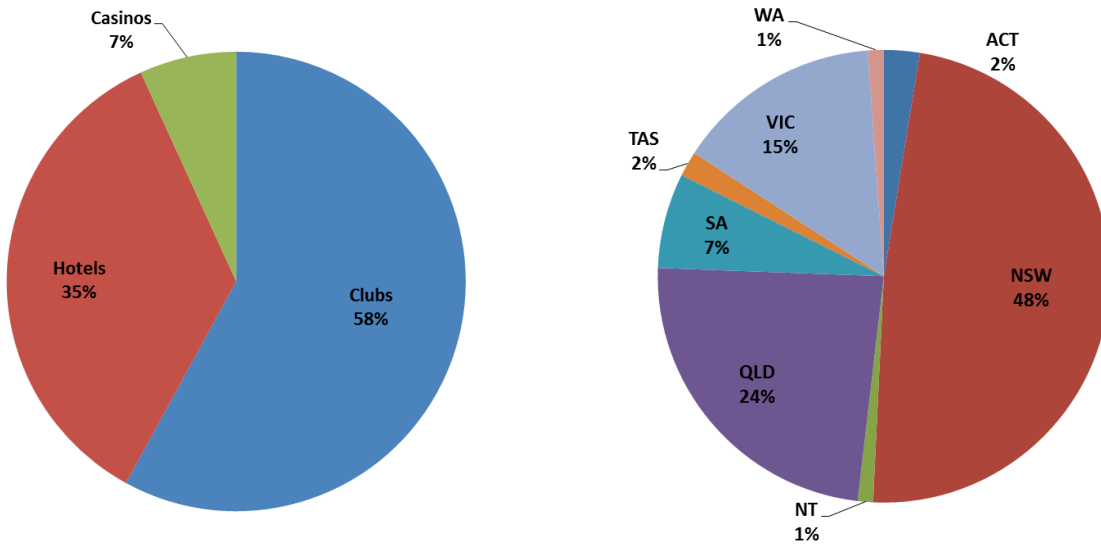
<sup>53</sup> The Casino (Electronic Gaming) Act 2017 has introduced legislation that would allow the casino to operate up to 200 EGMs, to be acquired through the existing trading scheme. To date the casino does not offer EGMs.

<sup>54</sup> This figure refers to the 36 EGMs available on Tasmania’s 2 Trans-Tasman Line Ferries. This figure is **not** included in the state total for Tasmanian EGMs.

<sup>55</sup> 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.

<sup>56</sup> Please note the 36 EGMs available on TT Line Ferries in Tasmania have not been included in the national total.

Figure 1-1 Estimated EGM distribution in Australia by venue type and state/territory (2017-18)



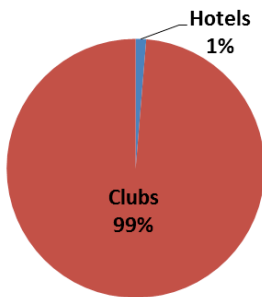
Australian EGM distribution by venue type

Australian EGM distribution by state/territory

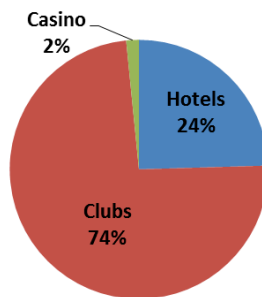
Source: Government Statistician, Queensland Treasury and Trade (2019) Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition). Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

Figure 1-2 Estimated EGM Distribution within Australian States/Territories (2017-18)

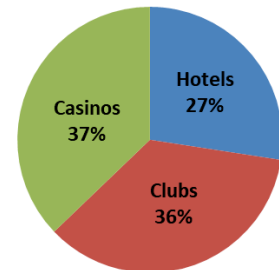
Australian Capital Territory



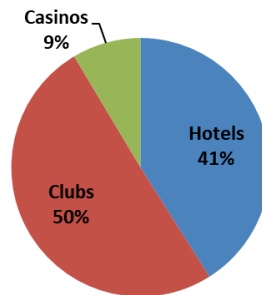
New South Wales



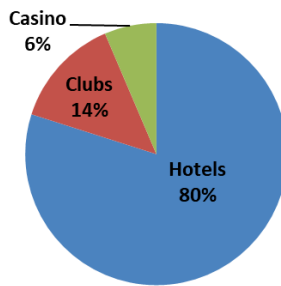
Northern Territory



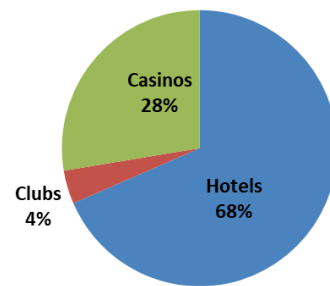
Queensland



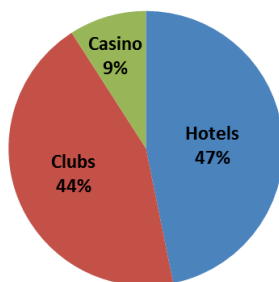
South Australia



Tasmania



Victoria



Western Australia

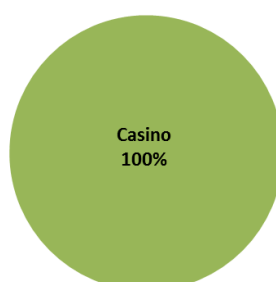
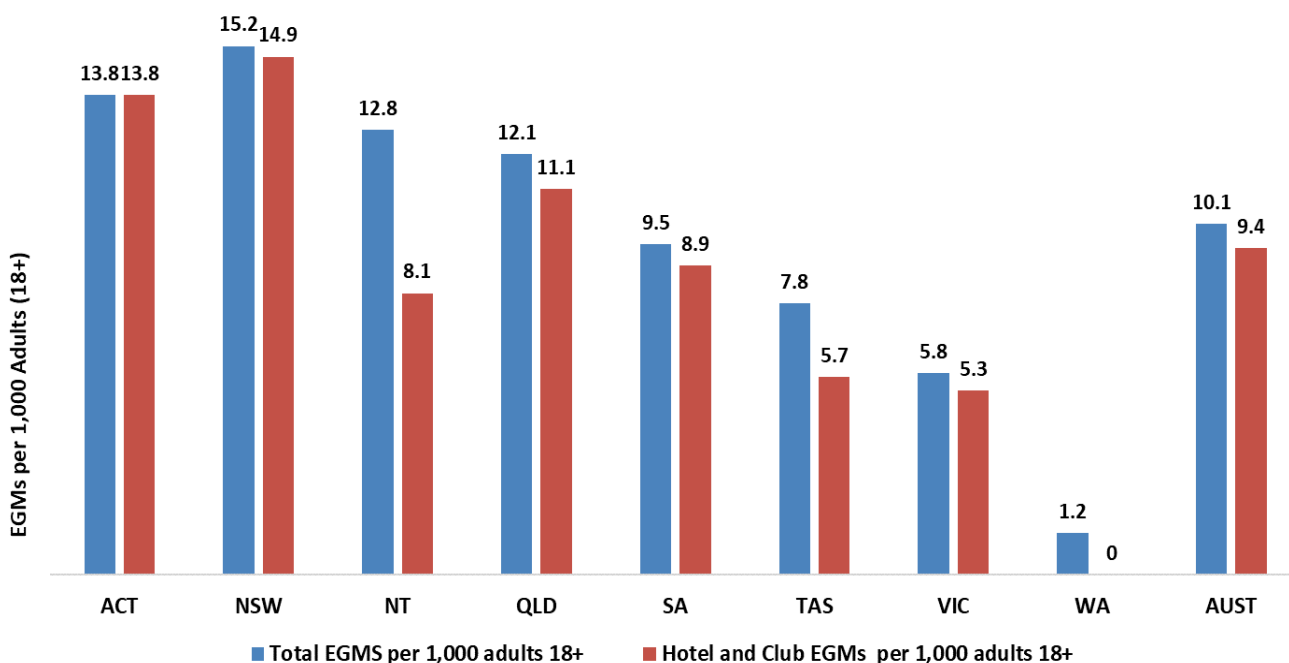
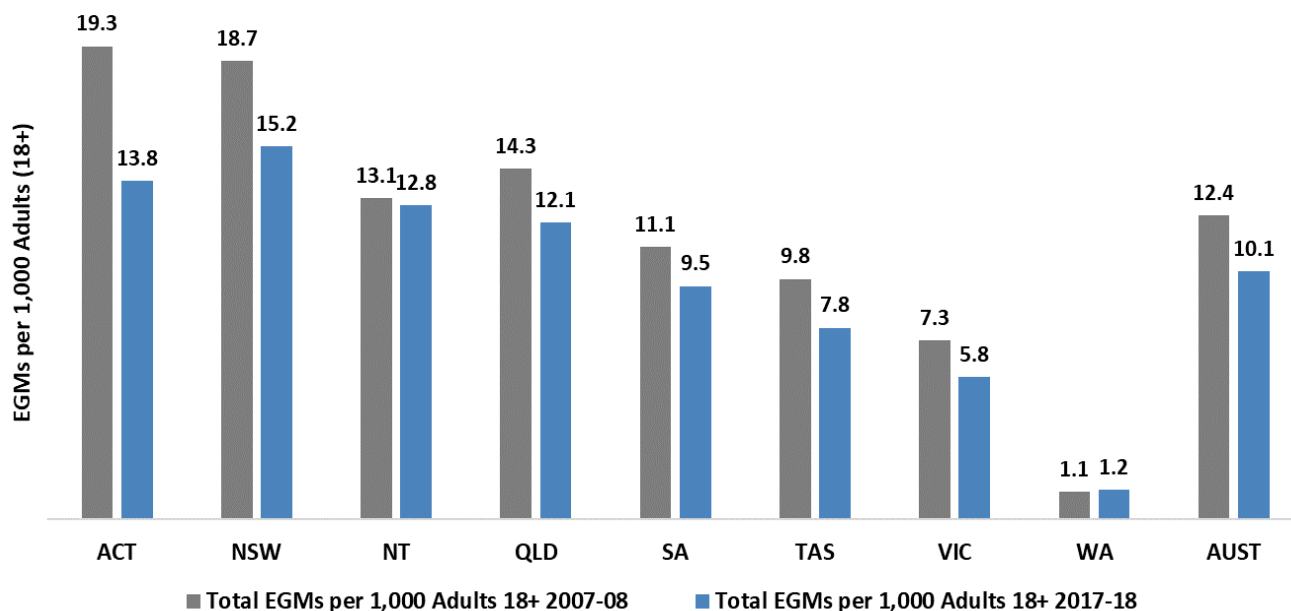


Figure 1-3 Estimated EGMs per 1,000 adults (18+) in Australia (2017-18)



Source: Government Statistician, Queensland Treasury and Trade (2019) Australian Gambling Statistics 1991-92 to 2017-18 (35th 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 2007-08 and 2017-18



Source: Government Statistician, Queensland Treasury and Trade (2019) Australian Gambling Statistics 1991-92 to 2017-18 (35th 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.<sup>57</sup>

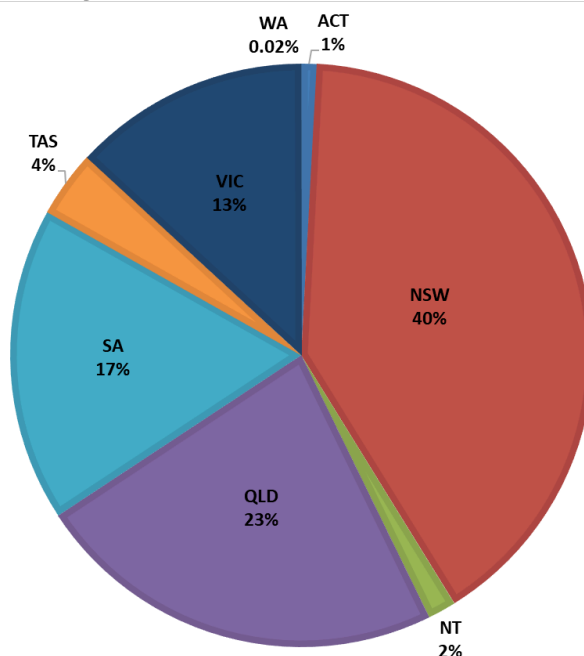
A computerised Keno system operates in clubs/hotels in a number of Australian jurisdictions and Keno is also available at a number of casinos. In Western Australia the Crown Perth casino is the only Keno provider in the state. Keno games may also be offered online or via lottery and TAB providers (e.g. SA Lotteries offers Keno at its 616 lottery outlets and Keno is also offered at 161 SA TAB outlets).

**Table 1-9 Estimated number of Keno outlets (land-based) in Australia by state/territory (2017-18)**

Location	Keno Outlets
Australian Capital Territory	38
New South Wales	1,800
Northern Territory	70 <sup>58</sup>
Queensland	1,025
South Australia	777
Tasmania	166 <sup>59</sup>
Victoria	585
Western Australia	1
<b>Total</b>	<b>4,462</b>

Source: Crown Perth, SKYCITY Darwin, Tasmanian Government Department of Treasury and Finance, Tabcorp Holdings Limited.

**Figure 1-5 Estimated Keno outlet distribution (land-based) in Australia by state/territory 2017-18**



Source: Crown Perth, SKYCITY Darwin, Tasmanian Government Department of Treasury and Finance, Tabcorp Holdings Limited.

<sup>57</sup> Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35<sup>th</sup> edition)*. Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

<sup>58</sup> SKYCITY Darwin operated NT Keno under an agreement with the Northern Territory Government. It was announced in November 2018 that the SKYCITY Entertainment Group had sold the Darwin casino to Delaware North. Effective as of April 2019 the casino has been renamed the Mindil Beach Casino Resort and is licenced to operate NT Keno throughout hotels and clubs in the Northern Territory. <https://nt.gov.au/industry/gambling/gambling/casinos>

<sup>59</sup> 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> (accessed 1 May 2018).

## 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, pools 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 Australia<sup>60</sup>*

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 was once the largest lottery operator in Australia with licences in the Australian Capital Territory (in perpetuity) New South Wales (to 2050), the Northern Territory (to 2032), Queensland (to 2072), South Australia (to 2052), Tasmania (to 2020) and Victoria (to 2028)<sup>61</sup>.

In all states of Australia, with the exception of Western Australia, lotteries are now provided by “the Lott” – a brand of Tabcorp Holdings Limited following the combination of Tatts Group Ltd and Tabcorp Holdings Limited on 22 December 2017.

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.

Lotterywest, is currently the only government operated lottery structure in Australia and was constituted under the *WA Lotteries (Control) Act 1954*.

The West Australian lottery now operates under the *WA Lotteries Commission Act 1990* trading as Lotterywest with profits from the lottery operation benefitting WA Health, Sports the Arts and other eligible organisations.<sup>62</sup>

<sup>60</sup> Australian Competition Tribunal (2017) Proposed acquisition of Tatts Group Limited by Tabcorp Holdings Limited: Tatts Group Limited Statement, 8 March 2017.

<sup>61</sup> Tatts Group (2017) *Annual Report 2016-17*.

<sup>62</sup> Lotterywest (2018) *Lotterywest Annual Report 2017-18*.



Table 1-10 Lottery/instant lottery providers in Australia by state/territory (2017-18)<sup>63</sup>

Location	Licensee (Brand)
Australian Capital Territory	Tabcorp Holdings Limited/Tatts Group (NSW Lotteries)
New South Wales	Tabcorp Holdings Limited/Tatts Group (NSW Lotteries)
Northern Territory	Tabcorp Holdings Limited/Tatts Group (Tatts & Golden Casket)
Queensland	Tabcorp Holdings Limited/Tatts Group (Golden Casket)
South Australia	Tabcorp Holdings Limited/Tatts Group (Tatts Lotteries SA)
Tasmania	Tabcorp Holdings Limited/Tatts Group (Tatts & Golden Casket)
Victoria	Tabcorp Holdings Limited/Tatts Group (Tattersall's Sweeps)
Western Australia	Lotterywest

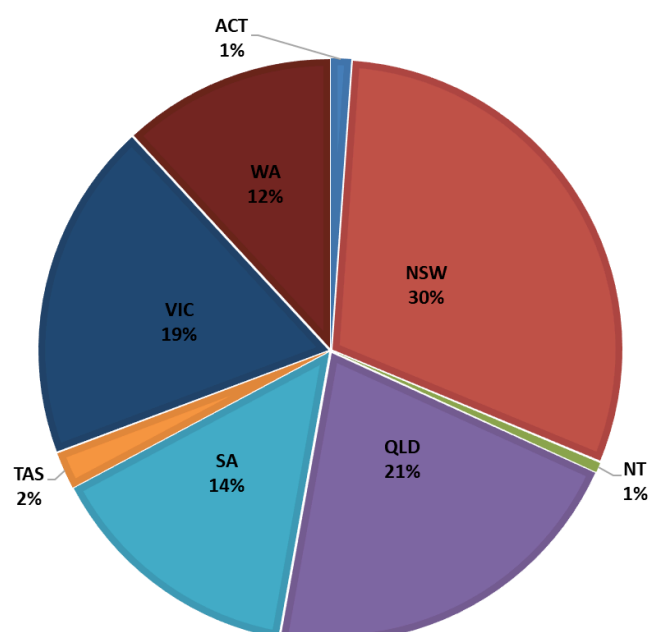
### Lottery Outlets in Australia (Land-Based)

Table 1-11 Estimated number of lottery/instant lottery outlets (land-based) in Australia by state/territory (2017-18)

Location	Lottery Outlets
Australian Capital Territory	48
New South Wales	1288
Northern Territory	23
Queensland	898
South Australia	616
Tasmania	88
Victoria	806
Western Australia	506 <sup>64</sup>
<b>Total</b>	<b>4,273</b>

Source: Lotterywest, Tabcorp Holdings Limited.

Figure 1-6 Estimated lottery and instant lottery land-based outlet distribution in Australia by state/territory 2017-18



Source: Lotterywest, Tabcorp Holdings Limited.

<sup>63</sup> 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 (*Tabcorp Annual Reports 2017 and 2018*).

<sup>64</sup> Lotterywest (2018) *Lotterywest Annual Report 2017-18*. Please note that 503 are full service outlets while a further three outlets are 'scratch n win' outlets only.

## 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* (Cth) 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 and the Arts](#) and the [Australian Communications and Media Authority \(ACMA\)](#) provide information about online gambling services, prohibited content and resources for consumers in Australia.

**Table 1-12 Licensed TABs, Lottery Providers, Corporate Bookmakers and Betting Exchanges in Australia<sup>65</sup>**

Provider	Type	State/Territory Licensing Authority
bet365	Wagering	Northern Territory Racing Commission
BetEasy	Wagering	Northern Territory Racing Commission
Betfair <sup>66</sup>	Betting Exchange	Northern Territory Racing Commission
Betstar	Wagering	Northern Territory Racing Commission
Bluebet	Wagering	Liquor and Gaming NSW
Bookmaker.com.au	Wagering	Northern Territory Racing Commission
ClassicBet	Wagering	Northern Territory Racing Commission
DraftKings	Wagering	Northern Territory Racing Commission
Draftstars	Wagering	Northern Territory Racing Commission
Elitebet	Wagering	Liquor and Gaming NSW
Ladbrokes	Wagering	Northern Territory Racing Commission
Lottoland	Wagering	Northern Territory Racing Commission
Madbookie	Wagering	Northern Territory Racing Commission
MoneyBall	Wagering	Northern Territory Racing Commission
Neds	Wagering	Northern Territory Racing Commission
Palmerbet	Wagering	Liquor and Gaming NSW
PlayON	Wagering	Northern Territory Racing Commission
PlayUP	Wagering	Northern Territory Racing Commission
PointsBet	Wagering	Northern Territory Racing Commission
Skrilla	Wagering	Northern Territory Racing Commission
SportChamps	Wagering	Northern Territory Racing Commission
Sportsbet	Wagering	Northern Territory Racing Commission
Sportsbetting.com.au	Wagering	Northern Territory Racing Commission
RWWA (WATAB TABTouch)	Wagering	WA Department of Local Government, Sport and Cultural Industries
Tabcorp (trading as TAB)	Wagering	Australian Capital Territory, New South Wales, Victoria
The Lott	Lotteries	ACT, New South Wales, Northern Territory, Queensland, South Australia, Tasmania, Victoria
TopBetta	Wagering	Northern Territory Racing Commission
TopSport	Wagering	Liquor and Gaming NSW
UBET (trading as TAB) <sup>67</sup>	Wagering	Queensland, South Australia, Tasmania
Unibet	Wagering	Northern Territory Racing Commission
World Lottery Club	Wagering	Northern Territory Racing Commission

Source: Australian Communications and Media Authority (ACMA).

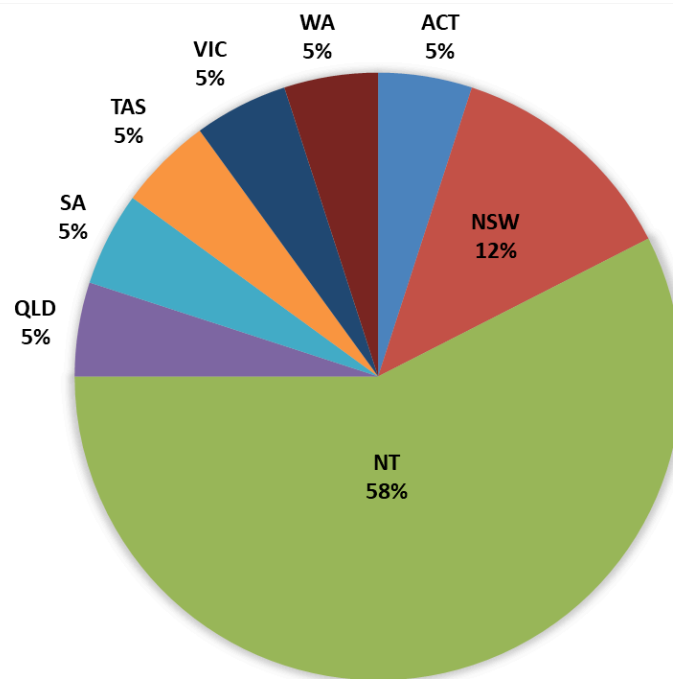
A list of licensed on-course bookmakers registered to offer their services online is also available on the website of the [Australian Communications and Media Authority](#).

<sup>65</sup> Current at January 2020.

<sup>66</sup> Betfair moved to the Northern Territory licensing regime in September 2016 after betting exchange platforms were legalised by the NT Government in April 2016.

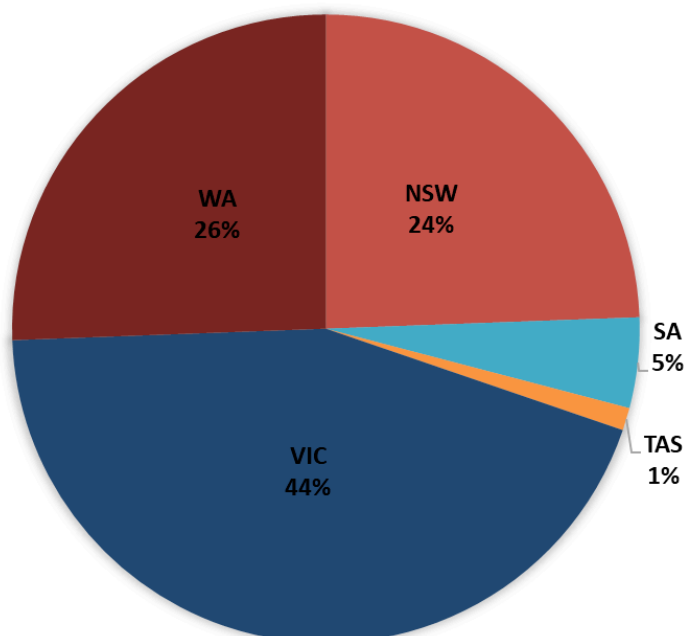
<sup>67</sup> On the 19 October 2016 the proposed combination of Tabcorp and Tatts Group Ltd was announced. On the 22nd December 2017 Tabcorp officially combined with Tatts – the previous owners of UBET (*Tabcorp Annual Reports 2017 and 2018*).

**Figure 1-7 Legal Online Gambling Providers (TABs, Lottery Providers, Corporate Bookmakers, Betting Exchanges) by Licensing Authority in Australia<sup>68</sup>**



Source: Australian Communications and Media Authority (ACMA).

**Figure 1-8 Legal Online Gambling Providers (Oncourse Bookmakers) by Licensing Authority in Australia<sup>69</sup>**



Source: Australian Communications and Media Authority (ACMA).

<sup>68</sup> Current at January 2020.  
<sup>69</sup> Current at January 2020.

## 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.<sup>70</sup>

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.

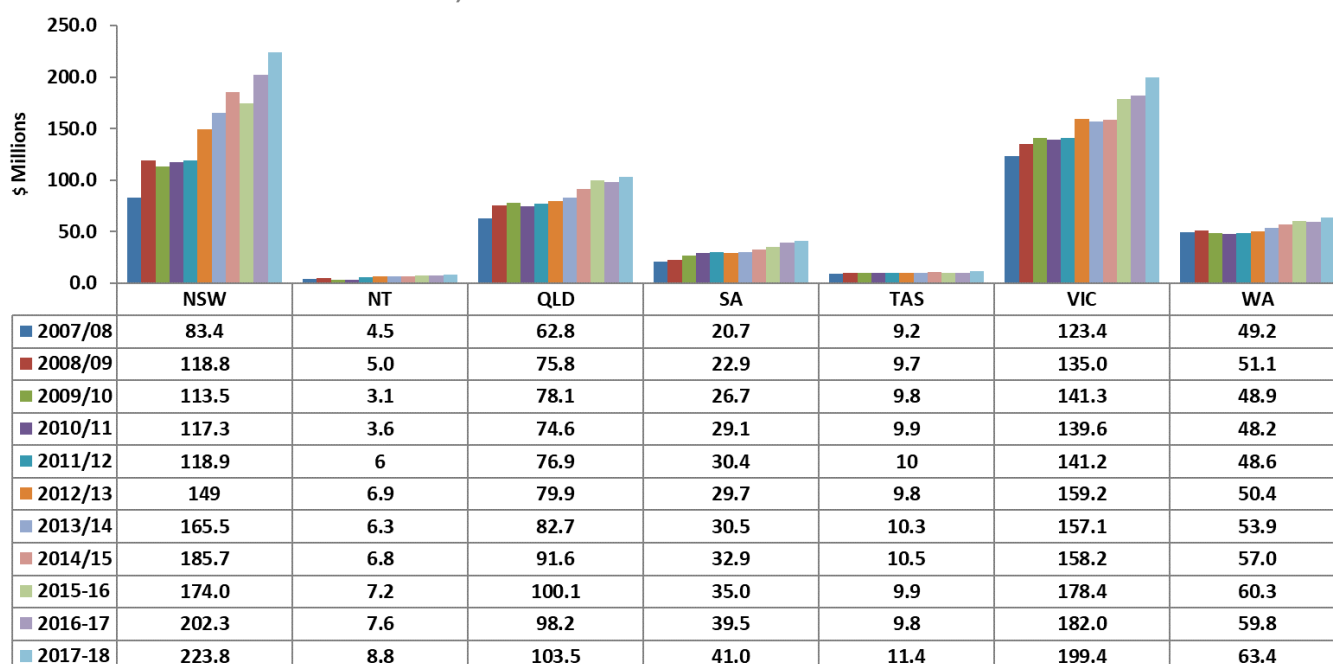
### Thoroughbred Racing

**Table 1-13** Number of thoroughbred race clubs, tracks, meetings and races in Australia by state/territory (2017-18)

Location	Clubs	Racetracks	Meetings	Total Races
Australian Capital Territory	1	2	25	196
New South Wales	129	125	780	5,662
Northern Territory	5	5	71	413
Queensland	116	105	673	4,536
South Australia	25	24	186	1,448
Tasmania	4	5	73	560
Victoria	68	69	549	4,418
Western Australia	37	37	290	2,176
<b>Total</b>	<b>385</b>	<b>372</b>	<b>2,6478</b>	<b>19,409</b>

Source: Racing Australia (2087) Racing Australia: Fact Book 2017-18.

**Figure 1-9** Thoroughbred prize money (\$ millions) in Australia by state/territory (2007-08 to 2017-18)



Source: Racing Australia (2008, 2009, 2010, 2011, 2012, 2013, 2013/14, 2014/15, 2016-17, 2017-18) Racing Australia Fact Book.

<sup>70</sup> Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1991-92 to 2016-17 (34<sup>th</sup> edition)*.

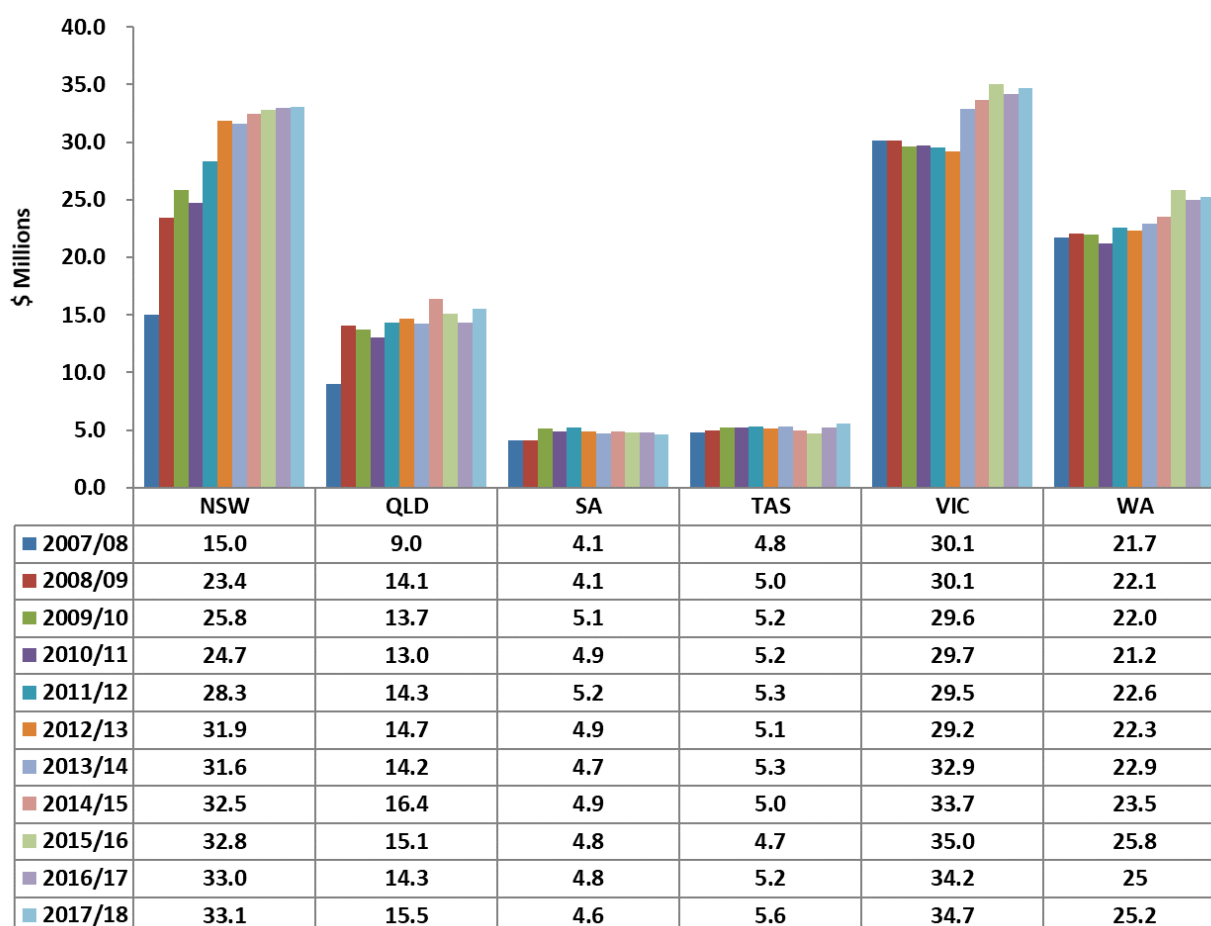
## Harness Racing

**Table 1-14** Number of harness racing tracks, meetings and races in Australia by state/territory (2017-18)<sup>71</sup>

Location	Racetracks	Meetings	Races
Australian Capital Territory <sup>72</sup>	N/A	N/A	N/A
New South Wales	30	485	3,952
Northern Territory <sup>73</sup>	N/A	N/A	N/A
Queensland	6	279	2,332
South Australia	9	146	1,086
Tasmania	8	92	709
Victoria	28	437	3,849
Western Australia	13	255	2,159
<b>Total</b>	<b>94</b>	<b>1,694</b>	<b>14,087</b>

Source: Harness Racing Australia, Annual On-Line National Stakemoney Statistics, 2017-18.

**Figure 1-10** Harness racing total stakemoney (\$ millions) in Australia by state/territory (2007-08 to 2017-18)<sup>74</sup>



Source: Harness Racing Australia, Annual On-Line National Stakemoney Statistics, 2017-18.

<sup>71</sup> 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.

<sup>72</sup> No information available.

<sup>73</sup> No information available.

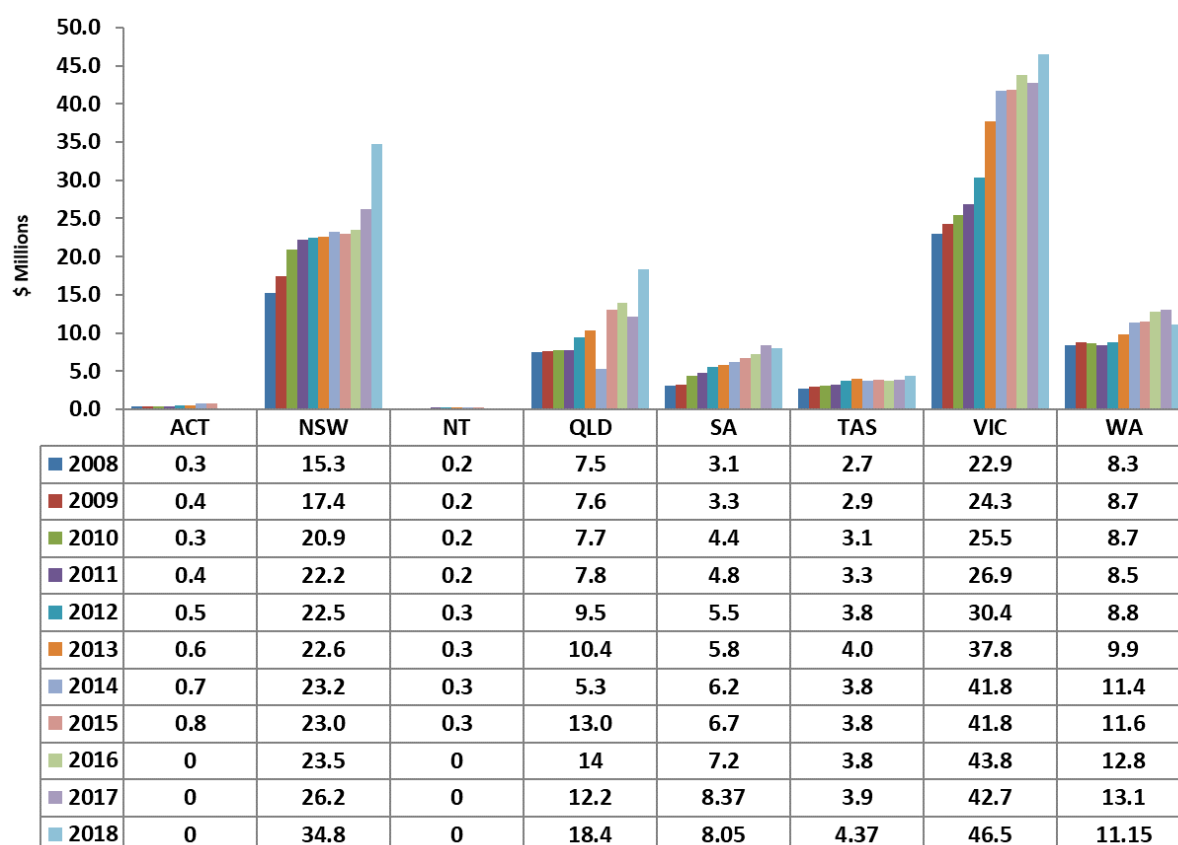
<sup>74</sup> Please note that during the 2007-2008 periods harness racing was at times either restricted or suspended owing to an equine Influenza outbreak.

## Greyhound Racing

Table 1-15 Number of greyhound racing clubs, meetings and races in Australia by state/territory (2017-18)

Location	Clubs	Meetings	Races <sup>75</sup>
Australian Capital Territory <sup>76</sup>	1	-	-
New South Wales	33	1,121	11,407
Northern Territory	1	50	N/A
Queensland	7	566	5,470
South Australia	6	353	N/A
Tasmania	3	156	1,602
Victoria	13	1,193	N/A
Western Australia	3	317	3,545
<b>Total</b>	<b>67</b>	<b>3,756</b>	<b>N/A</b>

Source: GRNSW Annual Report 2018, Darwin Greyhound Association, RSA Annual Report 2017-18, Tasracing Annual Report 2018, Racing Queensland Annual Report 2017-18, GRV Annual Report 2017-18, WAGRA Annual Report 2017-18.

Figure 1-11 Greyhound racing stakemoney paid (\$ millions) in Australia by state/territory (2008-2017)<sup>77</sup>

Source: GRNSW Annual Report 2018, RSA Annual Report 2017-18, Tasracing Annual Report 2018, Racing Queensland Annual Report 2017-18, GRV Annual Report 2017-18, WAGRA Annual Report 2017-18.

<sup>75</sup> Figures not available for the NT, SA and Victoria.

<sup>76</sup> 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. <https://www.act.gov.au/greyhound> (accessed 18 July 2019)

<sup>77</sup> 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.<sup>78</sup>

#### *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.<sup>79</sup>

**Table 1-16 Number of bookmakers in Australia (2013-14 to 2017-18)**

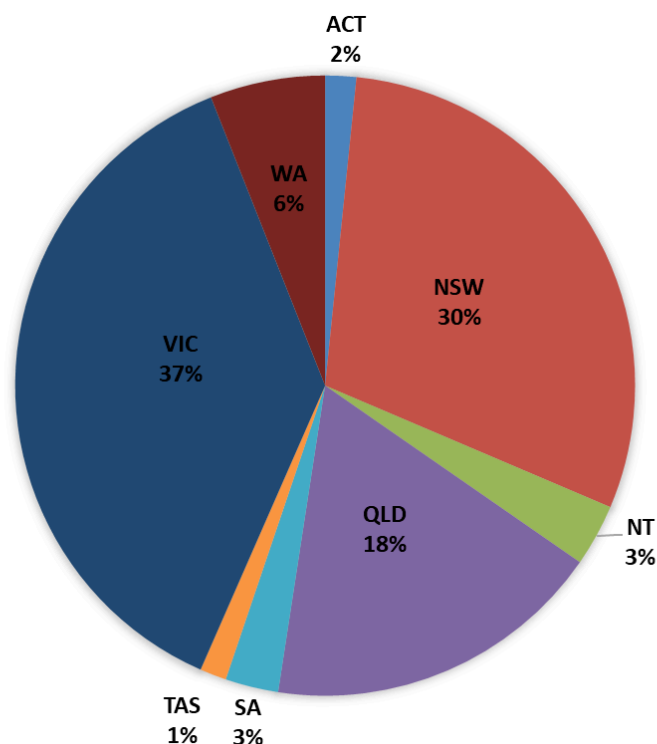
Location	2017-18	2016-17	2015-16	2014-15	2013-14
<b>Australian Capital Territory</b>	7	9	10	10	5
<b>New South Wales</b>	129	144	157	168	160
<b>Northern Territory</b>	14	25	32	28	30
<b>Queensland</b>	77	77	72	72	79
<b>South Australia</b>	12	13	12	12	11
<b>Tasmania</b>	6	8	8	N/A	N/A
<b>Victoria</b>	162	163	180	176	178
<b>Western Australia</b>	26	34	N/A	N/A	N/A
<b>Total</b>	<b>433</b>	<b>473</b>	<b>471</b>	<b>466</b>	<b>463</b>

Source: Racing Australia (2014, 2015, 2016, 2017 & 2018), Racing Australia: Fact Book 2017-18.

<sup>78</sup> Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35th edition)*. Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

<sup>79</sup> Government Statistician, Queensland Treasury and Trade (2019) *Australian Gambling Statistics 1991-92 to 2017-18 (35th edition)*. Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

Figure 1-12 Estimated distribution of bookmakers in Australia (2017-18)



Source: Racing Australia (2018) Racing Australia: Fact Book 2017-18.

### 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.<sup>80</sup>

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 (2014-15 to 2017-18)

	2014-15	%	2015-16	%	2016-17	%	2017-18	%
	\$ mill		\$ mill		\$ mill		\$mill	
<b>Thoroughbred Racing</b>	15,898.27	60	15,718.33	54	18,063.53	55	19,554.22	55
<b>Harness Racing</b>	2,456.98	7	1,760.51	6	1,666.95	5	1,644.54	5
<b>Greyhound Racing</b>	4,212.42	12	3,162.14	11	3,200.56	10	3,265.41	9
<b>Sports Betting</b>	5,891.53	22	8,243.41	29	9,666.81	30	11,230.49	31
<b>Total</b>	28,459.19	100	28,884.39	100	32,597.85	100	35,694.67	100

Source: Racing Australia: Fact Book 2014-15, 2015-16, 2016-17 & 2017-18.

<sup>80</sup> Government Statistician, Queensland Treasury and Trade (2019) Australian Gambling Statistics 1991-92 to 2018-19 (35<sup>th</sup> edition).



## 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.<sup>81</sup>

**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.<sup>82</sup>

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.<sup>83</sup>

<sup>81</sup> Government Statistician, Queensland Treasury and Trade (2014) Australian Gambling Statistics 1997-98 to 2014-15 (32<sup>nd</sup> edition).

<sup>82</sup> 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.

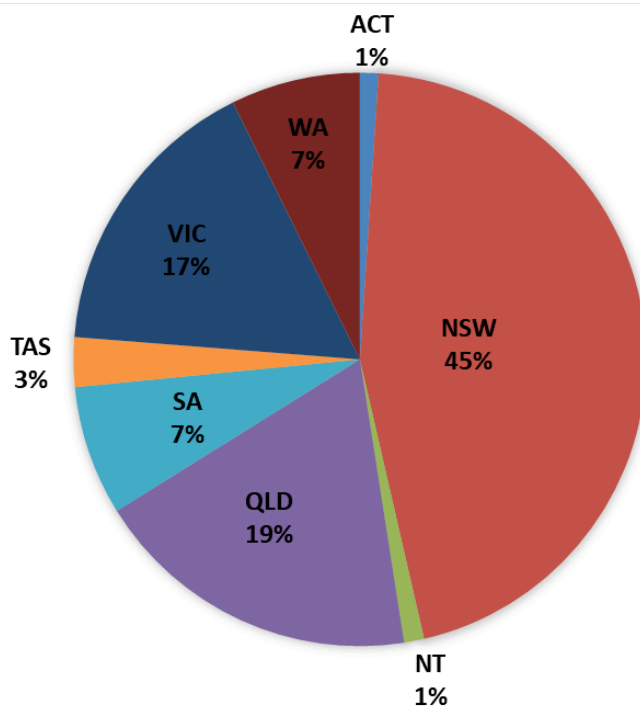
<sup>83</sup> Tabcorp Holdings Limited (2012) *Victorian TAB enters into new pooling arrangements with RWWA*, Media Release 3 August 2012.

**Table 1-18** Estimated number of TAB retail outlets (land-based) in Australia by state/territory (2017-18)

Location	Total
Australian Capital Territory	47
New South Wales	2,047
Northern Territory	51
Queensland	840
South Australia	330
Tasmania	126
Victoria	742
Western Australia	330 <sup>84</sup>
<b>Total</b>	<b>4,513</b>

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

**Figure 1-13** Estimated distribution of TAB outlets (land-based) in Australia (2017-18)



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

<sup>84</sup> Racing and Wagering Western Australia (2018) Annual Report 2017-18

## LICENCE AND EXCLUSIVITY ARRANGEMENTS

## Casinos

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

Location	Casino	Duration
<b>Australian Capital Territory</b>	Casino Canberra	Established in 1992. A 99-year licence. Exclusivity expired in 2012.
<b>New South Wales<sup>85</sup></b>	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.
<b>Northern Territory</b>	SKYCITY Darwin <sup>86</sup>	Established in 1979. The licence term expires in 2031, with an option for an extension for a further five-year period. <sup>87</sup>
	Lasseters Casino	Established in 1982. The licence term expires in 2031 an application can be made to extend the term from June 2026. <sup>88</sup>
<b>Queensland<sup>89</sup></b>	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).
	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. <sup>90</sup>
	The Star Gold Coast	Established in 1985. Licence awarded in perpetuity. A 10-year regional casino gaming exclusivity agreement which expired in 1996.
<b>South Australia</b>	Adelaide Casino	Established in 1986. The current licence term is until 2085 unless terminated earlier. Exclusivity until 30 June 2035 (extended from 2015 in 2013). <sup>91</sup>
<b>Tasmania</b>	Country Club Casino	Established in 1973 (Wrest Point) and 1982 (Country Club). The Deed of Agreement between the Crown and Federal Hotels Pty Ltd provides exclusive rights for the Federal Group to operate table gaming, gaming machines and keno throughout the state until 30 June 2018. The 15-year exclusivity licence thereafter converts to a rolling 5-year licence renewable annually). It was announced in November 2019 that Federal Group would retain the Tasmanian casino licences with further details still to be advised. <sup>92</sup>
	Wrest Point Casino	
<b>Victoria</b>	Crown Melbourne	Established in 1994. Licensed until 2050.
<b>Western Australia</b>	Crown Perth	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.

<sup>85</sup> In November 2013 the NSW Government announced that a Restricted Gaming Facility will operate from 2019 (after the exclusivity period for 'The Star' has expired). This facility will operate at Barangaroo from November 2019 but will provide VIP table games only at a \$1.3 billion hotel complex run by Crown Resorts Ltd.

<sup>86</sup> In November 2018 the sale of the Darwin casino by SKYCITY Entertainment Group to Delaware North was announced. From April 2019 the casino has been renamed the Mindil Beach Casino Resort. <https://www.mindilbeachcasinoresort.com.au/>

<sup>87</sup> SKYCITY Entertainment Group (2018) *Annual Report: Year ended 30 June 2017*.

<sup>88</sup> Lasseters Hotel Casino Operators Agreement <https://www.territorystories.nt.gov.au> (accessed 20 Jan 2020).

<sup>89</sup> 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. The resort is due for completion in 2022. Once complete the previous Treasury Casino and Hotel will be repurposed.

<sup>90</sup> *Cairns Casino Agreement Act 1993* (QLD)

<sup>91</sup> SKYCITY Entertainment Group (2011) *Annual Report* and SKYCITY Entertainment Group Ltd (2013) *Full Year Results Presentation*.

<sup>92</sup> [http://www.premier.tas.gov.au/\\_data/assets/pdf\\_file/0006/499857/2019\\_12\\_09\\_-\\_Fact\\_Sheets\\_Gaming\\_Tas.pdf](http://www.premier.tas.gov.au/_data/assets/pdf_file/0006/499857/2019_12_09_-_Fact_Sheets_Gaming_Tas.pdf) (accessed 20 January 2020).

## Keno

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

Location	Licensee	Duration
<b>Australian Capital Territory</b>	Tabcorp Holdings Limited	Tabcorp ACT Pty Ltd (a member of the Tabcorp Holdings Limited group) acquired ACTTAB on 14 October 2014. The business continues to trade under the ACTTAB name.  Tabcorp Holdings Ltd has an approval to conduct Keno in the ACT that expires in October 2064. <sup>93</sup>
<b>New South Wales</b>	ClubsNSW Tabcorp Holdings Limited	ClubKeno Holdings Pty Limited (a subsidiary of ClubsNSW) and Keno (NSW) Pty Limited (a subsidiary of Tabcorp Holdings Limited), as joint licensees, hold the current licence for the game of Keno in NSW, which expires in April 2050. <sup>94</sup>
<b>Northern Territory</b>	SKYCITY Darwin <sup>95</sup>	SKYCITY Darwin 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 SKYCITY Darwin.
<b>Queensland</b>	Tabcorp Holdings Ltd	Licensed until June 2047.
<b>South Australia</b>	Tabcorp Holdings Limited	Keno operates under an agency agreement with the Lotteries Commission of South Australia until December 2052.
<b>Tasmania</b>	Federal Group	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. The 15-year exclusivity licence thereafter converts to a rolling 5-year licence renewable annually, which automatically commences in 2018. Under the Deed, if no action is taken by the Minister responsible for the Gaming Control Act (currently the Treasurer) before 30 June 2019, the period of exclusivity under the Deed will extend by one year, to 30 June 2024. This arrangement then rolls over every year unless action is taken to cease it. <sup>96</sup>  Announcements in Tasmania in November 2019 included that the Federal Group will retain the casino and keno licences. <sup>97</sup>
<b>Victoria</b>	Tabcorp Holdings Limited	Licence and exclusivity until April 2022.
<b>Western Australia</b>	Crown Perth	Operates in casino only.

<sup>93</sup> Tabcorp Holdings Limited (2019) *Annual Report 2018-19*.

<sup>94</sup> NSW Government (2016), NSW Keno licence extended to 2050: Media release, 12 February 2016.

<sup>95</sup> SKYCITY Darwin operated NT Keno under an agreement with the Northern Territory Government in 2017-18. In November 2018 the SKYCITY Entertainment Group sold the Darwin casino to Delaware North. From April 2019 the casino has been renamed the Mindil Beach Casino Resort and is licensed to operate NT Keno throughout hotels and clubs in the Northern Territory. <https://nt.gov.au/industry/gambling/gambling/casinos>

<sup>96</sup> [http://www.premier.tas.gov.au/releases/ministerial\\_statement\\_on\\_gaming](http://www.premier.tas.gov.au/releases/ministerial_statement_on_gaming)

<sup>97</sup> [http://www.premier.tas.gov.au/\\_data/assets/pdf\\_file/0006/499857/2019\\_12\\_09\\_-\\_Fact\\_Sheets\\_Gaming\\_Tas.pdf](http://www.premier.tas.gov.au/_data/assets/pdf_file/0006/499857/2019_12_09_-_Fact_Sheets_Gaming_Tas.pdf) (accessed 20 January 2020).

## Lotteries

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

Location	Licensee (Brand) <sup>98</sup>	Duration
<b>Australian Capital Territory</b>	Tabcorp Holdings Limited (NSW Lotteries)	Non-exclusive lottery licence in perpetuity/until revoked. <sup>99</sup>
<b>New South Wales</b>	Tabcorp Holdings Limited (NSW Lotteries)	Exclusive lottery licence and various product licences until April 2050.
<b>Northern Territory</b>	Tabcorp Holdings Limited (Tatts/Golden Casket)	Non-exclusive lottery licence until June 2032.
<b>Queensland</b>	Tabcorp Holdings Limited (Golden Casket)	Non-exclusive lottery licence until July 2072.
<b>South Australia</b>	Tabcorp Holdings Limited (SA Lotteries)	Exclusive <i>Master Agent Agreement with the Lotteries Commission SA</i> until December 2052.
<b>Tasmania</b>	Tabcorp Holdings Limited (Tatts)	Non-exclusive <i>Foreign Games Permit</i> until 2020. Tasmanian lotteries operate under renewable five year permits linked to the Victorian (June 2020) and Queensland (June 2023) licences. <sup>100</sup>
<b>Victoria</b>	Tabcorp Holdings Limited (Tatts)	Exclusive lottery licence until June 2028. <sup>101</sup>
<b>Western Australia</b>	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.

<sup>98</sup> On the 19 October 2016 the proposed combination of Tabcorp and Tatts Group Ltd was announced. On the 22<sup>nd</sup> December 2017 Tabcorp officially combined with Tatts. Lotteries are run by Tabcorp Holdings Ltd in various states/territories under a number of brands.

<sup>99</sup> Tabcorp Holdings Limited (2019) *Annual Report 2018-19*.

<sup>100</sup> Tabcorp Holdings Limited (2019) *Annual Report 2018-19*.

<sup>101</sup> Tabcorp Holdings Limited (2019) *Annual Report 2018-19*.

## Wagering

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

Location	Licensee <sup>102 103</sup>	Duration
<b>Australian Capital Territory</b>	Tabcorp Holdings Limited	Tabcorp ACT Pty Ltd (a member of the Tabcorp Holdings Limited group) acquired ACTTAB on 14 October 2014. <sup>104</sup>  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). <sup>105</sup>
<b>New South Wales</b>	Tabcorp Holdings Limited	Wagering licence expires in March 2097 with retail exclusivity to expire in June 2033.
<b>Northern Territory</b>	Tabcorp Holdings Limited	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.  The licence gives exclusive rights to operate a totalisator in the Territory and conduct retail betting on racing and sports through the totalisator.  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.
<b>Queensland</b>	Tabcorp Holdings Limited	Wagering and sports betting licences to 30 June 2098, exclusivity until 30 June 2044. <sup>106</sup>
<b>South Australia</b>	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. <sup>107</sup>
<b>Tasmania</b>	Tabcorp Holdings Limited	Licensed for race and sports wagering until March 2062. <sup>108</sup>
<b>Victoria</b>	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). <sup>109</sup>
<b>Western Australia</b>	WA TAB	Perpetual exclusivity.

<sup>102</sup> 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.

<sup>103</sup> With the merging of the Tabcorp and Tatts businesses, UBET has been rebranded as TAB in NT, QLD, SA and TAS.

<sup>104</sup> <https://help.ubet.com/hc/en-us/articles/360019809352-TAB-retail-rollout-begins> (accessed 30 July 2019).

<sup>105</sup> 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).

<sup>106</sup> Tabcorp Holdings Limited (2019) *Annual Report 2018-19*.

<sup>107</sup> Tabcorp Holdings Limited (2019) *Annual Report 2018-19*.

<sup>108</sup> Tabcorp Holdings Limited (2019) *Annual Report 2018-19*.

<sup>109</sup> Tabcorp Holdings Limited (2019) *Annual Report 2018-19*.